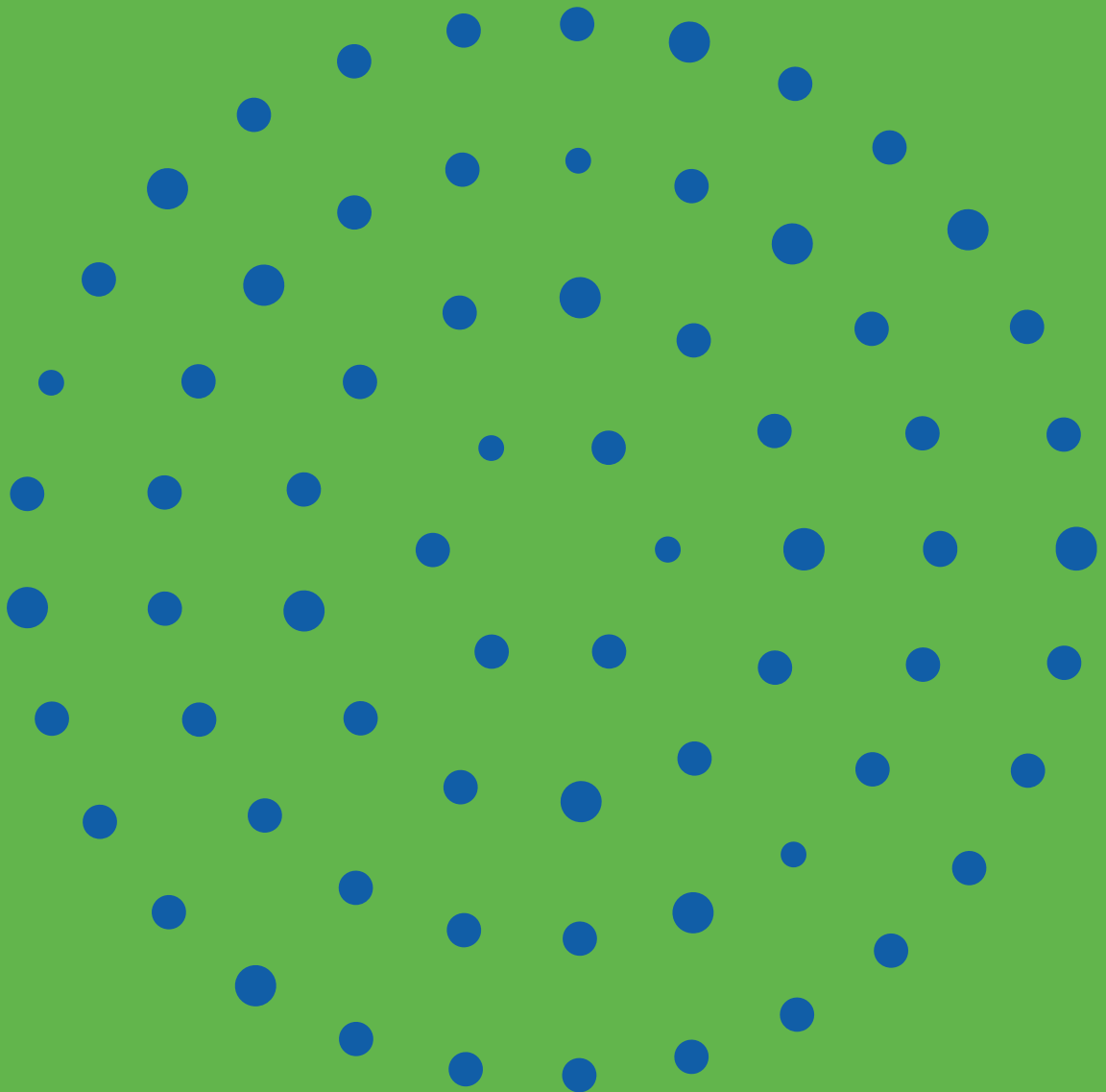


2023
OVERSEAS HALLYU SURVEY



●●● For users,

- ① This report is a summary of the '2023 Overseas Hallyu Survey,' conducted from November 11 to December 9, 2022, involving locals aged 15-59 in 26 foreign countries who have experienced Korean cultural content.
- ② The overall margin of error for this survey (n=25,000) is ± 0.62 percentage points at a 95% confidence level, and for individual countries (n=800 to 1,200 samples), the margin of error is $\pm 2.833.46$ to percentage points at a 95% confidence level.
- ③ In 2022, we expanded the target countries from the original 18 to a total of 26 by adding Kazakhstan, Mexico, Canada, Germany, Italy, Spain, Saudi Arabia, and Egypt. The sample size for each country also increased from a minimum of 400 and a maximum of 600 to a minimum of 800 and a maximum of 1,200. The additional countries are marked with an asterisk (*) in the main text of the report. For further details, please refer to Chapter 1: Survey Overview.
- ④ All statistical figures are rounded to one decimal place; hence, the sum of percentages reported in the document may not exactly add up to 100%, and errors may occur within a range of ± 0.2 percentage points.
- ⑤ For questions allowing multiple responses (1st + 2nd rank, 1st + 2nd + 3rd rank, etc.), percentages are calculated based on the number of instances, and the sum of the response percentages may exceed 100%.
- ⑥ The financial information in this report, such as expenditure, was initially queried in the local currency and is presented in US dollars (USD) based on the average exchange rate during the most recent year (from November 1, 2021, to October 31, 2022).
- ⑦ When presenting results by country, they are sorted in descending order by size within a region. If sorting by multiple items is challenging, the order is based on that presented in the sample distribution table in Chapter 1, Section 2: Survey Design.
- ⑧ Symbols used in the statistical tables are as follows.
[-] indicates items that were not surveyed. [0.0] indicates that the survey result is zero or approximately zero.
- ⑨ Foreign words (such as 'YouTube') are represented in Korean according to loanword notation rules.
- ⑩ In Chapter 2: Key Indicators Time Series Analysis, exercise caution when interpreting the results. Changes have been observed, including variations in the survey items and classifications of Korean cultural content. Additionally, an increase in the number of target countries by eight and a significant expansion of sample sizes compared to the previous year has been observed. For changes in individual questions, please refer to the Americas in Chapter 2. In cases where the questions differ by year, they are presented based on the 2022 standard. Changes in the questionnaire compared to 2021 are separately summarized in Chapter 1, Section 3: Survey Content.
- ⑪ This survey measures the perceptions of the participants (Hallyu consumers/users). Therefore, the experience rates, popularity, consumption ratios, usage amounts, expenditures, changes in consumption levels before and after the COVID-19 outbreak, and brand power indices may differ from the actual levels of Hallyu consumption, usage, and spending.
- ⑫ This report can be downloaded from the KOFICE website. For inquiries concerning the included data, please contact the Research Team at KOFICE.

Table of Contents


Chapter 1: Survey Overview	5
Section 1: Survey Overview	6
Section 2: Survey Design	7
Section 3: Survey Details	9
Section 4: Respondent Characteristics	11
Section 5: Key Analytical Concepts and Measurement Methods	16
Section 6: Major Hallyu Issues in 2022	18
Chapter 2: Research Findings-Country Summary	19
Section 1: Perception of South Korea	20
Section 2: Experience and Perception of Korean Cultural Content	25
Section 3: Consumption of Korean Cultural Content	33
Section 4: Hallyu Ripple Effects	92
Section 5: Summary and Implications	105

List of Tables

[Table 2-1] Awareness of South Korea by Country	21
[Table 2-2] Top 10 Images Associated with South Korea by Country	22
[Table 2-3] Perception of South Korea by Country	24
[Table 2-4] Experience Rate of Korean Cultural Content by Country	26
[Table 2-5] Popularity of Korean Cultural Content by Country	28
[Table 2-6] Brand Power Index of Korean Cultural Content by Country	30
[Table 2-7] Ease of Use of Korean Cultural Content by Country	34
[Table 2-8] Online/Mobile Platforms for Accessing Korean Cultural Content by Region	43
[Table 2-9] Purchase Channels for Korean Cultural Content by Region: Fashion, Beauty, and Food	46
[Table 2-10] Consumption Volume of Korean Cultural Content by Country	48
[Table 2-11] Proportion of Korean Cultural Content Consumption by Country	50
[Table 2-12] Expenditure on Korean Cultural Content by Country	52
[Table 2-13] Frequency of Watching Korean Fashion/Beauty/Food Videos	53
[Table 2-14] Change in Consumption of Korean Cultural Content Pre-COVID-19 by Country	55
[Table 2-15] Affinity for Korean Cultural Content by Country	56
[Table 2-16] Proportion of Fiction and Non-fiction Publications	84
[Table 2-17] Interest in Korean Cultural Content by Country	87
[Table 2-18] Willingness to Pay for Korean Cultural Content by Country	88
[Table 2-19] Net Promoter Score of Korean Cultural Content by Country	91
[Table 2-20] Change in Perception and Negative Perception Sympathy after Experiencing Korean Cultural Content	93
[Table 2-21] Recent One-Year Purchase Rate of Low-Engagement Korean Products/Services by Country	94
[Table 2-22] Average Purchase Frequency of High-Engagement Korean Products/Services Over the Last 4 Years by Country	95
[Table 2-23] Reasons for Purchasing Korean Brands/Products by Country	97
[Table 2-24] Intention to Purchase Korean Products/Services by Country	100
[Table 2-25] Willingness to Recommend Korean Products/Services by Country	102
[Table 2-26] Influence of Consuming Korean Cultural Content on Korean Product/Service Usage by Country	104

List of Figures

[Figure 2-1] Awareness of South Korea	20
[Figure 2-2] Top 10 Images Associated with South Korea	22
[Figure 2-3] Perception of South Korea	23
[Figure 2-4] Experience Rate of Korean Cultural Content	25
[Figure 2-5] Popularity of Korean Cultural Content within the Home Country	27
[Figure 2-6] Korean Cultural Content Brand Power Index	29
[Figure 2-7] Reasons for Not Experiencing Korean Cultural Content	31
[Figure 2-8] Future Willingness to Use Korean Cultural Content	32
[Figure 2-9] Ease of Use of Korean Cultural Content	33
[Figure 2-10] Channels of Exposure to Korean Cultural Content	35
[Figure 2-11] Channels of Exposure to Korean Cultural Content by Region	36
[Figure 2-12] Online/Mobile Platforms for Accessing Korean Cultural Content	41
[Figure 2-13] Purchase Channels for Korean Cultural Content: Fashion, Beauty, and Food	45
[Figure 2-14] Consumption Volume of Korean Cultural Content	47
[Figure 2-15] Proportion of Korean Cultural Content Consumption	49
[Figure 2-16] Expenditure on Korean Cultural Content	51
[Figure 2-17] Frequency of Watching Korean Fashion/Beauty/Food Videos	53
[Figure 2-18] Change in Consumption of Korean Cultural Content Pre-COVID-19	54
[Figure 2-19] Affinity for Korean Cultural Content	56
[Figure 2-20] Factors Contributing to Popularity of and Detracting from Affinity for Korean Cultural Content	58
[Figure 2-21] Factors Contributing to Popularity of and Detracting from Affinity for Korean Cultural Content by Region	61
[Figure 2-22] Most Preferred Korean Cultural Content	68
[Figure 2-23] Most Preferred Korean Cultural Content by Country	70
[Figure 2-24] Most Preferred Hallyu Stars	77
[Figure 2-25] Most Preferred Hallyu Stars by Country	78
[Figure 2-26] Proportion of Fiction and Non-fiction Publications	84
[Figure 2-27] Popularity of Cultural Content by Country	85
[Figure 2-28] Interest in Korean Cultural Content	86
[Figure 2-29] Willingness to Pay for Korean Cultural Content	88
[Figure 2-30] Willingness to Recommend Korean Cultural Content	89
[Figure 2-31] Change in Perception and Agreement with Negative Perceptions after Experiencing Korean Cultural Content	92
[Figure 2-32] Experience in Purchasing Korean Products/Services	94
[Figure 2-33] Reasons for Purchasing Korean Products/Brands	96
[Figure 2-34] Intention to Purchase Korean Products/Services	98
[Figure 2-35] Willingness to Recommend Korean Products/Services	102
[Figure 2-36] Influence of Consuming Korean Cultural Content on Korean Product/Service Usage by Country	103



+ 2023 OVERSEAS HALLYU SURVEY

Chapter 1 Survey Overview

Section 1: Survey Overview

1. Purpose of Survey

- To collect foundational data for comparing the status and spread of Hallyu content in key overseas countries. This aims to explore proactive policy directions for a sustainable Hallyu ecosystem and overseas market conditions.
- To gather and analyze information on overseas consumers/users needed for the global expansion of Hallyu-related industries, and provide foundational data for devising business strategies.

2. History

Survey Timeframe	Content
February 2012 (First Survey)	<ul style="list-style-type: none"> Countries Surveyed: Nine countries (China, Japan, Taiwan, Thailand, the United States, Brazil, France, the United Kingdom, and Russia) Survey Target: Individuals aged 15 to under 59 who have experienced Korean cultural content Sample Size: 3,600 samples
December 2012 (Second Survey)	<ul style="list-style-type: none"> Countries Surveyed: Nine countries Changes in Survey Target: Individuals aged 15 to 49 who have experienced Korean cultural content
February 2014 (Third Survey)	<ul style="list-style-type: none"> Countries Surveyed: UAE, and South Africa added, totaling 11 countries Expanded Survey Target: Individuals aged 15 to 59 who have experienced Korean cultural content Expanded Sample Size: 3,600 samples → 4,400 samples (400 samples per country)
November 2014 (Fourth Survey)	<ul style="list-style-type: none"> Countries Surveyed: Indonesia, Malaysia, and Australia added, totaling 14 countries Expanded Sample Size: 4,400 samples → 5,600 samples (400 samples per country)
November 2015 (Fifth Survey)	<ul style="list-style-type: none"> Countries Surveyed: 14 Countries Expanded Sample Size: 5,600 samples → 6,500 samples (sample size varies by country)
November 2016 (Sixth Survey)	<ul style="list-style-type: none"> Countries Surveyed: India added, totaling 15 countries Expanded Sample Size: 6,500 samples → 7,200 samples
November 2017 (Seventh Survey)	<ul style="list-style-type: none"> Countries Surveyed: Türkiye added, totaling 16 countries Expanded Sample Size: 7,200 samples → 7,800 samples
November 2018 (Eighth Survey)	<ul style="list-style-type: none"> Countries Surveyed: 16 Countries Addition of Questions: Online/Mobile Platform Access Channels Reduction in Sample Size: 7,800 samples → 7,500 samples
November 2019 (Ninth Survey)	<ul style="list-style-type: none"> Countries Surveyed: Vietnam added, totaling 17 countries Expanded Sample Size: 7,500 samples → 8,000 samples Preliminary Survey for Additional Countries: Saudi Arabia, Canada, Mexico, Argentina, Germany, and Kazakhstan
October 2020 (Tenth Survey)	<ul style="list-style-type: none"> Countries Surveyed: Argentina added, totaling 18 countries Expanded Sample Size: 8,000 samples → 8,500 samples Addition of Questions: Attitude toward Korean cultural content (Questions measuring current brand power)
November 2021 (Eleventh Survey)	<ul style="list-style-type: none"> Countries Surveyed: 18 Countries Adjustment of sample size by country: Differently distributed as 400/500/600 samples considering the population size of each country
November 2022 (Twelfth Survey)	<ul style="list-style-type: none"> The "2023 Overseas Hallyu Survey" Conducted Countries Surveyed: Addition of Kazakhstan, Canada, Mexico, Italy, Spain, Germany, Saudi Arabia, and Egypt, totaling 26 countries Expanded Sample Size: 8,500 samples (400-600 samples per country) → 25,000 samples (800-1,200 samples per country) Changes in content categories: <ul style="list-style-type: none"> Webtoons, which were previously investigated as part of publications (books/e-books/comics/webtoons), are now separated, forming publications (books/e-books) and webtoons (Previous) Drama, Variety Shows, Movies, Music, Animation, Publications, Games, Fashion, Beauty, Food (Updated) Drama, Variety Shows, Movies, Music, Animation, Publications, Webtoons, Games, Fashion, Beauty, and Food

3. Survey Frequency

- Annually

Section 2: Survey Design

1. Survey Target

- Locals aged 15-59 who are aware of South Korea and have experience with Korean cultural content.
- In the United Arab Emirates (UAE), the local population constitutes only 11.5%¹ of the total population, with the majority being foreign expatriates (88.5%). Therefore, third-country nationals are also included in the survey.

2. Countries for the Survey:

- From the original 18 countries, 8 additional countries are included, making a total of 26 countries surveyed. These additional countries are marked with an asterisk (*) in the table below.
- In the results of Chapter 3, newly added countries are indicated by an asterisk (*) next to the country name.

Region	Country
Asia-Pacific (10 countries):	China, Japan, Taiwan, Thailand, Malaysia, Indonesia, India, Vietnam, Kazakhstan*, and Australia
Americas (5 countries):	United States, Canada*, Mexico*, Brazil, and Argentina
Europe (7 countries):	United Kingdom, France, Italy*, Spain*, Germany*, Russia, and Türkiye
Middle East (2 countries):	UAE and Saudi Arabia*
Africa (2 countries)	Egypt* and South Africa

3. Survey Execution

- Managing Organizations: MCST · KOFICE
- Implementing Organization: ResearchLab Corp.

4. Survey Period

- Preliminary Survey: October 19, 2022-November 9, 2022
- Main Survey: November 11, 2022-December 9, 2022

5. Survey Method

- Self-administered surveys using structured questionnaires targeted at overseas online panels

6. Sample Extraction Method:

- Allocation sampling by country, gender, and age

¹ UNITED ARAB EMIRATES POPULATION STATISTICS 2023

7. Sample Allocation

Region	Country	Total	Gender		Age			
			Male	Female	Age 15- 19	Age 20-29	Age 30-39	Age 40-59
Total		25,000	12,500	12,500	6,250	6,250	6,250	6,250
Asia-Pacific (10 countries)	China	1,200	600	600	300	300	300	300
	Japan	1,100	550	550	275	275	275	275
	Taiwan	900	450	450	225	225	225	225
	Thailand	900	450	450	225	225	225	225
	Malaysia	900	450	450	225	225	225	225
	Indonesia	1,100	550	550	275	275	275	275
	India	1,200	600	600	300	300	300	300
	Vietnam	900	450	450	225	225	225	225
	Kazakhstan*	800	400	400	200	200	200	200
	Australia	900	450	450	225	225	225	225
Americas (5 countries)	US	1,100	550	550	275	275	275	275
	Canada*	900	450	450	225	225	225	225
	Mexico*	1,100	550	550	275	275	275	275
	Brazil	1,100	550	550	275	275	275	275
	Argentina	900	450	450	225	225	225	225
Europe (7 countries)	UK	900	450	450	225	225	225	225
	France	900	450	450	225	225	225	225
	Italy*	900	450	450	225	225	225	225
	Spain*	900	450	450	225	225	225	225
	Germany*	900	450	450	225	225	225	225
	Russia*	1,100	550	550	275	275	275	275
	Türkiye	900	450	450	225	225	225	225
Middle East (2 countries)	UAE	800	400	400	200	200	200	200
	Saudi Arabia*	900	450	450	225	225	225	225
Africa (2 countries)	Egypt*	900	450	450	225	225	225	225
	South Africa	900	450	450	225	225	225	225

Section 3: Survey Details

1. Survey

- To reflect recent trends in the consumption/use of Korean cultural content, additional options have been included for 'Online/Mobile Platforms', 'Most Preferred Animation', 'Game Awareness', and 'Most Preferred Game'.
- Added explanatory text to clarify the use of OTT as TV and to ensure accurate measurement.

Category	Items	Major Changes
Perception of South Korea	<ul style="list-style-type: none"> Perception of South Korea Overall Perception of South Korea Images Associated with South Korea 	
	<ul style="list-style-type: none"> Ease of Use of Korean Cultural Content 	
Korean Cultural Content Consumption Patterns (Drama~Food)	<ul style="list-style-type: none"> Channels of Exposure to Korean Cultural Content 	Added explanatory text stating that watching OTT on TV is categorized under 'Online/Mobile Platforms'.
	<ul style="list-style-type: none"> Online/Mobile Platforms for Access to Korean Cultural Content 	(Video) Added 'Viki', 'Disney+', 'Apple TV+' (Music) Added 'Joox', 'V live'
	<ul style="list-style-type: none"> Content Usage/Spending 	Differentiated 'Games' into 'Direct Play' and 'Video Viewing'.
	<ul style="list-style-type: none"> Affinity for Korean Cultural Content 	
	<ul style="list-style-type: none"> Popularity Factors of Korean Cultural Content 	
	<ul style="list-style-type: none"> Factors Detracting from Affinity for Korean Cultural Content 	
	<ul style="list-style-type: none"> Nationality of Overseas Popular Content Within Home Country 	
	<ul style="list-style-type: none"> Willingness to Recommend Korean Cultural Content 	Added Questions
	<ul style="list-style-type: none"> Relevance of Korean Cultural Content to Hallyu 	Question Changes
	<ul style="list-style-type: none"> Proportion of Fiction and Non-fiction Korean Publications 	Added Questions
	<ul style="list-style-type: none"> Most Preferred Korean Drama (Open-Ended) 	
	<ul style="list-style-type: none"> Most Preferred Korean Movie (Open-Ended) 	
<ul style="list-style-type: none"> Most Preferred Korean Actor (Open-Ended) 		
<ul style="list-style-type: none"> Most Preferred Korean Singer/Group (Open-Ended) 		
<ul style="list-style-type: none"> Most Preferred Animation 	Added options 'Bread Barbershop', 'Yobi, the Five Tailed', 'Fox', 'Seoul Station', 'Speckles: The Tarbosaurus', and 'The Hen Who Dreamed She Could Fly.'	
<ul style="list-style-type: none"> Awareness of the Korean Games 	'Lost Ark', 'Mir 4', 'COOKIE RUN: KINGDOM', 'MARVEL Future Revolution'	
<ul style="list-style-type: none"> Most Preferred Korean Game 	Same as above	
Changes in Consumption	<ul style="list-style-type: none"> Change in Consumption Compared to Pre-COVID-19 	
Perception of Korean Cultural Content	<ul style="list-style-type: none"> Popularity of Korean Cultural Content Within Home Country 	
	<ul style="list-style-type: none"> Interest in Korean Cultural Content 	
	<ul style="list-style-type: none"> Willingness to Pay for Korean Cultural Content 	
	<ul style="list-style-type: none"> Attitude Toward Korean Cultural Content 	
Hallyu Ripple Effects	<ul style="list-style-type: none"> Changes in Overall Perception of South Korea After Experiencing Korean Cultural Content 	
	<ul style="list-style-type: none"> Degree of Agreement with Negative Perceptions of Hallyu 	
	<ul style="list-style-type: none"> Frequency of Purchasing Korean Products in the Last Year* 	
	<ul style="list-style-type: none"> Number of Times Korean Products/Services Were Purchased in the Last Four Years 	
	<ul style="list-style-type: none"> Intention to Purchase Korean Products/Services* 	
Respondent Characteristics	<ul style="list-style-type: none"> Reasons for Purchasing Korean Products/Services* 	
	<ul style="list-style-type: none"> Willingness to Recommend Korean Products/Services 	
	<ul style="list-style-type: none"> Influence of Consuming Korean Cultural Content on Korean Product/Service Purchasing and Usage by Country 	
	<ul style="list-style-type: none"> Gender Age Residence Marital status 	<ul style="list-style-type: none"> Occupation Education level Average annual household income

* Due to religious reasons in Saudi Arabia, questions related to alcohol are not permissible. Therefore, the sub-item related to 'alcoholic beverages' was excluded from questions about the 'frequency of purchasing Korean products in the last year' and 'intention to purchase Korean products/services'

2. Classification of Korean Cultural Content

- To minimize confusion due to different content categories per question, we have standardized the categories of Korean cultural content into 11 types.
- Considering the recent growth rate and market size of Hallyu, we have distinguished 'Webtoons' from 'Publications (books, e-books, comics, webtoons, etc.)', and 'comics' have been excluded.

Category	Previous	Updated
Count	10 categories of Korean cultural content	11 categories of Korean cultural content
Types	Dramas, Variety Shows, Movies, Music, Animation, Publications (Books, E-Books, Comics, Webtoons, Etc.), Games, Fashion, Beauty, and Food	Dramas, Variety Shows, Movies, Music, Animation, Publications (Books, E-Books, Etc.), Webtoons, Games, Fashion, Beauty, and Food

3. Response Method

- The survey inquires about participants' experience with various forms of Korean cultural content, posing questions regarding content with which they are familiar.
- Since 2020, to enhance response quality, respondents have been limited to providing answers for up to six content types they have experience with.

Section 4: Respondent Characteristics

1. Respondent Characteristics

(Unit: %)

Category	Total	Asia-Pacific										
		China	Japan	Taiwan	Thailand	Malaysia	Indonesia	India	Vietnam	Kazakhstan*	Australia	
Total	(25,000)	(1,200)	(1,100)	(900)	(900)	(900)	(1,100)	(1,200)	(900)	(800)	(900)	
Gender	Male	50.0	50.0	50.0	50.0	50.0	50.0	50.0	50.0	50.0	50.0	
	Female	50.0	50.0	50.0	50.0	50.0	50.0	50.0	50.0	50.0	50.0	
Age	Age 15-19	25.0	25.0	25.0	25.0	25.0	25.0	25.0	25.0	25.0	25.0	
	Age 20-29	25.0	25.0	25.0	25.0	25.0	25.0	25.0	25.0	25.0	25.0	
	Age 30-39	25.0	25.0	25.0	25.0	25.0	25.0	25.0	25.0	25.0	25.0	
	40-49	16.9	20.2	13.0	14.8	18.2	19.4	20.6	18.2	21.0	17.8	14.2
	50-59	8.1	4.8	12.0	10.2	6.8	5.6	4.4	6.8	4.0	7.3	10.8
	Average (age)	30.8	30.3	31.4	31.2	30.5	30.4	30.0	30.3	30.0	31.2	31.6
Final Education	High school or less	28.4	19.9	38.8	21.0	30.3	31.9	39.4	14.3	19.8	16.0	31.7
	College Graduate	48.9	71.2	55.7	61.2	61.8	47.8	57.8	35.2	40.1	50.6	48.2
	Graduate school	21.9	8.9	5.4	17.7	7.6	20.2	2.6	50.3	39.7	30.3	19.3
	Others	0.8	0.0	0.1	0.1	0.3	0.1	0.2	0.2	0.4	3.1	0.8
Occupation	Middle/high school student	11.8	13.9	18.6	13.8	12.9	13.6	14.8	9.8	13.0	5.5	8.2
	Undergraduate/graduate student	12.0	14.6	7.2	10.4	7.2	9.1	6.5	12.8	7.9	16.0	11.9
	Clerical/technical position	15.5	22.6	24.3	26.3	24.3	16.8	22.8	17.6	28.9	20.8	9.2
	Sales/Production	8.0	10.8	9.8	13.0	10.1	6.9	2.9	4.3	8.2	10.6	8.7
	Professional	17.6	22.3	7.3	12.3	6.7	22.8	8.4	23.2	21.4	9.8	15.3
	Part-time	13.3	2.2	11.7	6.4	11.1	11.9	16.4	13.9	7.8	9.4	18.4
	Self-employed	8.5	10.0	6.5	9.8	14.9	10.9	18.4	8.3	10.1	7.1	4.7
	Housewife	6.0	1.8	8.7	4.6	3.4	4.8	6.1	7.1	0.8	11.6	12.2
	Unemployed/retired	5.4	1.5	5.4	2.6	5.8	2.4	1.5	1.3	1.1	7.4	9.9
Others	1.9	0.5	0.5	0.8	3.6	0.9	2.2	1.8	0.8	1.9	1.4	
Marital Status	Married	50.3	65.9	43.3	43.7	53.4	51.6	61.6	62.8	67.0	51.9	48.1
	Single	49.6	34.1	56.7	56.1	46.6	48.4	38.4	37.3	33.0	48.1	51.8
	Others (divorced, etc.)	0.1	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.1
Nationality	Korean local	0.8	0.3	0.1	0.3	0.1	0.3	0.2	0.2	0.6	1.1	1.6
	Local	99.1	99.7	99.9	99.7	99.9	99.7	99.8	99.8	99.4	98.9	98.4
	Third country	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
South Korea Awareness	High Awareness	28.7	35.7	22.5	28.7	40.9	43.4	42.7	52.6	44.1	11.1	21.1
	Medium Awareness	52.4	57.0	65.4	61.8	44.3	47.4	46.5	36.5	52.1	64.3	54.3
	Low Awareness	18.9	7.3	12.2	9.6	14.8	9.1	10.8	10.9	3.8	24.6	24.6

(continued)

(Unit: %)

Category		Americas				
		US	Canada*	Mexico*	Brazil	Argentina
Total		(1,100)	(900)	(1,100)	(1,100)	(900)
Gender	Male	50.0	50.0	50.0	50.0	50.0
	Female	50.0	50.0	50.0	50.0	50.0
Age	Age 15-19	25.0	25.0	25.0	25.0	25.0
	Age 20-29	25.0	25.0	25.0	25.0	25.0
	Age 30-39	25.0	25.0	25.0	25.0	25.0
	40-49	13.9	12.1	17.7	17.1	16.3
	50-59	11.1	12.9	7.3	7.9	8.7
	Average (age)	31.1	32.0	30.7	30.5	31.4
Final Education	High school or less	41.8	24.7	20.2	40.9	34.2
	College Graduate	38.4	55.6	42.0	34.2	51.1
	Graduate school	19.5	19.6	37.0	24.2	14.0
	Others	0.4	0.2	0.8	0.7	0.7
Occupation	Middle/high school student	18.1	10.3	7.9	16.5	8.6
	Undergraduate/graduate student	8.5	13.9	15.8	4.7	15.8
	Clerical/technical position	8.0	14.3	8.6	12.0	8.7
	Sales/Production	7.0	7.8	5.5	9.6	5.6
	Professional	13.6	20.0	19.4	15.0	18.7
	Part-time	11.8	10.6	20.8	14.8	25.1
	Self-employed	4.9	4.9	9.6	14.0	8.7
	Housewife	9.6	6.3	7.4	4.7	3.3
	Unemployed/retired	15.4	10.1	3.4	5.3	3.8
	Others	3.0	1.8	1.5	3.3	1.9
Marital Status	Married	38.7	42.1	50.1	52.7	38.2
	Single	61.1	57.9	49.8	47.3	61.8
	Others (divorced, etc.)	0.2	0.0	0.1	0.0	0.0
Nationality	Korean local	0.9	2.3	0.1	0.1	0.3
	Local	99.1	97.7	99.9	99.9	99.7
	Third country	0.0	0.0	0.0	0.0	0.0
South Korea Awareness	High Awareness	21.5	23.6	18.6	20.3	21.2
	Medium Awareness	53.4	57.1	55.1	53.3	50.9
	Low Awareness	25.1	19.3	26.3	26.5	27.9

(continued)

(Unit: %)

Category		Europe						
		UK	France	Italy*	Spain*	Germany*	Russia*	Türkiye
Total		(900)	(900)	(900)	(900)	(900)	(1,100)	(900)
Gender	Male	50.0	50.0	50.0	50.0	50.0	50.0	50.0
	Female	50.0	50.0	50.0	50.0	50.0	50.0	50.0
Age	Age 15-19	25.0	25.0	25.0	25.0	25.0	25.0	25.0
	Age 20-29	25.0	25.0	25.0	25.0	25.0	25.0	25.0
	Age 30-39	25.0	25.0	25.0	25.0	25.0	25.0	25.0
	40-49	11.9	14.0	16.1	15.6	11.9	14.5	18.2
	50-59	13.1	11.0	8.9	9.4	13.1	10.5	6.8
	Average (age)	31.3	31.1	30.8	31.1	31.6	31.6	30.8
Final Education	High school or less	33.2	38.3	51.8	25.2	38.0	19.6	31.4
	College Graduate	47.4	36.1	24.8	38.8	44.4	46.7	51.1
	Graduate school	18.8	25.2	23.0	34.6	14.0	29.4	17.2
	Others	0.6	0.3	0.4	1.4	3.6	4.3	0.2
Occupation	Middle/high school student	14.3	13.2	14.7	10.6	10.9	8.9	13.2
	Undergraduate/graduate student	10.7	11.7	12.9	14.1	11.3	15.5	8.7
	Clerical/technical position	13.8	8.9	10.4	16.7	19.1	27.0	12.9
	Sales/Production	8.0	8.1	5.9	6.1	11.2	12.0	7.9
	Professional	22.1	24.6	20.1	21.9	12.7	9.4	20.7
	Part-time	12.3	16.2	14.0	13.8	17.1	8.8	6.3
	Self-employed	5.3	6.1	6.6	5.0	4.3	3.2	8.1
	Housewife	5.2	3.1	3.9	3.6	3.9	6.6	11.8
	Unemployed/retired	6.7	6.0	8.8	6.8	6.7	7.5	5.3
	Others	1.6	2.1	2.8	1.6	2.8	1.1	5.1
Marital Status	Married	42.1	42.3	39.6	42.3	36.3	47.2	66.9
	Single	57.8	57.7	60.3	57.7	63.1	52.8	33.1
	Others (divorced, etc.)	0.1	0.0	0.1	0.0	0.6	0.0	0.0
Nationality	Korean local	1.0	0.6	0.2	2.6	0.8	0.5	0.1
	Local	99.0	99.4	99.8	97.4	99.2	99.5	99.9
	Third country	0.0	0.0	0.0	0.0	0.0	0.0	0.0
South Korea Awareness	High Awareness	21.9	39.1	27.6	25.6	21.6	24.5	11.3
	Medium Awareness	55.9	48.6	55.3	61.3	56.3	64.6	54.8
	Low Awareness	22.2	12.3	17.1	13.1	22.1	10.9	33.9

(continued)

(Unit: %)

Category		Middle East		Africa	
		UAE	Saudi Arabia*	Egypt*	South Africa
Total		(800)	(900)	(900)	(900)
Gender	Male	50.0	50.0	50.0	50.0
	Female	50.0	50.0	50.0	50.0
Age	Age 15-19	25.0	25.0	25.0	25.0
	Age 20-29	25.0	25.0	25.0	25.0
	Age 30-39	25.0	25.0	25.0	25.0
	40-49	21.4	22.9	20.9	17.6
	50-59	3.6	2.1	4.1	7.4
	Average (age)	30.2	30.1	30.2	30.5
	Final Education	High school or less	14.1	17.3	7.4
College Graduate		55.8	62.8	71.4	43.8
Graduate school		30.1	19.6	20.8	21.4
Others		0.0	0.3	0.3	0.4
Occupation	Middle/high school student	5.5	6.2	3.3	15.2
	Undergraduate/graduate student	18.9	18.0	23.1	9.0
	Clerical/technical position	5.8	4.8	2.8	9.3
	Sales/Production	6.9	8.8	4.4	9.6
	Professional	24.3	27.6	23.2	19.1
	Part-time	16.4	14.1	25.4	12.0
	Self-employed	8.9	7.4	9.6	12.3
	Housewife	10.6	8.2	3.4	3.8
	Unemployed/retired	2.0	4.3	3.1	6.9
Others	0.9	0.6	1.6	2.8	
Marital Status	Married	59.1	61.4	56.7	36.1
	Single	40.8	38.4	43.3	63.8
	Others (divorced, etc.)	0.1	0.1	0.0	0.1
Nationality	Korean local	6.5	0.9	0.1	0.1
	Local	90.4	99.1	99.9	99.9
	Third country	3.1	0.0	0.0	0.0
South Korea Awareness	High Awareness	12.0	15.8	13.9	28.4
	Medium Awareness	36.6	40.1	42.7	45.1
	Low Awareness	51.4	44.1	43.4	26.4

2. Number of Respondents by Korean Cultural Content

- In Chapter 3: Survey Results, where the sample sizes differ, the numbers in the following cells can be considered as the number of cases.

Region	Country	Dramas	Variety shows	Movies	Music	Animation	Publications	Webtoons	Games	Fashion	Beauty	Food
Total		11,647	8,663	12,837	12,511	10,174	6,696	7,268	9,856	9,784	10,562	14,279
Asia-Pacific (10 countries)	China	714	611	677	597	507	432	478	528	562	586	669
	Japan	620	196	452	703	149	135	126	222	351	413	825
	Taiwan	541	450	515	453	368	304	373	385	406	435	564
	Thailand	520	459	532	484	410	366	417	408	477	456	523
	Malaysia	569	493	550	554	401	235	365	365	445	464	566
	Indonesia	684	511	674	648	504	424	475	466	543	521	654
	India	588	589	687	553	557	435	441	553	587	591	584
	Vietnam	459	373	417	410	336	323	349	336	382	440	439
	Kazakhstan*	408	181	450	389	265	124	83	235	280	507	609
	Australia	297	266	352	515	310	197	216	270	290	324	598
Americas (5 countries)	US	261	271	374	602	440	197	250	329	315	320	717
	Canada*	274	256	352	522	328	176	195	270	297	307	617
	Mexico*	493	383	614	582	498	359	437	462	485	482	567
	Brazil	499	389	689	581	554	325	245	476	430	409	454
	Argentina	334	244	479	569	462	190	257	414	335	301	460
Europe (7 countries)	UK	286	264	348	519	324	168	182	297	269	276	519
	France	329	189	397	434	284	219	199	362	231	256	449
	Italy*	464	198	416	370	367	214	175	402	292	283	421
	Spain*	260	216	459	416	391	228	255	427	302	341	473
	Germany*	264	201	343	430	367	174	178	361	252	291	591
	Russia*	400	239	529	464	386	208	107	353	365	657	784
	Türkiye	562	281	589	396	418	249	322	426	314	346	395
Middle East (2 countries)	UAE	411	342	417	348	350	293	297	371	403	415	414
	Saudi Arabia*	502	358	469	361	407	286	335	395	409	442	470
Africa (2 countries)	Egypt*	514	339	502	270	384	243	283	399	359	379	475
	South Africa	394	364	554	341	407	192	228	344	403	320	442

Section 5: Key Analytical Concepts and Measurement Methods

1. Brand Power Index (BPI)

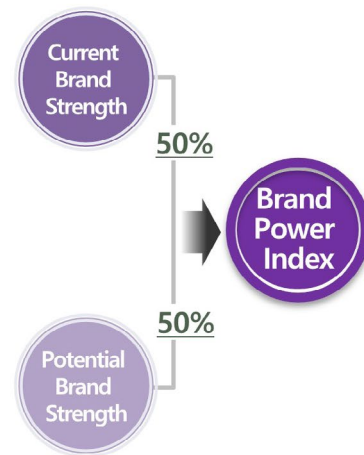
- The Brand Power Index (BPI) quantifies the qualitative value of a brand through various attributes and is utilized accordingly.
- In this survey, the 'Hallyu Brand Power Index' is classified into current brand strength and potential brand strength, representing the current and future attitudes of individual users toward Korean cultural content.
- Starting from the 2020 survey, questions to measure potential brand strength have been added. The measurement of current brand strength utilizes the question about the 'popularity of Korean cultural content in one's home country.'
- Each question's scale is converted to a maximum score of 100 points. Both potential and current brand strength are weighted at 50% to calculate the Brand Power Index.
- The Brand Power Index ranges from a minimum of 20 to a maximum of 100 points.

Q. How popular do you think Hallyu is in your country? (rate each content, convert to a score out of 100, and average)

- | | | |
|--|-------|--|
| 1. Hardly anyone uses it | 20pt | |
| 2. Popular among a niche audience | 40pt | |
| 3. Known not just by a niche audience but also by the general public | 60pt | |
| 4. Widely known and related products are sold | 80pt | |
| 5. Highly popular and related products are selling well | 100pt | |

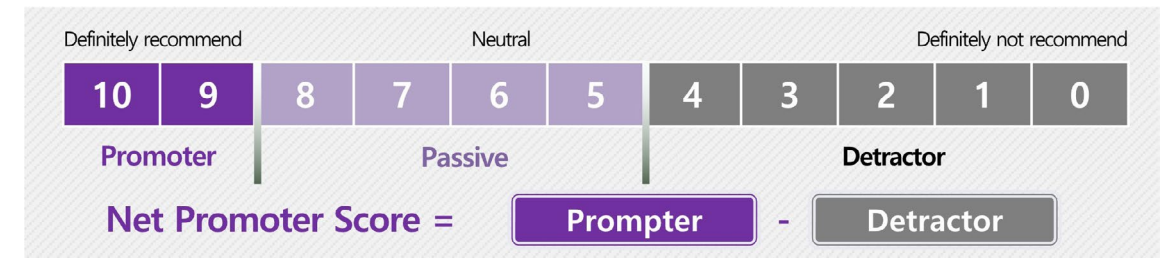
Q. What best describes your attitude towards Korean cultural content? (rate each content, convert to a score out of 100, and average)

- | | | |
|--|-------|--|
| 1. Heard of it, but not familiar | 20pt | |
| 2. Know it and familiar | 40pt | |
| 3. Familiar and would use it | 60pt | |
| 4. Would like to use it but not willing to invest time and money | 80pt | |
| 5. Would like to use it and willing to invest time and money | 100pt | |



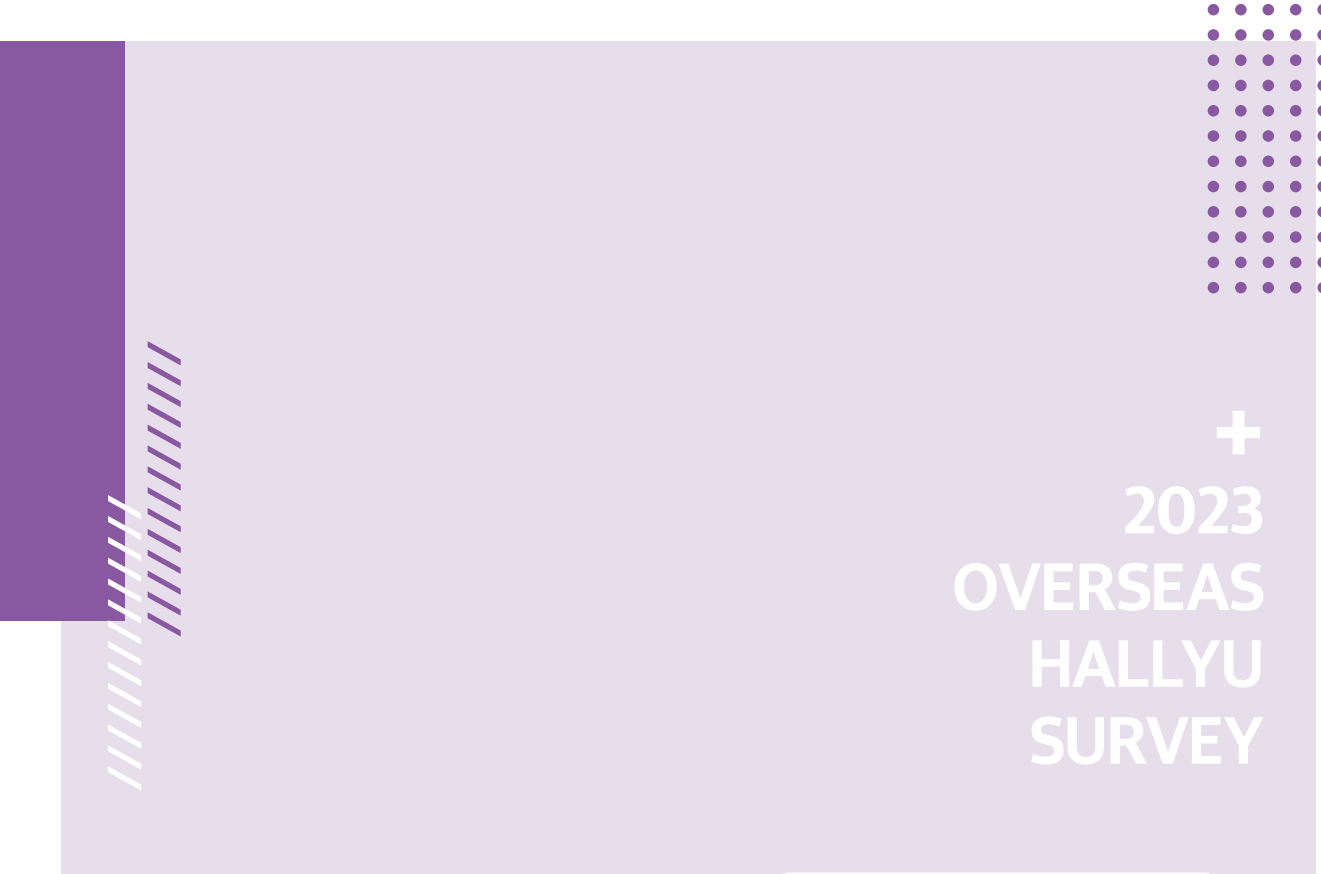
2. Net Promoter Score

- Since the net recommendation index was first introduced in the Harvard Business Review by the consulting firm, Bain & Company in 2004, global companies have actively used it.
- For those with experience in Korean cultural content and those who have purchased Korean brand products/services, the willingness to recommend to others is measured on an 11-point scale, ranging from 0 points 'definitely not recommend' to 6 points 'neutral' to 10 points 'strongly recommend.'
- Detractors are those who respond with 0 to 4 points, passive promoters are those who respond with 5 to 8 points, and promoters are those who respond with 9 to 10 points. The Net Promoter Score is defined as the percentage of promoters minus the percentage of detractors.
- The Net Promoter Score theoretically ranges from a minimum of -100 points to a maximum of +100 points.
- A higher score indicates a higher willingness to recommend the subject to others, while a lower score implies a lesser willingness. The score serves as an indicator of the extent to which positive word of mouth can attract new users.



Section 6: Major Hallyu Issues in 2022

2022. 01.	<ul style="list-style-type: none"> • Netflix Original Variety Show "Single's Inferno" Season 1 enters the Top 10 TV Programs in 18 countries: South Korea, Bahrain, Canada, Hong Kong, Indonesia, Japan, Kuwait, Malaysia, Maldives, Morocco, Philippines, Qatar, Saudi Arabia, Singapore, Taiwan, Thailand, United Arab Emirates, and Vietnam • "Pinkfong Baby Shark Dance" becomes the first to reach 10 billion cumulative views on YouTube.
2022. 02.	<ul style="list-style-type: none"> • Smilegate's "Lost Ark" records the second-highest number of concurrent players ever on Steam. • "Grass" by Keum Suk Gendry-Kim gets named the best- translated work at the Muriel Award for best comic books.
2022. 03.	<ul style="list-style-type: none"> • Stray Kids tops the Billboard Album Chart 'Billboard 200'. • BTS holds "BTS PERMISSION TO DANCE ON STAGE - SEOUL", live-streamed simultaneously in 75 countries. • (March 25) Apple TV+ drama "Pachinko" premieres • (March 28) "Pachinko" ranks 4th in Twitter's TV Series Trending Chart between March 21 and 27.
2022. 04.	<ul style="list-style-type: none"> • Singer PSY's "That That" tops the Canadian iTunes' "Top Songs" chart. • 'HiteJinro' witnesses approximately 27.0% year-over-year increase in the Japanese soju market.
2022. 05.	<ul style="list-style-type: none"> • BLACKPINK's "Shut Down" tops Spotify's Global Weekly Chart. • The film "Decision to Leave" wins the Best Director Award at the Cannes Film Festival. • Webtoon "Navillera" becomes the first Korean work to be nominated for the "Eisner Awards."
2022. 06.	<ul style="list-style-type: none"> • CJ ENM signs an MOU with the Saudi Arabian Ministry of Culture for cultural exchange enhancement.
2022. 07.	<ul style="list-style-type: none"> • Aespa ranks third on the Billboard Album Chart 'Billboard 200'. • BLACKPINK member, Jisoo is named the world's most beautiful woman according to a survey by the UK entertainment media "Nubia Magazine."
2022. 08.	<ul style="list-style-type: none"> • BLACKPINK's World Tour "BORN PINK" spans 26 cities across four continents. • The world's largest Hallyu festival "KCON" is held after a three-year hiatus. • Art fair "Frieze" holds its first-ever "Frieze Seoul."
2022. 09.	<ul style="list-style-type: none"> • The drama "Extraordinary Attorney Woo" becomes the most-watched Netflix content globally. • The drama "Squid Game" wins the first-ever Emmy award for a non-English speaking and Asian actor, Lee Jung-Jae. Director Hwang Dong-hyuk also receives the first-ever Emmy for a non-English-speaking director.
2022. 10.	<ul style="list-style-type: none"> • BTS holds an exclusive concert "Yet to Come in BUSAN", leading to an increase in both domestic and international flights to Busan.
2022. 11.	<ul style="list-style-type: none"> • BTS wins two awards at the "American Music Awards (AMA)." • Fashion brand 'MLB' becomes the first single brand in South Korea to achieve an annual revenue of 1 trillion won in the Chinese market. • BTS member Jungkook participates in the official theme song (Dreamers) for the Qatar World Cup and performs at the opening ceremony.
2022. 12.	<ul style="list-style-type: none"> • The Pinkfong Company's "Bebefinn" becomes the first Korean animation to top Netflix's global charts. • BLACKPINK's "BORN PINK" is selected as one of Billboard's 'Top 50 Best Albums of the Year'.
2023. 01.	<ul style="list-style-type: none"> • Apple TV+ drama "Pachinko" wins Best Foreign Language Series at the 28th Critics' Choice Awards.



+ 2023 OVERSEAS HALLYU SURVEY

Chapter 2 Research Findings- Country Summary

Section 1: Perception of South Korea

1. Awareness of South Korea²

The awareness rate for South Korea was found to be 96.9%. Of these, 47.8% mentioned that they “have a basic understanding of South Korea”, while 23.2% claimed they “have in-depth knowledge of South Korea.”

Regionally, the awareness rate is highest in Africa (98.0%), followed by Asia-Pacific (97.5%), Europe (96.7%), the Middle East (95.9%), and the Americas (95.8%). The top three countries with high accurate awareness are the UAE (45.1%), India (45.0%), and Vietnam (41.7%), whereas the lowest are Russia (9.0%), France (9.2%), and Spain (10.2%).

[Figure 2-1] Awareness of South Korea

[BASE: Survey participants, n=37,836, unit: %]



Q. Are you aware of the country South Korea? (1. Heard of it/2. Heard the name/3. Roughly know it/4. Know it well)

² The survey targeted individuals who are aware of South Korea and have experienced its cultural content. However, Section 1, '1. Awareness of South Korea' analyzes the data from all respondents who answered the question about their awareness of South Korea.

[Table 2-1] Awareness of South Korea by Country

[BASE: Survey participants, n= , unit: %]

Region	Country	Number of cases	Never heard of it (1)	Heard the name (2)	Roughly know it (3)	Know it well (4)	Awareness (2+3+4)
Total		(37,836)	3.1	25.9	47.8	23.2	96.9
Asia-Pacific	Vietnam	(1,114)	0.3	5.1	52.9	41.7	99.7
	China	(1,599)	0.4	9.2	57.7	32.7	99.6
	Malaysia	(1,556)	0.4	12.6	46.0	40.9	99.6
	Taiwan	(1,134)	0.5	10.9	62.0	26.5	99.5
	Indonesia	(1,406)	1.5	13.9	46.9	37.6	98.5
	Kazakhstan*	(1,384)	2.3	27.5	58.6	11.6	97.7
	Japan	(1,750)	2.9	22.4	57.6	17.1	97.1
	India	(1,506)	4.8	14.5	35.7	45.0	95.2
	Thailand	(1,188)	5.4	16.7	42.4	35.5	94.6
	Australia	(1,456)	5.6	33.6	44.0	16.8	94.4
Americas	Brazil	(1,623)	2.2	33.8	48.1	16.0	97.8
	Argentina	(1,251)	2.6	31.5	47.5	18.4	97.4
	Canada*	(1,489)	4.6	28.1	49.4	17.9	95.4
	US	(2,075)	5.3	32.8	44.6	17.3	94.7
	Mexico*	(1,712)	5.7	33.4	47.0	13.9	94.3
Europe	Türkiye	(1,148)	0.8	15.2	54.1	29.9	99.2
	Russia*	(1,743)	0.9	28.8	61.3	9.0	99.1
	Italy*	(1,410)	2.3	36.5	48.4	12.8	97.7
	UK	(1,519)	3.0	34.4	46.7	15.9	97.0
	Germany*	(1,776)	4.0	33.3	47.3	15.4	96.0
	France	(1,814)	5.3	50.3	35.1	9.2	94.7
	Spain*	(1,474)	5.8	32.9	51.2	10.2	94.2
Middle East	Saudi Arabia*	(1,135)	2.2	19.2	39.4	39.2	97.8
	UAE	(1,011)	6.2	14.3	34.3	45.1	93.8
Africa	Egypt*	(1,160)	1.2	19.8	40.7	38.3	98.8
	South Africa	(1,403)	2.7	36.1	39.9	21.2	97.3

2. Images Associated with South Korea

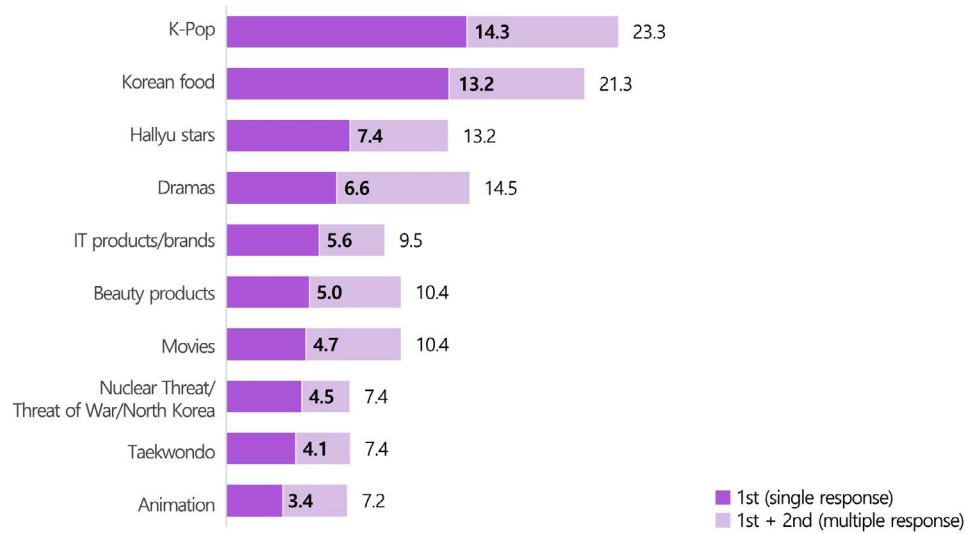
When one thinks of South Korea, the first things that typically come to mind are 'K-pop' (14.3%) and 'Korean food' (13.2%). 'K-pop' has held the top spot for six consecutive years, while 'Korean food' has maintained its position for five years. Seven out of the top 10 images associated with South Korea (including K-pop, Korean food, Hallyu stars, dramas, beauty products, films, and animation) are related to Hallyu.

Across countries, 'K-pop' and 'Korean food' are the most frequently mentioned. The countries with the highest association rates for primary Korean cultural content are as follows: for 'K-pop,' Indonesia (27.9%), Malaysia (26.8%), and Japan (25.6%); for 'dramas,' Indonesia (13.8%), Taiwan (13.1%), China (11.0%); and for 'films,' India (7.9%), UAE (7.6%), and Egypt (7.1%).

The findings suggest that the awareness of Korean cultural content is relatively high in these countries.

[Figure 2-2] Top 10 Images Associated with South Korea

[BASE: Total, n=25,000, unit: %, sorted in descending order from 1st]



Q. When you think of South Korea, what is the first thing that comes to mind?

[Table 2-2] Top 10 Images Associated with South Korea by Country

[BASE: Total, n=(), unit: 1st %]

Region	Country	Number of cases	K-Pop	Korean food	Hallyu stars	Dramas	IT products/brands	Beauty products	Movies	North Korean nuclear threat /war danger zone /North Korea	Taekwondo	Animations
Total			14.3	13.2	7.4	6.6	5.6	5.0	4.7	4.5	4.1	3.4
Asia-Pacific	China	(1,200)	6.1	15.8	6.5	11.0	4.3	6.4	4.9	1.6	2.5	2.4
	Japan	(1,100)	25.6	27.8	9.2	8.2	2.1	3.2	1.9	3.5	0.6	0.5
	Taiwan	(900)	11.6	22.8	8.8	13.1	7.6	2.4	3.4	2.3	1.0	0.4
	Thailand	(900)	21.3	16.0	9.3	9.6	3.9	3.1	5.4	0.7	2.2	1.4
	Malaysia	(900)	26.8	16.7	9.9	10.2	4.2	2.2	4.7	1.2	2.1	0.7
	Indonesia	(1,100)	27.9	12.0	12.7	13.8	5.5	2.5	3.4	0.9	3.0	0.4
	India	(1,200)	11.4	6.4	10.3	5.7	7.4	5.8	7.9	2.8	2.6	3.4
	Vietnam	(900)	11.4	16.2	6.3	7.9	5.7	5.3	4.0	2.0	3.0	1.7
	Kazakhstan*	(800)	8.0	23.5	4.5	6.4	10.3	11.4	4.0	1.5	4.1	2.5
Australia	(900)	19.1	17.2	5.2	3.0	2.9	4.8	3.9	6.7	4.6	4.1	
Americas	US	(1,100)	16.5	16.7	4.8	2.2	3.0	3.2	4.0	9.3	5.0	5.6
	Canada*	(900)	18.3	21.9	5.4	2.1	2.8	3.6	3.0	4.4	4.2	5.3
	Mexico*	(1,100)	17.5	7.8	10.8	5.0	3.9	6.4	3.5	3.4	6.1	3.9
	Brazil	(1,100)	17.7	4.2	7.3	6.7	6.5	3.9	6.3	6.0	5.3	4.6
	Argentina	(900)	16.7	6.2	12.3	2.8	5.4	3.0	4.8	5.8	8.8	6.9
Europe	UK	(900)	17.9	12.3	5.9	4.2	4.4	3.0	5.3	7.0	5.3	3.0
	France	(900)	14.8	7.7	6.2	3.2	7.1	2.7	5.0	6.9	4.6	3.9
	Italy*	(900)	9.7	6.6	6.1	7.9	7.6	5.4	3.4	9.4	7.1	3.9
	Spain*	(900)	12.3	8.9	5.6	1.9	4.9	5.8	4.7	9.7	6.2	4.7
	Germany*	(900)	10.3	14.7	5.1	2.8	4.4	4.2	3.6	9.9	5.3	6.4
	Russia*	(1,100)	8.4	18.5	5.9	2.7	8.0	13.5	2.8	2.6	5.8	4.0
	Türkiye	(900)	9.9	6.1	3.4	10.0	4.0	6.1	6.9	4.3	5.0	3.6
	UAE	(800)	10.5	9.1	7.6	7.1	5.0	7.6	7.6	4.1	2.9	3.6
Middle East	Saudi Arabia*	(900)	6.6	10.2	8.4	9.9	7.2	4.6	5.8	2.2	3.0	3.9
	Egypt*	(900)	3.6	9.1	6.6	6.9	8.4	5.6	7.1	5.7	3.7	3.3
Africa	South Africa	(900)	8.9	10.3	5.1	6.2	9.1	2.8	6.8	4.4	4.1	5.6

3. Perception of South Korea

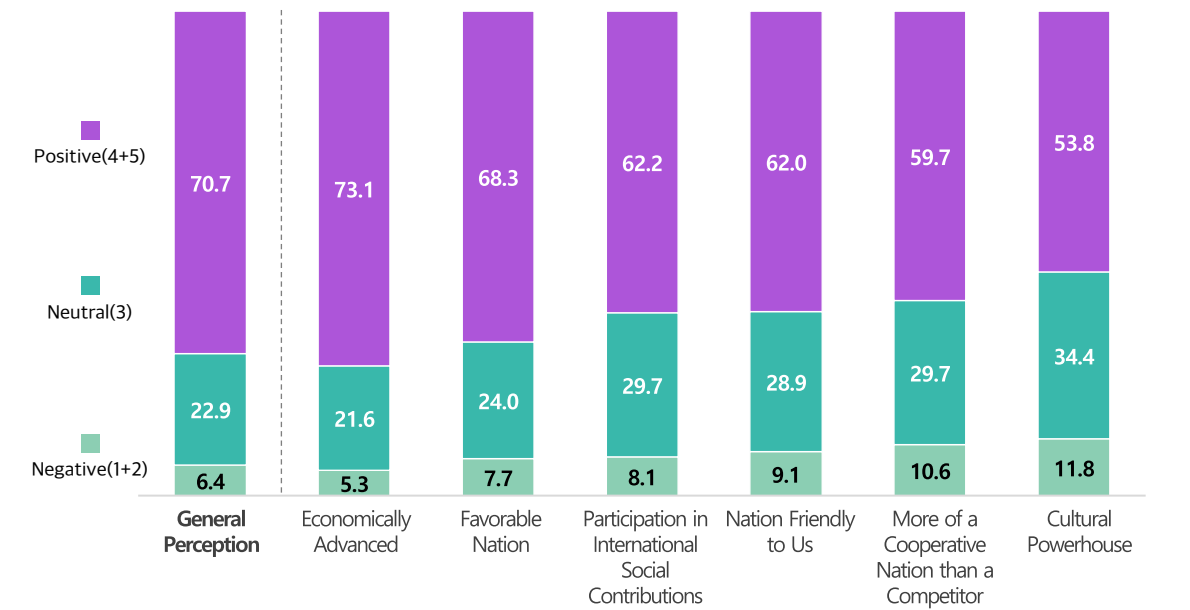
The positive evaluation of South Korea stands at 70.7%. According to specific categories, 73.1% view South Korea as economically advanced, 68.3% have a favorable impression of the country, and 62.2% recognize its participation in global social contributions. These figures confirm that South Korea is perceived as a nation of economic growth and international social responsibility. Concurrently, the positive assessment of South Korea as a "cultural powerhouse" is comparatively low at 53.8%.

Countries with a high positive evaluation of South Korea include Vietnam (90.0%), India (87.0%), and Indonesia (86.2%), all of which are Asian countries. Those with a low positive evaluation are Japan (35.4%), Germany (52.6%), and Taiwan (54.4%). Notably, among the top five countries that view South Korea as a cultural powerhouse (including UAE 72.6%, Vietnam 71.8%, India 71.2%, Thailand 70.9%, and Malaysia 65.0%), four countries (Vietnam, India, Thailand, and Malaysia) belong to the Asia-Pacific region, with the Middle East's UAE ranking first.

Notably, China recognizes South Korea as economically advanced but has lower-than-average positive evaluations regarding "favorable nation" (57.2%), "nation friendly to us" (54.2%), and "more of a cooperative nation than a competitor" (57.4%). Moreover, the positive response rate for being a "cultural powerhouse" (38.7%) is considerably lower than for being perceived as friendly or cooperative. Japan shows low positive response rates in all categories. Russia, Italy, and Germany are also on the list of countries with low positive evaluations regarding South Korea's cultural influence. China, Japan, Russia, Italy, and Germany fall into the lower group regarding experience or awareness of Korean cultural content, a topic we will delve into subsequently.

[Figure 2-3] Perception of South Korea

[BASE: Total, n=25,000, unit: %]



Q. How do you generally evaluate South Korea? (1. Strongly disagree /2. Disagree /3. Neutral /4. Agree /5. Strongly Agree)

[Table 2-3] Perception of South Korea by Country

[BASE: Total, n=(), unit: Positive (4+5)%]

Region	Country	Number of cases	General Perception	Economically Advanced	Favorable Nation	Participation in International Social Contributions	Nation Friendly to Us	More of a Cooperative Nation than a competitor	Cultural Powerhouse
Total		(25,000)	70.7	73.1	68.3	62.2	62.0	59.7	53.8
Asia-Pacific	Vietnam	(900)	90.0	93.2	82.9	76.7	79.0	85.4	71.8
	India	(1,200)	87.0	83.0	85.7	79.5	78.8	74.0	71.2
	Indonesia	(1,100)	86.2	92.5	78.3	82.2	89.0	82.5	51.2
	Thailand	(900)	81.9	79.4	78.6	76.2	74.0	71.2	70.9
	Malaysia	(900)	81.0	84.6	80.4	75.9	73.3	73.4	65.0
	Kazakhstan*	(800)	80.9	81.8	73.4	55.4	69.1	66.6	49.4
	Australia	(900)	70.9	65.3	74.2	65.3	68.9	65.9	54.7
	China	(1,200)	56.3	73.9	57.2	60.8	54.2	57.4	38.7
	Taiwan	(900)	54.4	81.0	51.4	62.3	38.6	37.8	50.4
	Japan	(1,100)	35.4	43.5	33.3	30.1	20.4	24.4	39.9
Americas	Mexico*	(1,100)	74.1	75.9	69.4	62.2	67.5	58.5	60.4
	Brazil	(1,100)	73.9	83.5	66.9	64.6	68.7	64.8	56.2
	Canada*	(900)	70.8	65.3	71.2	59.8	66.1	60.3	53.8
	Argentina	(900)	70.8	77.8	66.4	56.2	46.7	44.2	53.4
	US	(1,100)	65.6	58.5	65.2	59.4	62.0	58.0	50.3
Europe	Türkiye	(900)	83.4	74.1	81.9	67.8	74.0	69.1	54.4
	Russia*	(1,100)	65.7	68.4	57.0	48.5	34.5	47.9	35.1
	UK	(900)	65.2	62.9	65.2	60.1	60.0	53.4	50.2
	France	(900)	62.7	69.4	63.6	55.6	58.4	50.8	51.6
	Spain*	(900)	59.1	64.8	59.0	49.6	52.0	47.6	43.8
	Italy*	(900)	56.6	54.0	52.4	46.0	47.7	43.7	37.0
	Germany*	(900)	52.6	53.7	58.2	43.1	55.8	54.0	42.7
Middle East	UAE	(800)	82.0	81.8	80.5	78.1	76.6	73.3	72.6
	Saudi Arabia*	(900)	79.1	82.3	76.6	70.8	74.4	70.3	61.1
Africa	Egypt*	(900)	80.6	82.8	75.4	67.3	69.6	61.8	60.0
	South Africa	(900)	78.6	69.3	79.2	66.3	58.6	59.7	60.7

Section 2: Experience and Perception of Korean Cultural Content

1. Experience Rate of Korean Cultural Content

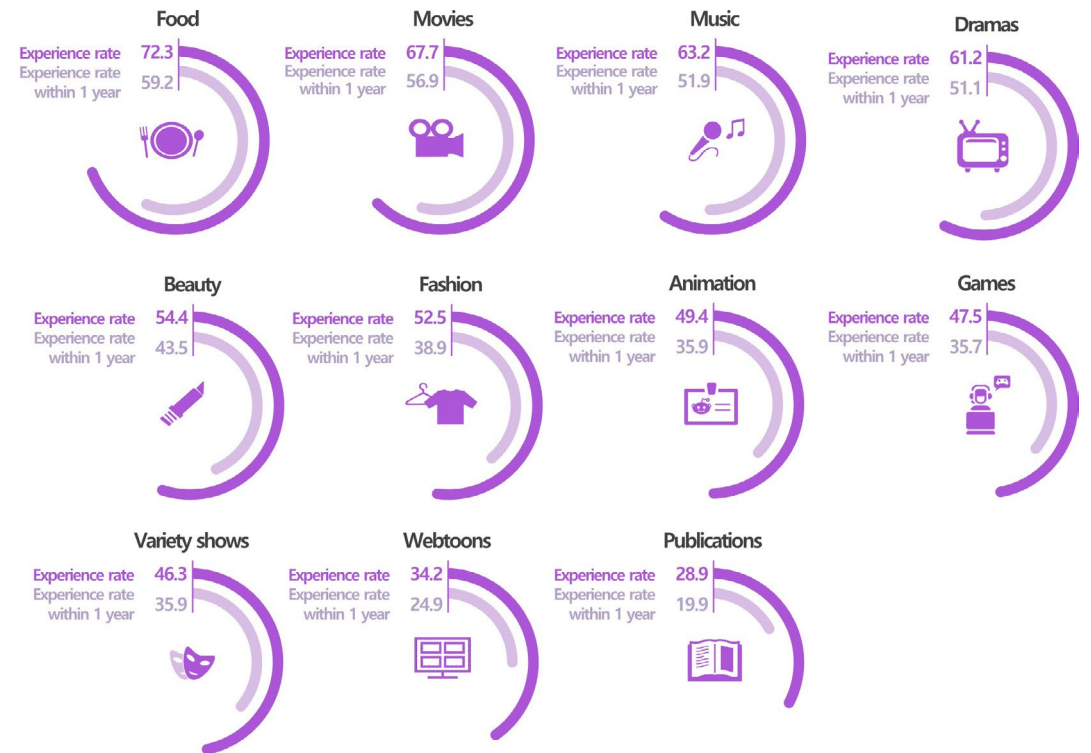
Among Hallyu consumers, the highest experience rate for Korean cultural content is food (72.3%), followed by movies (67.7%), music (63.2%), and dramas (61.2%). The experience rate in the last year also follows the same pattern: food (59.2%), movies (56.9%), music (51.9%), and dramas (51.1%). Publications (28.9%) and webtoons (34.2%) are cultural content that fewer people have experienced, according to the survey.

Countries with the highest experience rates for each type of cultural content (top three countries by content) are predominantly located in the Asia-Pacific region: Taiwan, Thailand, Malaysia, Indonesia, India, Vietnam, Argentina, and UAE. In the case of publications, Thailand (44.3%) and UAE (39.5%) are prominent; for games, India (63.0%), Türkiye (59.0%), and UAE (60.1%); and for animation, India (61.6%), Brazil (63.9%), and Argentina (58.9%). These countries differ from others in their experience rates for these specific contents.

Conversely, countries with lower experience rates include Japan, Kazakhstan, the United States, France, Italy, and Germany. Australia has the lowest experience rate in games (33.8%), the UK in movies (47.8%), Spain in dramas (33.4%), and Russia in webtoons (9.9%). Saudi Arabia (47.9%), Egypt (32.1%), and South Africa (42.4%) are among the bottom three countries in music experience rates.

[Figure 2-4] Experience Rate of Korean Cultural Content

[BASE: Total, n=25,000, unit: %]



- Q. Please select all the Korean cultural content you have personally experienced.
- Q. Please select all the Korean cultural content you have used within the last year.

[Table 2-4] Experience Rate of Korean Cultural Content by Country

[BASE: Total, n=(), unit: %]

Region	Country	Number of cases	Food	Movies	Music	Dramas	Beauty	Fashion	Animations	Games	Variety shows	Webtoons	Publications
Total		(25,000)	72.3	67.7	63.2	61.2	54.4	52.5	49.4	47.5	46.3	34.2	28.9
Asia-Pacific	China	(1,200)	81.0	82.3	74.3	85.8	68.3	69.6	52.6	59.0	74.5	51.8	38.6
	Japan	(1,100)	83.0	48.6	72.2	64.4	43.5	38.2	13.7	21.8	21.7	11.5	12.8
	Taiwan	(900)	90.6	85.1	76.0	87.7	65.2	67.4	46.2	54.3	75.7	52.3	35.2
	Thailand	(900)	88.8	90.1	81.4	86.9	78.2	82.6	58.2	57.0	78.7	62.9	44.3
	Malaysia	(900)	90.3	89.6	89.7	92.7	73.6	73.2	48.9	40.6	82.1	42.2	26.1
	Indonesia	(1,100)	89.5	92.8	88.6	92.8	72.5	74.8	57.8	45.1	67.8	60.0	38.8
	India	(1,200)	66.2	79.0	58.3	65.8	68.9	70.3	61.6	63.0	68.3	41.0	38.8
	Vietnam	(900)	75.1	72.0	70.4	78.0	72.4	66.6	44.4	49.4	64.1	40.4	38.9
	Kazakhstan*	(800)	85.6	65.4	58.0	60.9	72.3	41.9	38.1	29.6	23.6	10.4	15.6
	Australia	(900)	76.4	48.3	66.6	40.2	43.1	39.7	40.7	33.8	36.7	24.4	23.7
Americas	US	(1,100)	73.8	40.8	62.3	28.7	34.7	33.7	46.5	35.2	30.6	24.5	19.4
	Canada*	(900)	80.1	49.2	68.8	38.1	42.7	41.3	43.4	36.8	36.3	23.7	21.6
	Mexico*	(1,100)	67.3	73.7	66.7	57.1	56.5	58.8	58.3	51.0	42.5	50.4	34.3
	Brazil	(1,100)	51.2	78.0	65.0	57.6	46.5	51.1	63.9	53.3	45.5	22.4	34.6
	Argentina	(900)	62.0	64.8	76.4	45.0	39.0	46.9	58.9	52.4	30.6	32.4	21.2
Europe	UK	(900)	66.4	47.8	65.3	37.7	37.0	36.8	41.7	37.7	36.6	21.1	20.7
	France	(900)	57.9	51.4	55.0	43.1	31.0	30.6	38.4	45.7	24.8	24.3	27.8
	Italy*	(900)	57.0	55.6	48.6	60.4	35.3	38.8	48.8	52.6	25.8	20.6	25.6
	Spain*	(900)	62.0	61.2	53.3	33.4	42.4	40.8	50.8	54.6	28.0	32.2	27.6
	Germany*	(900)	74.2	45.8	55.2	34.8	37.6	33.2	46.6	45.4	25.0	21.0	20.9
	Russia*	(1,100)	81.5	57.7	51.0	44.4	68.5	39.9	39.5	36.9	25.3	9.9	20.6
	Türkiye	(900)	54.4	83.2	53.9	79.0	48.9	45.4	58.1	59.0	38.3	43.8	31.6
Middle East	UAE	(800)	69.8	74.5	53.8	71.5	71.1	67.6	57.4	60.1	60.1	43.3	39.5
	Saudi Arabia*	(900)	69.0	72.0	47.9	75.6	66.0	62.4	58.4	57.2	53.4	48.4	35.4
Africa	Egypt*	(900)	66.3	72.0	32.1	73.3	52.2	51.7	54.4	56.7	48.4	42.4	31.3
	South Africa	(900)	58.8	75.7	42.4	53.9	42.3	55.2	56.2	46.3	51.3	26.7	21.3

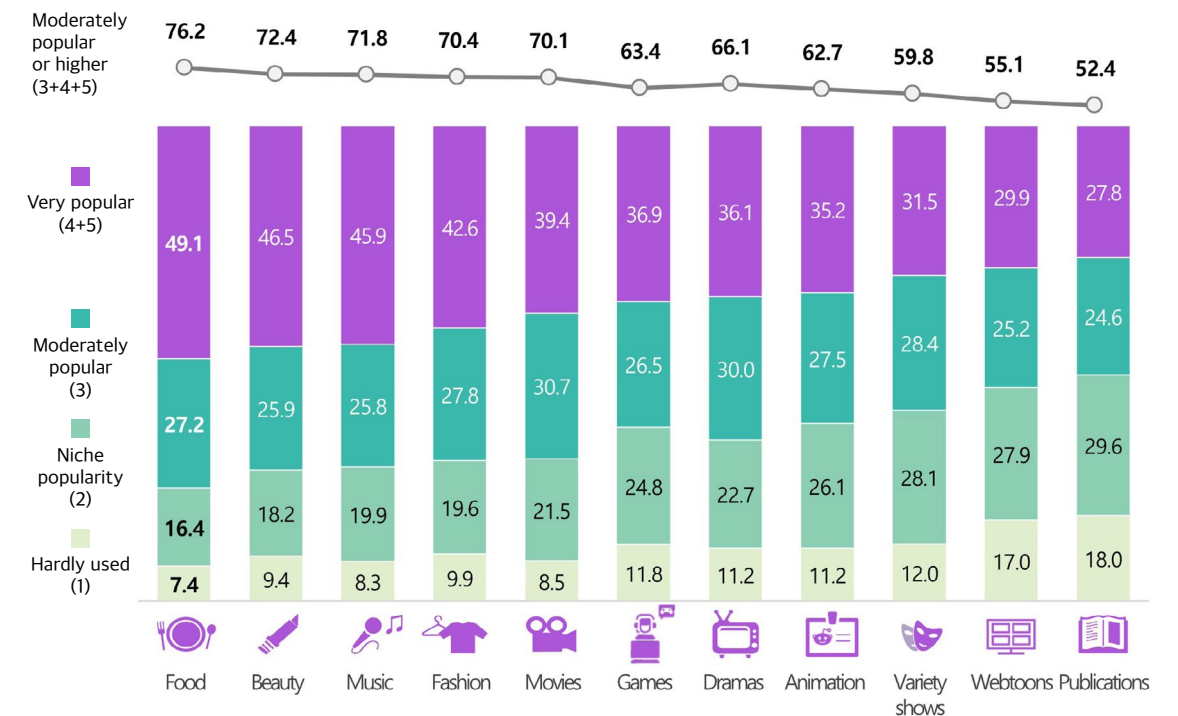
2. Popularity of Korean Cultural Content

The popularity of Korean cultural content generally falls within the moderate to high range (3+4+5), with response rates ranging from 52.4% and 76.2%. Except for publications, all types of content receive the highest proportion of "very popular" responses. Particularly, food (49.1%), beauty (46.5%), and music (45.9%) receive approximately 20 percentage points more "very popular" responses than "moderately popular" ones. Fashion, movies, and games are less popular than food, beauty, and music, but still receive 8-15 percentage points more "very popular" responses than "moderately popular" ones. Dramas, animations, and variety shows receive the highest proportions of "very popular" responses, although the gap between "very popular" and "moderately popular" is not significantly large (3.1-7.7 percentage points). Publications (29.6%), variety shows (28.1%), and webtoons (27.9%) receive the most "niche popularity" responses and are gradually gaining public attention, primarily through enthusiasts.

Countries where Korean cultural content is highly popular include Japan, Taiwan, Malaysia, Indonesia, India, Vietnam, UAE, and Saudi Arabia, mostly situated in Asia-Pacific and the Middle East. Conversely, countries with lower popularity include Japan, the United States, Argentina, France, Italy, Germany, Russia, Türkiye, Kazakhstan, and South Africa primarily in the Americas and Europe. Specifically, Japan has a high "very popular" response rate for food (65.4%) but is among the bottom countries for beauty (26.7%), fashion (14.5%), variety shows (12.8%), publications (11.2%), webtoons (11.0%), and games (10.6%).

[Figure 2-5] Popularity of Korean Cultural Content within the Home Country

[BASE: Total, n=25,000, unit: %]



Q. How popular do you think Hallyu is in your country? (1. Hardly anyone uses it / 2. Popular among a niche audience / 3. Known not just by a niche audience but also by the general public / 4. Widely known and related products are sold / 5. Highly popular and related products are selling well)

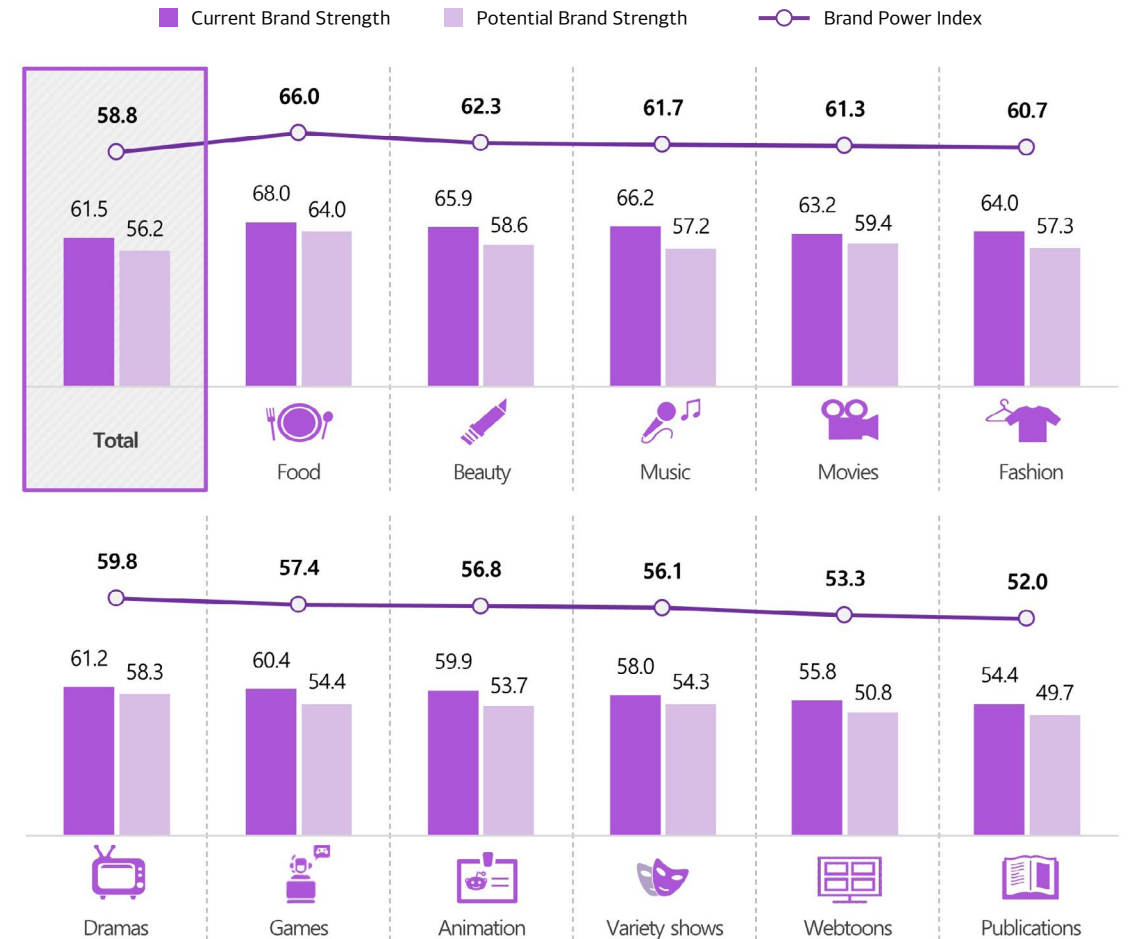
[Table 2-5] Popularity of Korean Cultural Content by Country

[BASE: Total, n=(), unit: Very popular (4+5)%]

Region	Country	Number of cases	Food	Movies	Music	Dramas	Beauty	Fashion	Animations	Games	Variety shows	Webtoons	Publications
Total		(25,000)	49.1	46.5	45.9	42.6	39.4	36.9	36.1	35.2	31.5	29.9	27.8
Asia-Pacific	China	(1,200)	52.1	57.7	45.3	50.3	43.2	43.1	42.8	35.9	39.6	34.8	35.0
	Japan	(1,100)	65.4	46.3	55.1	38.8	26.7	14.5	36.2	10.6	12.8	11.0	11.2
	Taiwan	(900)	63.7	55.0	52.1	53.1	47.9	40.6	55.3	29.9	41.6	32.9	26.9
	Thailand	(900)	53.9	52.9	48.6	48.8	44.9	38.2	37.9	38.4	39.7	37.9	35.0
	Malaysia	(900)	68.3	64.8	63.6	60.6	58.3	34.2	57.7	34.1	52.2	31.9	27.7
	Indonesia	(1,100)	59.4	59.8	58.2	57.1	50.7	34.5	50.5	35.3	43.1	37.7	30.4
	India	(1,200)	48.3	53.7	53.0	52.2	51.8	49.8	46.1	48.0	45.9	41.3	41.3
	Vietnam	(900)	58.1	61.2	56.0	57.9	49.3	43.0	53.6	38.9	46.7	37.0	38.3
	Kazakhstan*	(800)	49.5	52.0	33.4	37.8	31.4	23.6	26.6	23.9	18.9	15.8	15.9
	Australia	(900)	49.2	34.9	42.4	32.1	27.8	26.7	24.2	31.7	22.2	23.7	26.9
Americas	US	(1,100)	51.7	35.9	41.5	30.7	27.4	33.9	27.1	34.9	24.0	24.7	24.8
	Canada*	(900)	57.8	40.9	48.3	36.3	27.8	33.8	28.7	31.1	24.3	23.0	21.1
	Mexico*	(1,100)	52.4	57.3	56.8	55.2	50.1	46.0	43.5	45.5	38.0	39.5	32.7
	Brazil	(1,100)	42.2	44.4	51.8	43.3	41.9	41.7	35.8	42.5	34.3	31.3	33.1
	Argentina	(900)	36.3	33.0	49.1	33.9	29.3	33.8	22.9	32.0	20.0	23.1	19.3
Europe	UK	(900)	46.8	34.9	42.2	33.1	31.2	32.2	28.6	32.0	24.1	25.1	24.8
	France	(900)	29.3	27.1	35.6	27.2	27.6	33.1	21.9	30.1	18.6	26.4	20.4
	Italy*	(900)	36.8	32.9	33.6	30.6	33.0	36.3	31.8	32.6	20.9	21.9	18.2
	Spain*	(900)	41.6	37.7	38.8	34.6	35.2	43.0	25.4	36.8	21.8	26.9	24.7
	Germany*	(900)	46.2	33.7	37.2	30.9	30.1	33.4	21.9	34.1	24.6	25.6	22.2
	Russia*	(1,100)	40.1	42.1	26.5	26.5	23.1	20.1	17.9	21.8	13.8	15.6	15.9
	Türkiye	(900)	35.0	41.9	40.3	39.4	42.0	41.4	34.8	38.6	30.3	33.0	29.6
Middle East	UAE	(800)	58.0	61.9	59.8	59.6	59.5	53.9	51.0	52.0	50.9	49.3	48.3
	Saudi Arabia*	(900)	50.0	54.6	48.8	51.9	47.4	47.4	42.8	46.9	41.9	43.3	41.6
Africa	Egypt*	(900)	42.1	47.9	39.0	43.9	44.9	44.8	37.4	39.8	37.1	39.6	34.2
	South Africa	(900)	38.6	39.4	32.3	39.4	40.6	38.0	31.7	37.9	28.9	25.0	21.3

[Figure 2-6] Korean Cultural Content Brand Power Index

[BASE: Total, n=25,000, unit: points out of 100]



3. Korean Cultural Content Brand Power Index (BPI)

The brand power index for Korean cultural content stands at 58.8 points, with food (66.0 points), beauty (62.3 points), and music (61.7 points) scoring the highest. Publications (52.0 points), webtoons (53.3 points), and variety shows (56.1 points) score lower compared to other content types.

The brand power of food surpasses that of other content types. Regarding the gap in index points between food and the next highest content type, beauty, food scores 3.7 points higher. Dramas (2.4 points), variety shows (2.8 points), and webtoons (1.3 points) show a gap of more than one point from the next ranked content, while other content types have less than a one-point gap from their next ranked counterpart. Overall, content with higher mass popularity also tends to have a higher brand power index, while content with lower popularity tends to have a lower index. The score for current popularity is higher than for potential popularity, indicating that the current evaluation surpasses the prospects.

The top countries regarding the brand power index for Korean cultural content are Taiwan, Malaysia, Indonesia, Vietnam, India, UAE, and Saudi Arabia, which are primarily located in Asia-Pacific and the Middle East. Conversely, the countries scoring lowest on the index are Japan, Kazakhstan, the United States, Argentina, Italy, France, Germany, and Russia. Generally, these are countries where “very popular” has a low response rate.

- Q. (Current popularity) How popular do you think Hallyu is in your country at the moment? (1. Hardly anyone uses it / 2. Popular among a niche audience / 3. Known not just by a niche audience but also by the general public / 4. Widely known and related products are sold / 5. Highly popular and related products are selling well)
- Q. (Potential popularity) What best describes your attitude towards Korean cultural content? (1. Heard of it, but not familiar / 2. Know it and familiar / 3. Familiar and would use it / 4. Would like to use it but am not willing to invest time and money / 5. Would like to use it and willing to invest time and money)

[Table 2-6] Brand Power Index of Korean Cultural Content by Country

[BASE: Total, n= (), unit: points out of 100]

Region	Country	Number of cases	Total	Food	Beauty	Music	Movies	Fashion	Drama	Games	Animations	Variety shows	Webtoons	Publications	
Total			(25,000)	58.8	66.0	62.3	61.7	61.3	60.7	59.8	57.4	56.8	56.1	53.3	52.0
Asia-Pacific	China	(900)	68.3	74.1	73.9	70.4	69.5	72.6	71.2	64.4	63.5	67.9	61.7	61.8	
	Japan	(1,200)	66.3	66.9	68.4	68.0	69.3	68.2	66.8	65.9	65.8	66.3	62.3	61.2	
	Taiwan	(1,100)	65.8	73.3	71.3	71.2	70.3	70.3	70.8	57.5	59.2	64.9	59.9	55.2	
	Thailand	(900)	65.4	75.7	71.9	70.9	71.2	70.0	70.8	56.7	57.2	67.1	55.2	52.9	
	Malaysia	(900)	65.2	73.6	68.6	67.2	68.4	67.8	69.8	62.7	57.9	65.1	59.6	56.7	
	Indonesia	(1,200)	65.2	69.9	69.8	65.8	67.4	68.3	67.5	63.9	60.7	65.1	60.0	58.3	
	India	(900)	63.3	68.8	66.6	66.3	66.3	66.2	64.2	59.3	59.7	62.9	59.9	56.2	
	Vietnam	(900)	55.1	67.5	56.5	59.8	55.3	55.0	52.6	52.9	53.8	51.6	50.3	50.2	
	Kazakhstan*	(800)	51.4	66.4	64.7	52.3	54.7	54.9	52.9	45.9	47.1	44.7	40.4	42.0	
Australia	(1,100)	49.8	67.5	57.4	61.7	51.2	54.7	55.5	41.0	38.7	42.4	38.7	38.6		
Americas	US	(1,100)	61.3	66.0	65.3	64.6	63.8	64.8	60.8	60.3	59.6	57.8	57.4	54.2	
	Canada*	(1,100)	60.3	61.7	61.8	64.2	64.1	61.1	61.0	60.7	62.0	58.1	53.7	55.2	
	Mexico*	(900)	55.3	70.1	57.6	60.5	54.6	56.0	53.5	54.3	53.5	51.3	48.8	47.5	
	Brazil	(1,100)	54.6	66.9	55.1	59.1	53.3	54.4	52.0	54.8	55.1	50.3	50.5	49.1	
	Argentina	(900)	53.1	58.6	54.0	61.7	56.0	54.1	50.5	54.2	53.7	47.6	47.7	45.6	
Europe	UK	(900)	59.9	59.0	61.8	59.9	65.1	60.5	62.5	61.3	60.1	57.2	56.7	54.8	
	France	(900)	54.7	63.8	55.3	60.2	55.1	54.4	54.0	54.5	54.2	51.3	49.9	48.7	
	Italy*	(900)	54.7	61.1	55.9	56.2	57.8	54.4	51.9	58.6	55.9	49.6	50.5	49.5	
	Spain*	(900)	53.8	65.1	54.9	56.2	53.9	53.7	51.0	54.9	54.2	49.9	48.9	48.9	
	Germany*	(900)	52.3	57.1	51.4	55.0	53.8	51.7	51.9	54.5	52.6	48.5	50.3	48.6	
	Russia*	(900)	52.3	56.9	53.1	53.2	55.1	51.6	55.6	54.8	53.4	48.4	46.3	46.9	
	Türkiye	(1,100)	48.9	61.1	59.3	49.0	50.4	49.6	48.3	46.5	47.3	43.4	40.3	42.3	
Middle East	UAE	(800)	68.4	70.8	71.3	69.0	71.1	71.3	69.0	67.3	66.8	67.7	64.9	63.9	
	Saudi Arabia*	(900)	65.2	67.5	68.1	64.6	66.6	67.1	66.0	65.0	65.0	63.8	62.8	60.8	
Africa	Egypt*	(900)	61.8	64.6	63.7	58.0	66.3	62.6	64.5	64.0	61.4	59.7	58.9	56.0	
	South Africa	(900)	56.3	61.7	58.4	55.2	61.6	59.3	56.9	57.2	58.0	54.9	49.3	47.1	

4. Reasons for Not Experiencing Korean Cultural Content and Willingness to Use³

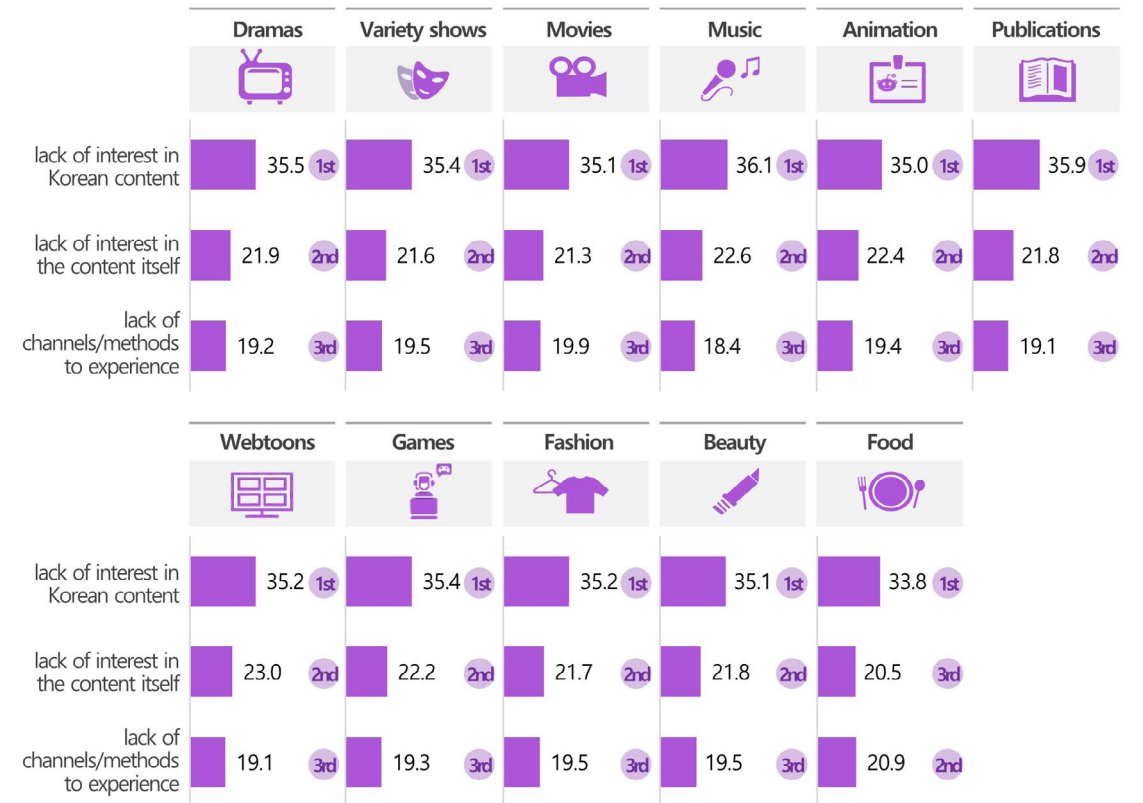
According to the survey of those without experience, the primary reason for not having experienced Korean cultural content was a 'lack of interest in Korean content'. 'Lack of interest in the content itself' and 'no available channel/method to experience Korean content' were mentioned as subsequent reasons.

'No available channel/method to experience Korean content' includes both cases where access is physically/economically challenging and where access is possible but the method is unknown. Therefore, strategies should be developed considering national infrastructure characteristics and reasons for non-experience.

Regarding the willingness to use Korean cultural content, 71.9% responded that they have no plans to use it in the future. The content with a relatively high willingness to use is food (16.8%), which records more than twice the following categories: beauty (7.2%), fashion (6.8%), and games (6.4%).

[Figure 2-7] Reasons for Not Experiencing Korean Cultural Content

[BASE: Respondents who have not experienced Korean cultural content, n=3,986, unit: %]

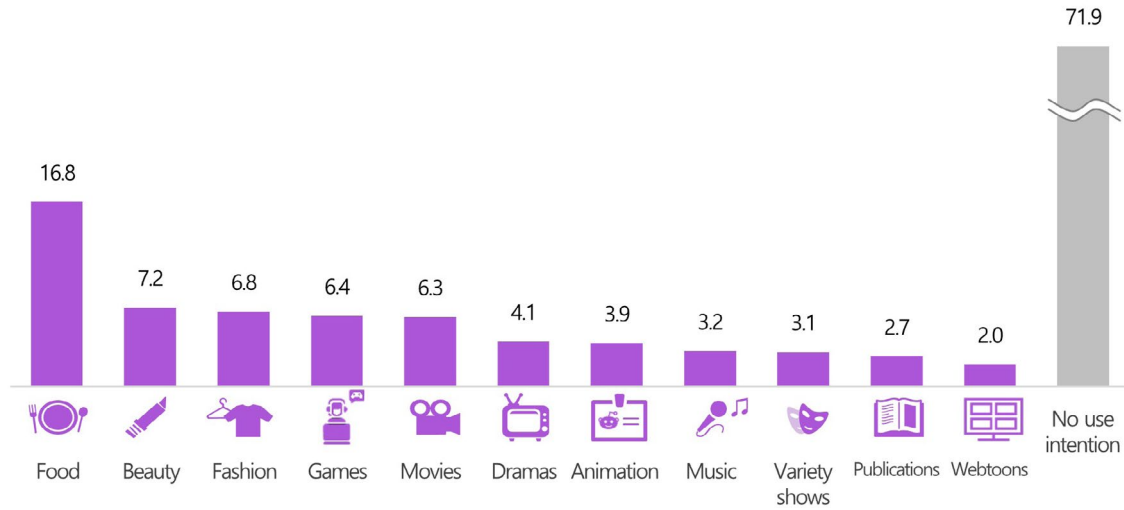


Q. What are the reasons for not having any experience with each of the Korean cultural contents? Please select all that apply.

³ This survey targets those who are aware of South Korea and have experienced at least one of the 11 Korean cultural contents. However, the section on 'Reasons for Not Experiencing Korean Cultural Content and Willingness to Use' is based on a separate survey and analysis of those who have not experienced any.

[Figure 2-8] Future Willingness to Use Korean Cultural Content

[BASE: Respondents who have not experienced Korean cultural content, n=3,986, unit: Multiple response%]



Q. What Korean cultural content would you like to use in the future? Please select all that apply.

Section 3: Consumption of Korean Cultural Content

1. Ease of Use of Korean Cultural Content

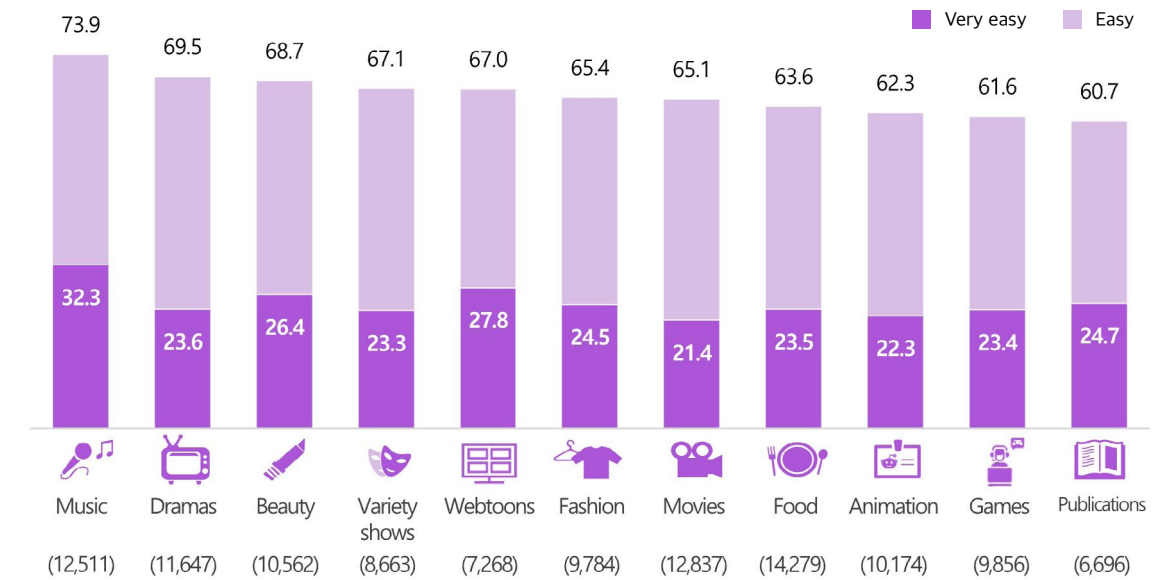
The most accessible content, with high ease of use scores (Ease 4+5%), are music (73.9%), dramas (69.5%), and beauty (68.7%). Notably, music, which ranks first, has a response rate exceeding 70%, unlike other content in the 60% range. Conversely, the accessibility of publications (60.7%), games (61.6%), and animation (62.3%) are somewhat lower.

Content rated as very easy to use include music (32.3%), webtoons (27.8%), and beauty (26.4%). Music and beauty have long been mainstays of Hallyu content and are interpreted to have exceptional channel accessibility. Webtoons are primarily distributed digitally, which likely contributes to their perceived ease of access.

The countries with the highest response rates for ease of use are China, Malaysia, Indonesia, India, Vietnam, and Türkiye, which are traditionally key regions for Hallyu, including the New Southern Policy countries (ASEAN, India) and China. Conversely, countries with lower response rates include Japan, Kazakhstan, Argentina, Italy, Spain, Germany, and Russia, which are primarily part of the New Northern Policy countries, as well as the Americas and Europe.

[Figure 2-9] Ease of Use of Korean Cultural Content

[BASE: Experienced respondents by Korean cultural content, n=(), unit: %]



Q. When you want to access Korean cultural content, you can do so easily. (1. Strongly disagree /2. Disagree /3. Neutral /4. Agree /5. Strongly Agree)

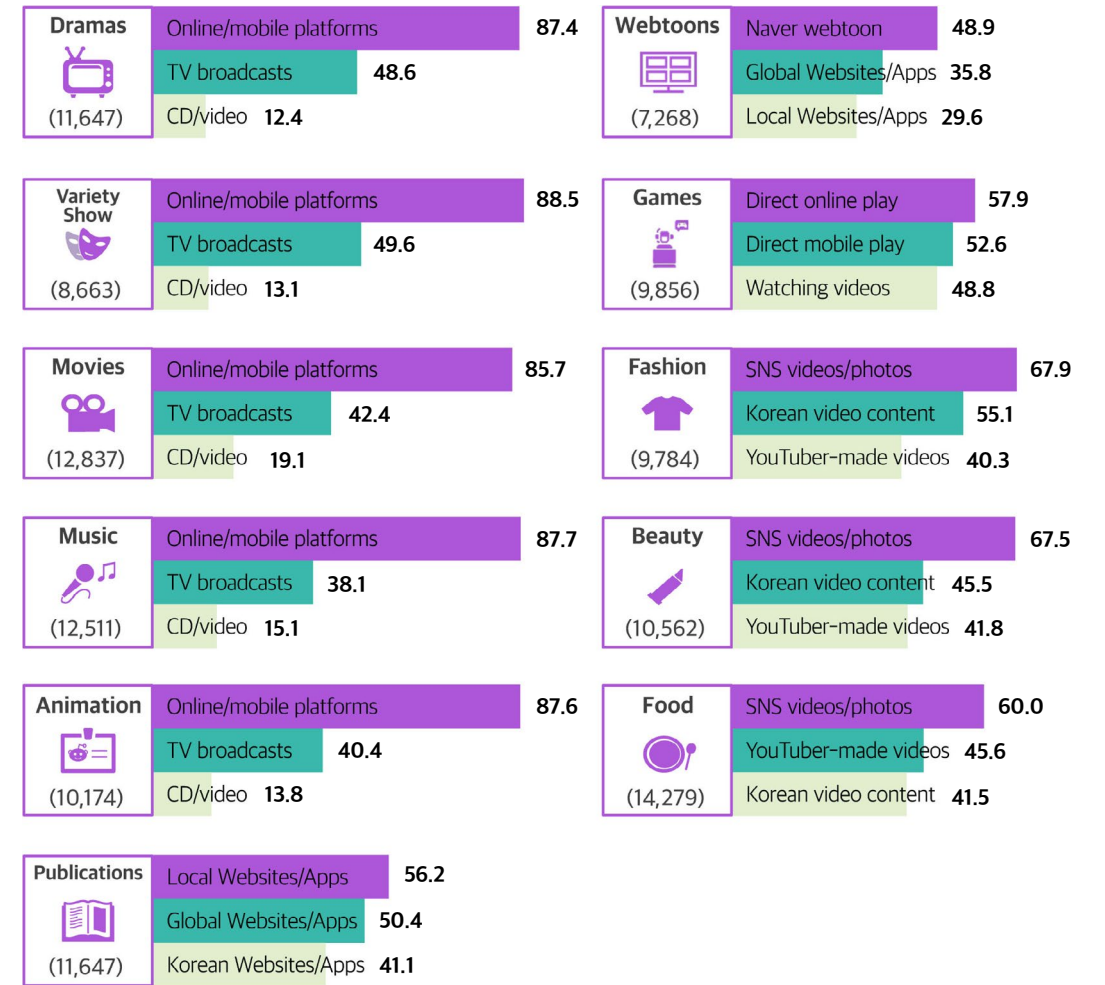
[Table 2-7] Ease of Use of Korean Cultural Content by Country

[BASE: Experienced respondents by Korean cultural content, n = different by floor / refer to the survey summary, unit: Ease (4+5) %]

Region	Country	Music	Drama	Beauty	Variety shows	Webtoons	Fashion	Movies	Food	Animations	Games	Publications
Total		73.9	69.5	68.7	67.1	67.0	65.4	65.1	63.6	62.3	61.6	60.7
Asia-Pacific	China	82.2	75.1	74.2	73.8	73.2	79.5	76.2	79.8	75.7	78.2	75.2
	Japan	62.7	58.5	61.7	48.5	60.3	57.5	56.4	56.7	50.3	60.4	51.9
	Taiwan	75.5	77.1	63.9	71.6	66.2	67.0	70.3	73.4	58.4	65.2	54.9
	Thailand	76.9	75.8	78.9	70.4	70.5	70.4	72.9	74.8	72.4	71.1	66.1
	Malaysia	79.2	84.2	78.0	77.5	66.8	74.8	81.5	76.5	68.6	64.9	63.8
	Indonesia	88.3	88.9	86.2	86.1	83.6	81.0	86.1	79.1	79.4	76.8	75.2
	India	87.2	79.3	82.2	79.6	78.7	79.2	79.8	77.4	80.1	79.6	79.8
	Vietnam	85.1	84.3	85.0	78.8	77.7	83.0	80.8	82.0	75.6	72.3	71.2
	Kazakhstan*	48.6	42.4	52.7	38.1	45.8	45.4	46.0	45.5	39.2	31.1	31.5
Australia	68.5	64.6	66.4	68.0	72.2	61.0	58.2	66.7	60.6	62.6	61.4	
Americas	US	68.9	68.2	64.4	66.1	65.2	56.8	59.9	61.5	60.0	58.7	65.0
	Canada*	69.7	62.8	64.2	55.9	65.6	54.2	58.2	65.5	52.4	55.9	51.7
	Mexico*	79.0	64.7	70.5	62.7	57.9	59.0	58.6	61.7	54.8	57.4	46.5
	Brazil	80.7	73.9	71.6	70.2	73.1	71.2	66.8	65.9	70.8	64.3	61.5
	Argentina	78.0	56.3	59.8	50.4	60.3	49.9	55.7	45.7	57.8	48.8	46.3
Europe	UK	64.5	63.6	64.1	54.9	64.3	60.2	59.8	54.7	49.4	52.5	60.7
	France	69.6	50.5	58.6	49.2	58.3	56.7	51.4	59.0	45.8	53.0	51.6
	Italy*	70.5	50.9	62.9	50.5	52.0	50.0	46.6	52.7	44.1	50.2	43.0
	Spain*	69.5	53.8	62.5	50.5	49.0	49.3	46.6	55.4	48.3	48.7	44.7
	Germany*	62.6	50.0	55.7	53.2	53.9	47.6	41.7	56.2	48.0	48.5	44.3
	Russia*	48.7	40.5	49.9	36.8	54.2	34.2	38.4	39.4	39.1	30.6	29.3
Türkiye	88.4	85.9	80.3	81.1	70.5	82.2	83.0	74.7	78.5	73.9	67.1	
Middle East	UAE	81.9	80.8	78.8	77.2	68.4	75.7	79.1	76.3	74.3	76.0	73.4
	Saudi Arabia*	78.1	75.1	69.9	69.0	66.0	70.7	70.8	70.2	70.0	66.3	67.8
Africa	Egypt*	78.9	75.9	62.5	67.6	65.7	70.2	69.5	56.0	66.1	67.4	64.6
	South Africa	73.0	64.5	61.9	61.3	58.8	60.8	58.5	58.4	59.5	52.9	52.6

[Figure 2-10] Channels of Exposure to Korean Cultural Content

[BASE: Experienced respondents by Korean cultural content, n=(), unit: Multiple response%]



2. Channels of Exposure to Korean Cultural Content

The primary point of contact for video and audio content is "Online/Mobile Platforms." When comparing this with the second-ranking "TV Broadcasting", music shows a 49.6 percentage point gap, followed by animation with 47.2 percentage points, movies with 43.3 percentage points, variety shows with 38.9 percentage points and dramas with 38.8 percentage points. This indicates a higher dependency on online platforms for music. Moreover, this is supported by the fact that music ranks first in ease of use for Korean cultural content.

For publications, the top point of contact is 'Local Sites/Apps' (56.2%). This is followed by 'Global Sites/Apps' (50.4%) and 'Korean Sites/Apps' (41.1%). For webtoons, almost half of the access comes through 'Naver Webtoon' (48.9%), followed by 'Global Sites/Apps' (35.8%) and 'Local Sites/Apps' (29.6%). For games, most people play directly online (57.9%) or on mobile (52.6%), while 48.8% also engage in watching videos.

Fashion and beauty are primarily accessed through 'SNS videos/photos'. The SNS dependency on fashion (67.9%) and beauty (67.5%) exceeds food (60.0%). For fashion (55.1%) and beauty (45.5%), 'Korean Video Content' ranks second, while 'YouTuber-Made Videos' ranks second for food.

Regional differences in the ways people access Korean cultural content exist. First, for dramas, variety shows, movies, and animations, the rate of 'TV Broadcasting' is higher in Asia-Pacific than in other regions. In the Americas, although the rate for online/mobile platform access is relatively high, 'TV Broadcasting' is less frequent compared to other regions. In Europe, the rate of access via 'Online/Mobile Platforms' is relatively lower than in other regions. In the Middle East, the rate of access to 'CDs/Videos' is relatively high for variety shows, movies, music, and animation.

The primary mode of music consumption across all regions is 'Online/Mobile Platforms' with an average rate of 87.7%, followed by 'TV Broadcasting' and 'CDs/Videos.' Region-specific trends show that Africa (90.5%) and the Americas (89.3%) heavily rely on 'Online/Mobile Platforms.' Conversely, Asia (49.8%) and the Middle East (41.7%) have a relatively higher rate of access through 'TV Broadcasting.'

For publications, Asia-Pacific, Europe, the Middle East, and Africa predominantly use 'Local Websites/Apps,' while the Americas primarily use 'Global Websites/Apps.' The Middle East (49.4%) and Asia-Pacific (46.1%)

demonstrate a higher rate of access through 'Korean Websites/Apps' compared to other regions, while the Americas (34.7%) and Europe (33.7%) show somewhat lower rates.

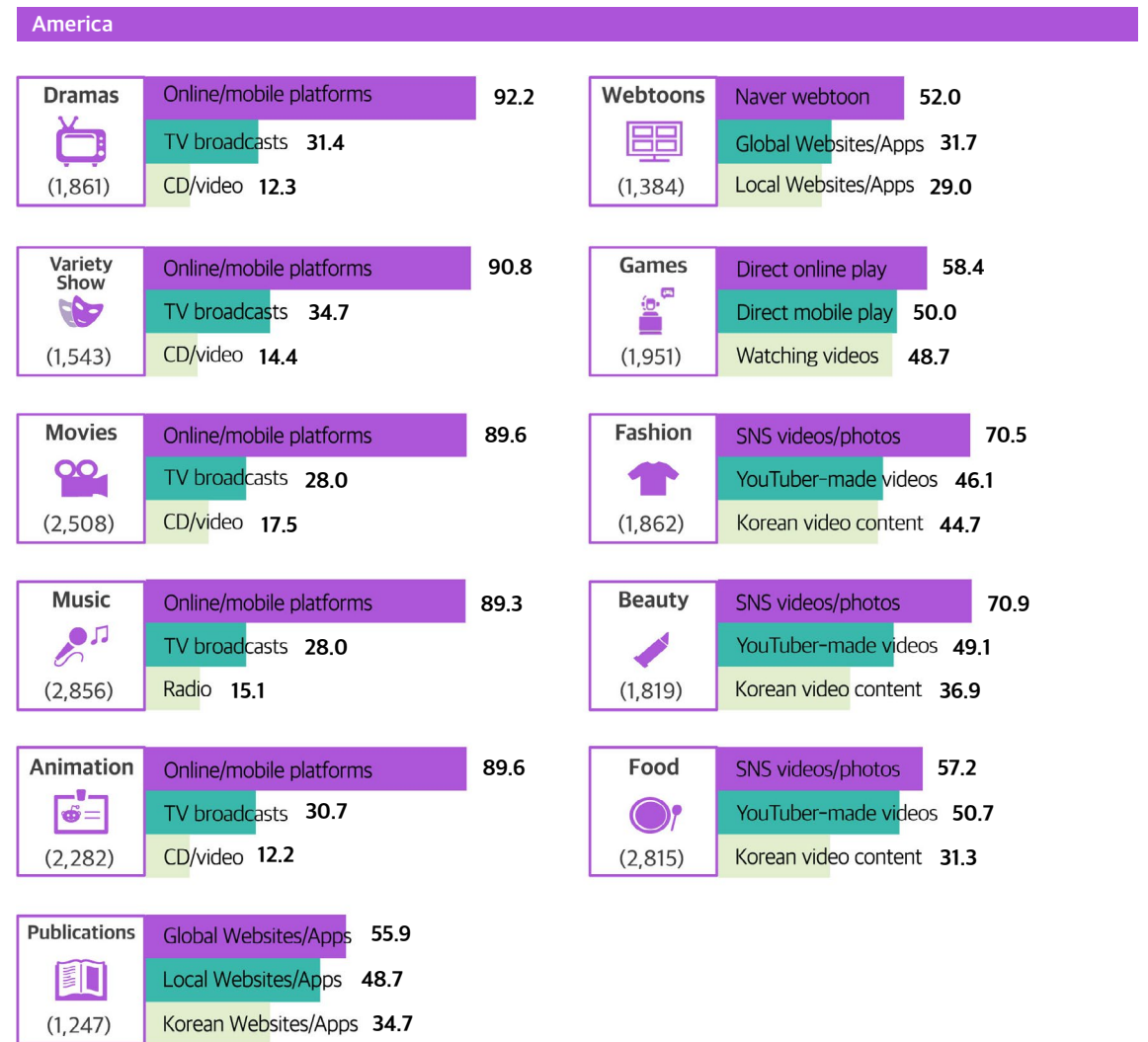
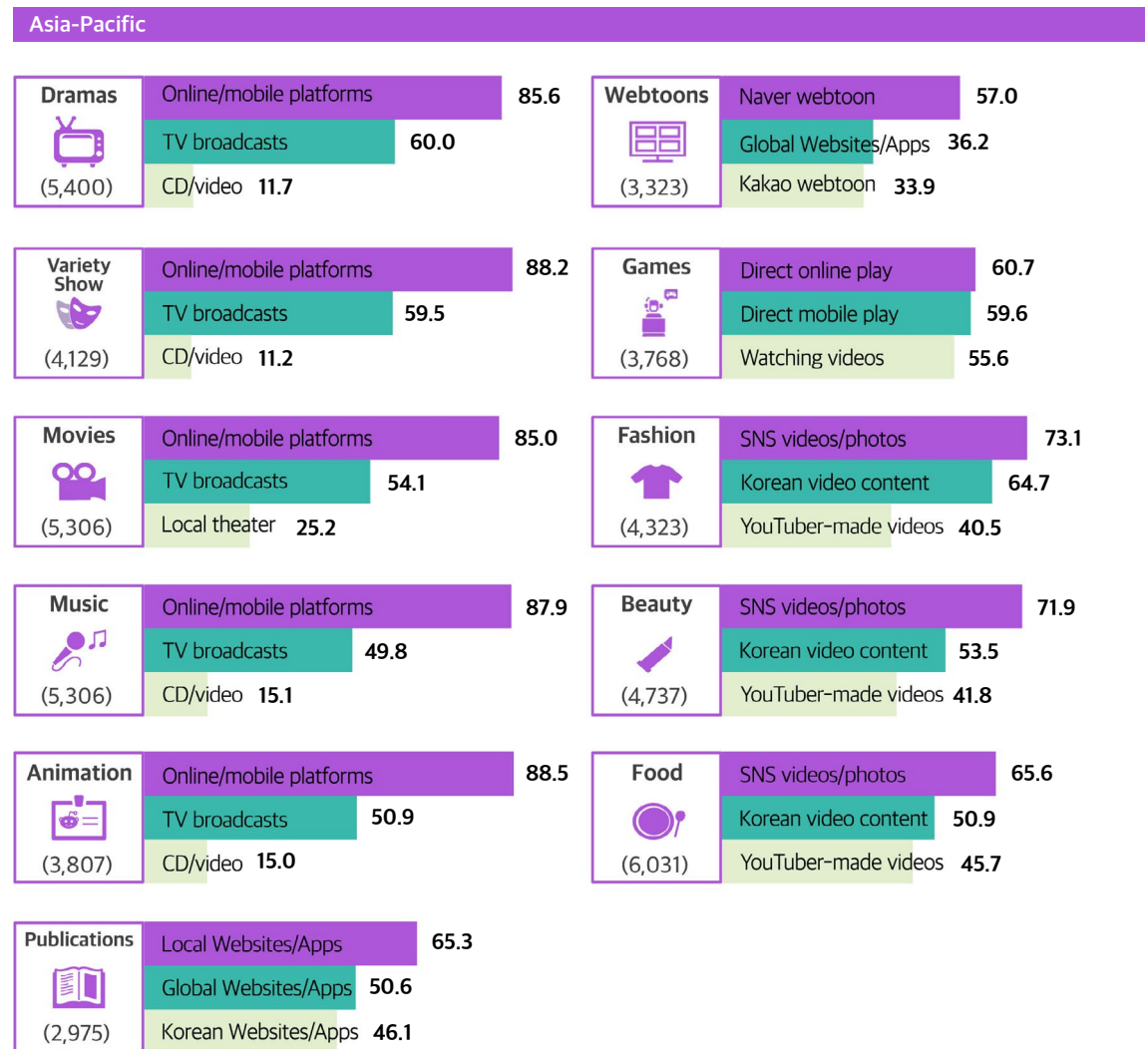
For webtoons, Asia-Pacific, the Americas, and Europe primarily use 'Naver Webtoon,' whereas the Middle East (43.4%) and Africa (48.3%) show a higher access rate through 'Global Websites/Apps.' Interestingly, Asia-Pacific (33.9%) and the Middle East (33.5%) show 'Kakao Webtoon' ranking third in webtoon access, outperforming 'Local Websites/Apps.'

In the realm of gaming, most respondents claimed to engage directly in online and mobile games. However, in the Middle East, the rate for 'Watching Videos' (54.3%) was higher than 'Direct Mobile Play' (49.1%).

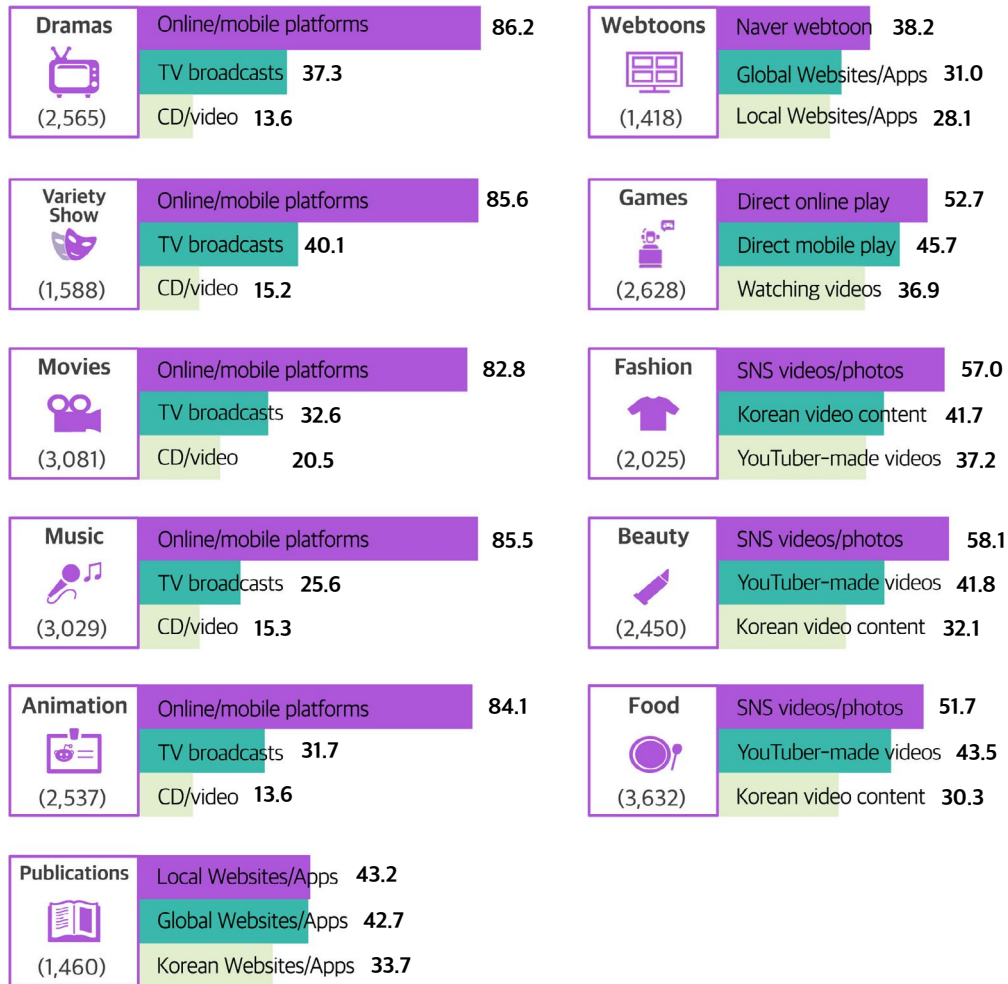
For fashion, beauty, and food, the prevalent access method overall is 'SNS Videos/Pictures.' However, in the Middle East, the top method of access to fashion and food is 'Korean Video Content,' indicating a significant influence of Korean dramas and movies.

[Figure 2-11] Channels of Exposure to Korean Cultural Content by Region

[BASE: Experienced respondents by Korean cultural content, n= (), unit: Multiple response%]



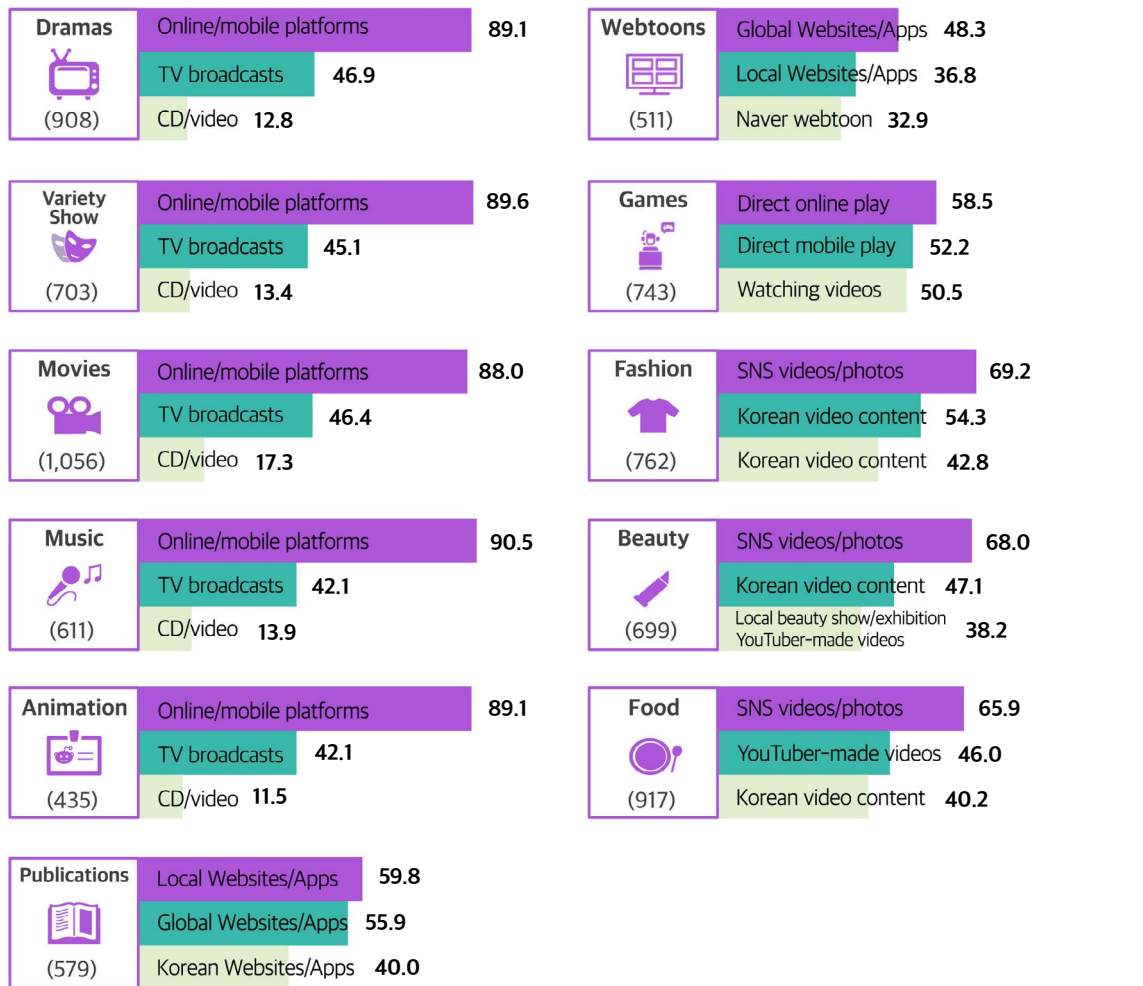
Europe



Middle East



Africa

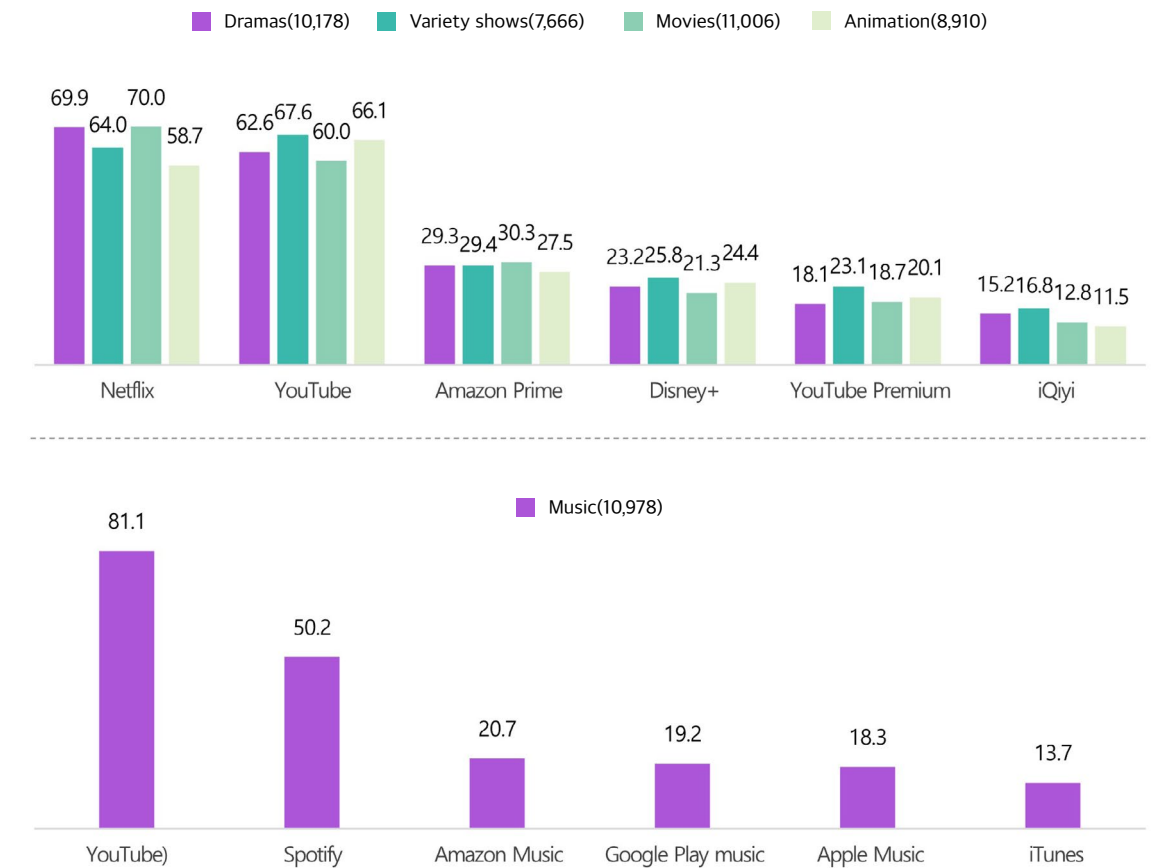


3. Online/Mobile Platforms for Access to Korean Cultural Content

The primary online/mobile platforms for dramas, variety shows, movies, and animations are 'Netflix' and 'YouTube.' The content with comparatively high access rates on these platforms includes: 'Netflix,' movies (70.0%) and dramas (69.9%), and 'YouTube,' variety shows (67.6%) and animations (66.1%). For music, 'YouTube' (81.1%) is the leading platform, followed by 'Spotify' (50.2%).

[Figure 2-12] Online/Mobile Platforms for Accessing Korean Cultural Content

[BASE: Respondents who have Accessed Korean Cultural Content via Online/Mobile Platforms, n= (), Unit: Multiple response%]



Q. Please select all the online/mobile platforms you primarily use to access Korean cultural content.

Asia-Pacific

In Asia-Pacific, users primarily access dramas and movies through 'Netflix,' and variety shows and animations through 'YouTube.' Platforms 'Amazon Prime' and 'Disney+' ranked 3rd and 4th, showing a significant gap from the top two platforms. Access through other platforms is also relatively low. For music platforms, 'YouTube' (80.4%) has the highest usage rate, but 'Joox'⁴ (15.2%) and 'QQ Music' (14.3%) also show relatively high access rates compared to other regions.

Americas

In the Americas, Netflix leads as the platform for accessing video content such as dramas, variety shows, animations, and movies. Excluding animation (68.2%), all categories exhibit a high access rate ranging from 79.9% to 87.0%. YouTube, ranking second, has a comparatively lower access rate between 54.9% and 62.9%, showing a significant gap from the first place. Additionally, Amazon Prime has a higher access rate in the Americas compared to other regions. For music platforms, YouTube (83.7%) and Spotify (61.7%) have high access rates, with Spotify being particularly higher in North America than in other regions.

Europe

In Europe, the access rates for dramas (76.7%), variety shows (65.1%), and movies (72.6%) are highest on Netflix, while animation has the highest rate on YouTube (61.3%). Platforms outside the top 5 show less than 10% access. The primarily used music platforms are YouTube and Spotify. Compared to other regions, the variety of platforms used per person is not particularly diverse, as the response rate for music platforms is relatively low.

Middle East

In the Middle East, Netflix leads in access rates for dramas (75.0%) and movies (74.7%), while YouTube leads in variety shows (73.0%), animation (66.2%), and music (85.8%). Generally, access is concentrated on the top two platforms; however, Apple TV+ shows an access rate in the 20% range, relatively higher than other regions. Moreover, platforms outside the top five show relatively higher access rates, indicating that this region uses a diverse range of platforms for watching Korean videos. Concurrently, the access rates for music platforms such as YouTube Premium, Amazon Music, and Apple Music are relatively high compared to other regions.

Africa

In Africa, YouTube (72.9-74.8%) has the highest access rate for dramas, variety shows, movies, and animations. Additionally, music platforms such as Google Play Music and Deezer⁵ have higher access rates than other regions.

4 Tencent's streaming service in China

5 French online music streaming service

[Table 2-8] Online/Mobile Platforms for Accessing Korean Cultural Content by Region

[BASE: Respondents who have Accessed Korean Cultural Content via Online/Mobile Platforms, n= (), Unit: Multiple response%]

Category	Total	Asia-Pacific	Americas	Europe	Middle East	Africa
Dramas						
Number of cases	(10,178)	(4,624)	(1,716)	(2,210)	(819)	(809)
Netflix	69.9	58.9	87.0	76.7	75.0	72.4
YouTube	62.6	64.9	55.8	55.5	72.3	73.7
Amazon Prime	29.3	22.4	39.1	36.7	34.2	22.7
Disney+	23.2	23.9	21.7	22.7	26.7	19.9
YouTube Premium	18.1	16.8	19.2	16.8	23.3	21.6
iQiyi	15.2	27.5	4.4	3.4	8.8	6.1
Youku	11.2	15.8	6.7	5.8	11.8	8.7
Viu	11.2	20.1	0.0	0.4	11.8	13.1
Apple TV+	11.2	10.1	10.8	9.5	22.3	11.4
Hulu	8.2	6.2	13.2	5.0	14.5	11.0
VIKI	6.8	4.8	11.8	6.0	11.2	5.6
Iflix	6.7	8.6	3.3	2.5	13.3	8.3
SlingTV	4.1	4.0	3.6	3.1	8.4	4.1
Variety shows						
Number of cases	(7,666)	(3,642)	(1,401)	(1,360)	(633)	(630)
YouTube	67.6	69.5	62.9	62.1	73.0	73.8
Netflix	64.0	55.2	79.9	65.1	71.1	69.2
Amazon Prime	29.4	21.7	40.5	36.3	38.2	25.6
Disney+	25.8	26.3	23.6	25.6	30.2	23.0
YouTube Premium	23.1	21.6	24.4	21.9	31.0	23.5
iQiyi	16.8	28.3	5.7	5.2	11.5	5.4
Youku	14.5	18.5	11.3	9.7	13.4	10.3
Apple TV+	13.8	12.7	11.8	13.5	25.3	13.8
Viu	11.8	20.3	0.0	1.0	13.7	10.0
Hulu	9.6	7.1	15.7	7.9	13.3	10.3
Iflix	8.1	10.0	4.6	3.9	14.2	7.6
VIKI	8.0	6.0	10.8	8.5	12.8	7.1
SlingTV	5.8	5.5	5.5	5.4	11.2	3.2
Movies						
Number of cases	(11,006)	(4,509)	(2,246)	(2,551)	(771)	(929)
Netflix	70.0	59.1	86.5	72.6	74.7	71.6
YouTube	60.0	62.0	54.9	54.4	66.4	72.9
Amazon Prime	30.3	23.3	38.9	39.4	28.4	20.5
Disney+	21.3	23.9	17.9	19.9	23.0	19.8
YouTube Premium	18.7	19.3	17.4	15.6	25.9	21.7
iQiyi	12.8	25.4	3.9	2.4	8.8	4.8
Apple TV+	11.2	11.4	9.3	9.2	22.7	10.5
Youku	10.2	15.5	6.1	5.1	10.4	8.3
Viu	9.2	18.5	0.0	0.4	11.0	8.7
Hulu	7.5	5.9	11.9	4.6	13.0	8.1
VIKI	6.1	5.0	8.8	4.3	10.9	5.8
Iflix	6.1	8.4	2.8	2.6	13.6	5.8
SlingTV	3.6	4.3	3.0	2.3	7.1	2.7

[BASE: Respondents who have Accessed Korean Cultural Content via Online/Mobile Platforms, n= (), Unit: Multiple response%]

Category	Total	Asia-Pacific	Americas	Europe	Middle East	Africa
Animation						
Number of cases	(8,910)	(3,368)	(2,044)	(2,133)	(660)	(705)
YouTube	66.1	67.8	65.3	61.3	66.2	74.8
Netflix	58.7	50.3	68.2	60.6	63.8	60.4
Amazon Prime	27.5	23.4	32.6	31.3	30.2	18.2
Disney+	24.4	29.1	19.7	21.7	26.5	21.7
YouTube Premium	20.1	23.5	16.9	16.2	26.4	18.9
iQiyi	11.5	23.9	3.1	3.0	9.8	4.7
Apple TV+	11.4	13.5	8.5	8.4	21.8	9.4
Youku	10.9	16.8	7.0	5.3	13.5	9.1
Hulu	8.3	7.3	12.0	4.6	12.1	9.5
Viu	7.2	15.7	0.0	0.3	8.6	6.8
Iflix	6.6	9.7	3.1	2.8	12.6	7.4
VIKI	5.2	5.5	5.2	3.4	9.4	5.4
SlingTV	4.5	6.0	2.9	2.7	9.4	2.8
Music						
Number of cases	(10,978)	(4,664)	(2,550)	(2,590)	(621)	(553)
YouTube	81.1	80.4	83.7	78.1	85.8	82.5
Spotify	50.2	43.3	61.7	49.8	50.4	57.0
Amazon Music	20.7	17.1	25.9	20.9	26.9	19.5
Google Play Music	19.2	21.8	16.0	13.0	27.2	32.0
Apple Music	18.3	18.2	16.7	16.4	31.1	20.6
iTunes	13.7	13.3	12.8	11.2	23.8	20.6
Deezer	9.7	4.2	12.7	12.1	17.4	22.1
Joox	8.4	15.2	1.5	2.0	8.9	12.7
QQ Music	8.4	14.3	2.5	2.4	12.1	9.0
V Live	5.3	6.1	3.6	3.2	12.7	8.0

4. Purchase Channels for Korean Cultural Content

The primary channels for purchasing fashion are global websites/apps(55.6%). Beauty is primarily purchased through local websites/apps (54.4%), and food is mostly purchased from local offline stores (56.6%). Korean websites/apps represent 32.4% and 31.4% in fashion and beauty respectively, and 23.1% in food, which is somewhat lower than for other content.

[Figure 2-13] Purchase Channels for Korean Cultural Content: Fashion, Beauty, Food

[BASE: Experienced respondents by Korean cultural content, n= (), unit: Multiple response%]



Q. Please select all of the channels through which you usually purchase Korean cultural content.

Asia-Pacific

In the Asia-Pacific region, the use of 'local websites/apps' or 'local offline stores' is higher than in other regions.

Americas

In the Americas, fashion and beauty are primarily accessed through 'global websites/apps', while food is primarily accessed through 'local offline restaurants/stores'. The use of 'Korean websites/apps' or 'Korean offline stores' is relatively low.

Europe

In Europe, the most popular channel for purchasing fashion and beauty products is through 'global websites/apps', while for food, it is through 'local offline restaurants/stores'.

Middle East

Compared to other regions, the Middle East has relatively high usage rates of 'Korean websites/apps' for fashion, beauty, and food, at 42.6%, 38.3%, and 34.6%, respectively.

Africa

In Africa, similar to Europe, 'global websites/apps' are the most popular for purchasing fashion and beauty, while 'local offline restaurants/stores' are more frequently used for food. The usage rate of 'Korean offline stores' is generally low in all regions, and it is particularly low in Africa.

[Table 2-9] Purchase Channels for Korean Cultural Content by Region: Fashion, Beauty, Food

[BASE: Experienced respondents by Korean cultural content, n=(), unit: Multiple response%]

Category	Total	Asia-Pacific	Americas	Europe	Middle East	Africa
Fashion						
Number of cases	(9,784)	(4,323)	(1,862)	(2,025)	(812)	(762)
Global websites/apps	55.6	51.0	64.5	52.3	59.6	64.2
Local websites/apps	55.5	67.7	43.7	39.8	59.4	53.1
Local offline stores	36.4	43.9	30.5	28.4	36.2	29.9
Korean websites/apps	32.4	33.1	28.9	31.4	42.6	29.4
Korean offline stores	9.2	10.0	9.9	7.6	11.1	5.8
Beauty						
Number of cases	(10,562)	(4,737)	(1,819)	(2,450)	(857)	(699)
Local websites/apps	54.4	63.5	44.9	44.1	56.1	50.9
Global websites/apps	52.8	47.8	64.3	49.0	59.0	62.9
Local offline stores	41.3	48.0	35.0	36.8	39.7	29.3
Korean websites/apps	31.4	33.2	29.6	27.1	38.3	30.2
Korean offline stores	9.1	10.4	9.3	7.0	8.9	6.4
Food						
Number of cases	(14,279)	(6,031)	(2,815)	(3,632)	(884)	(917)
Local offline restaurants/stores	56.6	63.1	56.8	48.0	51.2	52.5
Local websites/apps	44.7	52.0	35.9	37.1	53.4	44.6
Global websites/apps	32.9	30.3	32.9	34.0	45.0	34.4
Korean websites/apps	23.1	24.8	20.0	20.3	34.6	21.9
Korean offline restaurants/stores	10.6	11.9	9.4	10.4	11.0	7.3

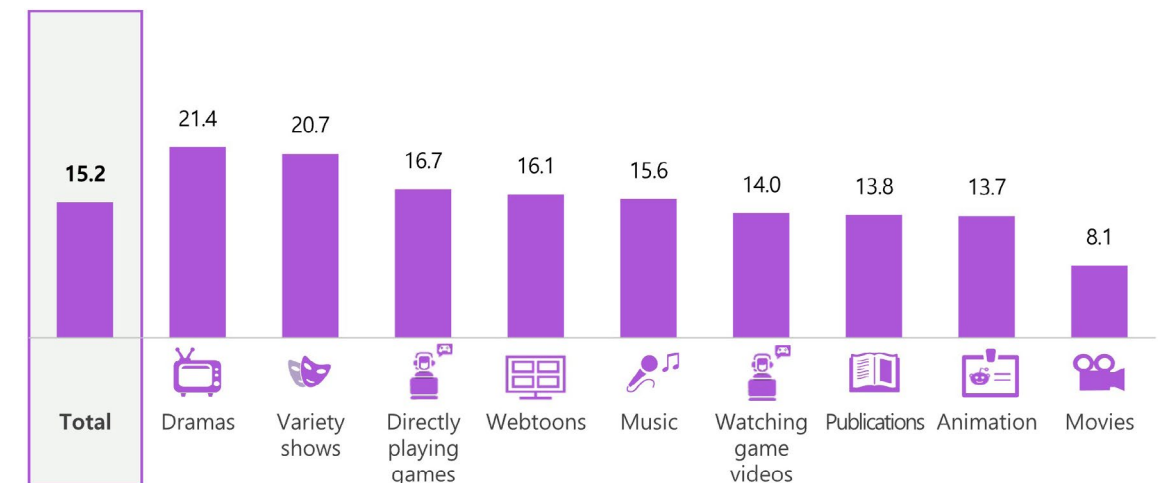
5. Consumption of Korean Cultural Content

Respondents use Korean cultural content for an average of 15.2 hours per month. The most consumed content is dramas (21.4 hours) and variety shows (20.7 hours), exceeding 20 hours a month, while other types of content range from 13.7 to 16.7 hours per month. Respondents watch an average of 8.1 films every three months.

Countries with the highest average consumption rates for different types of content are Indonesia, India, Thailand, Vietnam, Brazil, and the UAE, whereas those with lower rates are Japan, Taiwan, Australia, the United States, Canada, Spain, France, Germany, and Italy.

[Figure 2-14] Consumption Volume of Korean Cultural Content

[BASE: Experienced respondents by Korean cultural content, n=(), unit: Films-count/last 3 months, others-hours/1 month]



Note: For films, the number of films watched/attended in the last three months is considered; for other content, the average monthly usage time is surveyed. The overall average includes the average number of films watched, converted to a monthly time basis using the formula: ([average number of films watched/attended in the last 3 months × average runtime of Korean films (114.3 minutes from the Korean Film Council's 'Top 10 Korean Box Office Hits of 2020')]/3 months).

Q. What is your typical consumption amount, proportion, and average expenditure for Korean cultural content? (Consumption amount/average expenditure—films are based on the last 3 months, other content on a 1-month average)

[Table 2-10] Consumption Volume of Korean Cultural Content by Country

[BASE: Experienced respondents by Korean cultural content, n = different by floor / refer to the survey summary, unit: Films-count/last 3 months, others-hours/1 month]

Region	Country	Total	Dramas	Variety Shows	Directly playing games	Webtoons	Music	Watching game videos	Publications	Animation	Movies
Total		15.2	21.4	20.7	16.7	16.1	15.6	14.0	13.8	13.7	8.1
Asia-Pacific	India	28.0	48.1	44.5	30.1	24.1	30.5	21.9	19.9	25.7	11.9
	Indonesia	22.0	33.4	30.4	24.7	18.7	26.5	20.1	18.2	20.3	9.7
	Thailand	21.7	28.5	25.7	25.4	22.1	24.3	21.7	18.9	19.9	13.3
	Malaysia	19.1	28.4	25.0	20.3	16.9	22.3	17.8	16.4	17.8	10.6
	Vietnam	18.8	27.2	20.9	19.9	24.3	22.2	15.3	14.6	18.3	10.0
	China	15.7	21.9	17.0	18.7	15.1	17.1	15.9	16.2	16.0	5.6
	Taiwan	13.0	21.7	14.9	18.1	11.9	15.5	11.1	10.3	11.2	4.0
	Kazakhstan*	12.3	16.4	15.3	15.0	17.0	12.4	11.5	10.7	8.4	6.5
	Australia	8.2	10.7	9.5	8.6	9.6	5.7	8.1	10.1	8.3	5.3
Japan	6.7	9.3	7.5	9.1	6.9	7.4	6.5	6.0	5.2	3.9	
Americas	Brazil	19.5	27.4	30.9	19.4	21.2	16.9	17.8	16.3	17.8	11.7
	Mexico*	16.4	24.5	20.3	16.6	15.1	21.9	16.2	13.5	14.3	7.9
	Argentina	14.1	19.1	19.0	17.1	15.1	16.1	13.0	12.5	11.4	6.1
	US	10.1	13.8	11.8	11.3	11.8	7.5	11.0	10.4	8.6	7.1
	Canada*	9.7	13.9	13.1	11.5	12.0	7.7	9.0	8.3	8.2	5.9
Europe	Russia*	12.4	16.7	16.3	13.2	20.2	12.1	8.9	11.0	9.7	5.6
	Türkiye	11.7	15.8	15.3	11.5	11.5	13.7	11.8	10.6	10.7	7.6
	UK	11.2	15.8	11.0	12.0	18.0	9.9	9.8	11.7	8.6	6.3
	Germany*	9.7	11.2	11.0	8.7	12.5	8.5	10.2	11.9	8.1	8.0
	Spain*	9.3	12.3	10.6	9.8	10.0	11.5	8.8	10.0	7.9	4.7
	Italy*	8.8	10.2	10.6	9.1	11.8	11.1	7.4	8.5	8.1	4.5
Middle East	France	8.7	11.1	10.9	8.8	12.2	7.6	7.9	8.7	7.9	5.0
	UAE	22.1	25.2	27.6	29.8	19.8	25.1	22.6	18.5	22.7	12.0
Africa	Saudi Arabia*	15.0	17.1	20.0	15.5	14.5	17.5	14.9	14.3	14.4	10.8
	South Africa*	15.5	24.1	22.4	15.9	14.1	18.5	13.5	11.6	12.9	9.3
	Egypt*	15.2	17.1	19.2	16.8	14.8	16.4	14.9	15.9	14.1	11.4

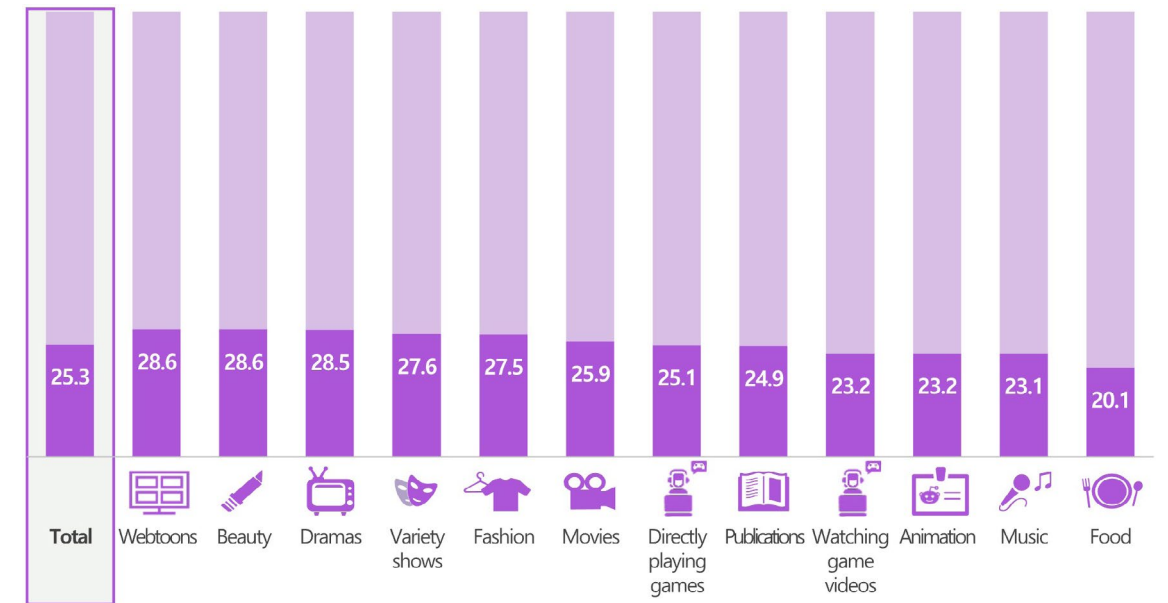
6. Consumption of Hallyu content

The proportion of Korean cultural content consumed among all cultural content is 25.3% on average. The types of content with a higher consumption proportion are webtoons (28.6%), beauty (28.6%), and dramas (28.5%). The content with a lower consumption proportion includes food (20.1%), music (23.1%), and animation (23.2%). Particularly, although food and music have high rates of exposure and brand power indices, their proportion in the overall content consumption for Korean content is comparatively low.

Countries with a higher proportion of consumption of Korean cultural content include Malaysia, Indonesia, India, Vietnam, Australia, UAE, and Saudi Arabia, while those with a lower proportion include Japan, Kazakhstan, Canada, Argentina, France, Italy, Spain, Russia, and Türkiye. Regions such as Asia-Pacific and the Middle East, where the popularity and brand power indices are comparatively higher, also show a higher consumption proportion. Conversely, in regions such as Europe and the Americas, where the popularity and brand power indices are lower, the consumption proportion is also lower.

[Figure 2-15] Proportion of Korean Cultural Content Consumption

[BASE: Experienced respondents by Korean cultural content, n = (), unit: %]



Q. What is your typical consumption amount, proportion, and average expenditure for Korean cultural content? (Consumption amount/average expenditure—films are based on the last 3 months, other content on a 1-month average)

[Table 2-11] Proportion of Korean Cultural Content Consumption by Country

[BASE: Experienced persons by Korean cultural content, n = different by floor / refer to survey outline, unit: %]

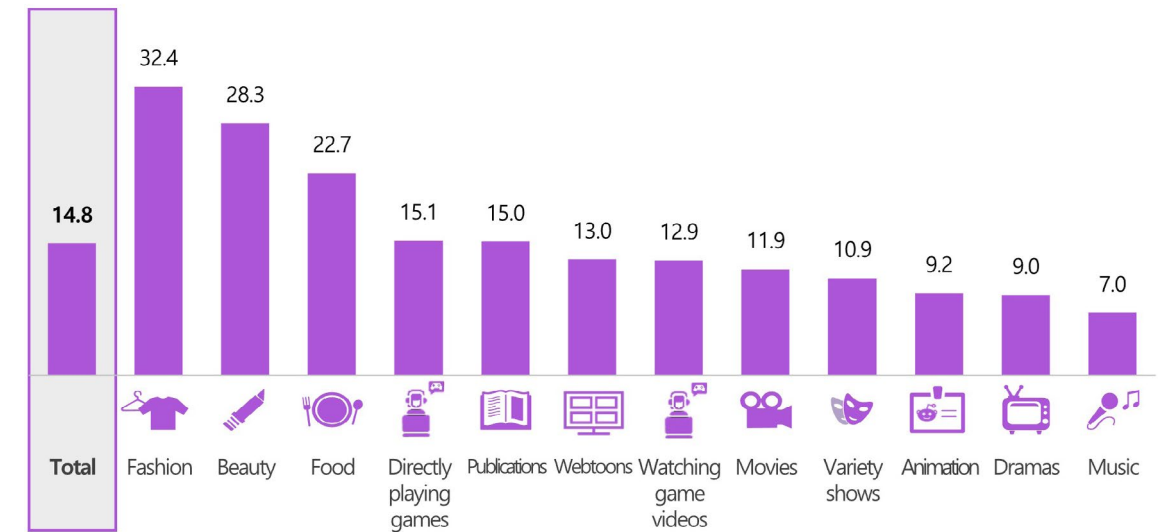
Region	Country	Total	Webtoons	Beauty	Dramas	Variety Shows	Fashion	Movies	Directly playing games	Publications	Watching game videos	Animation	Music	Food
Total		25.3	28.6	28.6	28.5	27.6	27.5	25.9	25.1	24.9	23.2	23.2	23.1	20.1
Asia-Pacific	Indonesia	35.5	35.3	36.8	41.6	38.4	35.7	39.0	35.4	31.1	31.4	31.6	37.9	29.1
	Vietnam	35.1	35.8	41.2	40.1	35.5	36.4	37.0	31.5	29.2	29.2	31.6	38.0	31.5
	India	32.7	32.1	35.6	34.8	33.2	34.9	33.6	32.5	32.4	30.9	29.8	32.9	28.8
	Malaysia	31.1	31.6	33.2	36.5	33.8	28.9	36.1	28.7	26.8	26.9	28.2	33.9	23.9
	Thailand	31.1	32.3	34.2	35.5	29.3	31.3	30.7	31.9	28.7	29.3	29.4	31.9	27.7
	China	27.9	29.1	30.8	30.2	27.1	27.2	28.4	30.4	27.9	28.0	29.8	26.0	20.9
	Taiwan	24.1	28.7	26.2	32.5	24.8	28.0	23.6	23.9	17.4	18.6	19.3	24.8	18.7
	Australia	22.4	33.2	25.5	25.1	24.0	26.9	20.5	22.4	27.8	22.3	20.1	17.1	17.7
	Kazakhstan*	17.9	30.4	20.1	20.3	23.0	16.8	17.9	19.4	16.6	17.7	18.0	15.1	13.4
Japan	16.3	25.3	22.9	18.6	17.4	19.0	15.0	18.5	21.0	15.4	16.6	14.5	9.5	
Americas	Mexico*	28.0	24.7	31.5	31.6	29.3	30.4	28.5	27.4	25.0	27.6	25.5	27.7	25.7
	Brazil	26.3	31.3	30.3	25.4	28.1	30.6	25.4	25.6	24.9	24.2	25.4	24.6	24.0
	US	21.0	28.7	26.0	27.9	25.0	22.4	20.8	21.6	24.5	20.1	19.1	16.2	16.0
	Canada*	19.2	28.8	21.2	23.9	20.6	20.9	18.9	22.0	22.8	20.3	17.3	13.7	14.5
	Argentina	18.5	21.6	19.8	20.5	21.4	17.1	19.9	19.6	16.9	17.7	16.1	18.2	15.8
Europe	Türkiye	23.9	22.5	30.1	25.0	25.7	26.7	25.4	22.8	19.8	21.3	21.2	22.0	23.2
	France	19.4	27.0	22.4	18.7	16.1	24.5	21.5	18.0	20.1	17.2	18.6	14.9	19.4
	Germany*	19.4	25.2	22.3	21.5	23.8	20.4	18.3	20.4	21.5	21.0	17.4	16.8	15.1
	UK	19.2	25.7	22.1	22.4	21.7	22.4	19.0	18.9	21.8	16.9	15.9	17.1	15.6
	Spain*	17.1	19.6	20.0	20.0	19.8	17.9	16.2	18.0	16.7	16.7	14.8	16.2	13.7
	Italy*	16.6	23.2	22.6	17.6	18.0	20.3	15.3	15.1	16.6	14.3	15.7	15.6	12.4
Russia*	14.6	28.5	16.9	18.0	18.7	17.1	13.6	15.8	16.8	12.8	13.5	11.7	9.5	
Middle East	UAE	33.3	30.1	38.3	33.3	33.0	36.7	33.9	33.1	28.7	31.5	32.3	31.7	34.4
	Saudi Arabia*	29.5	26.1	33.7	30.8	31.4	34.2	32.1	26.4	27.1	23.6	25.8	30.2	29.9
Africa	Egypt*	30.8	28.1	36.2	31.6	29.8	33.9	32.6	30.9	29.5	28.2	29.3	33.2	26.8
	South Africa	26.2	25.0	28.2	30.1	26.9	27.5	29.8	25.8	27.2	24.5	24.3	22.2	21.7

7. Expenditure on Korean Cultural Content

The average expenditure is 14.8 USD. The contents with high expenditures are fashion (32.4 USD), beauty (28.3 USD), and food (22.7 USD), characterized by being physical products with high unit prices. Contents with low expenditures include music (7.0 USD), dramas (9.0 USD), and animation (9.2 USD), which have relatively fewer buyers.

[Figure 2-16] Expenditure on Korean Cultural Content

[BASE: Experienced respondents by Korean cultural content, n = (), unit: Movies-USD/last 3 months, Others-USD/1 month]



Note: Movies are based on expenditures over the last 3 months, while other contents are based on an average monthly expenditure. The overall average converts movie expenditures to a monthly basis per respondent for calculation.

Q. What is your typical consumption amount, proportion, and average expenditure for Korean cultural content? (Consumption amount/average expenditure—films are based on the last 3 months, other content on a 1-month average)

[Table 2-12] Expenditure on Korean Cultural Content by Country

[BASE: Experienced respondents by Korean cultural content, n = different by floor / refer to the survey summary, unit: Movies-USD/last 3 months, Others-USD/1 month]

Region	Country	Total	Fashion	Beauty	Food	Directly playing games	Publications	Webtoons	Watching game videos	Movies	Variety Shows	Animation	Dramas	Music
Total		14.8	32.4	28.3	22.7	15.1	15.0	13.0	12.9	11.9	10.9	9.2	9.0	7.0
Asia-Pacific	China	24.9	73.1	71.1	44.3	21.0	19.4	14.2	13.9	15.8	9.3	12.0	6.6	8.7
	Australia	19.9	36.3	29.6	25.8	19.2	28.0	26.9	22.4	17.7	15.4	14.1	12.1	10.3
	Malaysia	13.1	23.2	25.1	21.7	14.4	13.8	10.2	12.4	13.4	7.7	10.4	9.4	6.4
	Thailand	12.5	26.5	26.2	26.7	11.6	10.4	8.4	11.4	10.5	6.1	6.9	6.7	4.7
	Taiwan	12.3	40.6	31.3	19.1	11.4	11.5	6.2	7.0	8.1	4.8	4.7	5.2	4.7
	India	9.6	17.3	14.2	13.7	9.2	11.6	9.3	8.3	11.2	7.7	7.8	5.3	8.3
	Vietnam	9.2	24.5	22.2	20.9	5.3	5.8	6.1	4.1	7.4	3.7	4.7	3.8	3.4
	Indonesia	7.5	14.2	13.3	13.8	7.7	7.7	3.4	5.6	8.7	6.5	5.8	5.2	4.0
	Kazakhstan*	7.0	20.8	17.5	14.2	2.9	0.6	0.9	1.2	2.7	2.1	1.1	1.5	1.1
	Japan	6.8	17.7	12.5	10.8	8.4	6.0	6.3	4.1	4.9	3.4	4.4	2.8	2.1
Americas	US	21.6	36.2	34.2	31.0	28.8	22.9	20.4	23.9	17.5	18.9	14.1	18.5	8.5
	Canada*	17.5	26.2	34.0	28.0	19.5	16.1	24.7	17.1	11.1	12.6	8.6	11.5	7.5
	Mexico*	13.5	27.7	25.7	23.2	15.5	12.2	8.0	13.6	10.9	11.5	8.0	7.8	7.0
	Brazil	12.6	24.5	18.6	18.5	13.6	13.9	14.0	14.2	10.7	14.6	8.5	11.1	6.3
	Argentina	3.6	6.8	6.8	7.5	2.8	3.3	2.0	2.3	4.3	4.0	2.3	3.7	2.1
Europe	UK	28.0	56.9	50.4	30.2	36.5	37.8	56.9	29.7	18.8	20.0	13.6	21.7	10.6
	France	18.6	44.6	32.1	31.9	22.4	17.4	14.9	20.2	12.8	11.6	11.5	8.8	8.6
	Germany*	17.3	31.0	27.2	24.8	16.9	18.5	18.9	19.3	14.0	18.3	10.0	12.3	8.9
	Spain*	15.3	26.2	29.0	25.4	18.1	17.3	11.6	12.7	9.3	17.0	8.8	11.5	6.7
	Italy*	14.2	35.7	28.4	22.9	15.3	14.2	11.7	12.8	10.0	10.4	7.1	8.2	6.2
	Russia*	7.9	26.7	19.9	13.8	3.6	2.2	5.2	1.6	2.1	1.3	1.2	1.0	0.8
Middle East	Türkiye	7.7	23.7	18.2	14.8	6.4	7.3	5.1	5.9	6.1	6.1	3.3	4.6	2.9
	UAE	40.3	69.9	63.8	48.6	43.0	40.4	39.3	37.8	44.6	33.4	35.4	27.3	26.7
Africa	Saudi Arabia*	29.0	61.7	45.4	37.2	25.4	30.0	21.0	24.4	27.2	24.9	20.9	26.7	19.1
	Egypt*	12.0	29.4	22.6	14.5	9.8	14.7	8.0	7.8	10.7	9.9	8.0	9.1	10.5
	South Africa	9.8	22.0	18.0	13.6	8.3	8.9	6.7	7.3	11.1	10.0	6.0	9.3	4.8

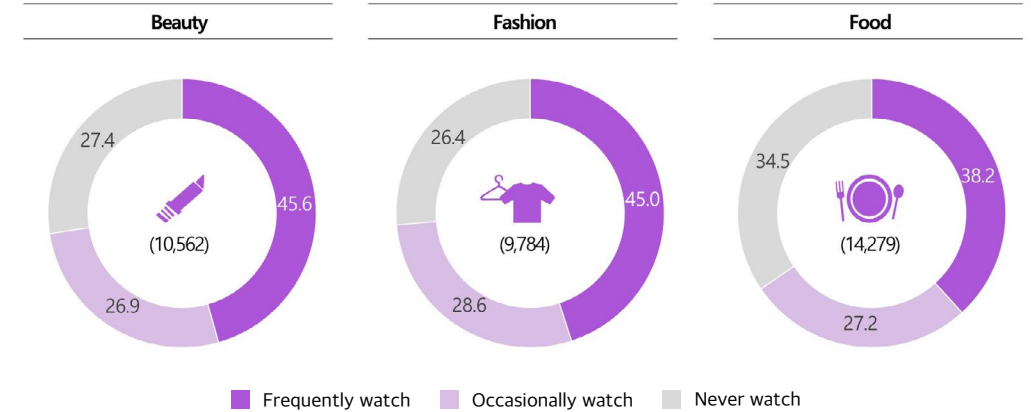
8. Frequency of Watching Korean Fashion/Beauty/Food Videos

The contents most frequently watched are beauty (45.6%), fashion (45.0%), and food (38.2%). Additionally, the content least watched is food, with a frequency of 34.5%.

The countries where content is most frequently watched are Vietnam, India, Türkiye, and the UAE, while those with the lowest frequencies are Japan, Kazakhstan, and Russia, recording rates in the 10% range.

[Figure 2-17] Frequency of Watching Korean Fashion/Beauty/Food Videos

[BASE: Experienced respondents by Korean cultural content, n=(), unit: %]



Q. How often do you watch videos on Korean fashion/beauty/food through online/mobile platforms? (1. Never watch/2. Rarely watch/3. Occasionally watch/4. Often watch/5. Very frequently watch)

[Table 2-13] Frequency of Watching Korean Fashion/Beauty/Food Videos

[BASE: Experienced respondents by Korean cultural content, n = different by floor / refer to the survey summary, unit: Frequently watch (4+5) %]

Region	Country	Beauty	Fashion	Food
Total		45.6	45.0	38.2
Asia-Pacific	China	50.5	57.3	53.7
	Japan	18.2	14.0	12.1
	Taiwan	32.0	36.5	37.2
	Thailand	51.1	46.8	51.8
	Malaysia	43.8	39.1	44.3
	Indonesia	53.9	49.2	56.6
	India	69.5	71.4	64.7
	Vietnam	68.0	61.8	70.4
	Kazakhstan*	18.5	14.3	18.1
	Australia	42.0	45.9	33.8
Americas	US	40.9	36.2	28.0
	Canada*	31.6	31.6	22.0
	Mexico*	56.2	52.0	44.8
	Brazil	59.7	57.2	48.9
	Argentina	43.2	31.0	29.8
Europe	UK	39.5	39.4	29.1
	France	39.8	41.1	34.5
	Italy*	41.3	30.1	26.1
	Spain*	41.6	35.8	30.9
	Germany*	29.2	25.0	19.3
	Russia*	14.3	18.1	14.4
Middle East	Türkiye	62.4	64.6	50.4
	UAE	65.5	61.3	60.9
Africa	Saudi Arabia*	63.1	58.2	60.4
	Egypt*	54.4	56.3	49.1
	South Africa	48.4	42.2	43.7

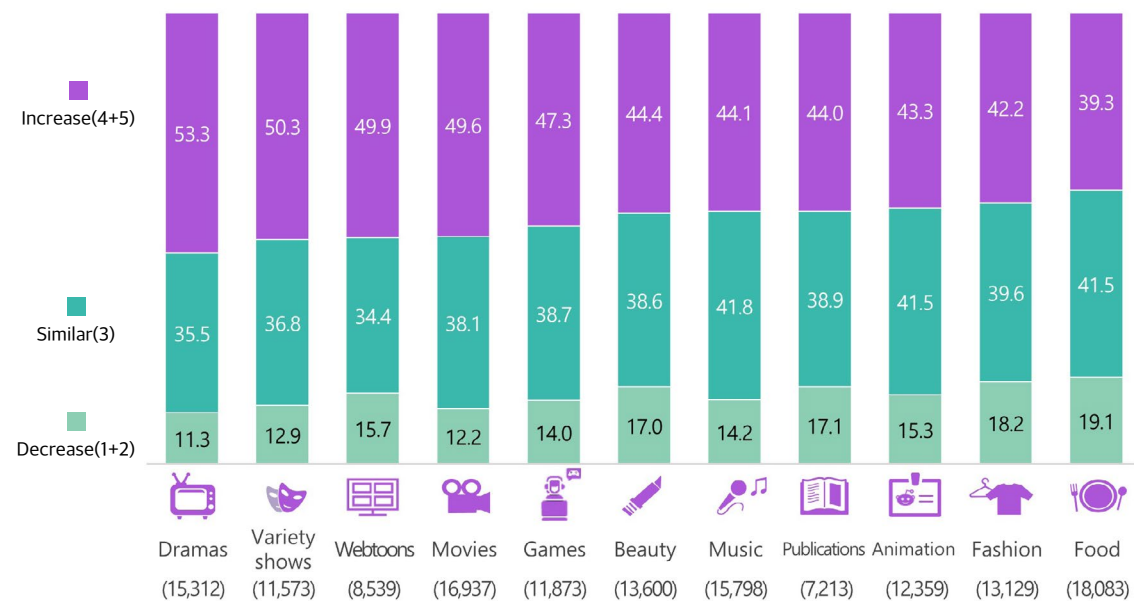
9. Change in Consumption Compared to Pre-COVID-19

Compared to before the onset of COVID-19, the consumption of Korean cultural content is generally “similar” or “increased”. Except for food, where the “similar” responses were more numerous, all other contents showed that “increased” outnumbered “decreased” or “similar”.

The countries with high response rates for ‘increased’ are Thailand, Indonesia, Vietnam, India, Brazil, Türkiye, the UAE, Saudi Arabia, and Egypt. Conversely, the countries with lower response rates are Japan, Taiwan, Kazakhstan, Argentina, France, Italy, Spain, and Russia.

[Figure 2-18] Change in Consumption of Korean Cultural Content Pre-COVID-19

[BASE: Experienced respondents by Korean cultural content, n=(), unit: %]



Q. Compared to before the onset of COVID-19, how has your consumption of Korean cultural content changed? (1. Decreased significantly/2. Decreased/3. Similar/4. Increased/5. Increased significantly)

[Table 2-14] Change in Consumption of Korean Cultural Content Pre-COVID-19 by Country

[BASE: Experienced respondents by Korean cultural content, n = different by floor / refer to the survey summary, unit: Increase (4+5) %]

Region	Country	Dramas	Variety Shows	Webtoons	Movies	Game	Beauty	Music	Publications	Animation	Fashion	Food
Total		53.3	50.3	49.9	49.6	47.3	44.4	44.1	44.0	43.3	42.2	39.3
Asia-Pacific	China	47.4	46.8	50.2	47.1	56.2	43.5	45.5	47.5	47.5	41.8	39.4
	Japan	26.8	27.2	41.7	23.6	32.9	27.8	23.8	24.1	28.5	23.3	19.9
	Taiwan	46.6	40.7	41.2	39.0	40.9	25.7	36.4	34.1	34.9	26.4	32.6
	Thailand	60.6	58.5	57.2	59.4	56.7	57.2	60.7	49.4	54.8	50.7	56.9
	Malaysia	60.1	52.9	52.1	57.3	52.1	46.1	50.8	44.7	42.0	41.1	49.3
	Indonesia	64.2	57.4	51.7	61.7	51.8	49.3	53.9	43.3	49.2	44.7	50.6
	India	77.3	72.3	65.7	71.4	67.1	66.0	72.6	65.4	66.7	64.4	62.0
	Vietnam	56.0	51.6	55.2	50.0	49.7	59.2	52.5	42.9	45.3	47.7	58.0
	Kazakhstan*	32.2	31.2	32.5	31.9	28.7	27.7	26.3	12.0	23.6	28.4	23.6
	Australia	39.8	40.0	48.6	40.7	45.1	34.5	29.5	40.8	35.2	36.1	37.4
Americas	US	50.0	48.4	45.6	46.3	44.2	38.5	34.2	38.0	37.4	38.3	31.0
	Canada*	49.9	44.6	43.2	40.4	36.9	37.0	29.4	33.5	30.4	33.3	33.6
	Mexico*	59.1	47.8	46.6	52.9	44.9	51.0	50.3	43.5	42.3	45.9	38.8
	Brazil	64.5	58.2	58.9	58.9	57.0	51.8	53.3	48.8	53.5	48.8	43.7
	Argentina	49.1	50.2	47.3	51.1	43.6	35.6	44.5	34.6	34.3	24.6	27.1
Europe	UK	47.5	46.2	53.7	43.3	39.8	43.2	36.2	45.7	38.4	42.0	38.6
	France	36.1	32.7	40.2	31.7	27.0	24.4	28.5	30.4	28.3	30.9	28.6
	Italy*	44.1	41.4	36.8	40.0	34.2	37.1	38.2	36.1	33.7	29.8	31.6
	Spain*	51.5	36.9	35.9	41.4	34.4	36.9	37.1	38.7	34.4	36.8	30.8
	Germany*	40.3	34.7	42.9	35.0	35.9	34.3	32.0	40.4	30.8	31.8	30.8
	Russia*	32.0	25.9	42.2	21.4	21.9	20.7	25.3	22.9	20.5	20.7	16.0
	Türkiye	60.2	59.7	49.0	60.3	56.5	55.7	53.0	53.9	52.8	54.0	47.3
Middle East	UAE	71.3	62.8	54.6	64.6	63.4	64.7	61.9	59.5	56.9	60.1	62.0
	Saudi Arabia*	60.7	52.6	54.1	58.2	53.2	55.7	57.3	53.6	51.5	55.2	52.7
Africa	Egypt*	58.2	54.8	55.5	60.5	58.8	51.3	58.1	55.0	51.8	50.1	45.4
	South Africa	52.6	48.1	45.0	49.0	46.0	38.6	49.0	38.0	46.2	36.4	38.9

10. Affinity for Korean Cultural Content

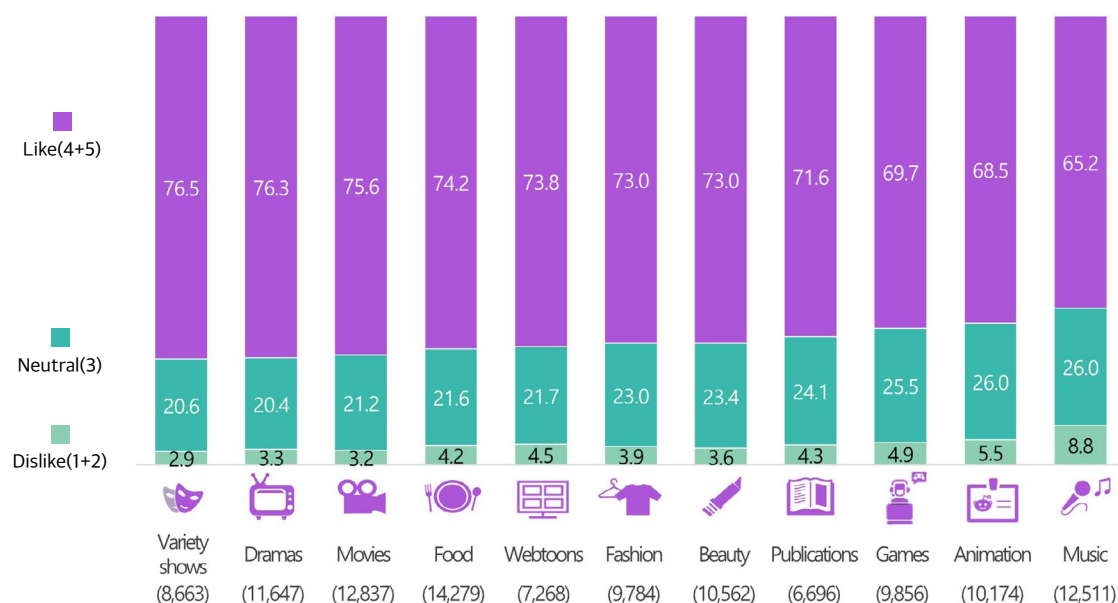
The Korean cultural content with the highest affinity is variety shows, at 76.5%. This is followed by dramas (76.3%), movies (75.6%), and food (74.2%). Music had the lowest affinity (65.2%) among Korean cultural content, and the highest dislike rate (8.8%).

While music is often the first thing associated with South Korea and has a high rate of experience, popularity, and brand power, it also has the lowest affinity and willingness to recommend. Understanding the reasons for this is necessary.

The countries with high-affinity rates are Thailand, Indonesia, India, Vietnam, Brazil, the UAE, and South Africa. Conversely, the countries with low-affinity rates are Japan, Kazakhstan, Russia, France, Italy, and Spain.

[Figure 2-19] Affinity for Korean Cultural Content

[BASE: Experienced respondents by Korean cultural content, n=(), unit: %]



Q. Overall, how much do you like the Korean cultural content you have recently used? (1. I don't like it at all/2. I don't like it/3. Neutral/4. I like it/5. I like it a lot)

[Table 2-15] Affinity for Korean Cultural Content by Country

[BASE: Experienced respondents by Korean cultural content, n = different by floor / refer to the survey summary, unit: Favorable (4+5)%]

Region	Country	Variety Shows	Dramas	Movies	Food	Webtoons	Fashion	Beauty	Publications	Game	Animation	Music
Total		76.5	76.3	75.6	74.2	73.8	73.0	73.0	71.6	69.7	68.5	65.2
Asia-Pacific	China	81.3	80.0	79.8	71.3	75.3	81.7	77.3	74.3	80.9	76.1	78.6
	Japan	49.5	55.6	48.9	69.1	58.7	53.0	61.3	58.5	50.9	43.6	51.1
	Taiwan	66.9	74.1	75.0	71.5	67.0	64.3	59.1	60.5	63.6	59.2	68.4
	Thailand	84.1	87.1	87.0	83.2	83.0	81.6	83.8	79.2	80.6	83.9	83.5
	Malaysia	80.9	82.2	86.0	79.3	76.4	74.8	80.6	73.2	72.3	72.6	76.5
	Indonesia	90.6	89.0	90.2	80.3	82.9	84.9	83.1	85.1	83.0	82.5	81.6
	India	89.8	92.2	93.7	85.8	87.1	88.8	89.0	89.2	84.8	86.4	90.8
	Vietnam	83.6	84.3	83.5	86.1	81.1	85.6	88.2	72.1	71.7	75.9	83.7
	Kazakhstan*	45.9	43.9	47.8	60.8	57.8	52.5	53.1	34.7	38.7	38.5	36.2
	Australia	73.3	73.1	73.9	80.6	70.8	67.9	71.6	73.1	69.6	63.5	53.8
Americas	US	79.0	80.8	75.1	81.3	71.2	67.9	72.5	71.1	67.8	67.3	59.0
	Canada*	71.9	71.9	74.7	80.1	71.3	66.3	72.3	61.9	65.2	60.4	54.2
	Mexico*	79.4	81.3	77.5	81.8	74.8	77.5	82.0	70.8	72.9	72.1	68.9
	Brazil	83.3	83.4	81.4	79.3	85.3	82.8	80.0	80.6	81.5	80.3	71.9
	Argentina	76.6	75.7	77.0	68.0	75.5	66.0	71.1	66.3	70.3	64.7	63.4
Europe	UK	65.9	78.7	74.7	78.2	69.8	71.4	68.8	67.9	61.3	60.8	53.6
	France	58.7	58.4	62.7	68.8	66.8	60.2	56.6	58.0	55.5	51.4	47.2
	Italy**	64.6	68.3	69.5	63.4	62.3	59.2	69.3	63.6	59.5	57.2	54.3
	Spain*	70.8	69.2	68.0	73.6	56.1	60.3	69.5	61.0	59.0	61.1	54.8
	Germany*	71.1	70.8	64.1	76.5	60.7	65.5	63.9	60.9	58.2	54.8	52.3
	Russia*	43.1	48.8	42.7	50.4	59.8	46.3	46.0	42.3	34.6	38.1	34.5
	Türkiye	80.4	82.7	83.4	68.6	71.4	83.1	81.8	79.1	76.5	76.3	77.5
Middle East	UAE	83.3	82.5	85.6	80.7	76.1	82.1	82.9	81.9	85.4	78.6	80.2
	Saudi Arabia*	77.7	78.7	75.3	74.0	70.4	74.3	81.2	75.9	72.2	74.4	71.2
Africa	Egypt*	75.2	77.0	77.9	66.3	71.4	74.7	72.0	74.1	75.2	74.2	74.4
	South Africa	80.5	87.6	82.1	79.0	73.2	78.7	75.6	74.0	76.2	73.0	71.8

11. Factors Contributing to Popularity of and Detracting from Affinity for Korean Cultural Content

The primary factors contributing to the popularity of Korean cultural content are the story and actors/singers/cast, while language issues were identified as factors limiting affinity. First, for dramas and movies, the popularity is driven by "well-structured and compelling storytelling," but is hindered by "the inconvenience of watching through translated subtitles or dubbing" and "the complexity and unfamiliarity of the Korean language."

Variety shows are popular for "entertaining games and topics" (27.8%), "providing an indirect experience of Korean life and culture" (26.9%), and "good program concepts and formats" (23.8%), among other content-related factors. Concurrently, factors diminishing their appeal include "the complexity and unfamiliarity of the Korean language" (21.9%), "the inconvenience of watching through translated subtitles or dubbing" (20.3%), and "mismatch with Korean humor" (18.1%), primarily citing language and cultural aspects.

Music is popular because of the "catchy choruses and rhythms" (28.7%) and the "attractive appearance or style of K-pop singers/groups" (28.5%). However, it is hindered by "complex and unfamiliar Korean lyrics" (27.2%) and "uniformity in music genres" (19.0%).

Animation is popular for its "visual appeal" (37.1%) and "likable character personalities/roles" (32.7%). Factors reducing its popularity include "the complexity and unfamiliarity of the Korean language" (24.0%) and "the inconvenience of watching through translated subtitles or dubbing" (21.5%).

Publications are popular primarily for their "good storytelling" (30.7%), but are hindered by "poor translation into the local language" (27.1%) and "difficulty in understanding the content owing to language and cultural differences" (22.7%).

Webtoons gain popularity because of "realistic and detailed illustrations" (24.2%), "well-structured and compelling storytelling" (22.1%), and "variety in topics or genres" (20.4%). However, they are less popular owing to "poor translation into the local language" (22.4%) and "difficulty in understanding the content because of language and cultural differences" (18.1%). Both publications and webtoons appear to require improvements in translation.

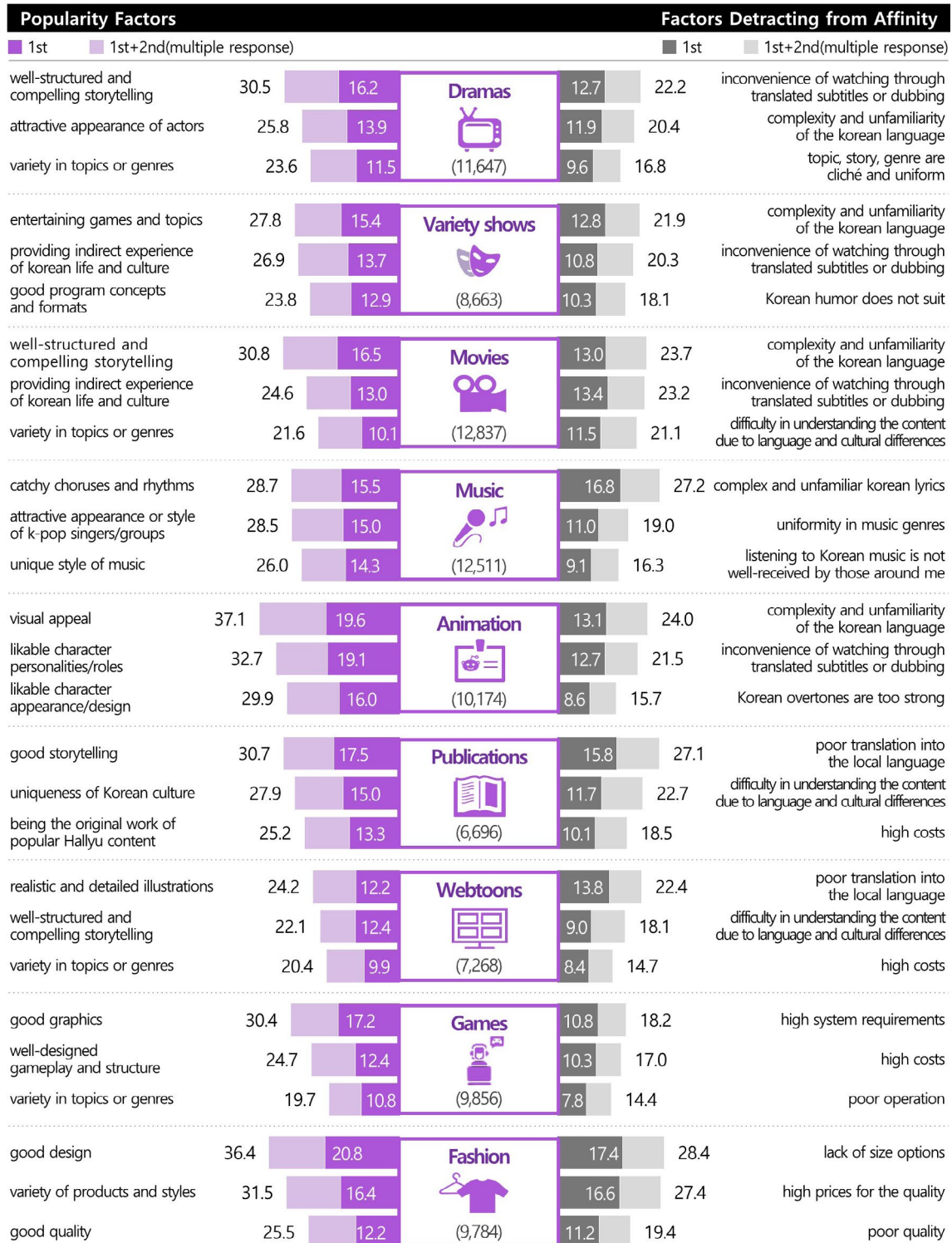
For games, the key factors for popularity are "good graphics" (30.4%) and "well-designed gameplay and structure" (24.7%), while high system requirements (18.2%) and high costs (17.0%) are drawbacks.

Fashion is popular for its "good design" (36.4%) and "variety of products and styles" (31.5%). Beauty products are popular for their "effectiveness and excellent quality" (40.3%) and "affordable prices for the quality" (24.8%). Conversely, the factors reducing their appeal include, for fashion, "lack of size options" (28.4%) and, for beauty, "high prices for the quality" (24.9%). In beauty, both quality and price serve as factors that either enhance or reduce its appeal.

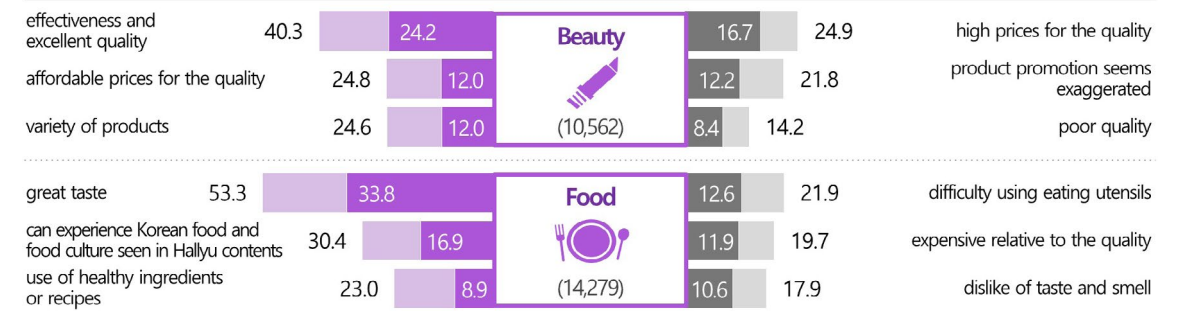
Food is popular primarily for its "great taste" (53.3%), while being hindered by "difficulty in using eating utensils" (21.9%).

[Figure 2-20] Factors Contributing to Popularity of and Detracting from Affinity for Korean Cultural Content

[BASE: Experienced respondents by Korean cultural content, n= (), unit: %]



(Continued)



Q. What do you think are the factors contributing to the popularity of Korean cultural content in your country? Please select the top two factors in order.

Q. What do you think are the factors reducing the appeal of Korean cultural content in your country? Please select the top two factors in order.

Asia-Pacific

Unlike other regions, the Asia-Pacific showed a relatively greater influence of actors in dramas, variety shows, and movies as factors for the content's appeal. Publications also show a high response rate of 29.5% for "being the original work of popular Hallyu content," suggesting that they are significantly influenced by visual content such as dramas and movies. Concurrently, negative factors affecting their appeal include fewer complaints about "the complexity and unfamiliarity of the Korean language," and more about the cliché nature of genres, differences in humor, and other content-related issues.

Given that music is the only field among the five regions where "inappropriate remarks by Korean singers and music officials" ranked in the top three, it is crucial to elevate awareness about cultural diversity and crisis management within K-Pop agencies.

The factors hindering positive sentiment toward food did not include the difficulty of using eating utensils, which distinguishes it from other regions that share a similar dining culture. Instead, relatively more negative opinions about cost-effectiveness and taste occurred.

Americas

In the Americas, the popularity of video content is largely attributed to its high quality in storytelling and visual aesthetics, as well as the indirect experience of Korean culture it offers. The primary drawbacks include the difficulty of the Korean language and the inconvenience of translation subtitles or dubbing services. A noteworthy obstacle to the enjoyment of variety shows was "too many broadcast subtitles," which ranked second. For food, the response rate for "great taste" was 57.1%, which is higher than in other regions. The primary obstacle is similar to other non-Asian regions: "difficulty using eating utensils," with a 24.3% response rate.

Europe

In Europe, popularity factors for dramas, movies, and publications primarily focused on story and genre. For animation and webtoons, outstanding visual aesthetics and realistic portrayals are the primary attractions. Similar to the Americas, the difficulty of the Korean language and inconveniences regarding translation subtitles

or dubbing are the primary drawbacks. Concerning food, the obstacle of "too many side dishes, making dining cumbersome" had a relatively high response rate of 17.4%.

Middle East

In the Middle East, the popularity of dramas, movies, and music is largely attributed to the talents and performances of actors and singers. For publications and webtoons, "good storytelling" received a relatively high response rate. Like other non-Asian regions, the difficulty of the Korean language is the primary obstacle.

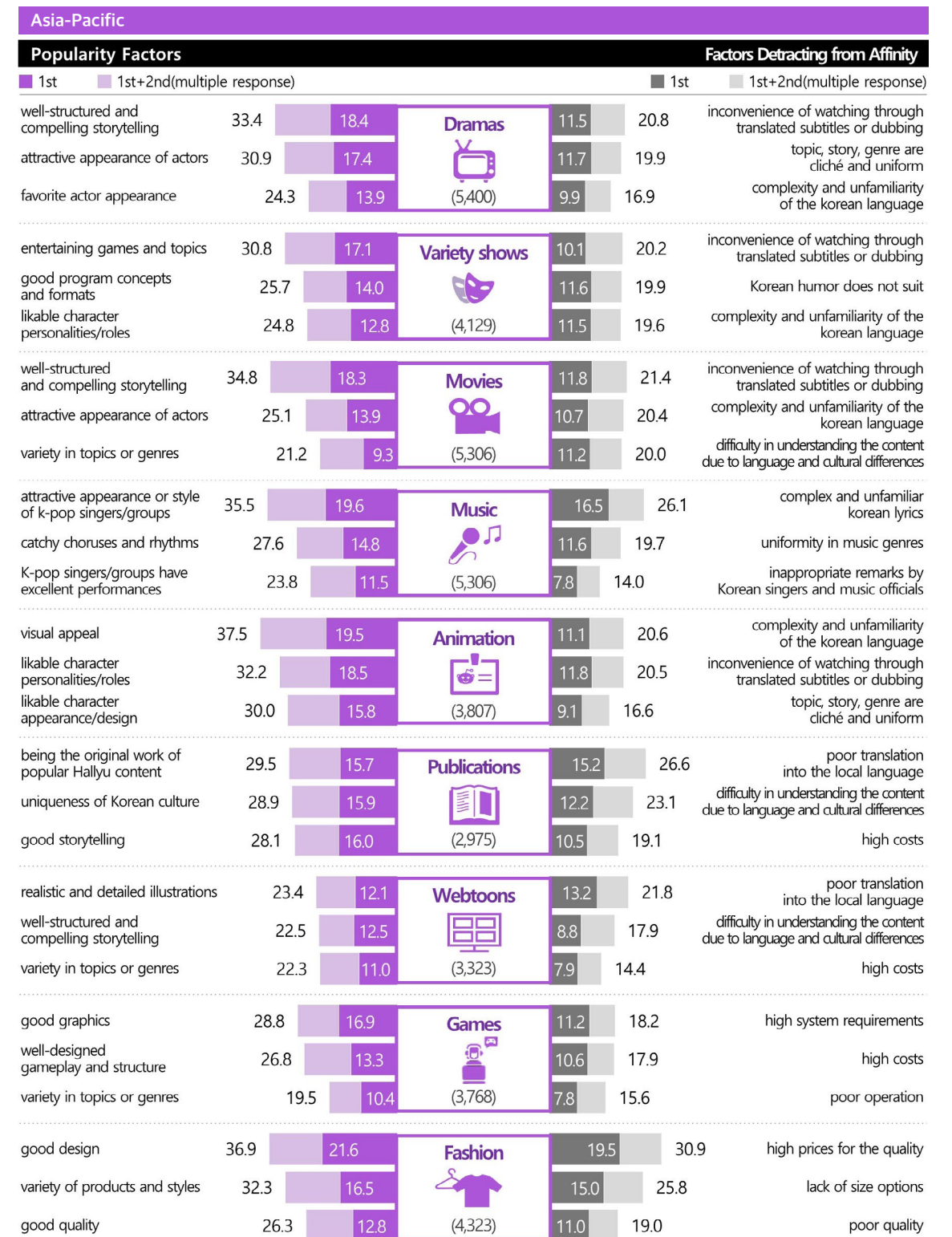
A significant hindrance to enjoying variety shows is "too many broadcast subtitles," which also ranked second in the Americas. Regarding food, "great taste" had a relatively low response rate of 39.0%. The difficulty of using eating utensils had a response rate of 27.6%, ranking it second after Africa.

Africa

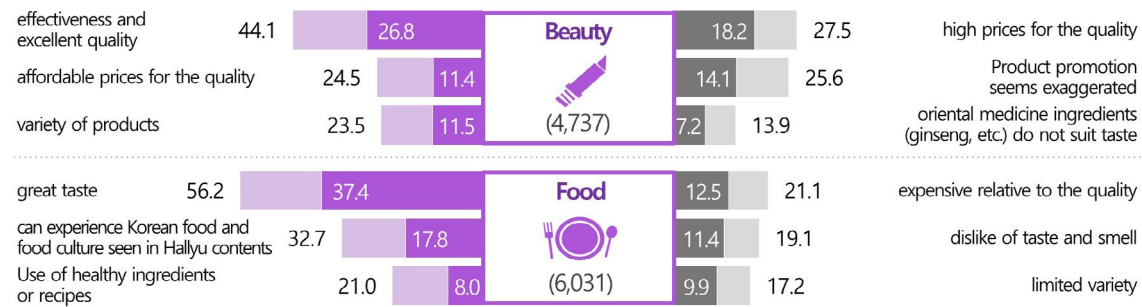
In Africa, the popularity of dramas, variety shows, and movies seems to be influenced more by the indirect experience of Korean culture than the actors or cast involved. For publications, webtoons, and games, the high quality of the content regarding story, illustrations, and graphics played a significant role. Similar to other regions, the difficulty of the Korean language and inconveniences in translation or dubbing services ranked as the top drawbacks. For food, "difficulty using eating utensils" had the highest response rate of 33.2%. Like in Europe, "too many side dishes, making dining cumbersome" had a relatively high response rate of 18.1%.

[Figure 2-21] Factors Contributing to Popularity of and Detracting from Affinity for Korean Cultural Content by Region

[BASE: Experienced respondents by Korean cultural content, n= (), unit: %]



(Continued)



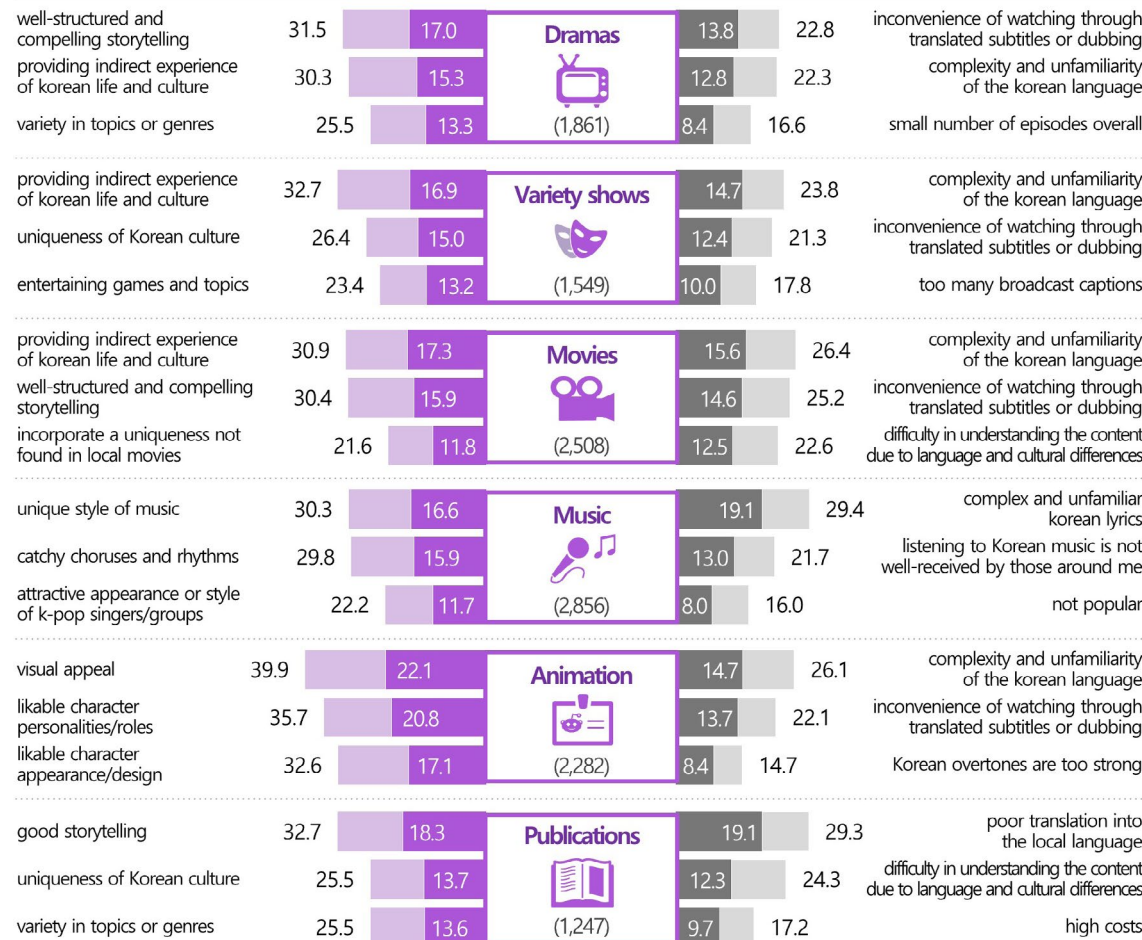
America

Popularity Factors

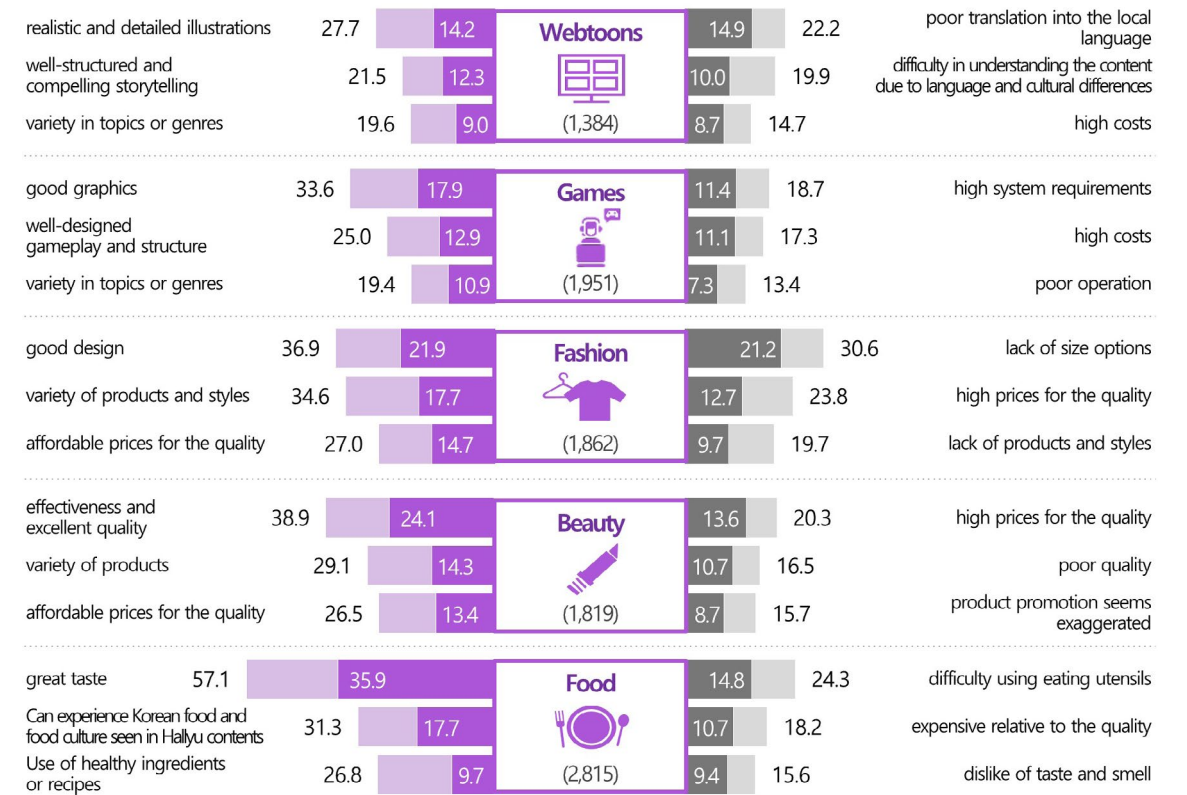
Factors Detracting from Affinity

■ 1st ■ 1st+2nd(multiple response)

■ 1st ■ 1st+2nd(multiple response)



(Continued)



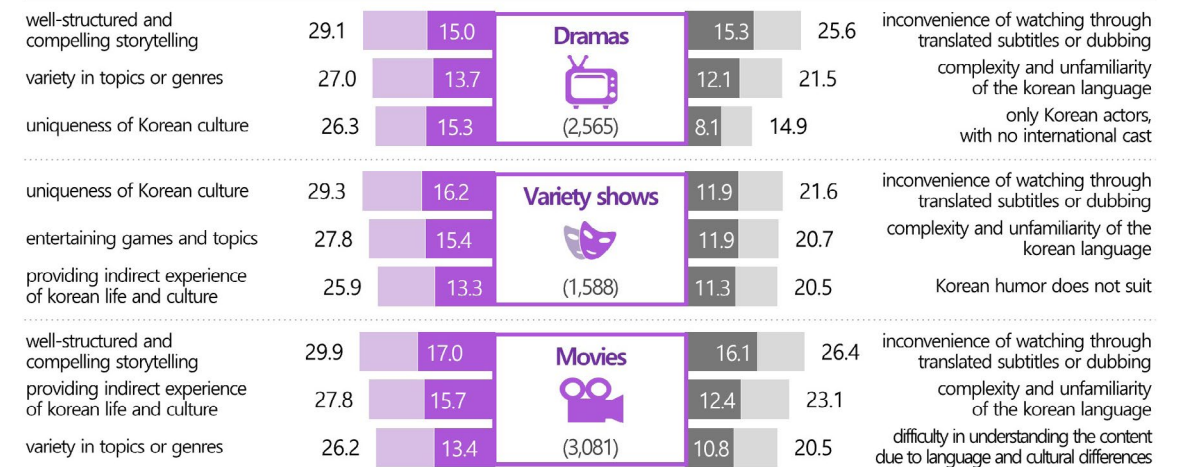
Europe

Popularity Factors

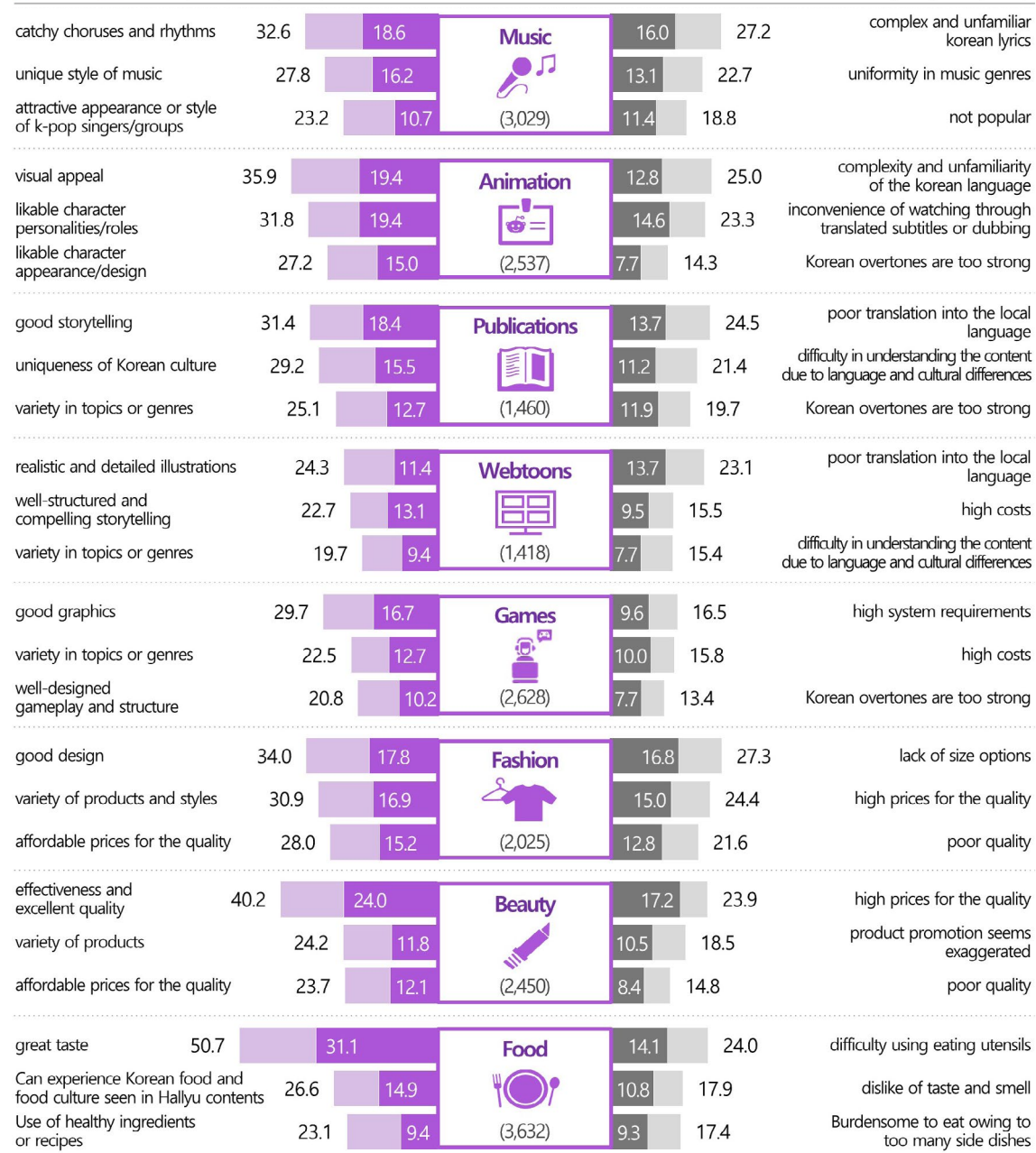
Factors Detracting from Affinity

■ 1st ■ 1st+2nd(multiple response)

■ 1st ■ 1st+2nd(multiple response)



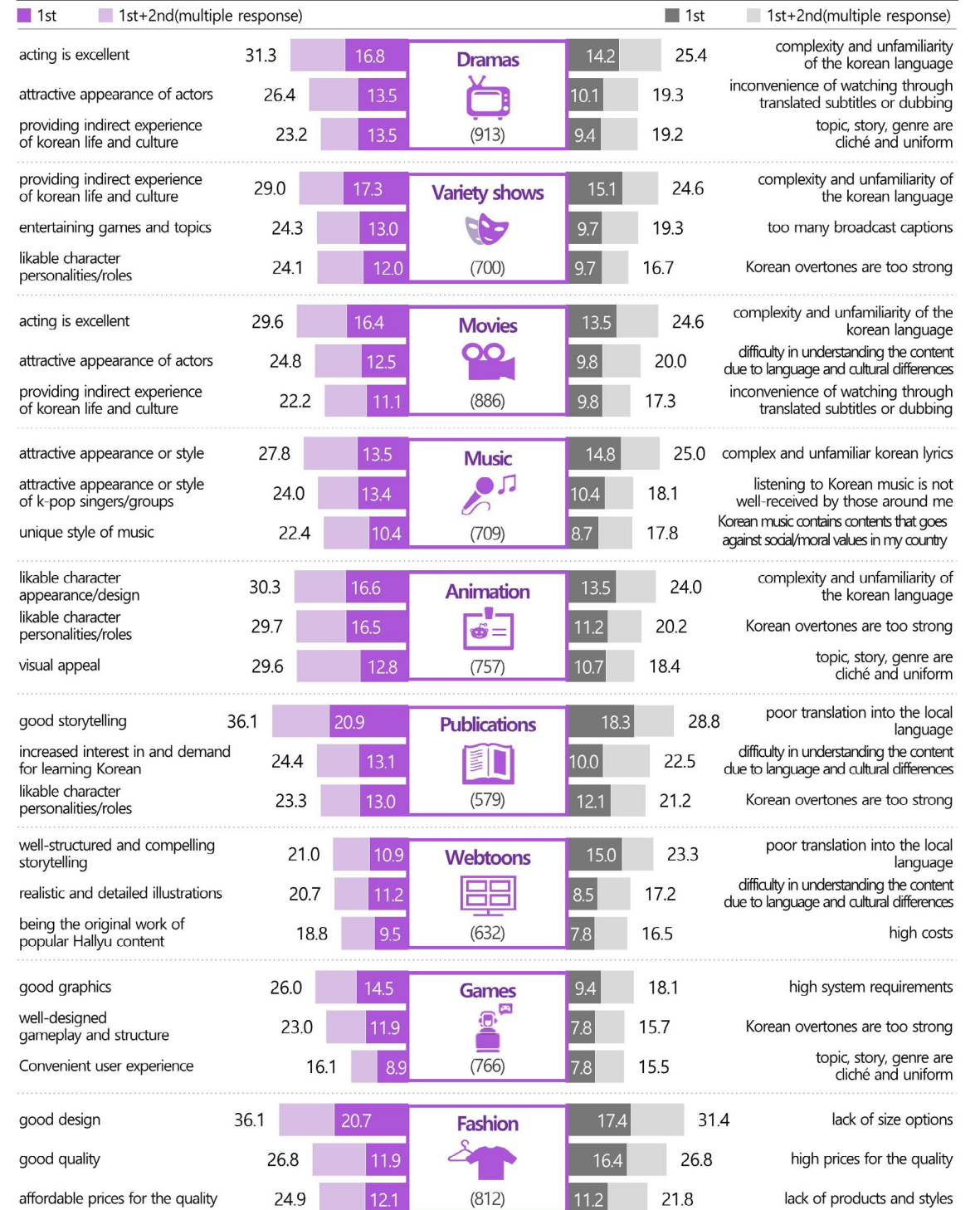
(Continued)



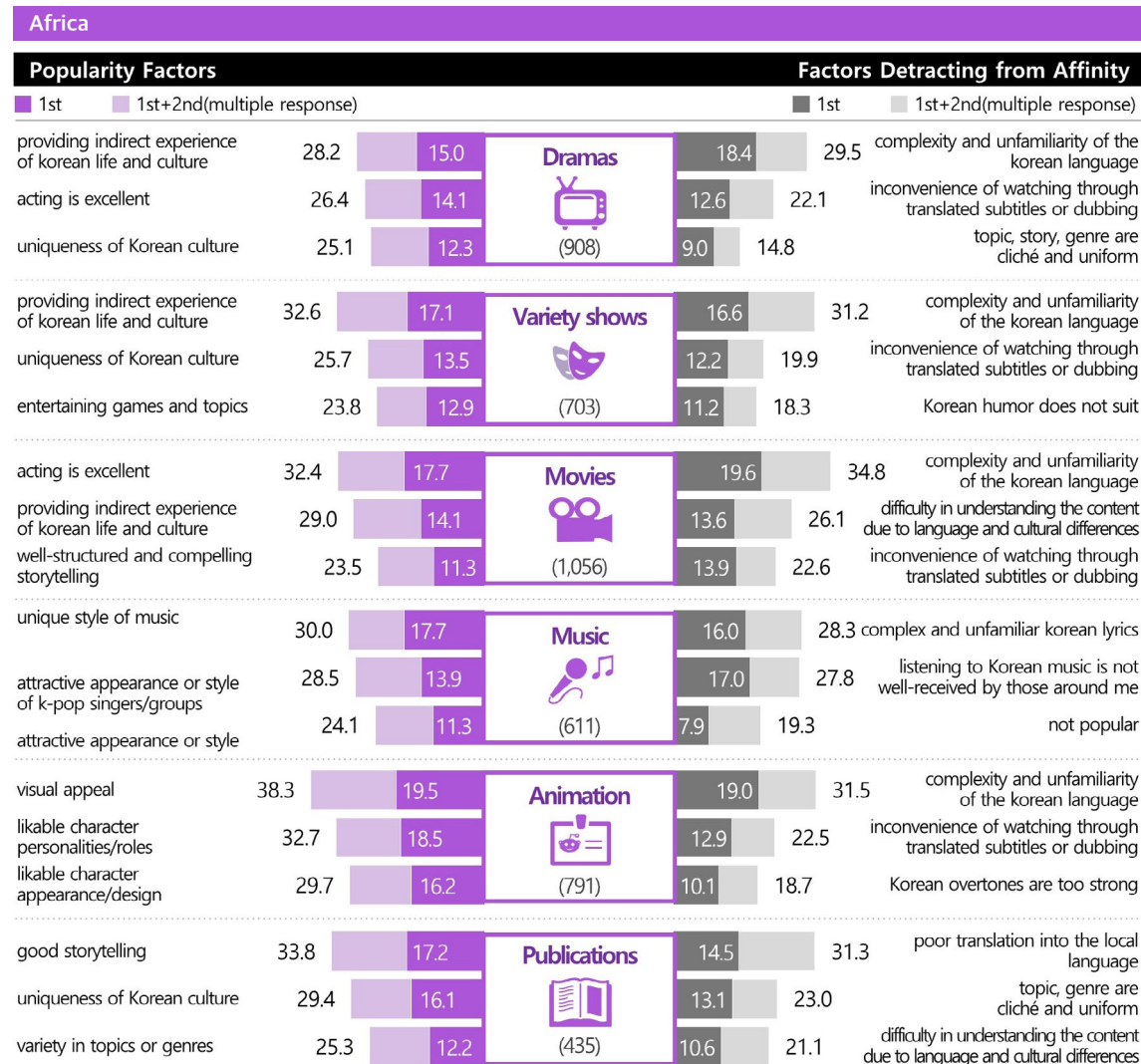
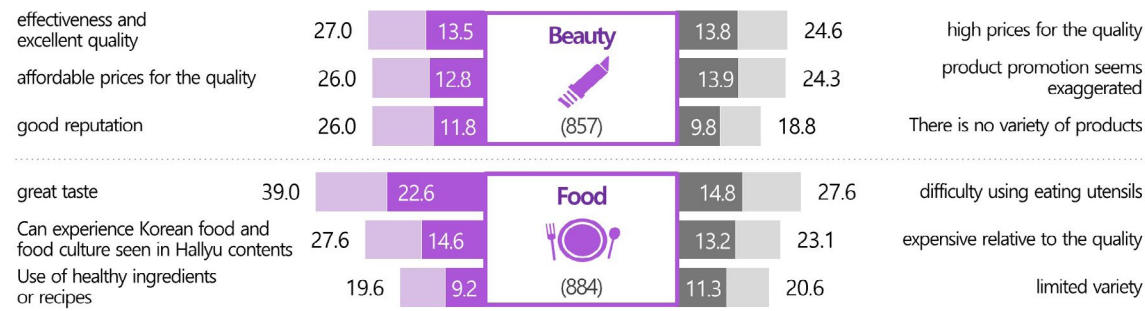
Middle East

Popularity Factors

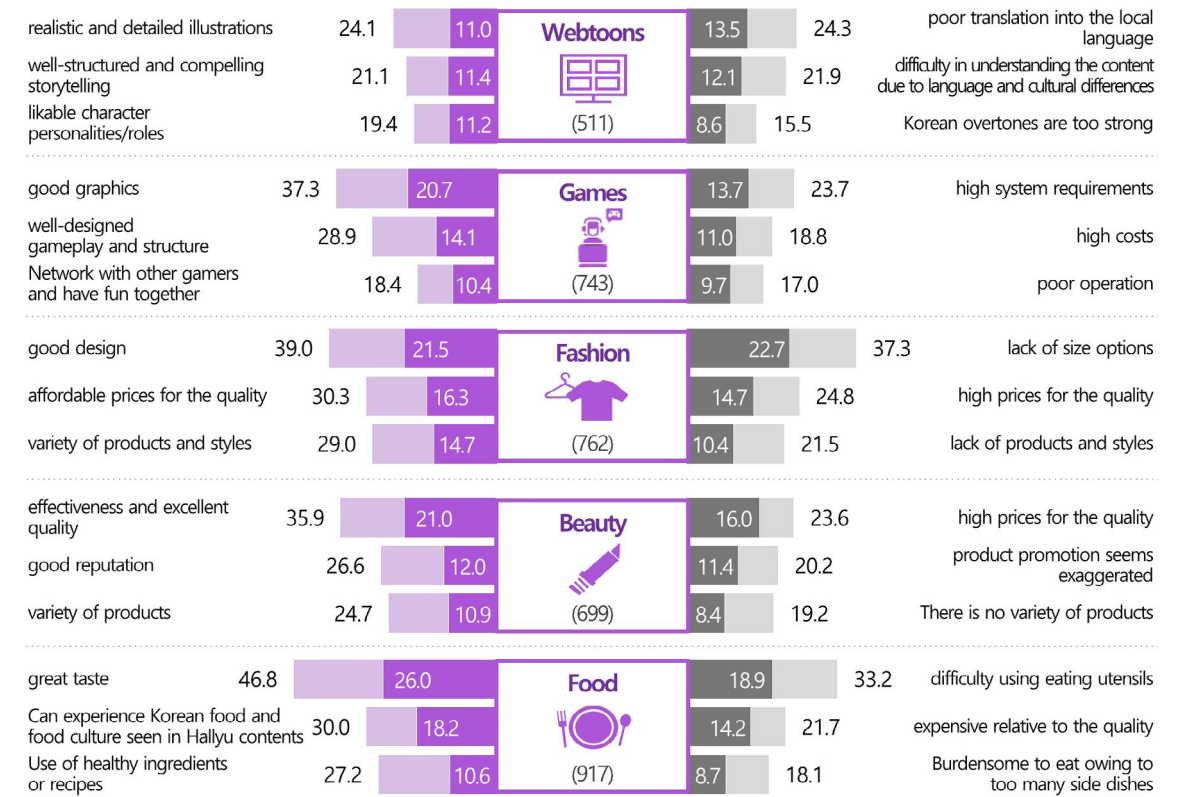
Factors Detracting from Affinity



(Continued)



(Continued)



12. Most Preferred Korean Cultural Content

The most popular Korean drama was the 2021 production "Squid Game" with an 11.3% preference rate. It was followed by new entries such as "Extraordinary Attorney Woo" (2.8%), "All of Us Are Dead" (2.6%), and "Business Proposal" (1.9%).

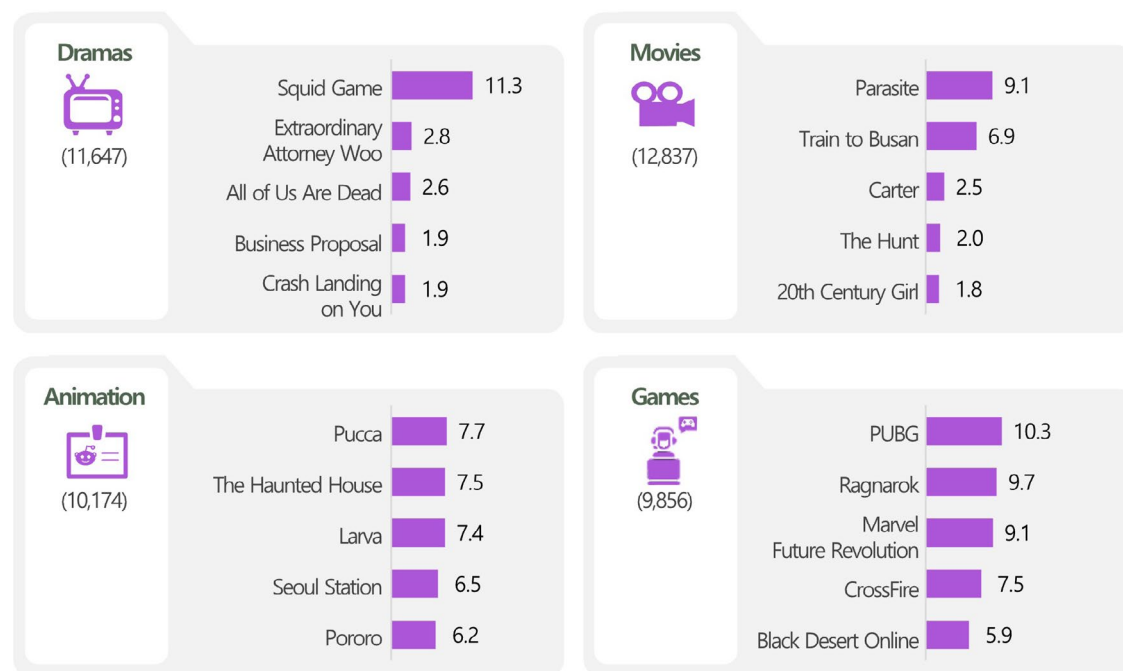
For movies, "Parasite" (9.1%) and "Train to Busan" (6.9%) continued to hold the top two positions from the previous year. Following them were the 2022 releases "Carter" (2.5%), "Hunt" (2.0%), and "20th Century Girl" (1.8%), which had high preference rates. Notably, "Carter" and "20th Century Girl" are Netflix Originals. Both "Parasite" and "Train to Busan" continue to be popular, having been distributed through local releases as well as through platforms including Netflix ("Parasite," "Train to Busan") and Google Play Movies ("Train to Busan").

In the animation category, minimal change in preferences compared to 2021 was observed. However, "Seoul Station," the prequel to "Train to Busan," ranked with 6.5% and appears to benefit from the popularity of "Train to Busan."

In games, "PUBG" (10.3%) and "Ragnarok" (9.7%) maintained their first and second positions, respectively, following 2021. Except for the newly entered "Marvel Future Revolution" (9.1%), all other games that ranked were the same as the previous year, with only "Dungeon Fighter Online" falling out of the rankings.

[Figure 2-22] Most Preferred Korean Cultural Content

[BASE: Experienced respondents by Korean cultural content, n= (), unit: %]



Q. What is your favorite Korean drama that you watched this year? (Open-ended) / Q. What is your favorite Korean movie that you watched this year? (Open-ended)
 Q. What is your favorite Korean animation? / Q. What is your favorite game among the following?

Asia-Pacific

Preferences in dramas vary by country. China prefers “Descendants of the Sun” (8.1%) and “My Love from the Star” (6.4%), Japan’s “Winter Sonata” (10.6%), and Thailand’s “Dae Jang Geum” (6.3%). In Kazakhstan, “Squid Game” scored a high 17.9%, which is approximately four times higher than the second and third-place dramas “The Heirs” (3.7%) and “Boys Over Flowers” (3.2%). However, the results showed a strong preference for older works. In Malaysia, Indonesia, India, Vietnam, and Australia, a high preference was observed for new releases such as “Squid Game,” “Business Proposal,” and “All of Us Are Dead.” In India, the locally influential Disney+ Hotstar features “Snowdrop”, which ranked second and caught attention.

In most countries, the movies “Parasite” and “Train to Busan” ranked first and second. Japan is the only country in the Asia-Pacific region where older films including “A Moment to Remember” (3.1%) and “Swiri” (2.2%) are highly preferred. Taiwan uniquely did not have “Parasite” in the rankings and showed a higher preference for new films such as “Seoul Vibe” (6.2%), “Confidential Assignment 2” (5.2%), and “Emergency Declaration” (4.7%).

In animation, “Larva” ranked first or second in China, Taiwan, Malaysia, Indonesia, and Vietnam. Japan prefers “Pororo,” Thailand “Secret Jouju,” India and Australia “Speckles: The Tarbosaurus,” and Kazakhstan “The Haunted House.”

In games, “PUBG” ranked first in five countries, second in three countries, and between third and fifth in

one country. In Thailand, “PUBG” did not enter the rankings, and “Cookie Run: Kingdom” took the top spot in preferences.

Americas

The most preferred drama in the Americas is “Squid Game,” while in Latin America, it is “Extraordinary Attorney Woo.” However, Argentina uniquely prefers “Stairway to Heaven” as its top drama. The most preferred movie across the Americas is “Parasite,” and the second to fifth places varied by country. The most popular animation in Latin America is “Pucca,” while in the United States, it is “The Haunted House,” and in Canada, “Seoul Station” takes the top spot. Although the most preferred games vary by country, “PUBG,” “Marvel Future Revolution,” and “Ragnarok” generally maintain high popularity.

Europe

In Europe, except for Russia, “Squid Game” emerged as the most preferred drama in all countries, followed by “All of Us Are Dead” and “Extraordinary Attorney Woo”. The most favored movie across all European countries, excluding Russia, was “Parasite”, with “Train to Busan” and “Carter” ranking second and third, respectively. Preferred animations vary by country, but “The Haunted House,” “Pucca,” and “Super Wings” are popular. Italy recorded a relatively high response rate for “Pucca” (24.3%), while Russia showed a high rate for “Pororo” (17.1%). In five countries, excluding Germany and Türkiye, “Marvel Future Revolution” was ranked as the most favored game.

Middle East

In the Middle East, “Squid Game” was the most preferred drama, and “Parasite” and “Train to Busan” recorded high response rates for most favored movies. Most favored animations and games vary by country.

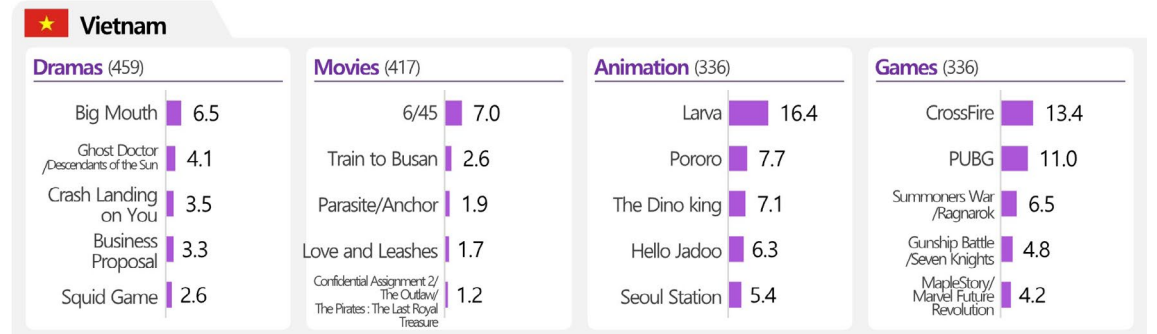
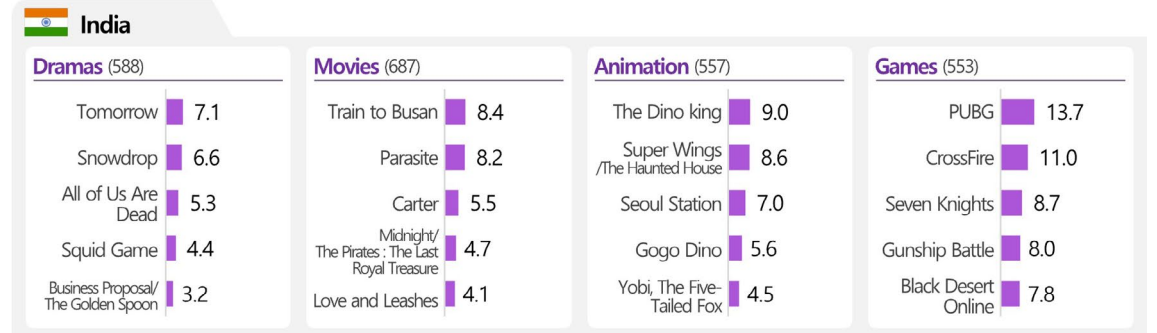
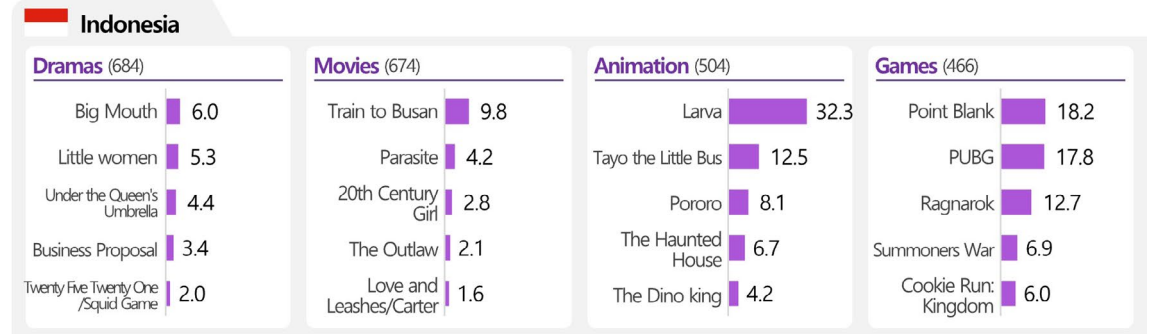
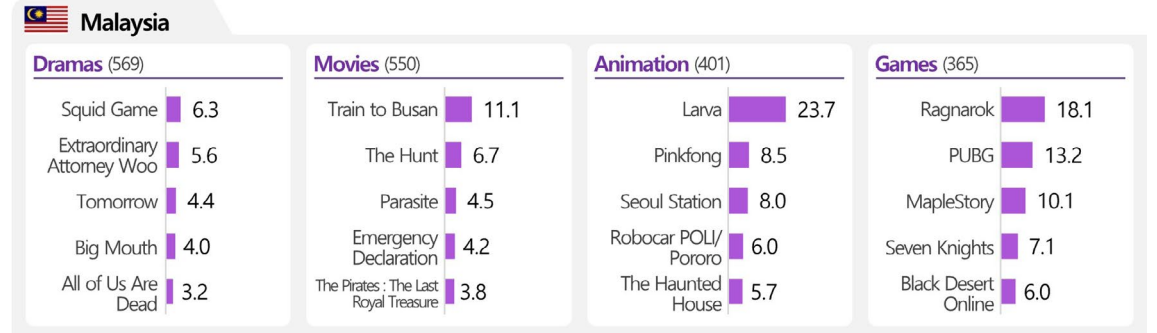
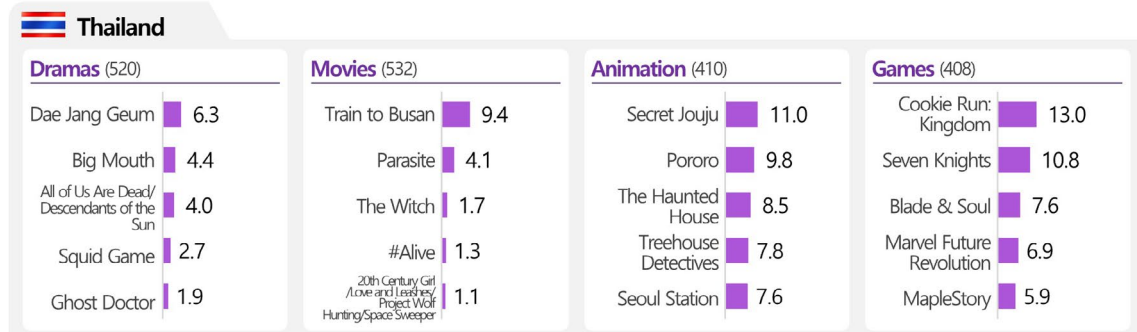
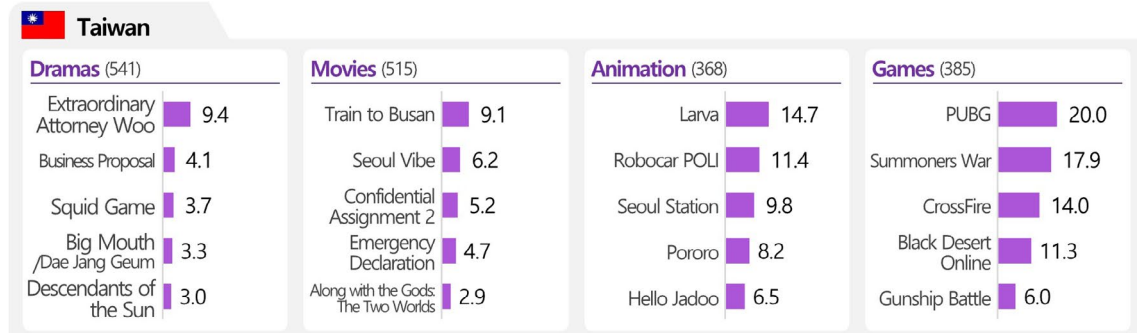
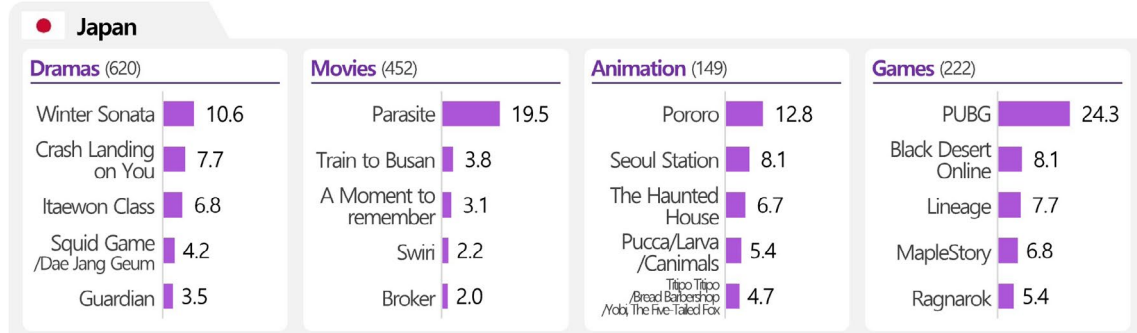
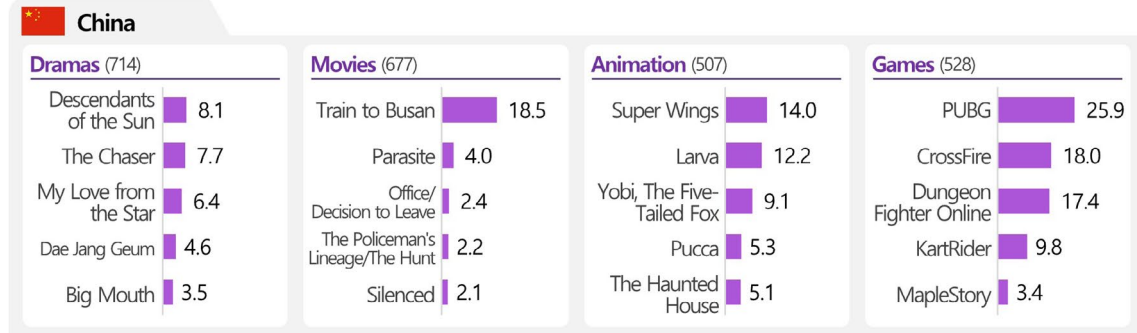
Africa

In Africa, “Squid Game” had the highest response rate as the most favored drama. Most favored movies vary by country; however, generally “Train to Busan,” “Carter,” and “Parasite” are popular. The most favored animations were “Pucca” in Egypt and “The Haunted House” in South Africa. Most favored games also vary by country, and the globally popular “PUBG” was not included in the rankings.

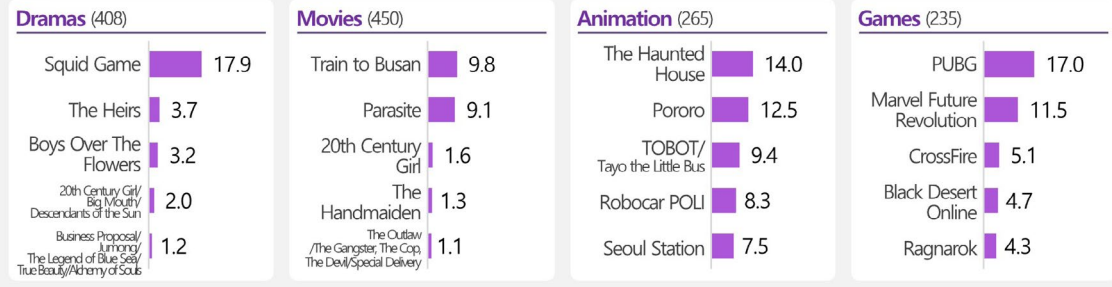
[Figure 2-23] Most Preferred Korean Cultural Content by Country

[BASE: Experienced respondents by Korean cultural content, n=0, unit: %]

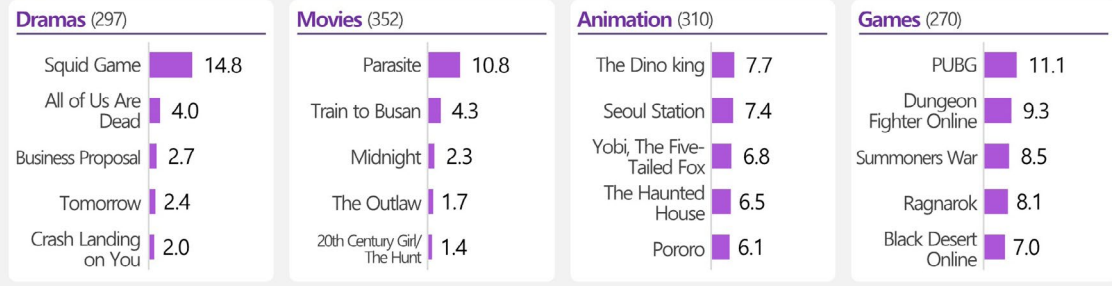
Asia-Pacific



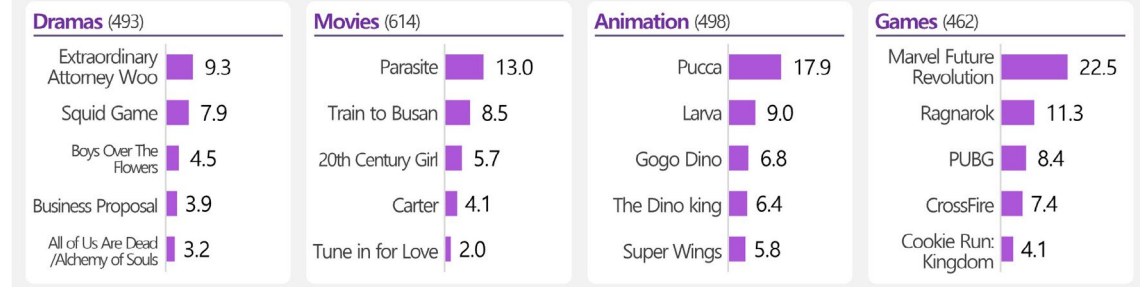
Kazakhstan



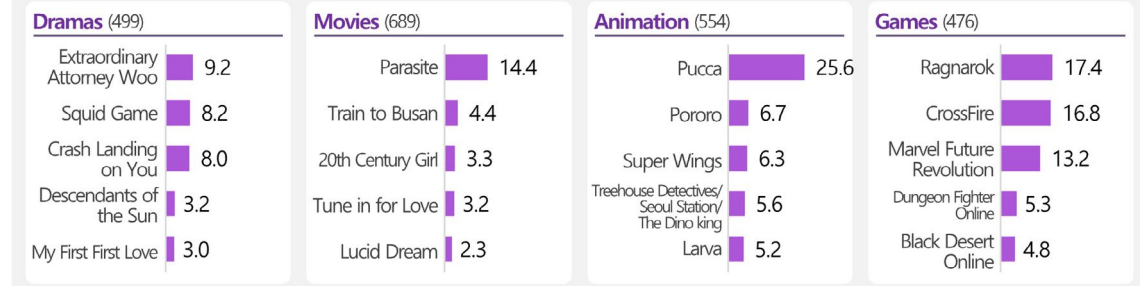
Australia



Mexico

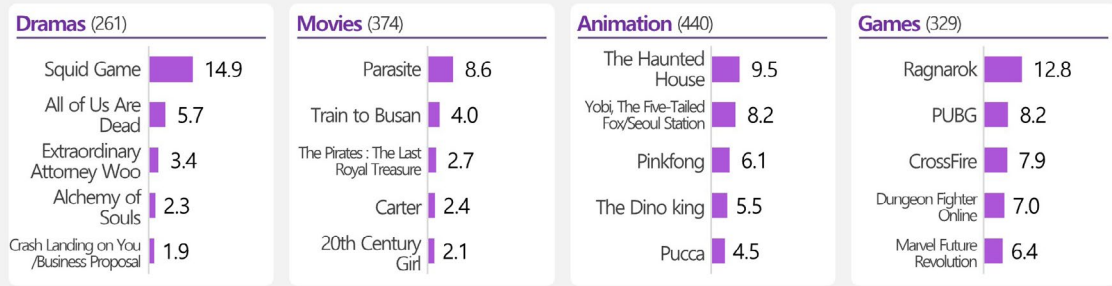


Brazil

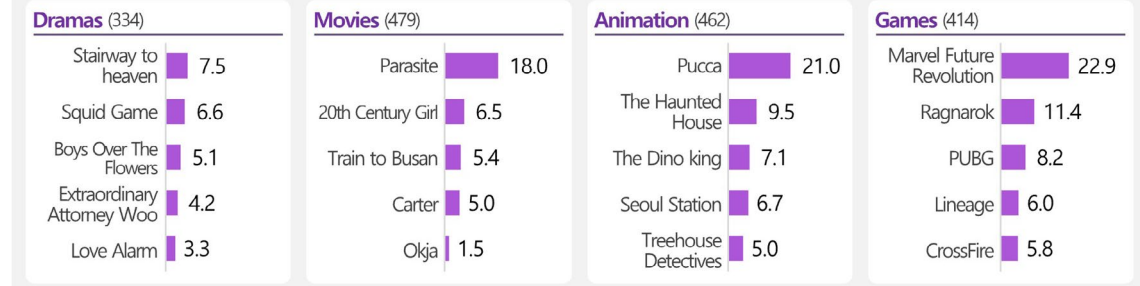


America

US

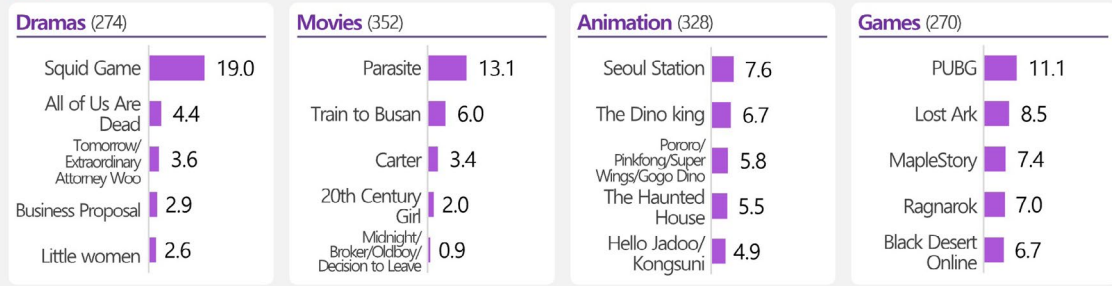


Argentina

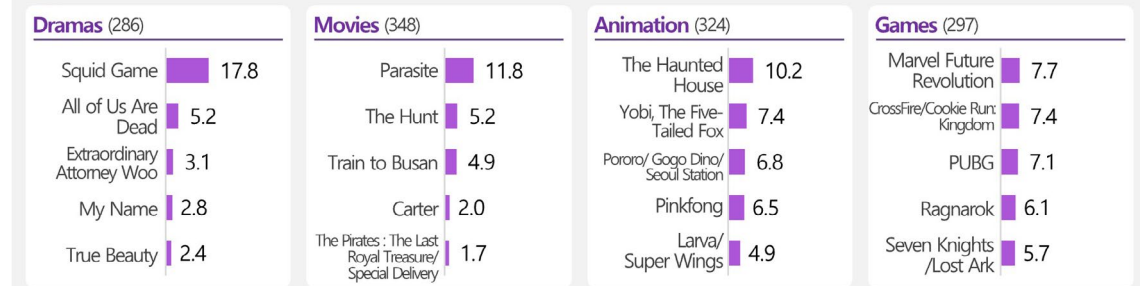


Europe

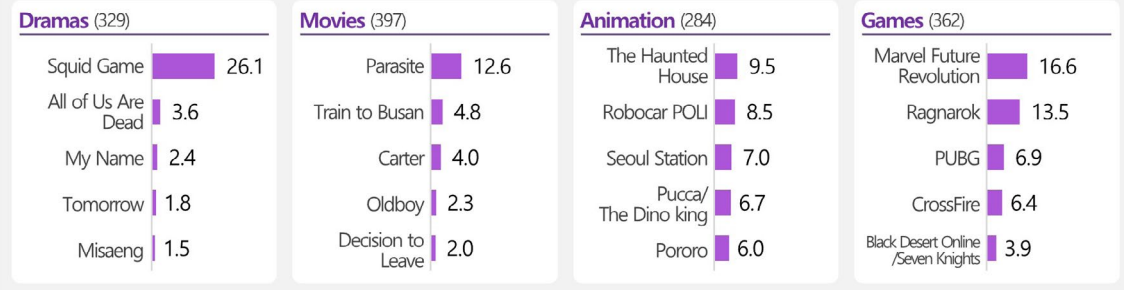
Canada



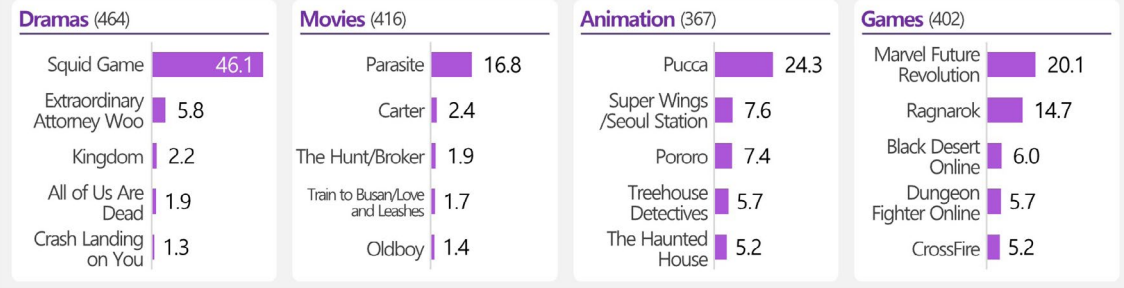
UK



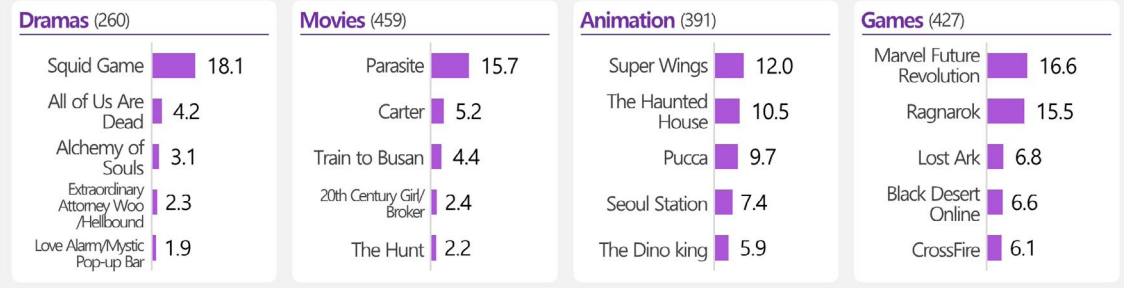
France



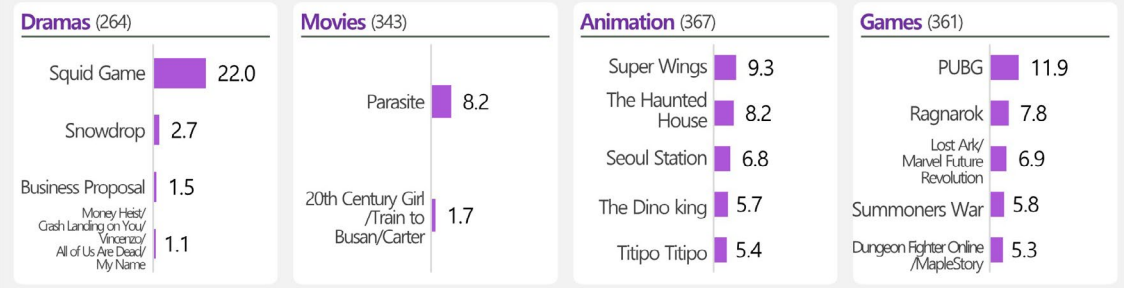
Italy



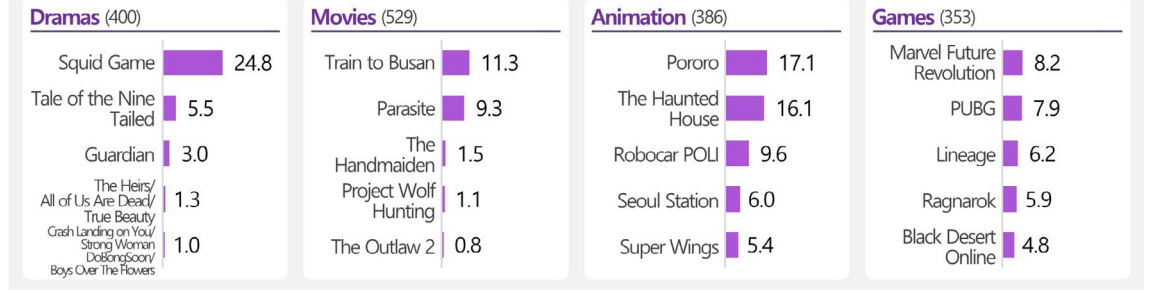
Spain



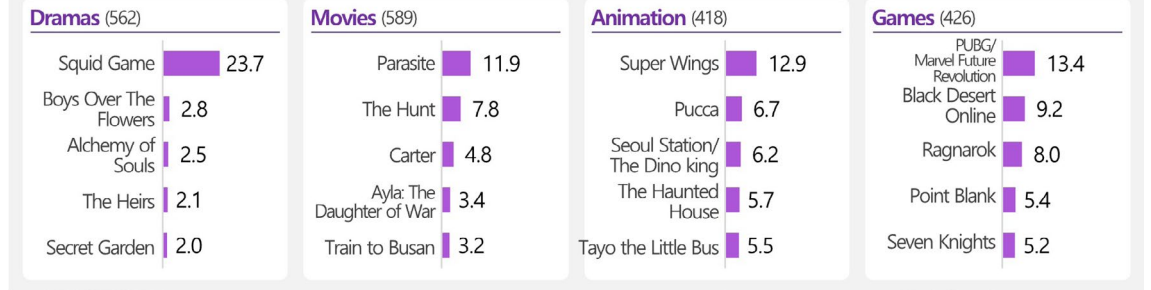
Germany



Russia

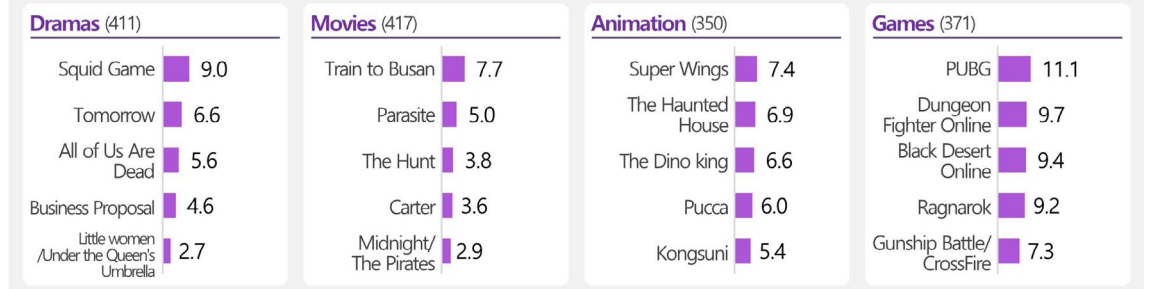


Türkiye

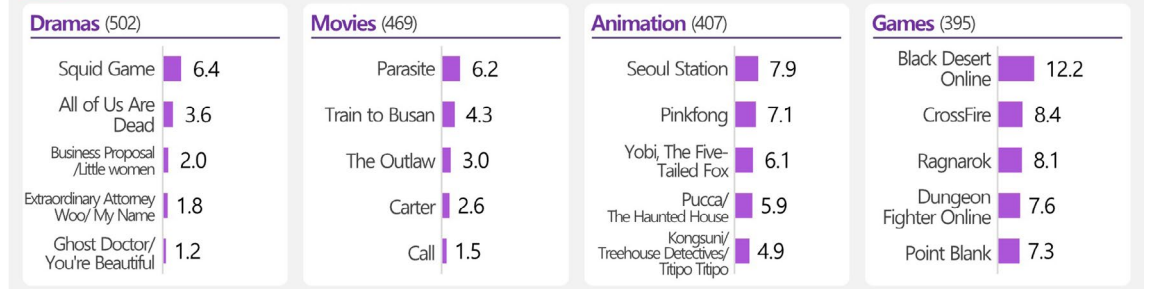


Middle East

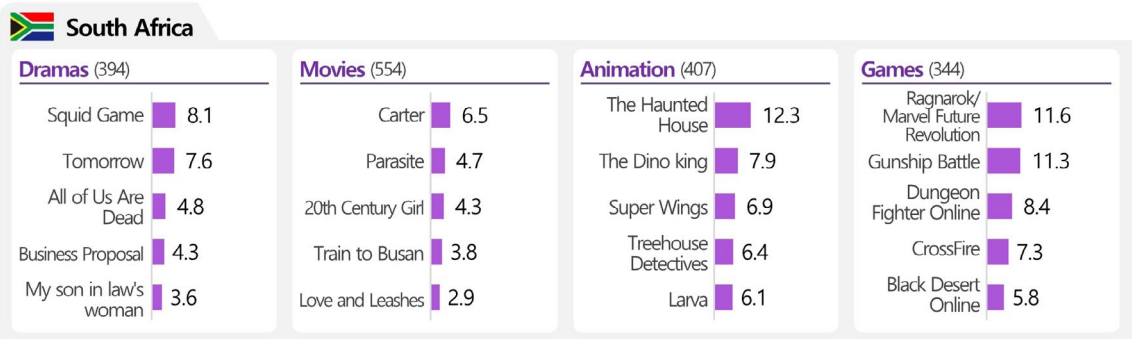
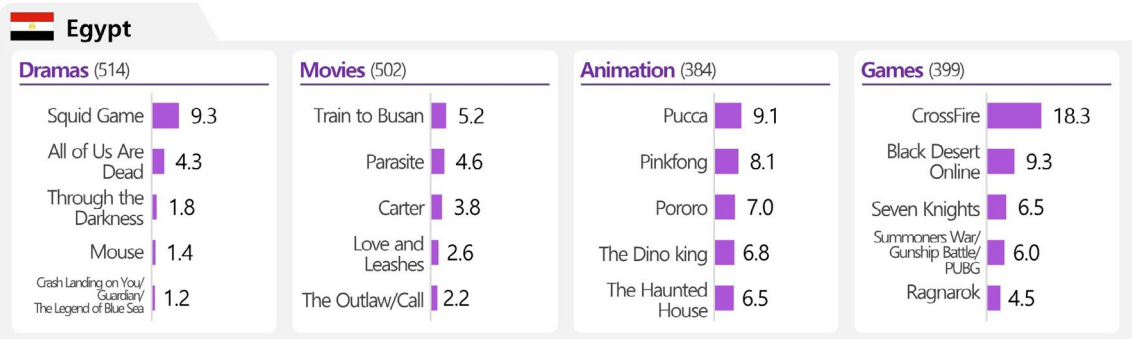
UAE



Saudi Arabia



Africa



13. Most Preferred Hallyu Stars

Actor Lee Min-ho (9.1%) secured the top spot, maintaining his position as the most favored actor for five consecutive years since 2018. Although rankings changed, actors including Gong Yoo (2.7%), Hyun Bin (2.4%), and Song Hye-Kyo (2.0%) remained in the top spots.

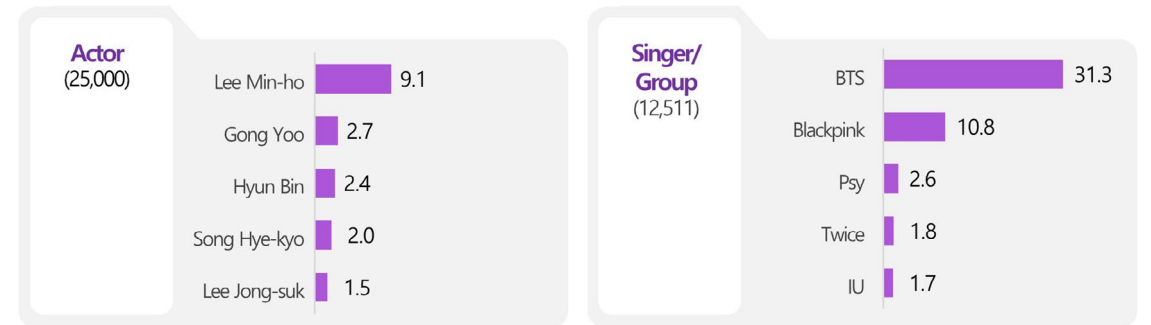
BTS (31.3%) was identified as the most favored musical group. Like the actors, they have maintained the top spot for five years. Following BTS, BLACKPINK (10.8%), PSY (2.6%), and TWICE (1.8%) were also in the top rankings.

Lee Min-ho gained phenomenal popularity in China through his roles in "Boys Over Flowers" in 2009 and "City Hunter" in 2011. He continued his fame in Asia, including the Philippines and Taiwan, with subsequent roles in "The Heirs" in 2013 and "The Legend of the Blue Sea" in 2016. In 2020, he starred in "The King: Eternal Monarch," which gained international popularity via Netflix. The series maintained a top 10 position for 119 days in Malaysia, 116 days in Thailand, and remained in the top 10 in 28 countries for 124 days.⁶ In 2022, he starred in the Apple TV+ series "Pachinko," which received critical acclaim from various international media outlets. His consistent overseas popularity and active engagement with international fans through platforms such as Twitter and Facebook likely contributed to his position as the most favored actor.

⁶ KOFICE (2021). "2020 White Paper"

[Figure 2-24] Most Preferred Hallyu Stars

[BASE: Total (actors), Respondents who have experienced Korean music (singers/groups), n= (), unit: %]



Q. Who is your current favorite Korean actor? (Open-ended) / Q. Who is your current favorite Korean singer/group? (Open-ended)

Asia-Pacific

Lee Min-ho was ranked as the most favored actor in eight countries. Japan showed a difference, with Bae Yong-joon (7.2%) ranking first, and in Taiwan, Gong Yoo (9.3%) ranked first. The second to fifth positions varied by country.

BTS was the most favored musical group in seven countries. India had the highest response rate at 42.0%, followed by Indonesia, Australia, and Japan, each recording over 30.0%. In China, IU (6.7%) was the most favored, while in Thailand (35.1%) and Malaysia (28.9%), BLACKPINK ranked first.

Americas

The most preferred actor in the Americas across five countries is Lee Min-ho with a response rate of 5.3-9.1%. Following him, Song Hye-Kyo ranks second in North America, while Gong Yoo ranks second in Latin America. Others like Bae Suzy, Lee Jung-jae, and Hyun Bin ranked between third and fifth.

The most preferred singer/group in all countries within the Americas is BTS, with a high response rate of 36.7-49.9%, followed by BLACKPINK and PSY.

Europe

In Europe, except for France and Germany, Lee Min-ho is the most preferred actor in five countries. In France, Gong Yoo leads with a 7.1% response rate, while in Germany, Lee Jong-suk leads with a 1.8% response rate. The second to fifth spots vary by country but generally include Hyun Bin, Lee Jung-jae, and Bae Suzy.

The most preferred singer/group across all European countries is BTS. Notably, the response rate for BTS in Argentina was 49.9%, which is relatively high compared to other countries.

Across Europe, the response rates for Hallyu stars were lower than in other regions, suggesting lower interest in Hallyu as the number of responses was minimal.

Middle East

In the Middle East, the most preferred actor is Lee Min-ho (UAE 12.6%, Saudi Arabia 8.9%), followed by Hyun Bin (UAE 5.1%, and Saudi Arabia 4.2%). Rankings for third to fifth place vary by country.

The most preferred singer/group is BTS with a 39.1% response rate in UAE and 22.2% in Saudi Arabia. BLACKPINK is second, followed by various others such as IU and PSY in UAE and Stray Kids in Saudi Arabia.

Africa

In Africa, Lee Min-ho leads with a relatively high response rate of over 10%, followed by Hyun Bin and Ji Chang-wook.

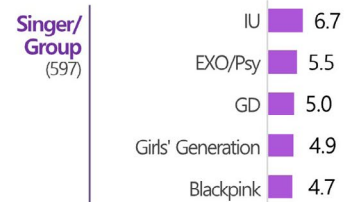
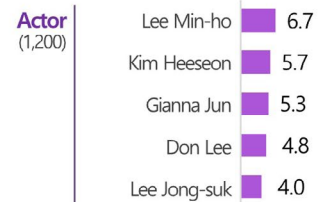
The most preferred singer/group in South Africa is BTS with 44.6% and in Egypt with 28.1%. BLACKPINK ranks second, followed by various others including PSY and IU in South Africa and SUPER JUNIOR in Egypt.

[Figure 2-25] Most Preferred Hallyu Stars by Country

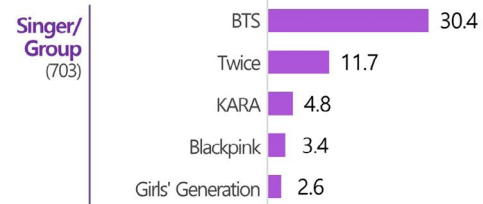
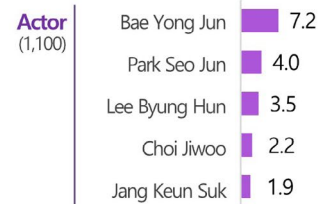
[BASE: Experienced respondents by Korean cultural content, n = (), unit: %]

Asia-Pacific

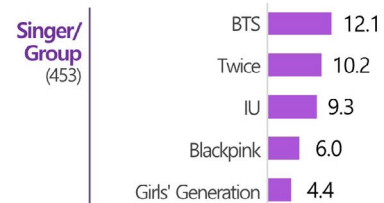
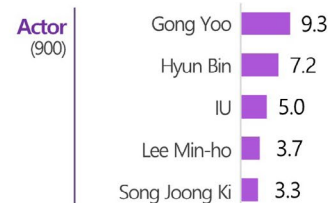
China



Japan



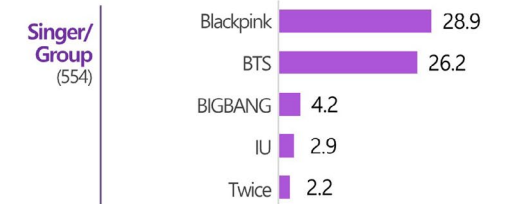
Taiwan



Thailand



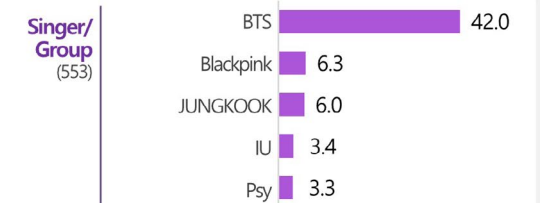
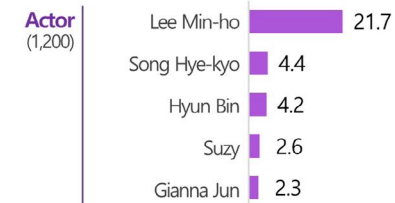
Malaysia



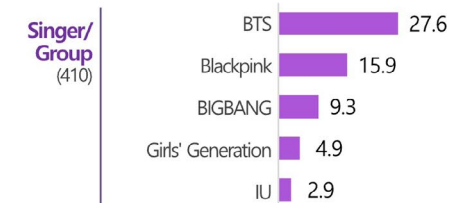
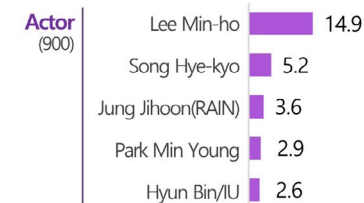
Indonesia



India



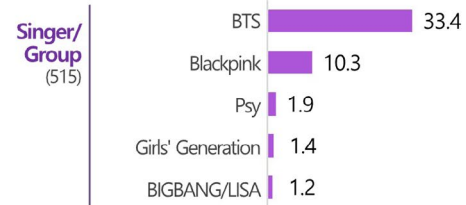
Vietnam



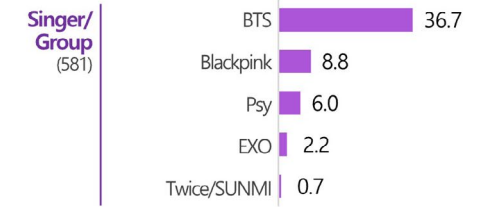
Kazakhstan



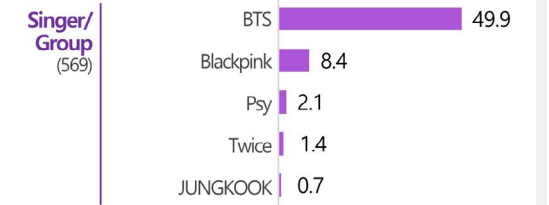
Australia



Brazil

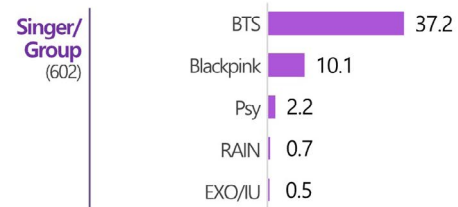


Argentina



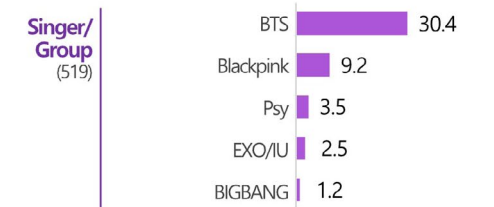
America

US

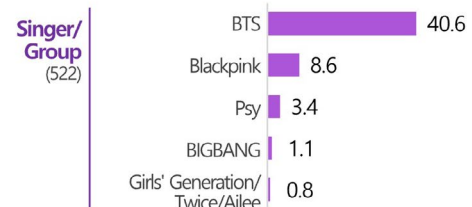


Europe

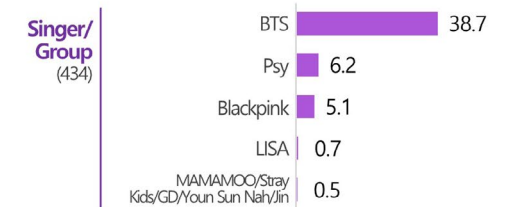
UK



Canada



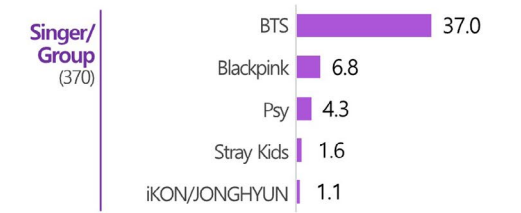
France

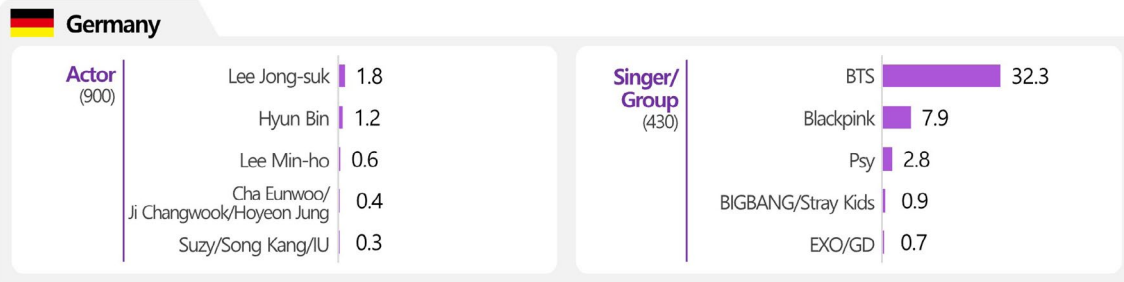
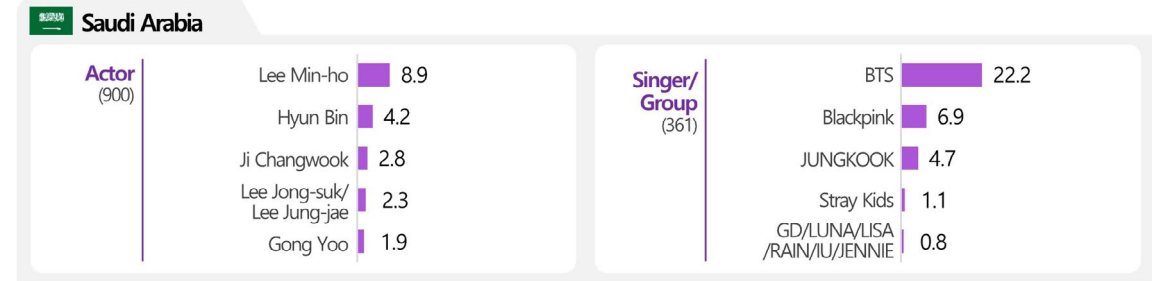
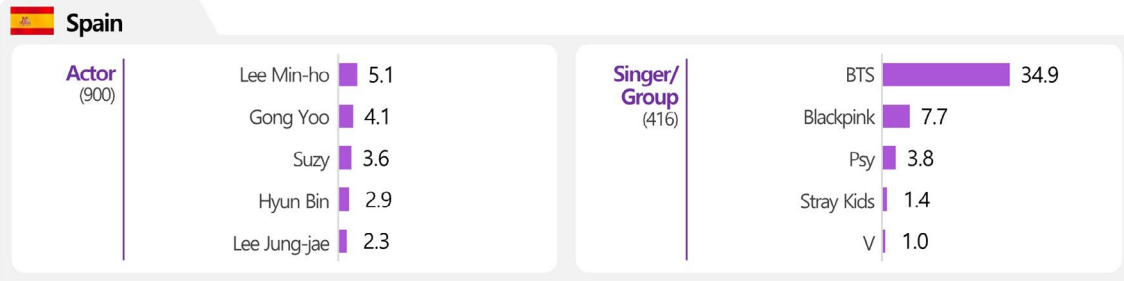


Mexico

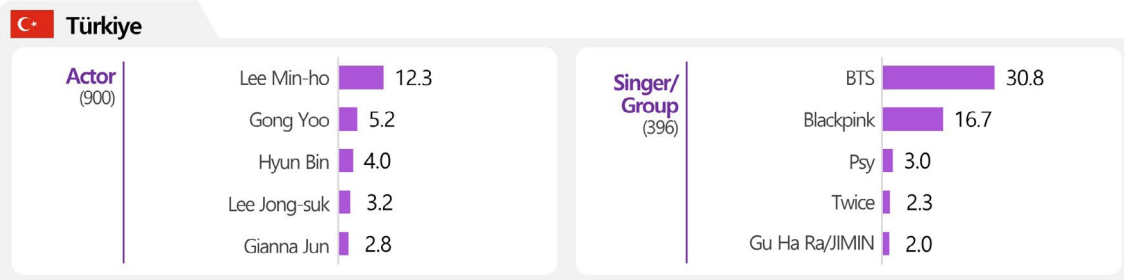
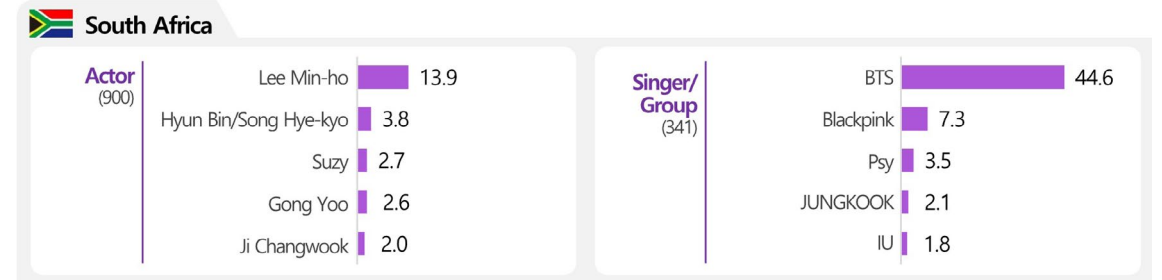
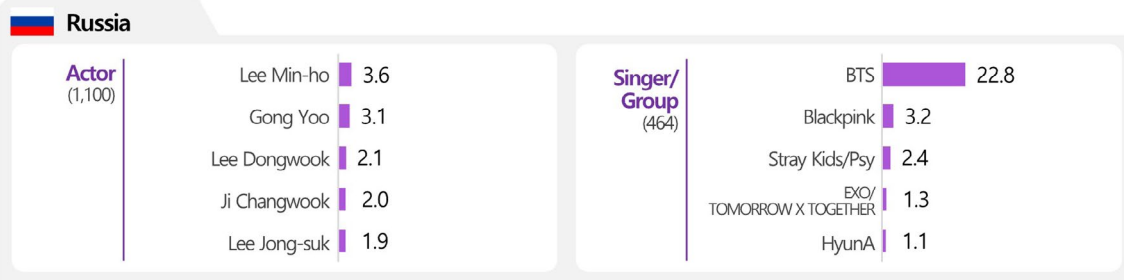
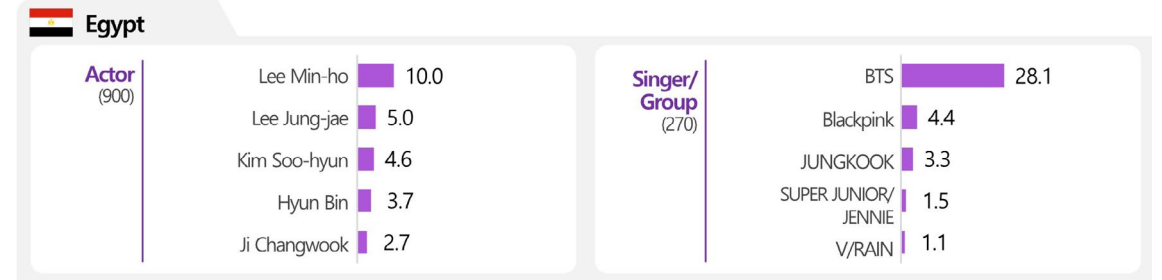


Italy

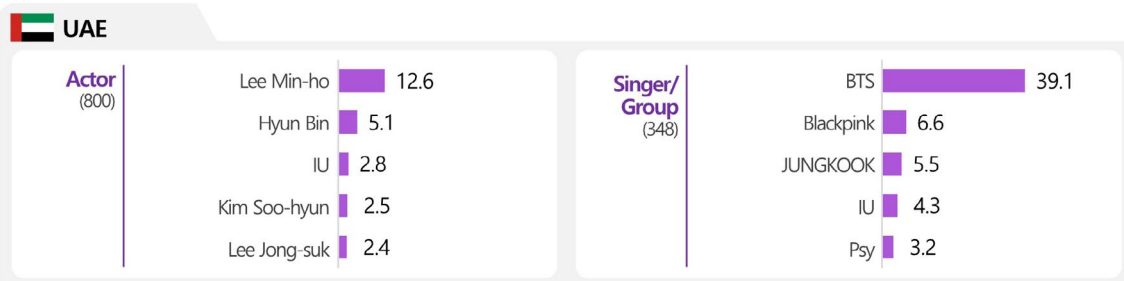




Africa



Middle East

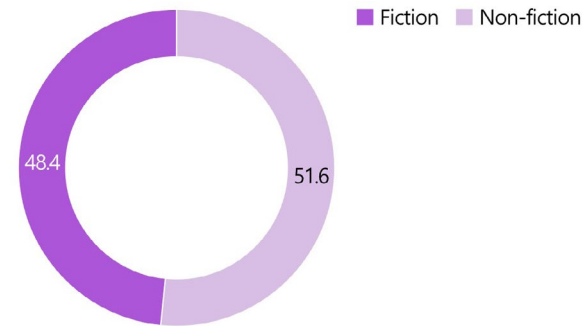


14. Proportion of Fiction and Non-fiction Publications

Among publications, the proportion of fiction was 51.6%, while non-fiction was 48.4%. Countries with high fiction usage include Russia (60.2%), Japan (56.5%), and Italy (54.8%). Countries with high non-fiction usage include Türkiye (53.2%), Taiwan (52.1%), and Saudi Arabia (51.3%).

[Figure 2-26] Proportion of Fiction and Non-fiction Publications

[BASE: Respondents who have experienced publications, n=6,696, unit: %]



Q. Among the Korean publications you normally consume, what is the proportion (based on volume) of fiction and non-fiction?

[Table 2-16] Proportion of Fiction and Non-fiction Publications

[BASE: Respondents who have experienced publications, n= (), unit: %]

Region	Country	Number of cases	Fiction	Nonfiction
Total		(6,696)	51.6	48.4
Asia-Pacific	China	(432)	50.3	49.7
	Japan	(135)	56.5	43.5
	Taiwan	(304)	47.9	52.1
	Thailand	(366)	50.8	49.2
	Malaysia	(235)	49.7	50.3
	Indonesia	(424)	52.0	48.0
	India	(435)	51.6	48.4
	Vietnam	(323)	51.8	48.2
	Kazakhstan*	(124)	54.6	45.4
	Australia	(197)	51.2	48.8
Americas	US	(197)	53.5	46.5
	Canada*	(176)	53.0	47.0
	Mexico*	(359)	53.7	46.3
	Brazil	(325)	52.1	47.9
	Argentina	(190)	52.7	47.3
Europe	UK	(168)	54.0	46.0
	France	(219)	49.3	50.7
	Italy*	(214)	54.8	45.2
	Spain*	(228)	49.6	50.4
	Germany*	(174)	50.3	49.7
	Russia*	(208)	60.2	39.8
	Türkiye	(249)	46.8	53.2
	UAE	(293)	51.3	48.7
Middle East	Saudi Arabia*	(286)	48.7	51.3
	Egypt*	(243)	49.7	50.3
Africa	South Africa	(192)	52.7	47.3

15. Popular Cultural Content by Country

Excluding animation and food, Korea ranks either first or second in popularity for various types of cultural content. The most popular Korean contents are dramas (38.0%), variety shows (33.8%), beauty (30.5%), and webtoons (26.6%). The contents that ranked second include movies (21.4%), music (23.7%), publications (22.4%), games (21.0%), and fashion (23.4%). For animation (19.5%) and food (14.7%), Korea ranks third.

Notably, in the category of beauty, the gap between Korea (30.5%) and the next most popular, the United States (19.8%), is 10.7 percentage points, indicating strong content competitiveness.

[Figure 2-27] Popularity of Cultural Content by Country

[BASE: Experienced respondents by Korean cultural content, n= (), unit: %]



Q. What foreign cultural content is popular in your country? Please select three in order of popularity.

16. Interest in Korean Cultural Content

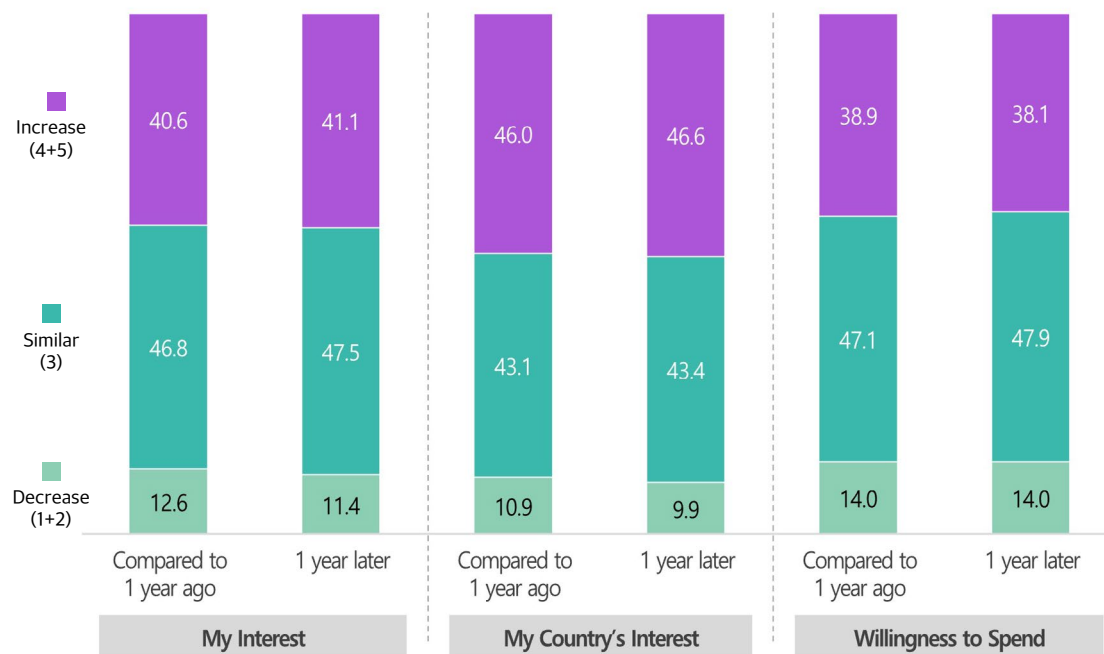
Interest in Korean cultural content appears to have remained stable when compared to the previous year, and it is expected to continue similarly over the next year, as indicated by nearly 50% of respondents. The proportion of those reporting an “increased” interest compared to a year ago is approximately the same as those who anticipate an “increase” in the coming year. Moreover, the inclination to spend showed minimal difference compared to a year ago and is anticipated to show minimal change in the rates of “similar” and “increased” responses in the year ahead. This suggests that a significant event or blockbuster production may be essential to boost interest.

The rate of “increased” interest among nationals is approximately 5 percentage points higher than one’s interest, indicating that individuals perceive a greater interest among others.

Countries with the highest rate of “increased” responses include Indonesia, India, Vietnam, and UAE, while the lower-ranking countries include Japan, Kazakhstan, Italy, Germany, and Russia.

[Figure 2-28] Interest in Korean Cultural Content

[BASE: Total, n=25,000, unit: %]



[Table 2-17] Interest in Korean Cultural Content by Country

[BASE: Total, n=(), unit: Increase (4+5) %]

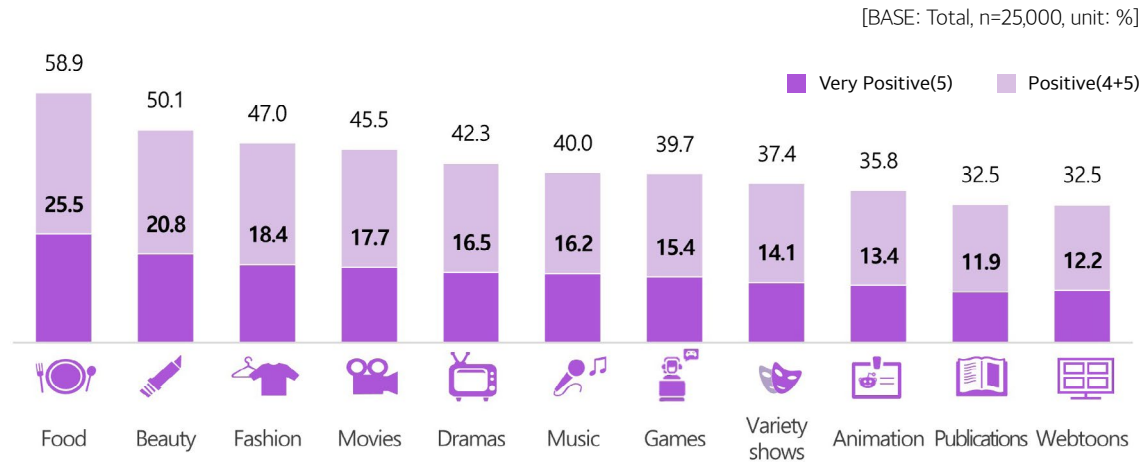
Region	Country	Number of cases	My Interest		My Country's Interest		Willingness to Pay	
			Compared to 1 year ago	1 year later	Compared to 1 year ago	1 year later	Compared to 1 year ago	1 year later
Total		(25,000)	40.6	41.1	46.0	46.6	38.9	38.1
Asia-Pacific	China	(1,200)	45.9	42.2	43.6	48.8	45.3	46.4
	Japan	(1,100)	20.5	15.2	21.2	18.5	16.6	14.4
	Taiwan	(900)	34.3	31.1	39.2	39.8	33.9	33.3
	Thailand	(900)	51.9	56.3	58.9	58.6	52.0	53.7
	Malaysia	(900)	51.6	52.0	59.0	59.0	47.4	46.7
	Indonesia	(1,100)	51.9	54.6	65.8	66.5	49.5	49.2
	India	(1,200)	67.5	65.1	68.3	67.1	64.1	64.3
	Vietnam	(900)	55.1	61.1	60.8	61.8	56.4	58.1
	Kazakhstan*	(800)	20.4	22.6	31.9	31.0	22.5	22.4
	Australia	(900)	31.2	31.0	35.3	40.4	36.6	32.1
Americas	US	(1,100)	32.6	29.9	39.6	38.8	30.0	28.6
	Canada*	(900)	32.3	27.1	35.4	34.1	29.1	25.9
	Mexico*	(1,100)	44.5	46.6	54.7	52.9	43.3	43.1
	Brazil	(1,100)	50.0	52.7	58.8	57.8	43.5	44.6
	Argentina	(900)	38.0	41.8	53.7	51.8	32.7	33.3
Europe	UK	(900)	35.6	32.2	39.4	37.1	33.1	30.7
	France	(900)	26.1	26.6	29.0	31.3	22.9	21.6
	Italy*	(900)	26.9	24.7	36.4	30.8	23.6	19.4
	Spain*	(900)	31.1	29.8	37.7	37.0	28.3	25.7
	Germany*	(900)	23.1	22.2	25.0	27.2	23.6	20.2
	Russia*	(1,100)	19.8	21.0	23.6	24.9	19.9	18.2
Middle East	Türkiye	(900)	54.1	57.4	59.4	64.1	50.4	50.2
	UAE	(800)	63.6	64.0	64.8	66.4	63.4	63.4
Africa	Saudi Arabia*	(900)	50.1	54.2	52.7	55.4	51.8	49.7
	Egypt*	(900)	47.8	54.3	52.8	56.3	46.0	47.6
	South Africa	(900)	45.7	50.2	46.3	52.3	43.1	44.7

17. Willingness to Pay for Korean Cultural Content

The willingness to pay is highest for food at 58.9%, followed by beauty consumer goods (50.1%) and fashion (47.0%). Webtoons and publications (32.5%) and animations (35.8%) showed a lower willingness to pay.

Countries showing a highly positive response to willingness to pay are Thailand, Indonesia, India, Vietnam, UAE, and South Africa, while lower-ranking countries include Japan, Kazakhstan, Brazil, Italy, Germany, and Russia.

[Figure 2-29] Willingness to Pay for Korean Cultural Content



Q. Please respond to the following items to indicate your willingness to pay for Korean cultural content in the future.
(1. Strongly disagree /2. Disagree /3. Neutral /4. Agree /5. Strongly Agree)

[Table 2-18] Willingness to Pay for Korean Cultural Content by Country

[BASE: Total, n=(), unit: Positive (4+5) %]

Region	Country	Number of cases	Food	Beauty	Fashion	Movies	Dramas	Music	Games	Variety shows	Animation	Publication	Webtoons
Total			58.9	50.1	47.0	45.5	42.3	40.0	39.7	37.4	35.8	32.5	32.5
Asia-Pacific	China	(1,200)	58.6	57.6	55.3	54.3	50.8	47.7	49.3	47.8	42.2	40.6	41.8
	Japan	(1,100)	42.4	26.8	24.9	21.6	21.3	21.9	14.1	12.3	10.3	10.7	11.1
	Taiwan	(900)	62.9	49.7	47.0	50.8	43.4	35.9	35.2	34.6	27.2	25.0	30.7
	Thailand	(900)	73.4	68.7	68.6	67.0	64.4	61.1	51.2	56.6	52.6	45.3	51.4
	Malaysia	(900)	69.8	59.3	56.7	53.6	51.0	45.4	30.8	42.2	28.9	25.6	28.1
	Indonesia	(1,100)	77.0	69.2	66.4	64.4	62.2	59.0	40.7	52.3	42.3	38.0	42.9
	India	(1,200)	70.9	71.2	71.9	70.5	69.3	64.7	63.6	67.1	61.5	56.8	54.9
	Vietnam	(900)	78.3	74.7	74.4	65.8	63.9	62.2	57.4	57.1	51.4	51.8	51.0
	Kazakhstan*	(800)	67.0	57.9	34.5	23.0	19.6	16.1	17.9	13.0	16.1	15.4	12.8
Australia	(900)	60.7	41.1	38.3	35.2	31.7	34.3	33.9	32.8	29.0	27.4	28.1	
Americas	US	(1,100)	62.0	37.7	36.7	34.0	27.6	35.2	35.0	28.1	30.6	27.8	25.1
	Canada*	(900)	61.4	38.6	35.8	31.4	28.0	27.3	30.7	27.1	24.3	23.2	22.3
	Mexico*	(1,100)	55.5	50.8	50.0	46.9	44.5	45.7	44.0	38.0	38.8	35.5	37.9
	Brazil	(1,100)	43.0	56.5	53.9	58.1	56.4	48.6	53.7	49.1	50.7	41.6	39.1
	Argentina	(900)	55.3	40.4	40.4	39.1	29.8	37.6	36.0	28.4	30.9	27.0	26.0
Europe	UK	(900)	54.2	37.0	35.7	34.4	31.0	34.0	33.3	28.9	27.7	26.6	24.8
	France	(900)	51.9	36.2	31.9	33.1	30.6	29.3	33.2	24.8	27.4	26.8	26.3
	Italy*	(900)	35.1	24.8	22.2	25.3	27.3	20.1	27.1	17.9	22.2	19.3	16.6
	Spain*	(900)	44.7	35.7	30.6	36.8	27.0	30.7	32.8	25.8	30.9	25.3	25.0
	Germany*	(900)	51.3	28.3	26.3	27.2	21.9	26.2	27.4	22.4	24.3	21.4	19.1
	Russia*	(1,100)	56.2	48.9	28.7	19.4	18.4	14.0	19.5	13.9	15.5	15.8	11.3
	Türkiye	(900)	56.1	57.7	54.2	61.6	60.9	48.8	56.1	47.2	49.4	45.3	48.9
Middle East	UAE	(800)	68.1	69.3	66.8	64.1	64.6	59.6	60.5	62.4	55.6	52.5	51.9
	Saudi Arabia*	(900)	57.9	60.0	59.1	55.8	51.6	47.4	50.4	52.0	48.4	44.3	44.0
Africa	Egypt*	(900)	56.2	52.1	50.2	53.1	51.1	40.7	49.1	43.6	45.7	40.2	37.9
	South Africa	(900)	62.1	49.7	55.2	52.3	44.2	37.7	44.9	41.8	42.3	30.3	30.6

18. Willingness to Recommend Korean Cultural Content

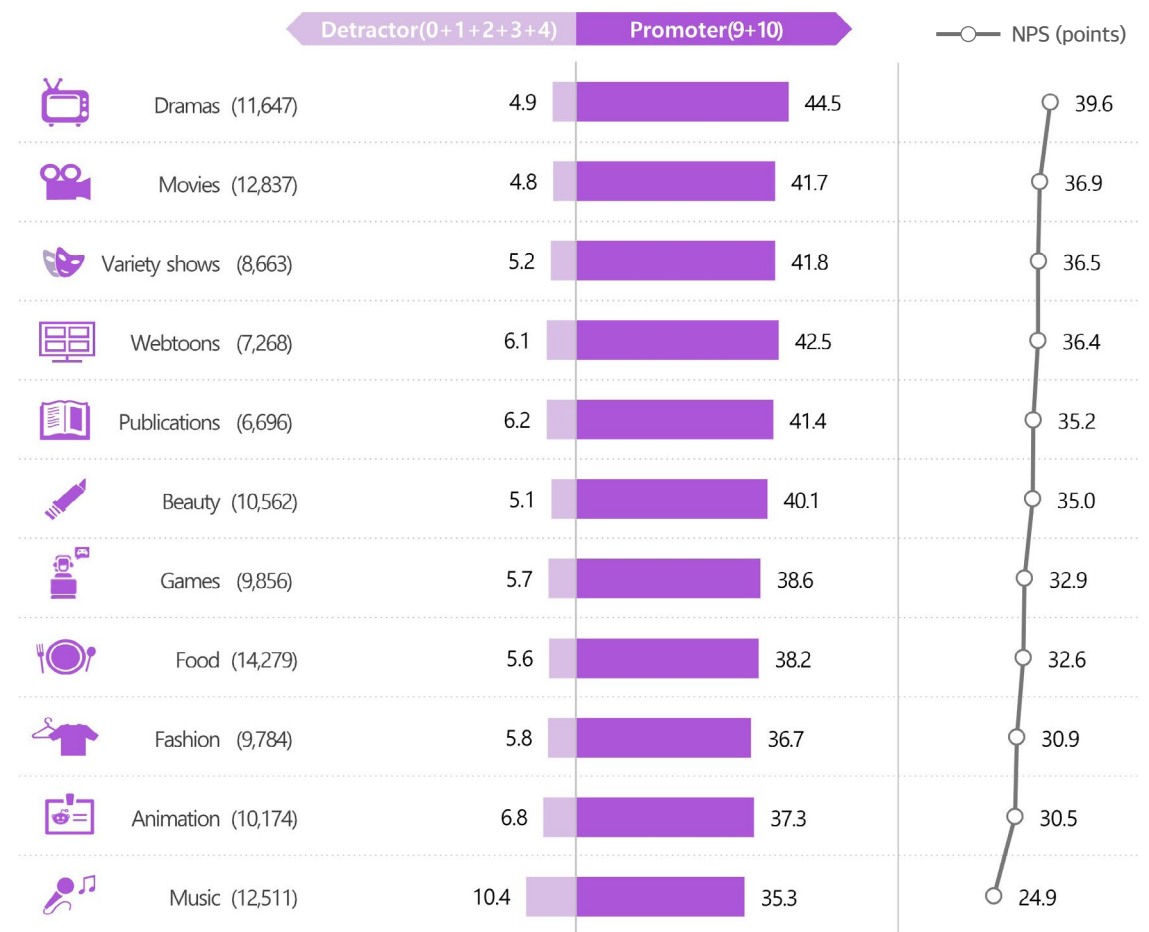
The Net Promoter Score (NPS) for Korean cultural contents is highest for dramas at 39.6 points, followed by movies (36.9), variety shows (36.5), and webtoons (36.4). Music scored the lowest NPS at 24.9 points, followed by animation (30.5) and fashion (30.9), which also scored lower than other Korean cultural contents.

A higher NPS indicates a greater likelihood of recommending to others, suggesting that dramas, movies, and variety shows are more likely to expand their user base in the future. Conversely, music, animation, and fashion have a lower potential for new user acquisition; however, this cannot be ruled out if globally, influential works emerge.

Regionally, the Middle East and Africa show NPS scores ranging from the high 30s to 40s, with each region recording first place in six and four types of content, respectively. Conversely, the Americas and Europe displayed relatively lower scores, ranging from the 30s to 40s, and even in the teens to 20s, respectively. Countries with high NPS rankings include Thailand, Indonesia, India, Vietnam, Brazil, and Türkiye. Concurrently, lower-ranking countries comprise Japan, Taiwan, Kazakhstan, the United Kingdom, France, Italy, Spain, and Germany.

[Figure 2-30] Willingness to Recommend Korean Cultural Content

[BASE: Experienced respondents by Korean cultural content, n=(), unit: %, points]



Q. Are you willing to recommend Korean cultural content to others? (0. Definitely Not Recommend/2-4. Not Recommend/5. Neutral/6-9. Recommend/10. Strongly Recommend)

Asia-Pacific

Thailand, Indonesia, and India displayed high NPS scores ranging from the 40s to 50s. Thailand showed extremely high NPS scores for music (60.1) and dramas (57.7), while India showed the same for publications (63.2) and dramas (62.8). Additionally, India (61.5), Thailand (60.1), and Vietnam (58.0) showed high NPS scores for music, a genre with divided opinions. Concurrently, Japan had the lowest NPS scores, ranging from -13.4 (fashion) to 9.5 (webtoons). Respondents from Kazakhstan particularly discouraged publications (5.6) and music (9.5).

Americas

The NPS for Hallyu in the Americas varies significantly by country. Brazil and Mexico exhibit relatively high NPS scores, while the United States and Canada lag. Notably, Brazil exhibits the highest NPS, surpassing 50 in all content categories except for music. Although in music, Brazil maintains a respectable NPS of 44.8, outperforming other countries in the region. Conversely, Canada records notably low scores in music (5.6), fashion and animation (12.5), variety shows (18.8), and games (19.6). Similarly, the US demonstrates lower scores in the teens for music (7.3), animation (13.9), and fashion (16.2), suggesting that short-term growth in these content categories is unlikely in North America.

Europe

Except for Türkiye, European countries generally have NPS scores below 30. Particularly, Germany has extremely low scores, ranging from -0.7 (music) to 22.8 (food). Drama, movies, and variety shows have relatively high NPS scores, while music, animation, and fashion are low.

Conversely, Türkiye shows high NPS scores, with a minimum of 34.4 for food and a maximum of 52.3 for dramas, indicating that attracting new users to Korean cultural content is comparatively easier in Türkiye than in Europe.

Middle East

The Middle East typically shows NPS scores ranging from the 30s to 40s, with the UAE scoring highest in variety shows at 49.1. Both the UAE and Saudi Arabia demonstrate relatively high NPS scores for dramas and movies. Additionally, the UAE also scores high for games (46.6), publications (46.1), and food (46.1).

Africa

Generally, African countries show slightly above-average NPS scores ranging from the 30s to 50s, with South Africa scoring highest for dramas at 54.3. Excluding dramas and music, Egypt generally has higher NPS scores than South Africa, particularly in publications (48.6), music (46.3), and movies (45.6). Conversely, South Africa shows high NPS scores for dramas and movies, but lower scores for beauty (32.8) and publications (33.9).

[Table 2-19] Net Promoter Score of Korean Cultural Content by Country

[BASE: Experienced respondents by Korean cultural content, n = different by floor / refer to the survey summary, unit: Points]

Region	Country	Dramas	Movies	Variety shows	Webtoons	Publications	Beauty	Games	Food	Fashion	Animations	Music
Total		39.6	36.9	36.5	36.4	35.2	35.0	32.9	32.6	30.9	30.5	24.9
Asia-Pacific	China	33.5	25.3	29.1	27.6	34.7	29.5	39.0	23.6	30.1	32.3	30.5
	Japan	-5.2	-6.2	-6.6	9.5	-7.4	1.5	0.5	0.5	-13.4	-8.1	-8.4
	Taiwan	22.0	21.4	18.9	23.3	17.8	15.6	24.9	19.9	18.2	14.7	21.0
	Thailand	57.7	54.3	52.3	48.9	51.6	49.8	52.5	50.5	44.2	55.6	60.1
	Malaysia	46.9	49.3	40.2	38.1	33.2	40.1	36.7	38.2	28.5	39.7	41.3
	Indonesia	51.2	49.0	48.7	43.6	44.1	46.8	49.6	44.6	42.4	51.2	42.9
	India	62.8	58.4	53.5	57.1	63.2	53.8	57.0	55.1	51.6	51.2	61.5
	Vietnam	52.3	51.8	47.2	55.9	40.6	54.8	45.5	53.8	48.2	47.9	58.0
	Kazakhstan*	26.7	28.9	24.3	30.1	5.6	42.8	19.1	42.7	30.7	14.7	9.5
Australia	29.0	23.0	27.1	36.1	29.4	20.1	26.3	26.1	22.1	16.5	3.7	
Americas	US	40.6	32.6	35.4	26.8	34.5	24.1	24.3	30.4	16.2	13.9	7.3
	Canada*	31.4	24.7	18.8	24.6	25.6	22.5	19.6	31.0	12.5	12.5	5.6
	Mexico*	52.5	47.7	47.3	38.9	41.2	47.7	40.3	49.6	45.2	41.6	38.1
	Brazil	66.1	58.2	58.9	59.6	54.5	57.5	56.5	52.0	55.1	53.6	44.8
	Argentina	43.4	37.8	35.7	37.4	28.4	31.2	35.5	28.9	26.0	21.4	20.9
Europe	UK	29.7	25.6	19.3	24.7	24.4	25.7	13.5	22.9	18.6	9.6	-0.6
	France	17.9	22.4	14.8	25.6	19.2	22.3	15.2	26.5	21.2	14.1	4.8
	Italy*	21.1	15.4	10.6	19.4	16.4	19.1	8.7	15.2	7.9	10.9	5.9
	Spain*	25.4	19.2	21.3	13.3	13.6	22.6	13.8	21.1	11.6	13.3	9.6
	Germany*	14.8	12.2	14.4	10.1	5.2	7.9	8.6	22.8	3.2	1.9	-0.7
	Russia*	27.0	22.1	20.5	33.6	19.2	29.1	15.0	26.0	17.8	13.7	3.2
	Türkiye	52.3	50.8	50.9	40.7	44.6	47.4	41.1	34.4	50.6	45.2	44.7
Middle East	UAE	47.7	48.2	49.1	36.4	46.1	40.7	46.6	46.1	41.4	41.7	43.4
	Saudi Arabia*	46.4	45.0	42.7	37.3	41.3	39.6	32.9	36.2	34.7	36.1	35.2
Africa	Egypt*	48.1	45.6	44.8	39.9	48.6	42.5	41.6	34.7	40.7	41.4	46.3
	South Africa	54.3	45.5	38.2	39.9	33.9	32.8	37.2	38.9	36.5	34.9	36.4

Section 4: Hallyu Ripple Effects

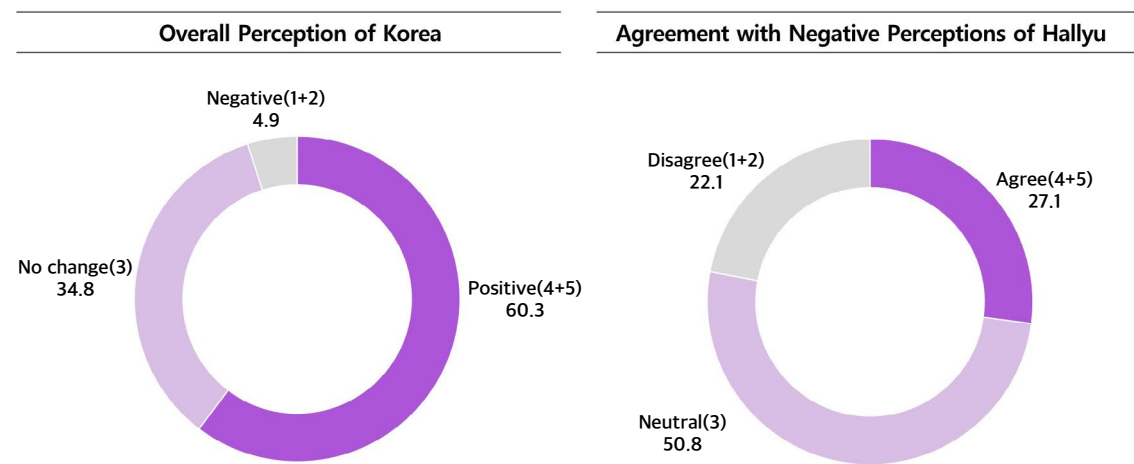
1. Change in Perception after Experiencing Korean Cultural Content

Among all the survey participants, 60.3% reported a positive shift in their overall perception of Korea after experiencing Korean cultural content. The rate of positive change significantly outweighs the negative (4.9%), although “No Change” makes up 34.8%. Notably, the countries showing the most positive impact include Vietnam (85.0%), India (84.3%), and the UAE (81.6%). Concurrently, the countries showing the most negative impact are China (12.3%), Germany (8.4%), and Spain (8.0%).

Regarding the negative perceptions of the Korean Wave, 27.1% responded ‘agree’ and 22.1% responded ‘disagree’. The top three countries concerning agreement with negative perceptions are the UAE (49.8%), Vietnam (47.8%), and India (46.0%). Conversely, the top three countries for disagreement include Argentina (34.0%), Türkiye (33.6%), and Brazil (32.4%). Notably, the UAE, Vietnam, and India, despite having the highest rates of positive perception after experiencing Korean content also show the highest rates of agreement with negative perceptions of Hallyu. These countries should be closely monitored for these changing perceptions.

[Figure 2-31] Change in Perception and Agreement with Negative Perceptions after Experiencing Korean Cultural Content

[BASE: Total, n=25,000, unit: %]



- Q. After experiencing Korean cultural content, how has your overall perception of Korea changed? (1. Very negatively / 2. Somewhat negatively / 3. No change / 4. Somewhat positively / 5. Very positively)
- Q. Recently, negative perceptions of Hallyu have been emerging in some countries. How much do you agree with these negative perceptions? (1. Strongly Disagree / 2. Disagree / 3. Neutral / 4. Agree / 5. Strongly Agree)

[Table 2-20] Change in Perception and Agreement with Negative Perceptions after Experiencing Korean Cultural Content by Country

[BASE: Total, n=, unit: %]

Region	Country	Number of cases	Overall Perception of South Korea			Degree of Agreement with Negative Perceptions of Hallyu		
			Negative (1+2)	No change (3)	Positive (4+5)	Negative (1+2)	No change (3)	Positive (4+5)
Total		(25,000)	4.9	34.8	60.3	22.1	50.8	27.1
Asia-Pacific	China	(1,200)	12.3	29.8	58.0	15.3	42.2	42.6
	Japan	(1,100)	5.6	64.4	30.0	20.5	54.0	25.5
	Taiwan	(900)	3.6	38.7	57.8	11.1	63.6	25.3
	Thailand	(900)	3.0	19.7	77.3	10.7	49.3	40.0
	Malaysia	(900)	2.9	27.6	69.6	19.0	51.0	30.0
	Indonesia	(1,100)	2.1	23.2	74.7	21.2	50.0	28.8
	India	(1,200)	2.7	13.1	84.3	18.7	35.3	46.0
	Vietnam	(900)	1.8	13.2	85.0	15.8	36.4	47.8
	Kazakhstan*	(800)	4.9	47.4	47.8	24.9	65.8	9.4
	Australia	(900)	5.3	43.2	51.4	19.1	49.9	31.0
Americas	US	(1,100)	4.5	48.4	47.1	27.6	53.6	18.7
	Canada*	(900)	5.1	45.6	49.3	29.3	50.0	20.7
	Mexico*	(1,100)	5.2	28.5	66.3	25.0	53.5	21.5
	Brazil	(1,100)	2.9	22.3	74.8	32.4	48.9	18.7
	Argentina	(900)	4.9	32.2	62.9	34.0	51.1	14.9
Europe	UK	(900)	7.3	45.9	46.8	22.9	53.9	23.2
	France	(900)	6.2	49.7	44.1	24.3	52.3	23.3
	Italy*	(900)	5.2	51.6	43.2	23.8	57.0	19.2
	Spain*	(900)	8.0	43.0	49.0	24.2	55.8	20.0
	Germany*	(900)	8.4	46.7	44.9	22.3	53.6	24.1
	Russia*	(1,100)	5.7	53.4	40.9	21.7	68.2	10.1
Middle East	Türkiye	(900)	5.1	23.0	71.9	33.6	37.7	28.8
	UAE	(800)	2.6	15.8	81.6	15.9	34.4	49.8
Africa	Saudi Arabia*	(900)	5.9	22.0	72.1	16.4	46.2	37.3
	Egypt*	(900)	3.1	25.3	71.6	19.6	51.3	29.1
	South Africa	(900)	2.6	31.9	65.6	23.7	58.8	17.6

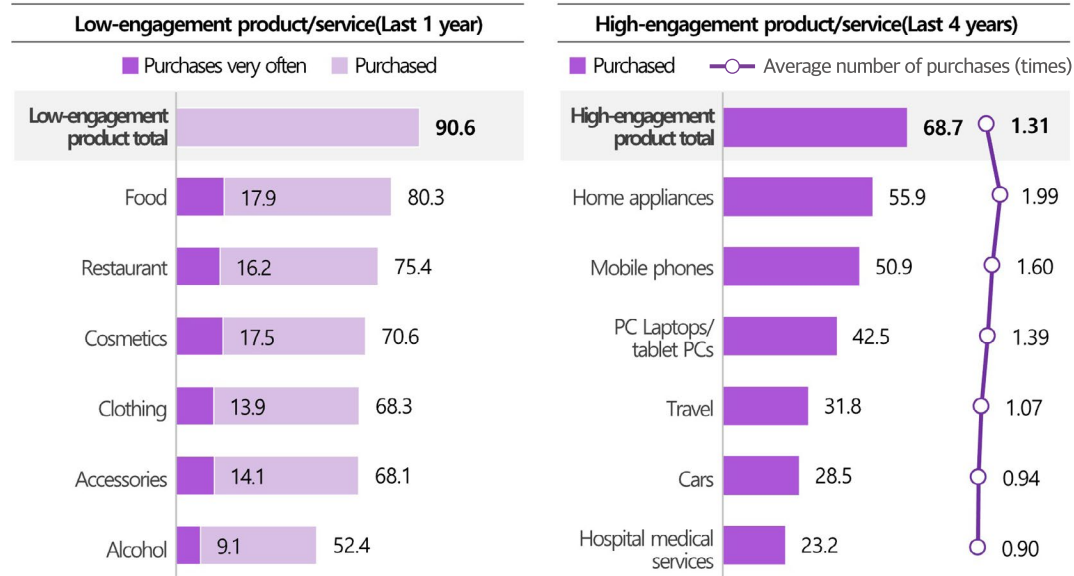
2. Experience in Purchasing Korean Products/Services

The rate of experience in purchasing low-engagement Korean products/services is 90.6%. The experience of purchasing low-engagement products/services is prevalent in “food” (80.3%), followed by “restaurants” (75.4%), “cosmetics” (70.6%), and “clothing” (68.3%). The countries with the highest rate of experience by category are China, Taiwan, Thailand, Malaysia, India, Vietnam, and the UAE; except for the Middle Eastern UAE, all these countries are in Asia-Pacific. Conversely, countries with the lowest rate of experience are Japan, Kazakhstan, the United States, Brazil, Argentina, Italy, and Russia.

The rate of experience in purchasing high-engagement products is 68.7%. For products/services, “home appliances” (55.9%), “mobile phones” (50.9%), and “laptops/tablets” (42.5%) are predominantly purchased. The frequency of purchase is also highest for home appliances at 1.99 times, followed by mobile phones at 1.60 times, and laptops/tablets at 1.39 times. The countries with the highest rate of experience by category are China, India, Vietnam, the UAE, Saudi Arabia, and Egypt, which are primarily in Asia-Pacific and the Middle East. The countries with the lowest rate are Japan, Kazakhstan, Canada, Argentina, Italy, and Russia, primarily in the Americas and Europe.

[Figure 2-32] Experience in Purchasing Korean Products/Services

[BASE: Total, n=25,000, unit: %, times]



Q. How often have you purchased Korean products in the last year? Please respond closest to your frequency of purchase.
 (1. No Purchase Experience / 2. Occasionally Purchase / 3. Regularly Purchase / 4. Often Purchase / 5. Purchase Very Often)
 Q. How often have you purchased or visited the following Korean products/services in the last four years?

[Table 2-21] Recent One-Year Purchase Rate of Low-Engagement Korean Products/Services by Country

[BASE: Total, n=(), unit: Purchase%]

Region	Country	Number of cases	Total	Food	Restaurants	Cosmetics	Clothing	Accessories	Alcohol
	Total	(25,000)	90.6	80.3	75.4	70.6	68.3	68.1	52.4
Asia-Pacific	Vietnam	(900)	99.9	98.2	97.2	97.3	97.3	95.2	92.0
	Thailand	(900)	98.2	91.3	91.1	89.1	88.9	84.9	79.9
	Malaysia	(900)	97.3	93.3	89.8	84.4	85.0	83.3	46.7
	Indonesia	(1,100)	97.3	92.5	89.1	84.7	86.3	83.8	41.3
	Taiwan	(900)	96.8	93.6	88.0	80.2	82.1	77.3	73.9
	China	(1,200)	96.8	87.0	87.1	87.4	82.8	81.5	76.6
	India	(1,200)	94.4	86.2	82.8	88.1	85.5	86.3	66.3
	Kazakhstan*	(800)	93.0	77.4	58.5	72.4	56.3	55.0	27.1
	Japan	(1,100)	90.8	84.1	53.0	57.1	52.3	45.0	46.1
	Australia	(900)	89.4	82.6	78.9	60.8	59.6	57.2	56.9
Americas	Mexico*	(1,100)	92.1	80.5	77.4	72.7	72.6	75.9	54.1
	Canada*	(900)	89.8	81.3	79.0	57.9	56.0	55.0	48.8
	US	(1,100)	86.5	78.5	74.3	51.8	52.6	53.3	43.9
	Brazil	(1,100)	83.5	66.5	65.6	64.8	63.5	66.3	50.5
	Argentina	(900)	79.9	60.0	59.9	49.8	47.0	53.4	36.7
Europe	Germany*	(900)	90.6	82.8	80.6	62.4	60.2	60.3	52.6
	Spain*	(900)	87.4	75.4	73.9	61.8	61.1	61.8	45.3
	Russia*	(1,100)	87.0	70.1	53.2	65.6	48.8	49.2	32.6
	Türkiye	(900)	85.0	69.7	66.4	72.1	62.6	69.1	48.2
	UK	(900)	83.3	76.7	68.4	55.3	54.4	56.0	49.2
	France	(900)	83.1	68.8	71.9	57.2	55.2	53.9	48.1
	Italy*	(900)	80.9	67.4	65.1	53.3	51.9	54.4	43.1
Middle East	UAE	(800)	97.6	90.0	88.5	90.3	88.8	90.0	68.1
	Saudi Arabia*	(900)	96.9	85.0	81.6	85.4	85.4	84.6	-
Africa	Egypt*	(900)	91.0	75.3	75.3	71.9	71.0	67.0	39.7
	South Africa	(900)	87.3	71.7	65.0	59.8	66.0	68.0	39.6

[Table 2-22] Average Purchase Frequency of High-Engagement Korean Products/Services Over the Last 4 Years by Country

[BASE: Total, n=(), unit: times]

Region	Country	Number of cases	Total	Home appliances	Mobile phones	Laptops/tablet PCs	Tourism	Cars	Hospital medical services
	Total	(25,000)	1.31	1.99	1.60	1.39	1.07	0.94	0.90
Asia-Pacific	India	(1,200)	2.29	3.12	2.69	2.46	1.86	1.73	1.89
	Thailand	(900)	1.54	2.61	1.69	1.34	1.54	1.08	0.97
	Australia	(900)	1.31	1.52	1.31	1.41	1.24	1.24	1.15
	Vietnam	(900)	1.15	2.04	1.38	0.98	1.10	0.65	0.73
	Malaysia	(900)	1.08	2.03	1.25	1.01	0.95	0.71	0.57
	Indonesia	(1,100)	1.03	2.21	1.60	0.93	0.65	0.38	0.42
	China	(1,200)	0.97	1.38	0.99	0.85	1.17	0.63	0.79
	Kazakhstan*	(800)	0.84	1.60	1.16	0.84	0.37	0.62	0.45
	Taiwan	(900)	0.79	1.24	1.08	0.63	0.95	0.46	0.37
	Japan	(1,100)	0.21	0.26	0.21	0.19	0.32	0.12	0.13
Americas	Brazil	(1,100)	1.13	1.83	1.30	1.16	0.99	0.80	0.68
	US	(1,100)	1.00	1.41	0.99	1.11	0.82	0.81	0.88
	Mexico*	(1,100)	0.94	1.59	1.20	1.11	0.64	0.56	0.52
	Argentina	(900)	0.87	1.65	1.08	1.02	0.62	0.46	0.36
	Canada*	(900)	0.85	1.11	0.85	0.86	0.77	0.90	0.60
Europe	Italy*	(900)	3.89	5.81	5.74	4.90	2.86	2.22	1.83
	Germany*	(900)	2.46	3.04	3.20	2.82	1.84	2.06	1.80
	UK	(900)	1.41	1.63	1.49	1.38	1.42	1.15	1.37
	Türkiye	(900)	1.35	1.70	1.57	1.81	0.99	1.07	0.94
	Spain*	(900)	1.00	1.46	1.13	1.10	0.79	0.84	0.69
	France	(900)	0.69	1.08	0.90	0.69	0.47	0.52	0.49
	Russia*	(1,100)	0.68	1.20	0.89	0.63	0.43	0.45	0.45
Middle East	UAE	(800)	2.69	3.89	3.17	2.77	2.17	2.01	2.11
	Saudi Arabia*	(900)	1.80	2.98	1.85	1.77	1.29	1.51	1.42
Africa	Egypt*	(900)	1.74	2.53	2.17	1.79	1.27	1.35	1.36
	South Africa	(900)	0.98	1.57	1.37	1.11	0.61	0.63	0.59

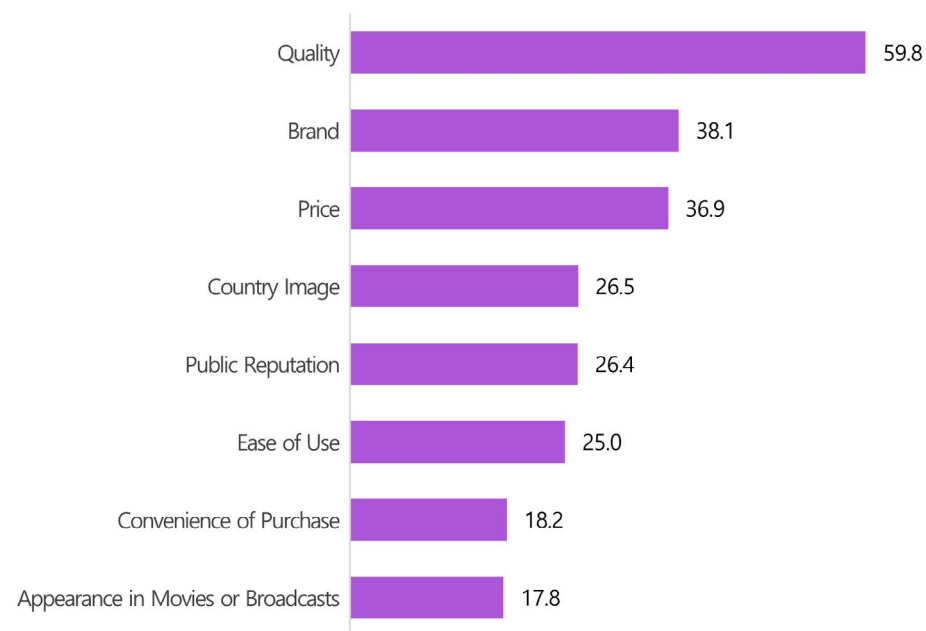
3. Reasons for Purchasing Korean Brands/Products

The primary reason for purchasing Korean brands/products is “quality,” reported by 59.8% of respondents. This is followed by “brand” (38.1%) and “price” (36.9%). “Appearance in movies or broadcasts” ranked the lowest at 17.8%; however, it was highly regarded in Thailand (28.4%), China (26.5%), and India (25.8%) than in other countries. Concurrently, Kazakhstan (6.6%), Russia (7.8%), and Japan (8.9%) ranked lower in the importance of media appearances, which correlates with their overall lower metrics in experience and affinity toward Korean cultural content.

Generally, quality is the crucial purchase factor across countries; however, China and Japan show differences by prioritizing “brand” (58.4%) and “price” (50.7%), respectively.

[Figure 2-33] Reasons for Purchasing Korean Products/Brands

[BASE: Respondents who have purchased Korean products/services, n=23,349, unit: Multiple response%]



Q. What is your reason for purchasing Korean brand products and services?

[Table 2-23] Reasons for Purchasing Korean Brands/Products by Country

[BASE: Respondents who have purchased Korean products/services, n= (), unit: Multiple response%]

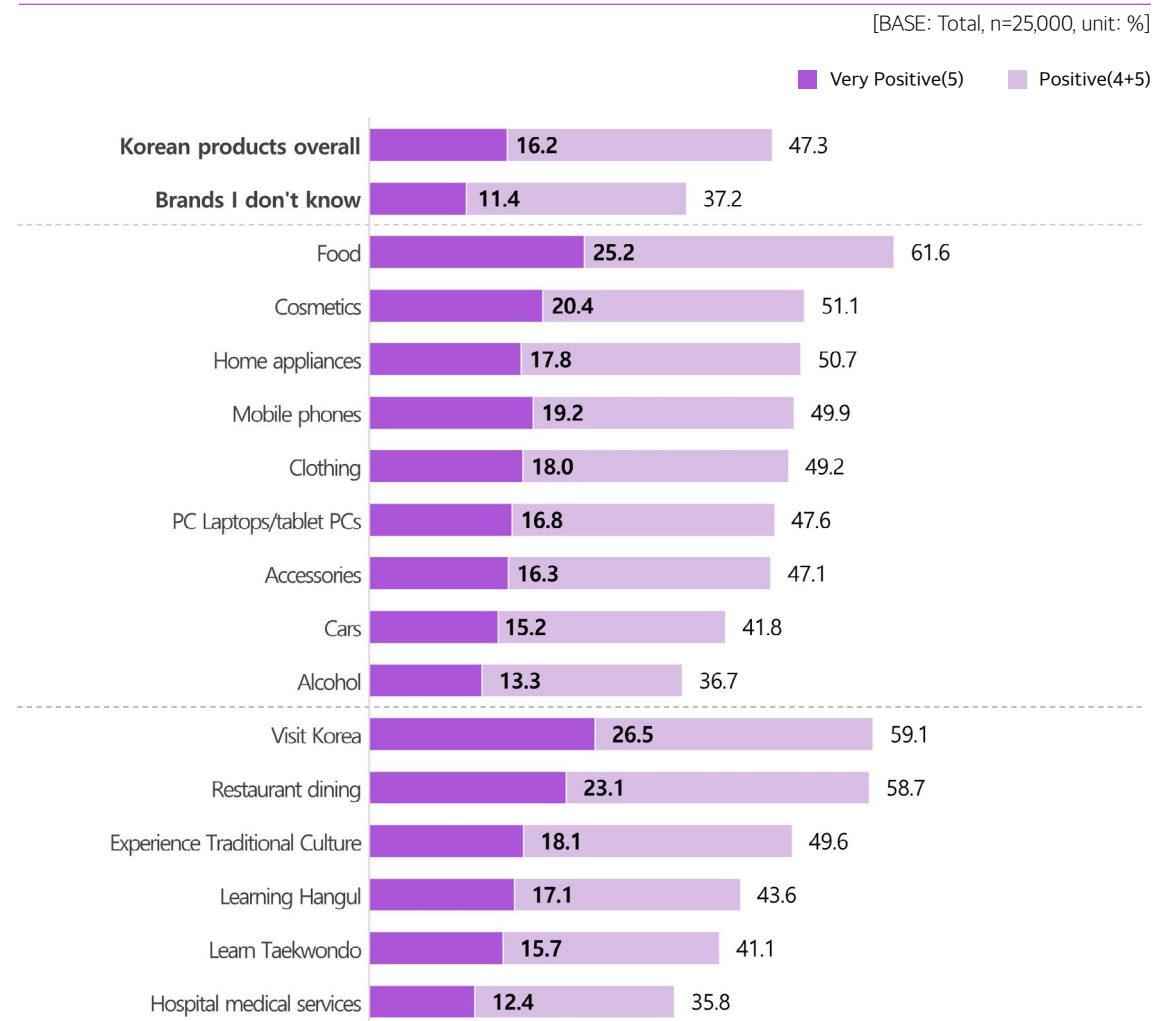
Region	Country	Number of cases	Quality	Brand	Price	Country Image	Public Reputation	Ease of Use	Convenience of Purchase	Appearance in Movies or Broadcasts
Total		(23,349)	59.8	38.1	36.9	26.5	26.4	25.0	18.2	17.8
Asia-Pacific	China	(1,165)	56.2	58.4	23.2	26.2	37.2	17.3	12.8	26.5
	Japan	(1,006)	37.4	21.1	50.7	15.6	25.9	26.6	25.7	8.9
	Taiwan	(879)	53.6	49.5	35.4	16.4	29.7	20.8	15.9	22.8
	Thailand	(890)	62.5	50.6	29.8	26.7	29.8	18.3	21.2	28.4
	Malaysia	(888)	73.1	41.3	35.9	26.8	26.5	22.2	18.4	21.5
	Indonesia	(1,085)	76.8	40.6	38.9	19.2	31.1	27.3	17.2	21.7
	India	(1,152)	64.7	47.1	21.8	39.9	29.9	24.0	19.2	25.8
	Vietnam	(899)	64.0	41.9	27.4	38.9	35.4	29.0	13.8	23.2
	Kazakhstan*	(768)	74.7	35.8	36.1	25.1	17.1	25.3	16.3	6.6
Australia	(818)	60.6	27.3	42.1	31.1	24.2	28.2	22.1	20.8	
Americas	US	(974)	55.9	36.7	41.9	24.2	23.6	24.6	20.1	14.1
	Canada*	(826)	60.0	32.1	44.4	25.1	21.3	29.1	20.1	13.8
	Mexico*	(1,047)	53.4	41.3	43.2	22.5	15.4	27.7	20.8	18.2
	Brazil	(966)	66.0	27.5	42.8	23.0	25.9	22.4	12.6	21.7
	Argentina	(790)	59.2	41.3	42.9	18.4	19.2	22.0	19.0	16.7
Europe	UK	(768)	56.4	36.1	37.9	29.9	25.9	29.8	19.3	15.6
	France	(783)	51.0	34.4	40.5	35.2	23.8	20.4	15.8	13.5
	Italy*	(784)	49.2	28.6	39.0	29.5	17.5	26.0	34.2	12.1
	Spain*	(822)	54.3	33.0	46.0	27.6	20.0	21.9	18.0	14.8
	Germany*	(835)	51.9	32.0	39.5	33.9	22.5	25.0	19.3	13.7
	Russia*	(1,003)	65.1	25.1	41.4	18.2	15.6	26.1	16.4	7.8
Middle East	Türkiye	(824)	64.6	48.4	29.9	19.5	23.4	31.7	16.0	18.6
	UAE	(792)	63.4	41.7	28.7	37.1	34.5	21.8	16.3	19.8
	Saudi Arabia*	(890)	57.9	35.3	35.5	31.9	38.7	28.5	13.4	16.4
Africa	Egypt*	(868)	60.1	40.2	25.8	29.0	48.3	23.3	9.0	11.2
	South Africa	(827)	61.7	36.8	45.2	20.6	19.6	31.7	23.3	22.9

4. Intention to Purchase Korean Products/Services

The overall intention to purchase Korean products/services stands at 47.3%. Among these, 37.2% responded that they would purchase even from brands they are not familiar with. The products with the highest purchase intent are “food” (61.6%), and for services, “visiting Korea” (59.1%). Lower purchase intentions were shown for “medical services” (35.8%) and “Taekwondo training” (41.1%). The intention to purchase products was relatively higher than for services.

The regions with the highest overall purchase intention include the Middle East, followed by Africa, Asia-Pacific, Americas, and Europe. The Americas and Europe show a lower level of intention to purchase Korean products/services compared to other regions, likely because of less active engagement with Korean cultural content.

[Figure 2-34] Intention to Purchase Korean Products/Services



Asia-Pacific

Asia-Pacific is the third-highest region in overall purchase intention. For products, the strongest purchase intentions were in “food” (67.5%), “cosmetics” (59.1%), and “clothing” (56.0%). In services, “visiting Korea” (64.4%) and “restaurant dining” (62.5%) had strong purchase intentions. “Food” had the highest rate of purchase intention in this region.

India (73.0%), Vietnam (67.7%), and Thailand (63.3%) showed high positive response rates for intention to purchase Korean products overall. Conversely, Japan (16.7%) showed purchase intention that did not even reach half of Kazakhstan's (38.8%). India, Vietnam, and Thailand all showed purchase intentions exceeding 50% across all products/services, while Japan generally displayed low purchase intentions ranging from 10-20% except for “food” (46.8%), “cosmetics” (30.8%), and “restaurant dining” (30.7%).

Americas

The overall intention to purchase Korean products in the Americas ranged from 41.7-42.7%, except for Brazil, which showed a relatively high response rate of 53.9%. Brazil was also the highest in intention to purchase “even unfamiliar brands” at 45.4%, while Argentina recorded a lower rate of 26.2%.

For products, “food” had the highest purchase intention, particularly in Canada (69.6%) and the United States (67.9%). For services, “restaurant dining” had a high response rate in Canada (68.3%) and the United States (66.4%), while Brazil recorded the highest intention for “visiting Korea” at 60.0%.

Europe

Compared to other regions, Europe shows a lower overall intention to purchase Korean products. Within Europe, Türkiye demonstrates the highest purchase intention at 53.8%, while Italy registers the lowest at 27.2%. “Willing to purchase even unfamiliar brands” stands at 49.7% in Türkiye and 20.4% in Italy.

Products with high purchase intention include “food” and “mobile phones”, while services such as “visiting Korea” and “restaurant dining.” Conversely, “alcohol” and “medical services” demonstrate lower intentions. Türkiye generally shows higher purchase intention for all products except alcohol, ranging from 47.1% to 57.0%. The UK demonstrates a high response rate of 64.1% for “food.” Italy shows over 40% purchase intention for “food,” “home appliances,” “mobile phones,” and “laptops/tablet PCs,” but records low response rates below 30% for other items.

Middle East

The Middle East shows the highest overall intention to purchase Korean products. Specifically, the UAE scored 67.9% and Saudi Arabia 63.6%; the intention to purchase “unfamiliar brands” is relatively high in the UAE at 60.9%, while in Saudi Arabia, it is somewhat lower at 49.9%.

Regarding specific products, a high intention to purchase “food,” “cosmetics,” and “home appliances” is observed. Notably in the UAE, the response rate for “food” and “cosmetics” exceeded 70.0%. Regarding services, the significant interest is in “visiting Korea,” followed by “restaurant dining” and “experiencing traditional culture.”

Africa

In Africa, the overall intention to purchase Korean products is 62.4% in Egypt and 56.2% in South Africa.

The intention to purchase “unfamiliar brands” is 47.3% in Egypt and 42.1% in South Africa.

Regarding products and services, a high response rate is observed for “food,” “home appliances,” “mobile phones,” and “visiting Korea.” Particularly in Egypt, a high intention to purchase is observed for “home appliances,” “mobile phones,” “laptops/tablet PCs,” and “cars,” with over 65.0% indicating interest.

[Table 2-24] Intention to Purchase Korean Products/Services by Country

[BASE: Total, n= (), unit: Positive (4+5) %]

Region	Country	Number of cases	Korean products overall	Brands I don't know	Food	Cosmetics	Home appliances	Mobile phones	Product Clothing	Laptops/tablet PCs	Accessories	Cars	Alcohol
Total		(25,000)	47.3	37.2	61.6	51.1	50.7	49.9	49.2	47.6	47.1	41.8	36.7
Asia-Pacific	India	(1,200)	73.0	59.3	70.5	73.3	68.6	72.1	70.6	69.6	73.1	61.7	53.2
	Vietnam	(900)	67.7	47.1	69.2	69.6	65.6	65.4	68.0	58.7	61.4	54.7	58.8
	Thailand	(900)	63.3	56.0	78.4	70.8	68.8	66.4	70.8	59.3	63.3	50.7	58.2
	Malaysia	(900)	57.2	40.9	74.9	63.0	61.4	61.1	61.3	54.0	55.6	46.9	29.9
	Indonesia	(1,100)	50.9	30.5	73.7	61.7	62.3	67.9	62.1	58.7	54.5	48.0	25.8
	China	(1,200)	50.3	37.3	63.5	63.7	50.7	52.1	53.4	47.9	52.6	41.2	47.3
	Taiwan	(900)	47.7	33.2	71.3	54.3	51.3	51.1	56.8	38.0	38.8	30.0	45.9
	Australia	(900)	43.6	38.4	69.6	46.9	48.3	41.1	46.2	41.8	46.8	43.2	46.9
	Kazakhstan*	(800)	38.8	24.3	60.3	56.5	52.4	46.1	43.9	42.6	38.4	45.6	18.9
	Japan	(1,100)	16.7	9.7	46.8	30.8	13.9	14.8	26.5	12.6	22.5	7.5	18.9
Americas	Brazil	(1,100)	53.9	45.4	56.2	52.5	54.3	56.9	49.6	55.4	50.8	45.8	39.8
	Canada*	(900)	42.7	34.1	69.6	41.9	42.4	36.9	45.0	38.1	41.7	37.9	39.7
	US	(1,100)	41.7	34.7	67.9	40.2	40.6	34.7	42.3	35.2	42.7	36.7	39.0
	Argentina	(900)	40.3	26.2	55.8	40.1	48.2	50.0	39.2	47.1	40.2	32.8	31.9
	Mexico*	(1,100)	39.5	38.0	55.5	47.5	44.6	45.1	48.1	44.7	47.7	33.9	36.5
Europe	Türkiye	(900)	53.8	49.7	51.2	55.3	51.9	57.0	47.1	55.1	52.3	51.2	38.0
	UK	(900)	41.8	36.4	64.1	39.6	45.6	40.1	43.4	41.6	41.7	38.6	39.0
	France	(900)	38.8	30.6	45.8	34.8	41.3	37.2	33.4	38.4	31.9	29.6	30.9
	Spain*	(900)	33.3	27.0	46.7	32.7	35.3	38.0	29.6	38.0	31.9	29.4	23.7
	Russia*	(1,100)	31.5	21.1	49.4	47.6	39.2	34.8	32.2	33.5	32.3	34.5	23.3
	Germany*	(900)	28.6	30.4	53.7	32.4	35.0	33.4	29.7	31.6	30.6	28.8	26.9
	Italy*	(900)	27.2	20.4	45.0	32.0	41.2	43.4	30.4	41.3	30.4	32.7	24.1
Middle East	UAE	(800)	67.9	60.9	70.3	70.5	68.1	65.9	68.0	68.0	68.0	60.3	52.1
	Saudi Arabia*	(900)	63.6	49.9	61.3	62.1	64.6	61.1	63.2	62.1	61.1	58.7	-
Africa	Egypt*	(900)	62.4	47.3	60.7	53.8	65.2	65.6	56.4	65.1	51.8	65.2	29.1
	South Africa	(900)	56.2	42.1	71.6	51.0	63.8	61.7	62.4	63.0	61.7	48.8	39.6

Region	Country	Number of cases	Services					
			Visit Korea	Restaurant Dining	Experience Traditional Culture	Learning Hangul	Learn Taekwondo	Hospital medical services
Total		(25,000)	59.1	58.7	49.6	43.6	41.1	35.8
Asia-Pacific	India	(1,200)	75.4	68.2	71.2	66.0	61.6	54.6
	Vietnam	(900)	71.1	68.4	65.4	56.8	50.7	56.4
	Thailand	(900)	77.1	77.9	68.3	69.4	53.9	50.8
	Malaysia	(900)	75.9	70.8	64.2	59.2	48.6	36.6
	Indonesia	(1,100)	72.9	65.8	62.2	63.8	50.8	45.7
	China	(1,200)	63.8	59.4	56.3	48.3	49.1	42.4
	Taiwan	(900)	66.4	69.1	53.0	43.2	28.7	26.3
	Australia	(900)	56.2	69.0	49.9	39.1	41.6	39.7
	Kazakhstan*	(800)	64.0	49.5	21.3	24.6	22.6	39.5
	Japan	(1,100)	24.1	30.7	13.6	15.8	7.3	8.4
Americas	Brazil	(1,100)	60.0	55.5	59.5	49.5	46.0	33.5
	Canada*	(900)	58.0	68.3	50.9	35.3	41.4	33.8
	US	(1,100)	52.3	66.4	50.5	40.9	46.5	32.1
	Argentina	(900)	58.4	52.1	40.6	39.6	39.4	33.1
	Mexico*	(1,100)	48.5	50.9	45.7	40.1	41.1	28.5
Europe	Türkiye	(900)	66.2	54.0	54.9	51.2	54.7	35.0
	UK	(900)	52.9	60.2	50.2	36.0	38.9	36.6
	France	(900)	43.2	50.6	42.7	23.6	27.3	26.4
	Spain*	(900)	32.8	47.1	31.6	22.6	25.9	19.2
	Russia*	(1,100)	52.0	41.7	20.7	18.9	16.7	19.2
	Germany*	(900)	39.2	54.0	37.3	25.9	27.7	24.1
Middle East	Italy*	(900)	48.7	44.8	37.7	24.9	25.0	20.7
	UAE	(800)	74.4	66.8	67.1	63.9	59.3	58.6
Africa	Saudi Arabia*	(900)	66.7	59.2	59.8	56.0	53.4	48.3
	Egypt*	(900)	69.7	60.8	53.6	55.6	53.3	44.2
Africa	South Africa	(900)	73.0	69.9	62.0	60.4	56.9	41.9

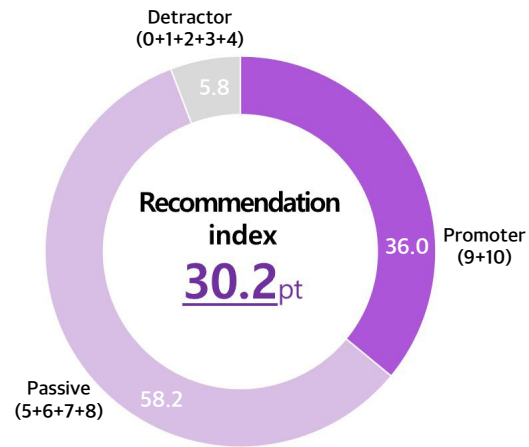
5. Willingness to Recommend Korean Products/Services

The NPS is 30.2 points, with 36.0% being promoters, 58.2% being passives, and 5.8% being detractors.

The top three countries with high NPS include Vietnam (59.0 points), India (54.7 points), and Brazil (52.6 points), while the bottom three are Japan (-12.5 points), Germany (6.1 points), and Italy (9.8 points).

[Figure 2-35] Willingness to Recommend Korean Products/Services

[BASE: Respondents who have purchased Korean products/services, n=23,349, unit: %]



Q. Are you willing to recommend Korean cultural content to others? (0. Definitely Not Recommend/ 1-4. Not Recommend/ 5. Neutral/ 6-9. Recommend/ 10. Strongly Recommend)

[Table 2-25] Willingness to Recommend Korean Products/Services by Country

[BASE: Respondents who have purchased Korean products/services, n= (), unit: %, points]

Region	Country	Number of cases	Detractor(A) (0+1+2+3+4)	Passive recommender (5+6+7+8)	Active Recommender (B) (9+10)	NPS (B-A) (points)
	Total	(23,349)	5.8	58.2	36.0	30.2
Asia-Pacific	Vietnam	(899)	0.4	40.2	59.4	59.0
	India	(1,152)	2.3	40.6	57.0	54.7
	Thailand	(890)	1.6	46.2	52.2	50.7
	Indonesia	(1,085)	1.8	51.3	46.9	45.2
	Malaysia	(888)	2.3	60.2	37.5	35.2
	Kazakhstan*	(768)	5.5	54.9	39.6	34.1
	China	(1,165)	5.2	62.4	32.4	27.3
	Australia	(818)	6.1	69.9	24.0	17.8
	Taiwan	(879)	4.9	72.5	22.6	17.7
Americas	Japan	(1,006)	18.7	75.1	6.2	-12.5
	Brazil	(966)	3.4	40.6	56.0	52.6
	Mexico*	(1,047)	5.6	51.9	42.5	36.9
	Argentina	(790)	5.1	60.5	34.4	29.4
	US	(974)	8.5	65.0	26.5	18.0
Europe	Canada*	(826)	6.7	70.0	23.4	16.7
	Türkiye	(824)	3.6	49.3	47.1	43.4
	Russia*	(1,003)	6.3	63.8	29.9	23.6
	UK	(768)	8.2	68.5	23.3	15.1
	Spain*	(822)	7.3	71.8	20.9	13.6
	France	(783)	8.9	68.7	22.3	13.4
Middle East	Italy*	(784)	8.3	73.6	18.1	9.8
	Germany*	(835)	11.5	70.9	17.6	6.1
Africa	UAE	(792)	5.2	47.2	47.6	42.4
	Saudi Arabia*	(890)	6.4	48.9	44.7	38.3
Africa	Egypt*	(868)	5.4	46.7	47.9	42.5
	South Africa	(827)	3.3	53.3	43.4	40.1

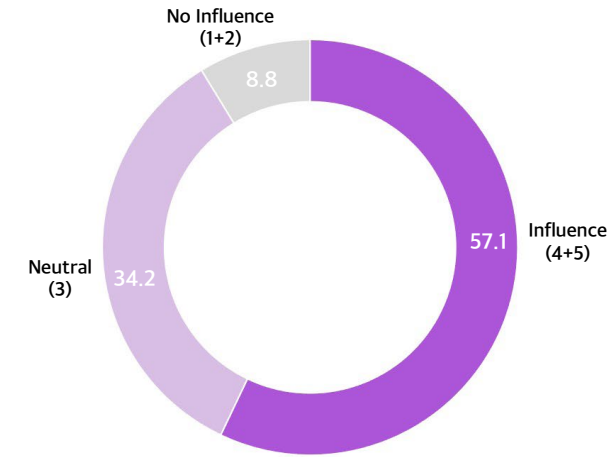
6. Influence of Consuming Korean Cultural Content on Korean Product/Service Usage

Among all the participants, 57.1% responded that consuming Korean cultural content influences their use of Korean products/services. Conversely, 8.8% stated it does not influence them.

The top three countries most influenced by Korean content are Indonesia (83.7%), Vietnam (81.1%), and India (77.3%), while the least influenced are Russia (35.3%), Japan (35.9%), and Germany (37.4%).

[Figure 2-36] Influence of Consuming Korean Cultural Content on Korean Product/Service Usage by Country

[BASE: Total, n=25,000, unit: %]



Q. How much do you think consuming Korean cultural content influences your purchasing and usage of Korean brand products and services (including tourism)? (1. Not influenced at all / 2. Not influenced / 3. Neutral / 4. Influenced / 5. Highly Influenced)

[Table 2-26] Influence of Consuming Korean Cultural Content on Korean Product/Service Usage by Country

[BASE: Total, n=(), unit: %, points]

Region	Country	Number of cases	No influence (1+2)	Neutral (3)	Influence (4+5)	Scale average(points)
Total		(25,000)	8.8	34.2	57.1	3.64
Asia-Pacific	Indonesia	(1,100)	2.4	13.9	83.7	4.08
	Vietnam	(900)	1.9	17.0	81.1	4.01
	India	(1,200)	3.0	19.8	77.3	4.10
	China	(1,200)	4.4	23.8	71.8	3.83
	Thailand	(900)	2.4	27.7	69.9	3.99
	Taiwan	(900)	2.8	29.8	67.4	3.81
	Malaysia	(900)	3.8	29.9	66.3	3.85
	Australia	(900)	9.2	40.4	50.3	3.51
	Kazakhstan*	(800)	16.5	43.0	40.5	3.28
Americas	Japan	(1,100)	14.7	49.4	35.9	3.19
	Mexico*	(1,100)	8.7	31.6	59.6	3.70
	Brazil	(1,100)	10.4	30.5	59.1	3.71
	Canada*	(900)	8.3	43.8	47.9	3.50
	US	(1,100)	10.4	42.7	46.9	3.47
Europe	Argentina	(900)	15.4	40.9	43.7	3.34
	Türkiye	(900)	7.9	28.7	63.4	3.78
	UK	(900)	11.4	40.2	48.3	3.46
	Spain*	(900)	11.9	40.3	47.8	3.45
	Italy*	(900)	13.6	45.7	40.8	3.31
	France	(900)	16.4	44.3	39.2	3.26
	Germany*	(900)	11.9	50.7	37.4	3.30
Middle East	Russia*	(1,100)	19.3	45.5	35.3	3.18
	UAE	(800)	3.3	21.8	75.0	4.03
Africa	Saudi Arabia*	(900)	6.7	26.9	66.4	3.81
	Egypt*	(900)	5.9	29.8	64.3	3.83
	South Africa	(900)	5.9	36.4	57.7	3.71

Section 5: Summary and Implications⁷

After "Squid Game," Consumption of Korean Cultural Content Slightly Decreases but Remains Stable

Hallyu has become firmly established itself as a representative image of South Korea. Three Hallyu-related keywords were in the top five images associated with South Korea in 2012 among individuals who have experienced Korean cultural content: "dramas" (18.3%), "K-pop" (14.9%), and "Korean food" (14.5%). These were followed by "Electronics" (14.0%) and the "Korean War" (6.7%). From 2018 to 2022, four of the top keywords were related to Hallyu (K-pop at 14.3%, Korean food at 13.2%, Hallyu stars at 7.4%, and dramas at 6.6%). Negative keywords including "Korean War" and "North Korea/Nuclear Issues" are no longer listed in the rankings.

Considering that no significant blockbuster was released in 2022 such as the Netflix original drama "Squid Game," which gained enormous popularity in 2021, the popularity and affinity for Korean cultural content declined compared to 2021 but remained higher than before, settling into a relatively stable state. "Squid Game" had a higher response rate in favorite dramas compared to top picks from other years, indicating that its influence has somewhat persisted.

In 2022, the percentage of participants who responded that Korean cultural content is "very popular" in their country was relatively high in the areas of food (49.1%), beauty (46.5%), music (45.9%), and fashion (42.6%). While a slight decline was observed compared to 2021 (▼0.3%-▼4.7%), the levels remain higher than those in 2020. The brand power index approaches 60 points. In 2020, it was 58.5 points; in 2021, it was 61.6 points; and in 2022, it was 58.8 points. Although it declined by 2.8 points from 2021, it remains similar to the 2020 level. The percentage of participants who responded that their consumption of Korean cultural content increased compared to before the onset of COVID-19 had dramatically risen in 2021 owing to the impact of "Squid Game"; however, it did not significantly decline afterward. The net increase in consumption of Korean cultural content compared to pre-COVID-19 levels ranged from a minimum of -1.4 to a maximum of 34.2 percentage points in 2020, a minimum of 19.5 to a maximum of 42.0 percentage points in 2021, and a minimum of 20.2 points to a maximum of 42.0 percentage points in 2022.

The share of consumption (average 25.3%) has declined compared to 2021 (27.4%) but is higher than in 2020 (21.4%). The average monthly usage time is 15.2 hours, which is less than in 2021 (15.4 hours) but confirms an overall increasing trend. Conversely, the average monthly expenditure stands at 14.8 USD, which has remained relatively stable at approximately 15 USD, similar to 12.2 USD in 2018 and 14.8 USD in 2022. The decline in expenditure is likely influenced by global economic downturns, the Russia-Ukraine war, and the increase in outdoor activities due to the reduced impact of COVID-19. The absence of significant blockbusters in Korean cultural content compared to the previous year also exacerbated the decline in spending. The decline in willingness to pay and expenditure reflects various political, economic, and socio-cultural conditions.

- Overall, the consumption volume and spending on Korean cultural content have decreased compared to last year; however, Korean dramas have seen an increase in consumption volume while their share of consumption

⁷ The insights were reorganized based on expert opinions collected through consultations; the participating experts are as follows. : Kang Shin-gyu (Research Fellow at the Korea Broadcast Advertising Corporation), Yang Jung-ae (Research Fellow at the Korea Press Foundation), Lee Sung-min (Professor at Korea National Open University), Cho Jae-hee (Professor at Sogang University).

has declined. Both consumption of overall dramas and Korean dramas have increased compared to last year, but the proportion of dramas from countries other than Korea is also rising. Spending on Korean dramas has also declined compared to last year. This indicates that consumers are viewing Korean dramas more economically, consuming them for longer periods while spending less.

- The past three years have seen significant changes in the global economic landscape. Particularly, 2022 marked the third year of the COVID-19 pandemic, which saw a decline in the virus's impact, an increase in outdoor activities, intensifying competition in the OTT market, the Russia-Ukraine war, a global economic downturn, and rising inflation. These factors have intensified "pie-sharing" within the content industry.
- While the consumption and proportion of Korean cultural content have recently shown modest growth and stabilization, there are notable concerns. The popularity, brand power index, willingness to pay, and expected spending on Korean content in the next year are either similar or lower than last year. Considering the global economic downturn and overall decrease in disposable income, deeper consideration of Hallyu's sustainability is necessary.
- As Korean media companies in 2023 are reducing investments to streamline operations and prepare for the long term, it is crucial to closely monitor and evaluate these trends.

Long-term Effects of COVID-19 Beneficial for Dramas, Movies, Variety Shows, and Webtoons; Webtoons Top Consumption Share

The pandemic had a positive impact on Hallyu. Particularly, the survey confirmed that COVID-19 has positively influenced the consumption of Korean dramas, webtoons, and movies. Compared to before the pandemic, the net increase rate of Korean cultural content consumption surged for dramas by over 40% (up 42 percentage points), while movies and variety shows increased by approximately 37.4 percentage points, and webtoons by approximately 34.2 percentage points. Other categories such as beauty, music, and publications also saw a net increase of over 20%. Movies including "Train to Busan" in 2016, "Parasite" in 2019, and "Decision to Leave" in 2022, along with the drama "Squid Game" in 2021, have consistently performed well and received global acclaim. The normalization of stay-at-home lifestyles and widespread OTT consumption due to COVID-19 also played a role. Webtoons have also garnered attention as the original works behind various popular Hallyu content.

The affinity for variety shows, dramas, and movies is also high. Korean variety shows ranked first with a 76.5% affinity (4+5%) rate among 11 types of content. Dramas and movies followed closely, with affinity rates of 76.3% and 75.6%, respectively. Separately measured from publications, webtoons recorded a 73.8% affinity rate, placing them fifth.

Particularly, webtoons are one of the emerging content types to watch. They were sixth in consumption share in 2021 and rose to the top position in 2022 with 28.6%. While some rankings have shifted, the change in the ranking of webtoons is particularly notable. Webtoons also saw the third-largest increase in consumption when compared to pre-pandemic levels, based on the net increase rate. The top deterrent to webtoon affinity is the "poor translation into the local language," indicating a need for improvement in this area. The willingness to pay for webtoons, at 32.5%, is lower than for other types of content, warranting further review.

- The fact that Naver Webtoon is the primary touchpoint for webtoon content highlights the potential for "platform Hallyu," or the international expansion of platforms.
- Nearly half of the respondents access Korean games through "video watching," suggesting the need to consider the impact of indirect contact.

- In the Americas and the Middle East, the primary deterrent to enjoying Korean variety shows was cited as "too many broadcast captions." However, Netflix originals such as "Single's Inferno" and "Physical: 100," which minimize this Korean production characteristic, have gained global popularity, warranting attention.

- While the global gaming market is experiencing a lagging growth, it is crucial to consider the increased outdoor activities as the impact of COVID-19 wanes. Consequently, the use of arcade games, PC rooms, and arcade centers is expected to increase.
- Similarly, indoor PC and console gaming will likely experience a decline compared to the pandemic years of 2020-2021. Hence, special attention must be paid to consumption patterns after the pandemic.
- On another note, the game "Marvel Future Revolution," which ranked highly in preferred games, was a collaboration between Netmarble and Marvel. It is difficult to consider this Hallyu content since it utilizes Marvel intellectual property (IP)⁸. On the other hand, this expansion of the market through collaboration with overseas IPs signals a moment worth contemplating in terms of Hallyu's impact from an IP perspective.

Discrepancy Between Popularity and Affinity for Korean Music

Although Korean music has high experience rates (63.2%) and brand power index (61.7 points), it scored relatively low in evaluations such as affinity and NPS. While the public standing of Korean music is high, these evaluations contrast with the general perception that K-pop is the leading content driving Hallyu. These results were also confirmed in 2021.

- Overall, as the popularity of Korean music and Hallyu rises, cultural clashes seem to be emerging as a factor hampering affinity.
- While the influence of first-generation overseas musicians like Park Jin-young, RAIN, and BoA was not global, subsequent K-Pop musicians like BTS and BLACKPINK have become global stars comparable to artists in English-speaking countries.
- Consequently, K-pop's recognition and popularity have surged; however, this has also led to polarized views and increased aversion toward K-pop.
- Factors inhibiting affinity in the Americas, Middle East, and Africa include "listening to Korean music is not well-received by those around me." This is particularly notable in the Americas, where it accounted for

8. Intellectual property is defined as a bundle of rights that enable the diversification of content across various genres and additional businesses (Lee Sung-min & Lee Yoon-kyung, 2016, "Research on Promoting Industry Through the Utilization of Content Intellectual Property," Korean Culture and Tourism Institute).

21.7%, suggesting significant implications related to derogatory attitudes and terms toward Hallyu fandom culture like “Koreaboo.”

- “Koreaboo” is a term derived from “weeaboo,” referring to white people who are excessively interested in Japanese popular culture. It is used derogatorily for fans who are excessively interested in Korean pop culture. This is particularly notable because it coincides with the period of BTS’s global success and frequently emerges as part of the phenomenon surrounding their fandom. Discussions are underway to interpret this in the context of racial tensions in North American and US society.⁹
- The term “Koreaboo” has expanded to refer to people obsessed with Korean elements and critical of other cultures, indicating the presence of negative views on Korean culture and a discriminatory structure against Koreans (and Asians) in the United States.¹⁰
- In American society, where discriminatory views against Asians persist, racial issues manifest in the derogatory term “Koreaboo” as K-Pop gains popularity beyond Asia and the Middle East to even the United States. This necessitates responsive efforts in the future.¹¹

The platforms for accessing Hallyu content are diversifying from Netflix and YouTube to Disney and others.

The consumption of Korean dramas, movies, variety shows, and webtoons is primarily expanding through online and mobile platforms. The rate of access to Korean cultural content (dramas, variety shows, movies, music, animation) via “online and mobile platforms” has surged past 85% in 2022, from approximately 40% in 2016. Concurrently, TV remains stagnant at 30-40%. From 2016 to 2022, the gap between online platforms and non-online platforms (TV, radio, CD/video, theaters, among others.) has been widening. Specifically, dramas (67.6%) and movies (70.0%) are primarily accessed through Netflix, while variety shows (67.6%), music (81.1%), and animation (66.1%) are primarily accessed via YouTube.

Currently, the access rates are largely stable centered around Netflix and YouTube, but are diversifying to platforms such as Disney+ and Amazon Prime. Preparations are required for the potential lag in the global OTT market, including Netflix, as COVID-19 comes to an end.

Conversely, the ease of using Korean cultural content has been gradually increasing since 2017, currently ranging from 60-70%. It is influenced by the growth of the OTT market and the diversification of platforms.

- The prominence of YouTube is decreasing, while that of Netflix is increasing, particularly in dramas and movies. This is attributed to Netflix’s growth slowing down in the US and Korea but still expanding in other countries, thus increasing the consumption of Korean dramas and movies.
- New entrants such as Disney+ and Apple TV+ are also gaining influence in the consumption of Korean dramas and movies.
- Analysts forecast a decline in OTT viewership from reduced consumption as outdoor activities increase

9-11. Won Yong-jin, Bang Hee-kyung, Lee Joon-hyung, Marisa Luckie (2020). “Koreaboo: A Missing Piece of the BTS Universe Puzzle. Korean Journal of Communication and Information, 2020, Vol. 64, No. 4, pp. 471-499. Citations and reorganizations from paper

owing to the decline in COVID-19’s impact and global economic downturns and conflicts such as the Russia-Ukraine war. Concurrently, a concern that Netflix may lose users because of intense competition in the OTT market exists.

- Netflix plans to prohibit account sharing among different households (expected in March 2023) and has introduced an ad-supported subscription plan in January 2022. These changes require reconsideration of distribution strategies for Korean cultural content.
- In fashion, beauty, and food, “SNS videos/photos” recorded over 60% and “YouTuber-made videos” is in the 40% range, indicating that both direct and indirect experiences are popular. Therefore, the impact of video content in these areas should not be overlooked.
- While Korean beauty and fashion maintain strong results regarding popularity and mass appeal among the 11 types of content, “high prices for the quality” is mentioned as a limiting factor in all regions.
- Considering that the overall image of South Korea is positive, no guarantee of long-term success exists for Korean beauty and fashion; hence, improvements are required.

“Squid Game” Remains Influential; “Extraordinary Attorney Woo” and “Carter” Rank High

The influence of “Squid Game,” which caused a global sensation, remains significant. Among the most favored dramas, “Squid Game,” released on Netflix in 2021, ranked first, surpassing “Extraordinary Attorney Woo” (2.8%), “All of Us Are Dead” (2.6%), and “Business Proposal” (1.9%). Although it has been two years since its release (September 17, 2021), it recorded an 11.3% preference rate in 2022. This is a notable increase compared to the top preference rates of 10% or less from 2018 to 2020, highlighting the enduring impact of “Squid Game”. The gap between the first place and subsequent rankings is substantial.

In the realm of movies, “Parasite” (9.1%) and “Train to Busan” (6.9%) continue to dominate the first and second places, respectively. This is attributed to the absence of any standout blockbuster films. Other new entries in the rankings include “Carter” (6.9%), “The Hunt” (2.5%), and “20th Century Girl” (1.8%).

In the realm of animation, “Pucca,” which settled for third place while “Larva” ranked first in 2021, reclaimed the top spot with 7.7%. “Seoul Station,” known as the prequel to “Train to Busan,” secured fourth place with 6.5% (added to the survey from 2022). In the gaming sector, “PUBG” (10.3%) and “Ragnarok” (9.7%) continued to hold first and second place.

The most favored Hallyu stars are actor Lee Min-ho and the group BTS. Since 2018, no change in the top spot has been observed. This suggests that as Hallyu shifts from a focus on actors to a focus on works, the importance of Hallyu stars has somewhat diminished.¹²

- In fashion, beauty, and food, “SNS videos/photos” recorded over 60% and “YouTuber-made videos” is in the 40% range, indicating that both direct and indirect experiences are popular. Therefore, the impact of video content in these areas should not be overlooked.
- While Korean beauty and fashion maintain strong results in terms of popularity and mass appeal among the 11 types of content, “high prices for the quality” is mentioned as a limiting factor in all regions.

12. Since the question about Hallyu stars allows for open-ended answers, possibly, the names of actors who are easier to recall or more well-known may be answered more frequently, requiring careful interpretation.

- Considering that the overall image of South Korea is positive, there is no guarantee of long-term success for Korean beauty and fashion, so improvements are necessary.
- The fact that "Seoul Station" ranked as the fourth most popular animation suggests that its consumption is linked to "Train to Busan," directed by Yeon Sang-ho.
- "The Haunted House" and "Seoul Station," being targeted at teenagers and adults respectively, indicate an expansion of the Korean animation audience beyond children.

Hallyu consumption is noteworthy in the Middle East and India, whereas it is weak in the Americas, Europe, Japan, and Kazakhstan.

The popularity of Korean cultural content is expanding beyond specific fanbases to the general public. When evaluating the subjective popularity of Korean cultural content in their respective countries, the percentage of respondents who indicated it as "moderately popular" or higher (combining moderately popular and very popular) ranged from 52.4% for publications to 76.2% for food. Notably, food (76.2%), beauty (72.4%), music (71.8%), fashion (70.4%), and movies (70.1%) all surpassed a 70% rating for "moderately popular" and "very popular" responses. This indicates an expansion of their popularity beyond dedicated fan bases to a wider audience. The rate of "very popular" responses increased from the high teens to the early 40% range in 2014, to the high 20% to high 40% range in 2022.

The epicenters of Hallyu are Asia and the Middle East. Examining the top three contents by country excluding Southeast Asia, India leads with five out of 11 contents, followed by the UAE has nine, and Saudi Arabia with four. The Americas and Europe demonstrate relatively low popularity. Although Japan is generally ranked lower, its second-place ranking in food is noteworthy.

<Top and Bottom Three Countries in Mass Popularity by Korean Cultural Content>

		Drama	Variety show	Movies	Music	Animations	Books/E-books	Webtoon	Games	Fashion	Beauty	Food
Top	1st	Malaysia	Malaysia	UAE	Malaysia	UAE	UAE	UAE	UAE	Malaysia	Malaysia	Malaysia
	2nd	Taiwan	UAE	Malaysia	UAE	India	Saudi Arabia	Saudi Arabia	India	UAE	UAE	Japan
	3rd	Vietnam	Vietnam	India	Indonesia	Saudi Arabia	India	India	Saudi Arabia	Vietnam	Vietnam	Taiwan
Bottom	26th	Russia*	Japan	Russia*	Russia*	Japan	Japan	Japan	Japan	Russia*	France	France
	25th	France	Russia*	Japan	South Africa	Russia*	Kazakhstan	Russia*	Russia*	France	Italy	Türkiye
	24th	Germany	France	US	Kazakhstan	Kazakhstan	Russia*	Kazakhstan	Kazakhstan	Italy	Argentina	Argentina

The following are the top three and bottom three countries based on the response rates to Questions 4 and 5.

Q. How popular do you think Hallyu is in your country? Please respond with the extent to which you agree. (1. Hardly anyone uses it / 2. Popular among a niche audience / 3. Known not just by a niche audience but also by the general public / 4. Widely known and related products are sold / 5. Highly popular and related products are selling well)

Distribution of Users and Purchasers high in India; Detractors High in China, Japan, and Russia due to Political, Diplomatic, and Cultural Reasons

Comparing profiles¹³ of purchasers, users, and detractors of Korean cultural content reveals several noteworthy distinctions. Users (aged 29-31) are on average, approximately one year younger than purchasers (aged 30-32). Additionally, users have slightly lower average annual household incomes. Regarding gender, relatively more female users and male purchasers exist. The NPS is notably higher for purchasers across various content types, ranging from dramas (4.3 points) to food (9.3 points). Purchasers tend to rely more on "online/mobile platforms" than users, although no distinct difference in the factors contributing to or inhibiting their affinity for the content is observed. Moreover, purchasers show a stronger inclination both to recommend Korean cultural content and to purchase Korean products/services. The positive response rate for the intention to purchase Korean products/services is notably higher for users and purchasers of a variety of shows, publications, and webtoons compared to other content. India stands out in the distribution of purchasers by country.

Conversely, those who do not recommend the content are younger on average (27-31 years) than users and purchasers. Dramas, variety shows, music, webtoons, games, and food have a higher male distribution, while fashion and beauty have a higher female distribution. The average annual household income for detractors (28,966 USD) is slightly higher than that of users (27,022 USD) and purchasers (28,316 USD). Detractors are predominantly distributed in neighboring countries such as China, Japan, and Taiwan, as well as in Russia, Australia, Germany, and the United States. The primary factors inhibiting affinity for dramas include "political/diplomatic relations with the home country," while variety shows are hindered by a "mismatch with Korean humor." For music, detractors cite "uniform genres" and "low artistic value, and for games, it is a "cultural mismatch." Additionally, fashion and beauty are hindered by "low quality," and food is affected by a "dislike of taste and smell." Notably, these factors are more prominently mentioned by non-recommenders than by users and purchasers. The positive response rate for the intention to purchase Korean products is considerably lower, ranging from the mid to high teens to the low 20s, compared to users (54.2-69.5%) and purchasers (57.0- 72.9%).

- India consistently ranks high, suggesting its future importance as a key hub for Hallyu and its diplomatic significance in the context of the government's Indo-Pacific policy.
- Therefore, a close examination of the growing Hallyu trends in India is crucial. It may be helpful to refer to the strong preference for Hallyu in central and northern India, as documented in the analysis section of the 2023 Overseas Hallyu Survey.

The primary reason for not engaging with Korean content is a "lack of interest in Korean content," indicating the need for delivering high-quality works.

The survey of individuals without prior experience of Korean cultural content reveals that the predominant reason across all types of content is the "lack of interest in Korean content." This suggests

13. Summary of the "Profile of Korean Cultural Content Users" section in the main text. Purchasers are defined as the top 50% group in spending on specific Korean cultural content, users are those who have used it within the last year, and detractors are those who do not recommend the specific Korean cultural content.

that while some interest in the content itself exists, people are not specifically considering its Korean origin. Therefore, the production of high-quality works or content is essential to change this perspective.

Additionally, “lack of channels/methods to access Korean content” ranks third in importance (second for food), encompassing both physical limitations and a lack of knowledge about access methods. This implies the need to develop strategies that increase the ease of accessing content and consider the unique infrastructure characteristics of each country. Future surveys should aim to distinguish whether the lack of methods/channels to experience the content is due to physical reasons or issues regarding accessibility.

Among those without prior experience, a significant 71.9% indicated no willingness to use Korean cultural content. For those who did express an interest, food (16.8%), beauty (7.2%), fashion (6.8%), and games (6.4%) received the highest response rates.

2023 Overseas Hallyu Survey

Publisher

Korean Foundation for International Cultural Exchange

Issuer

Jung Gil-hwa (President, KOFICE)

Survey Oversight

Kim Ah-young (Team Leader, Research Team, KOFICE)

Kim Jang-woo (Researcher, Research Team, KOFICE)

Conducted by

ResearchLab Co., Ltd.

Published on

November 10, 2023

Korean Foundation for International Cultural Exchange

Address: 330 Seongam-ro, Mapo-gu, Seoul, Republic of Korea, DMC Advanced Industry Center Building A, Room 203.

E-mail: research@kofice.or.kr

Website: www.kofice.or.kr

KOFICE