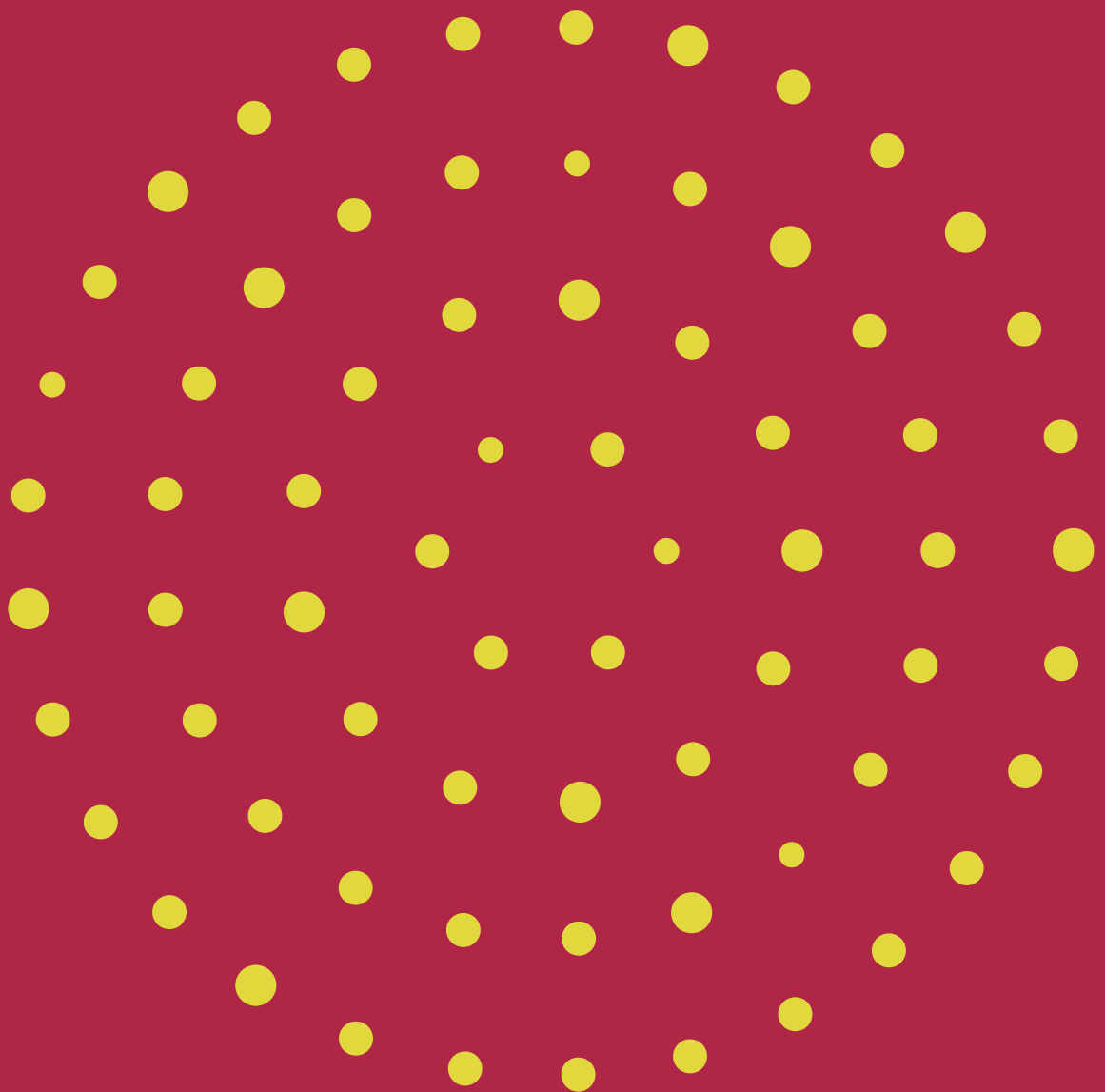


2024 OVERSEAS HALLYU SURVEY



NOTES

- 1 This survey started in 2012 with nine countries to contribute to the establishment of a sustainable Hallyu ecosystem and the formulation of policies to create an overseas market environment by annually measuring the usage and perceptions of Hallyu content among consumers with Hallyu experience in major overseas countries. The number of target countries and sample sizes have gradually increased over time, and the 13th survey was conducted in 2023, involving 26 countries.
- 2 This survey was conducted from November 10 to 30, 2023, and **involved locals aged 15–59 in 26 countries who have experienced Korean cultural content (hereinafter referred to as consumers with Hallyu experience)**; the total sample size was 25,000 and ranged from a minimum of 700 to a maximum of 1,600 for each country. The margin of error is $\pm 0.62\%$ for the entire sample ($n=25,000$) and ± 2.45 to 3.70% for each country ($n=700$ to $1,600$) at the 95% confidence level.
- 3 The survey was conducted online. As it targeted consumers who have experienced Korean cultural content from online panels, consumers with Hallyu experience (such as big city dwellers, younger demographics, and highly educated individuals) who use online platforms relatively more frequently tend to participate voluntarily. Thus, the survey does not represent the entire population with Hallyu experience in all the surveyed countries, but it merely represents the online population with Hallyu experience, which raises the need for caution in interpreting the survey results. Moreover, as the survey measured the thoughts and perceptions of the survey participants (consumers with Hallyu experience), metrics such as experience rate, popularity, proportion of consumption, consumption volume, and expenditure may differ from the actual levels of Hallyu consumption, use, and expenditure.
- 4 Statistical figures are mostly rounded to the nearest tenth and presented to one decimal place; hence, there may be a margin of error within $\pm 0.2\%$ where the sum of the percentages presented in the report does not add up to 100%. For multiple response questions (e.g., first + second priority, first + second + third priority, etc), percentages are calculated based on the number of cases, and the sum may exceed 100%. When comparing each survey item by country, the survey values are arranged in descending order, starting with the country with the highest values.
- 5 Questions involving financial information such as expenditure amounts were initially asked using local currencies, which were later converted to US dollars (USD) using the average exchange rate for the most recent year (from November 1, 2022, to October 31, 2023) at the time of the survey.
- 6 For comparisons of key survey items by year in the report, there are variations in sample sizes, survey items, questions, and classifications of cultural content by country in each year, which require caution in interpretation.
- 7 This report is a summary of the results of the *2024 Overseas Hallyu Survey* conducted in 2023. The full report can be downloaded from the Korean Foundation for International Cultural Exchange (KOFICE) website. For specific survey results, please refer to the reports with country-specific analyses and statistics. Please contact the Research Team at KOFICE for inquiries concerning the included data.

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18-89

PART 1.

Survey Overview

- 
- The year presented in this chapter is based on the “time of survey implementation”; thus, the survey year is indicated as “2023.”
 - Caution is required in interpreting time-series indices considering changes in target countries, increases in sample sizes, classifications of content by year, and variations in items.
 - As mentioned in the Notes, because this survey measured the thoughts (perceptions) of Hallyu consumers/users, metrics such as experience rate, popularity, proportion of consumption, consumption volume, and expenditure may differ from the actual levels of Hallyu consumption, use, and expenditure.
 - To provide a better understanding of the survey results, we conducted a survey via email with 33 respondents, including KOFICE overseas correspondents and KOTRA overseas trade officers, to gather their subjective perceptions on local reactions by category and reasons for changes in consumption volume in 2023. This information is separately organized in the “Local News” section at the bottom of the pages containing related items such as “Hallyu popularity.” When using this information as supporting material in the main text, it is referred to as “According to Local News.”

Purpose of Survey

The purpose of this survey is to collect foundational data that can track and compare the spread of Hallyu by measuring the usage and perception of Hallyu content among consumers with Hallyu experience in major overseas countries by year. The collected data are used to formulate government policies to create a sustainable Hallyu ecosystem and an overseas market environment. Furthermore, they provide the information necessary for Hallyu-related industries to expand into overseas markets and establish business strategies.

History of Survey

Survey Timeframe	Description
February 2012 (1st)	- 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 (2nd)	- Countries Surveyed: Nine countries - Changes in Survey Target: Individuals aged 15 to 49 who have experienced Korean cultural content
February 2014 (3rd)	- 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 (4th)	- 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 (5th)	- Countries Surveyed: 14 Countries - Expanded Sample Size: 5,600 samples → 6,500 samples (sample size varies by country)
November 2016 (6th)	- Countries Surveyed: India added, totaling 15 countries - Expanded Sample Size: 6,500 samples → 7,200 samples
November 2017 (7th)	- Countries Surveyed: Türkiye added, totaling 16 countries - Expanded Sample Size: 7,200 samples → 7,800 samples

Survey Timeframe	Description
November 2018 (8th)	- Countries Surveyed: 16 Countries - Addition of Questions: Online/mobile platform access channels - Reduction in Sample Size: 7,800 samples → 7,500 samples
November 2019 (9th)	- 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 (10th)	- 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 (11th)	- 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 (12th)	- The <i>2023 Overseas Hallyu Survey</i> 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: - 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, and Food (Updated) Drama, Variety Shows, Movies, Music, Animation, Publications, Webtoons, Games, Fashion, Beauty, and Food
November 2023 (13th)	- Conducted the <i>2024 Overseas Hallyu Survey</i> - Changed Sample Size by Country: 700–1,600 samples - Changed Content Classification: Changed the fashion category from products to products/styles - Changed the use of overseas online panel companies from single to multiple companies

Frequency of Survey

The survey is conducted every year.

Survey Targets

- The targets of this study are male and female locals aged 15–59 who have experienced at least one of 11 types of Korean cultural content, such as Korean dramas, variety shows, movies, music, animation, publications, webtoons, games, fashion products/styles, beauty products, and food.
- Experience by type of Korean cultural content is identified by the following question; the respondents who chose “1. Yes” for at least one of the 11 content types were considered “consumers with Hallyu experience.”

Q. Please select all types of Korean cultural content you have experienced.

Content	Yes	No
1. Korean dramas	1	2
2. Korean variety shows	1	2
3. Korean movies	1	2
4. Korean music (K-pop)	1	2
5. Korean animation	1	2
6. Korean publications (books, e-books, etc)	1	2
7. Korean webtoons	1	2
8. Korean games	1	2
9. Korean fashion products/styles	1	2
10. Korean beauty products	1	2
11. Korean food	1	2

- In the United Arab Emirates (UAE), only 11.5% of the population are nationals, while the majority (88.5%) comprises foreign immigrants¹; thus, third-country nationals were also included in the survey.

Target Countries

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

¹ UNITED ARAB EMIRATES POPULATION STATISTICS 2023

Survey Execution

- Organizing agency: Ministry of Culture, Sports and Tourism / KOFICE
- Executing agency: Research Lab

Survey Period

- Preliminary survey: October 13–25, 2023
- Main survey: November 10–30, 2023

Survey Method

- A self-administered survey using a structured questionnaire targeting overseas online panels
- Used two overseas online panel companies instead of one to compensate for the biased population samples

Sample Extraction

- Allocation sampling by country, gender, and age

Sample Allocation

Unit: Sample

Continent	Country	Total	Gender		Age			
			Male	Female	15~19	20~29	30~39	40~59
Total		25,000	12,500	12,500	6,250	6,250	6,250	6,250
Asia-Pacific (10 countries)	China	1,600	800	800	400	400	400	400
	Japan	1,000	500	500	250	250	250	250
	Taiwan	800	400	400	200	200	200	200
	Thailand	900	450	450	225	225	225	225
	Malaysia	800	400	400	200	200	200	200
	Indonesia	1,200	600	600	300	300	300	300
	India	1,600	800	800	400	400	400	400
	Vietnam	900	450	450	225	225	225	225
	Kazakhstan	700	350	350	175	175	175	175
	Australia	800	400	400	200	200	200	200
Americas (5 countries)	US	1,400	700	700	350	350	350	350
	Canada	800	400	400	200	200	200	200
	Mexico	1,000	500	500	250	250	250	250
	Brazil	1,200	600	600	300	300	300	300
	Argentina	800	400	400	200	200	200	200
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	800	400	400	200	200	200	200
	Germany	900	450	450	225	225	225	225
	Russia	1,000	500	500	250	250	250	250
	Türkiye	900	450	450	225	225	225	225
Middle East (2 countries)	UAE	700	350	350	175	175	175	175
	Saudi Arabia	800	400	400	200	200	200	200
Africa (2 countries)	Egypt	900	450	450	225	225	225	225
	South Africa	800	400	400	200	200	200	200

Major Changes in 2023

The questions mainly comprise "perception of Korea," "consumption status by content type (Hallyu consumption status)," "perception of Hallyu," "influence of Hallyu," and "respondent characteristics." To improve the questionnaire, two face-to-face meetings were held, gathering numerous opinions from various stakeholders such as academia, industry, and relevant government departments. The major changes in the 2023 survey are as follows. First, questions about overall favorability and willingness to recommend Korean cultural content were added. Second, the subjects measured in the items for "factors promoting favorability" and "factors inhibiting favorability" for each type of Korean cultural content were matched. Third, the choices and questions were updated. Fourth, the question types were changed considering usage characteristics. Overseas fans of Korean music tend to like two or more singers/groups. Therefore, the question on "favorite Korean singers/groups" was changed from a single response to multiple responses (up to two choices).

Survey Changes

	Item	Changed or not	Detailed changes
Perception of Korea	Perception of Korea		
	Overall perception of Korea		
	Images associated with Korea		

Item		Changed or not	Detailed changes
Consumption of Hallyu (Drama-Food)	Ease of using Korean cultural content		
	Korean cultural content access channels	Changed	• Added "online/offline communities related to Hallyu" for dramas, "internet search or introduction of remade Korean variety shows" for variety shows, "Manta" for webtoons, and "online/offline sales channels" for fashion/beauty/food
	Online/mobile access platforms for Korean cultural content	Changed	• Added "YouTube Music" and "Weverse" for music
	Korean cultural content usage/expenditure		
	Favorability toward Korean cultural content		
	Factors promoting favorability toward Korean cultural content	Changed	• Changed question from "popularity factors" to "factors promoting favorability" • Changed/added/deleted choices for content overall
	Factors inhibiting favorability toward Korean cultural content	Changed	• Changed/added/deleted choices for content overall
	Countries of popular foreign content in the country		
	Willingness to recommend Korean cultural content to others	Changed	• Changed from willingness to recommend Korean cultural content by type to "recently watched content" • Changed from an 11-point scale to a five-point Likert scale
	Degree of relevance to Hallyu in Korean cultural content		
	Genres of Korean publications used	Changed	• Changed from the proportion of literature/nonliterature usage to multiple-choice question
	Time of using Korean webtoons	New	
	Most preferred Korean drama (open-ended)		
	Most preferred Korean movie (open-ended)		
	Most preferred Korean actor (open-ended)		
	Most preferred Korean singer/group (open-ended)	Changed	• Changed from single response to up to two responses
	Most preferred animation	Changed	• Added <i>Red Shoes and the Seven Dwarfs</i> and <i>Lookism</i>
	Awareness of Korean games		
	Most preferred Korean games		
Perception of Hallyu	Popularity of Korean cultural content within the country		
	Interest in Korean cultural content		
	Willingness to pay for Korean cultural content		
	Overall favorability toward Korean cultural content	New	
	Overall willingness to recommend Korean cultural content to others	New	
	Changes in overall perception of Korea after experiencing Korean cultural content		
	Degree of agreement with negative perceptions of Hallyu		
	Reasons for negative perceptions of Hallyu		
Influence of Hallyu	Frequency of purchasing Korean products in the past year*		
	Number of times Korean products/services were purchased in the last 4 years		
	Intent to purchase Korean products/services*		
	Reasons for purchasing Korean products/services		
	Influence of consuming Korean cultural content on purchasing and using Korean products/services		
Respondent Characteristics	Gender	Occupation	
	Age	Education level	
	Area of residence	Average annual household income	
	Marital status		

* Owing 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 past year" and "intent to purchase Korean products/services."

Categories of Korean Cultural Content

In this survey, Korean cultural content is classified into 11 categories for measurement. For “fashion products,” respondents may not be able to come up with Korean fashion products or brands as there are insufficient global brands representing Korean fashion, possibly providing inaccurate responses. Thus, the category is changed to “fashion products/styles.”

Year*	Description
2016 (6 th)	Dramas, variety shows, movies, music, animation/comics, books (publications), webtoons, online/mobile games, fashion/beauty products, and food
2017 (7 th)	Dramas, variety shows, movies, music, <u>animation, comics, books (publications), character goods</u> , online/mobile games, fashion/beauty products, and food
2018 (8 th)	Dramas, variety shows, movies, music, animation, <u>books (including webtoons, comics)</u> , online/mobile games, fashion products, beauty products, and food
2019 (9 th)	Dramas, variety shows, movies, music, animation, <u>publications (books, e-books, comics, webtoons, web novels, etc.), games</u> , fashion products, beauty products, and food
2020 (10 th)	Dramas, variety shows, movies, music, animation, <u>publications (books, e-books, comics, webtoons, etc.)</u> , games, fashion products, beauty products, and food
2021 (11 th)	Dramas, variety shows, movies, music, animation, publications (books, e-books, comics, webtoons, etc.), games, fashion products, beauty products, and food
2022 (12 th)	Dramas, variety shows, movies, music, animation, <u>publications (books, e-books, etc.), webtoons</u> , games, fashion products, beauty products, and food
2023 (13 th)	Dramas, variety shows, movies, music, animation, <u>publications (books, e-books, etc.), webtoons</u> , games, fashion products/styles, beauty products, and food

* Data until 2015 are not presented as there may be confusion due to different content classifications for each item.

* The content that is underlined and in bold indicates modifications or updates compared to the previous year.

Response Method

The survey first asks about the experience with each type of cultural content, followed by questions to consumers who have experienced Korean cultural content by type in the following “Hallyu consumption status” section. The increase in the number of content types experienced also leads to a rise in the number of questions to respond to, which may deteriorate the quality of responses. Thus, respondents were to answer questions about up to six types of content they had experienced since 2020.

04

Respondent Characteristics

Respondent Characteristics

Unit: %

Category		Total no. of cases (person)	Asia-Pacific										Middle East		Africa	
			China	Japan	Taiwan	Malaysia	Thailand	Indonesia	India	Vietnam	Kazakhstan	Australia	UAE	Saudi Arabia	Egypt	South Africa
Total		25,000	6.4	4.0	3.2	3.2	3.6	4.8	6.4	3.6	2.8	3.2	2.8	3.2	3.6	3.2
Gender	Male	12,500	6.4	4.0	3.2	3.2	3.6	4.8	6.4	3.6	2.8	3.2	2.8	3.2	3.6	3.2
	Female	12,500	6.4	4.0	3.2	3.2	3.6	4.8	6.4	3.6	2.8	3.2	2.8	3.2	3.6	3.2
Age	15~19	6,250	6.4	4.0	3.2	3.2	3.6	4.8	6.4	3.6	2.8	3.2	2.8	3.2	3.6	3.2
	20~29	6,250	6.4	4.0	3.2	3.2	3.6	4.8	6.4	3.6	2.8	3.2	2.8	3.2	3.6	3.2
	30~39	6,250	6.4	4.0	3.2	3.2	3.6	4.8	6.4	3.6	2.8	3.2	2.8	3.2	3.6	3.2
	40~49	4,177	7.4	2.8	3.2	3.8	4.0	5.8	7.1	4.5	3.1	2.9	3.4	4.0	4.0	3.3
	50~59	2,073	4.3	6.4	3.2	2.1	2.7	2.8	4.9	1.7	2.2	3.9	1.6	1.5	2.7	2.9
Highest education level	High school graduate or below	6,959	3.1	5.1	2.0	3.6	3.6	6.5	2.7	2.0	2.2	4.5	1.7	2.7	2.1	3.4
	College graduate	12,588	9.4	4.6	4.5	3.4	4.7	5.6	4.8	3.8	2.6	2.6	2.9	3.7	4.4	3.2
	Graduate school	5,321	3.8	1.2	1.9	2.3	1.1	0.8	15.2	5.2	3.8	2.9	4.0	2.8	3.6	3.0
	Other	132	0.8	1.5	0.0	0.8	0.0	1.5	0.8	3.8	12.1	0.0	1.5	0.0	1.5	3.0
Occupation	Middle/high school student	2,655	5.2	4.9	3.2	2.3	4.4	4.2	4.2	2.8	1.8	4.7	2.4	4.0	3.8	3.0
	College (graduate) student	3,605	8.2	3.7	4.7	3.1	2.6	3.3	8.2	3.8	3.5	1.9	2.6	4.0	5.6	3.1
	Clerical/technical worker	4,238	9.0	6.1	4.7	2.3	6.7	6.0	6.7	5.3	4.1	2.1	1.6	0.6	0.4	2.7
	Sales/production worker	1,906	8.7	4.9	5.2	2.6	4.7	2.3	4.1	3.6	3.6	3.4	3.1	2.3	1.5	3.4
	Professional	4,282	7.1	1.4	2.5	4.5	1.8	2.4	7.5	4.0	1.3	4.1	4.7	4.0	4.0	3.6
	Part-time	3,201	2.1	3.1	1.0	3.4	2.1	7.2	7.2	3.2	1.7	4.0	3.3	3.4	5.5	3.0
	Self-employed	2,233	9.2	3.0	2.5	3.9	5.1	10.5	7.2	3.9	2.5	1.1	2.0	1.7	3.5	4.0
	Full-time homemaker	1,443	1.7	3.1	1.9	2.6	1.2	4.8	6.0	1.5	5.3	3.6	3.5	8.5	6.7	2.1
	Unemployed/retired	1,360	1.3	8.1	1.6	3.3	2.6	2.1	1.9	0.4	3.0	5.4	1.1	2.7	1.9	4.6
	Other	77	2.6	2.6	6.5	3.9	3.9	9.1	2.6	5.2	3.9	1.3	2.6	0.0	1.3	3.9
Marital status	Married	11,570	8.7	2.8	2.4	3.4	3.2	5.9	7.4	4.5	2.8	2.7	3.8	4.1	4.2	2.3
	Single	13,414	4.4	5.1	3.9	3.1	4.0	3.8	5.6	2.8	2.8	3.6	1.9	2.4	3.0	4.0
	Other	16	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Nationality	Korean descendant local	207	4.8	1.0	1.0	2.9	0.0	0.0	2.4	1.9	1.4	10.1	15.5	0.5	0.0	0.0
	Local	24,431	6.5	4.1	3.3	3.2	3.7	4.9	6.5	3.7	2.9	3.2	1.3	3.3	3.7	3.3
	Third-country national	362	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	100.0	0.0	0.0	0.0
Awareness of Korea	High	7,450	6.8	3.1	3.2	4.4	5.5	7.1	10.5	5.1	1.4	2.7	4.7	5.1	5.9	2.8
	Medium	13,292	7.2	4.8	3.8	2.7	2.9	4.1	5.0	3.5	3.4	3.3	2.2	2.4	2.8	2.9
	Low	4,258	3.0	3.1	1.3	2.5	2.4	2.8	3.8	1.1	3.2	3.7	1.6	2.2	2.1	4.9

Continued.....➤

Category		Americas					Europe						
		US	Canada	Mexico	Brazil	Argentina	UK	France	Italy	Spain	Germany	Russia	Türkiye
Total		5.6	3.2	4.0	4.8	3.2	3.6	3.6	3.6	3.2	3.6	4.0	3.6
Gender	Male	5.6	3.2	4.0	4.8	3.2	3.6	3.6	3.6	3.2	3.6	4.0	3.6
	Female	5.6	3.2	4.0	4.8	3.2	3.6	3.6	3.6	3.2	3.6	4.0	3.6
Age	15~19	5.6	3.2	4.0	4.8	3.2	3.6	3.6	3.6	3.2	3.6	4.0	3.6
	20~29	5.6	3.2	4.0	4.8	3.2	3.6	3.6	3.6	3.2	3.6	4.0	3.6
	30~39	5.6	3.2	4.0	4.8	3.2	3.6	3.6	3.6	3.2	3.6	4.0	3.6
	40~49	4.4	2.2	4.4	4.5	3	2.8	3.0	3.5	3.2	2.4	3.2	4.0
	50~59	8.0	5.2	3.1	5.5	3.6	5.3	4.8	3.8	3.2	6	5.5	2.7
	60~69	5.6	3.2	4.0	4.8	3.2	3.6	3.6	3.6	3.2	3.6	4.0	3.6
Highest education level	High school graduate or below	7.8	3.8	2.8	6.2	4.6	3.9	4.4	6.5	2.5	4.9	3.3	4.1
	College graduate	4.8	3.2	3.1	3.9	3.1	3.5	2.7	1.7	3.1	3.1	3.5	4.1
	Graduate school	4.7	2.3	7.7	5.1	1.6	3.5	4.6	4.1	4.3	2.6	5.8	1.8
	Other	2.3	3.0	3.0	6.8	2.3	2.3	1.5	4.5	3.8	23.5	18.9	0.8
Occupation	Middle/high school student	7.5	4.5	1.9	5.3	4.3	3.4	3.7	5.0	2.5	4.1	2.9	4.1
	College (graduate) student	4.1	3.1	3.7	2.6	3.4	3.6	3.4	3.6	3.8	2.2	4.8	3.6
	Clerical/technical worker	3.7	2.7	2.6	4.4	1.9	2.9	2.4	3.1	3.4	4.7	6.3	3.4
	Sales/production worker	5.3	3.3	4.0	5.7	3.0	3.6	3.8	2.3	2.2	4.9	5.2	3.5
	Professional	4.5	3.0	4.4	4.2	2.7	4.5	5.7	4.3	4.7	3.0	2.6	3.4
	Part-time	6.1	3.2	5.8	4.8	5.8	4.1	3.4	3.5	3.7	4.2	2.8	2.3
	Self-employed	4.2	2.0	6.1	8.3	3.3	1.8	2.0	3.4	1.7	2.0	2.1	3.0
	Full-time homemaker	9.2	2.3	6.2	5.1	1.7	3.9	2.5	2.4	1.3	2.1	4	6.9
	Unemployed/retired	13.2	5.8	1.4	5.2	1.8	4.9	5.1	4.3	2.9	5.2	5.7	4.4
	Other	5.2	1.3	5.2	13.0	1.3	3.9	1.3	3.9	0	6.5	0	9.1
	Housewife	5.6	3.2	4.0	4.8	3.2	3.6	3.6	3.6	3.2	3.6	4.0	3.6
Marital status	Married	4.1	2.5	4.7	5.0	2.3	3.0	3.2	2.9	2.9	2.8	4.1	4.3
	Single	6.9	3.8	3.4	4.6	4.0	4.2	3.9	4.2	3.4	4.3	3.9	3.0
	Other	6.3	6.3	6.3	0.0	6.3	0.0	50.0	0.0	0.0	18.8	6.3	0.0
Nationality	Korean descendant local	12.6	9.2	4.3	2.9	1.0	6.8	2.4	4.3	7.7	4.8	1.4	1.0
	Local	5.6	3.2	4.1	4.9	3.3	3.6	3.7	3.6	3.2	3.6	4.1	3.7
	Third-country national	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Awareness of Korea	High	5.5	2.7	2.5	3.9	2.1	2.8	1.6	1.7	1.6	2.9	2.0	2.3
	Medium	5.4	3.5	4.1	4.6	3.1	3.7	3.5	3.9	3.8	4.0	5.0	4.3
	Low	6.3	3.3	6.3	6.9	5.4	4.6	7.6	6.0	4.2	3.7	4.2	3.8

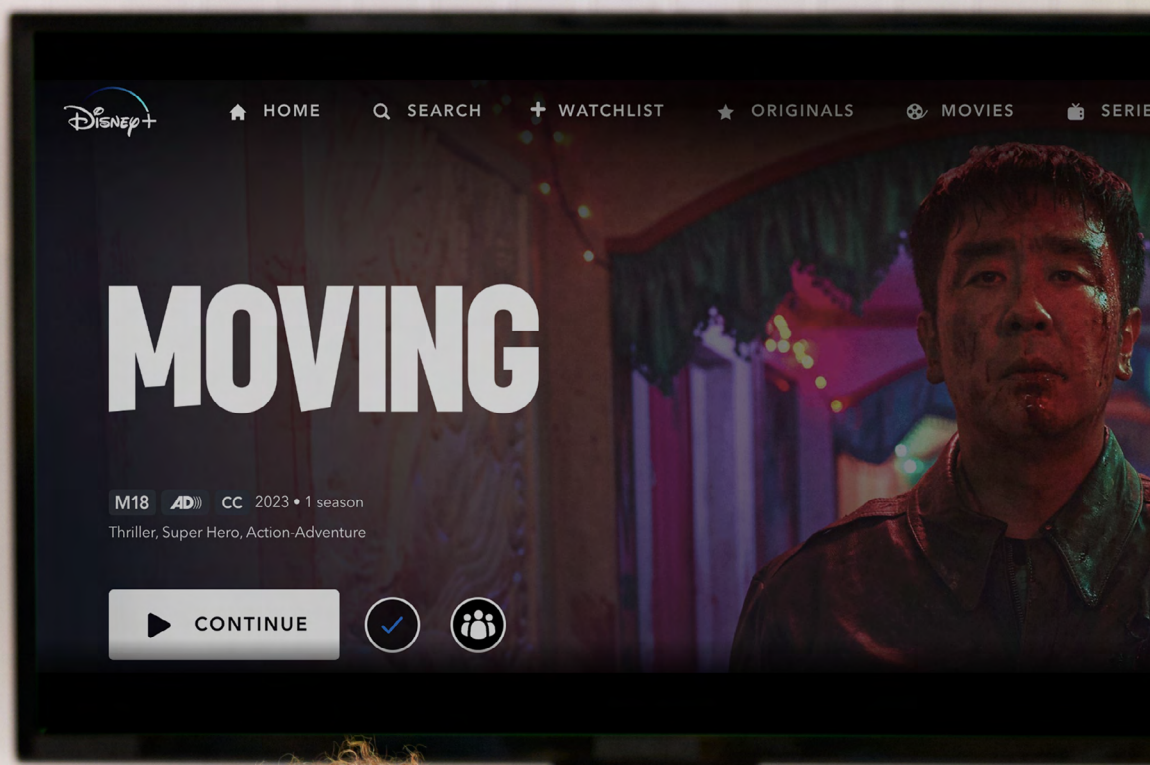
Number of Respondents by Type of Korean Cultural Content

The “Hallyu Consumption Status” section asks questions to consumers who have experienced each type of cultural content. Hence, the number of cases for each category (type of Korean cultural content) varies, as provided in the table below.

Unit: Sample

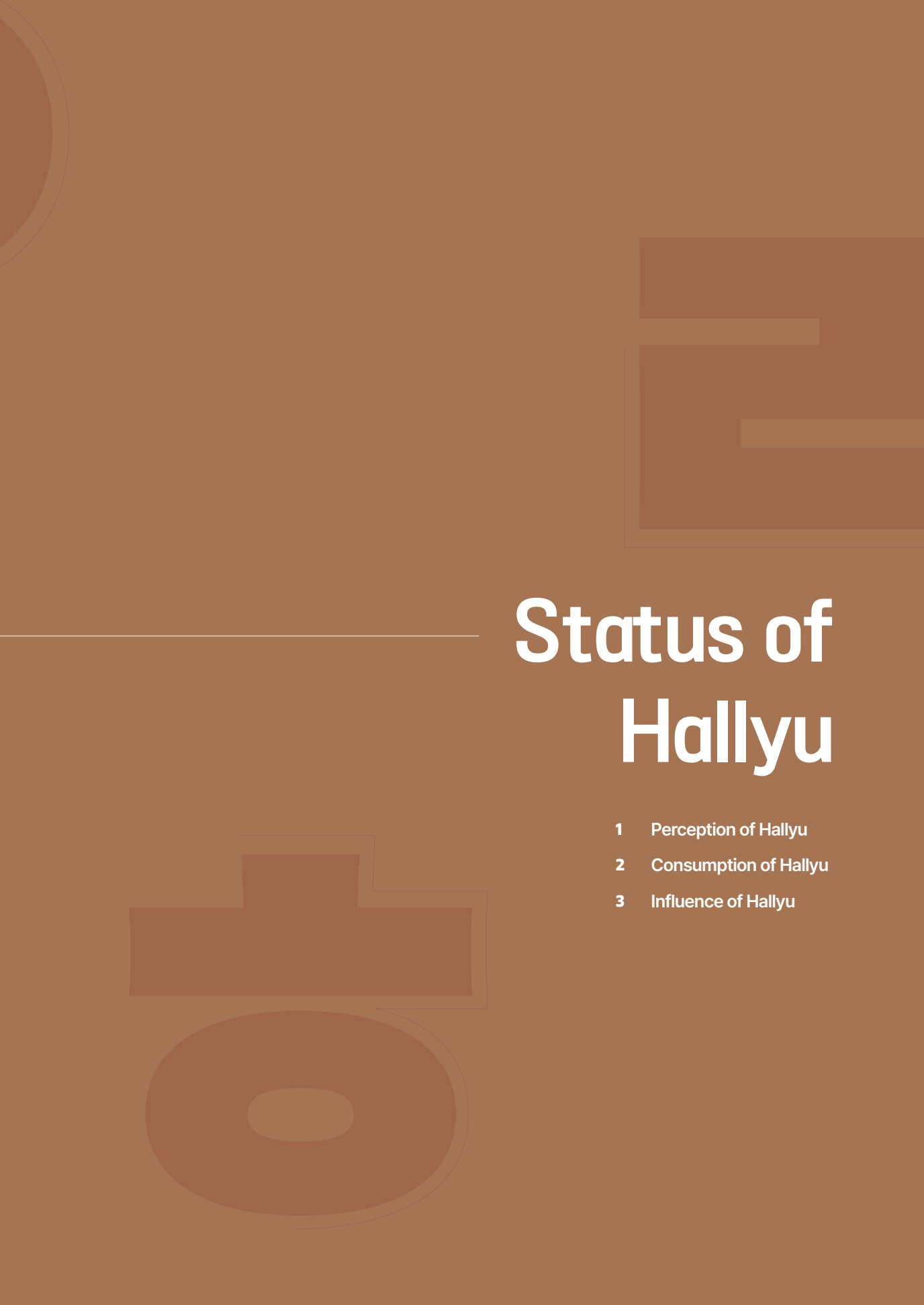
Category		Country	Dramas	Variety Shows	Movies	Music	Animation	Publications	Webtoons	Games	Fashion	Beauty	Food
Total			12,177	9,022	12,987	12,566	10,311	6,893	7,409	10,192	10,658	10,872	14,610
By continent	Asia-Pacific		5,633	4,447	5,503	5,536	4,109	3,135	3,645	4,174	4,867	4,979	6,262
	Americas		2,150	1,653	2,589	2,823	2,230	1,369	1,445	2,041	2,085	2,002	2,932
	Europe		2,673	1,618	3,063	2,943	2,476	1,433	1,388	2,489	2,245	2,485	3,726
	Middle East		822	614	821	588	692	454	437	695	714	732	792
	Africa		899	690	1,011	676	804	502	494	793	747	674	898
By country	Asia-Pacific	China	926	753	838	762	584	498	588	667	731	713	833
		Japan	531	215	358	627	173	149	137	246	319	368	755
		Taiwan	488	411	471	423	337	288	364	363	402	383	492
		Thailand	497	448	530	498	410	363	434	420	470	468	558
		Malaysia	491	423	480	460	358	226	346	322	421	420	480
		Indonesia	705	579	682	708	572	459	602	516	627	578	699
		India	861	776	913	760	745	509	571	720	836	831	816
		Vietnam	527	439	516	507	424	386	356	445	481	506	532
		Kazakhstan	353	164	392	342	248	120	103	223	310	435	519
		Australia	254	239	323	449	258	137	144	252	270	277	578
	Americas	US	459	456	547	751	553	351	375	503	478	482	921
		Canada	252	212	306	451	273	134	154	260	275	281	554
		Mexico	477	340	592	488	425	341	400	427	499	470	528
		Brazil	658	435	720	658	576	366	308	512	479	475	510
		Argentina	304	210	424	475	403	177	208	339	354	294	419
	Europe	UK	300	267	365	470	315	175	175	294	290	297	587
		France	385	213	420	452	302	223	213	381	281	282	496
		Italy	461	227	387	383	368	212	162	401	314	306	462
		Spain	240	198	430	365	350	194	239	365	289	324	468
		Germany	313	216	370	430	361	178	180	340	293	314	608
		Russia	426	244	505	449	381	226	125	347	421	609	703
		Türkiye	548	253	586	394	399	225	294	361	357	353	402
	Middle East	UAE	394	308	384	301	341	211	226	322	350	352	393
		Saudi Arabia	428	306	437	287	351	243	211	373	364	380	399
	Africa	Egypt	522	355	494	326	425	303	271	454	391	389	488
		South Africa	377	335	517	350	379	199	223	339	356	285	410
Gender	Male		5,932	4,430	6,842	6,130	5,322	3,306	3,588	6,010	4,627	3,896	7,359
	Female		6,245	4,592	6,145	6,436	4,989	3,587	3,821	4,182	6,031	6,976	7,251
Age	Teens		2,983	2,185	2,964	3,357	2,648	1,768	2,070	2,703	2,571	2,518	3,422
	20s		3,189	2,484	3,223	3,278	2,644	1,978	2,224	2,672	2,880	3,040	3,605
	30s		3,106	2,412	3,387	3,112	2,705	1,819	1,844	2,692	2,800	2,882	3,693
	40s		2,082	1,425	2,363	1,930	1,658	1,013	977	1,575	1,695	1,749	2,491
	50s		817	516	1,050	889	656	315	294	550	712	683	1,399

Jan 2023	- Netflix announced its plan to schedule a record-breaking 34 K-content titles in 2023. 1. 28. LE SSERAFIM's Japan debut single <i>FEARLESS</i> topped the Oricon Daily Singles Chart. 1. 27. Drama <i>Casino</i> ranked first on the Disney+ Original Drama category in KinoLights's "Today's OTT Ranking Chart."
Mar 2023	3. 2. Naver Webtoon's US headquarters, Webtoon Entertainment, ranked eight on Fast Company's "The World's Most Innovative Companies of 2023" and first in "The 10 Most Innovative Media Companies."
Apr 2023	China's multi-video platform Bilibili releases the animation <i>Aishang Ta De Liyou</i> based on Naver Webtoon <i>Doona!</i>
May 2023	5. 18. Samyang Buldak Bokkeum Myeon ranked second in best instant noodle rankings by American food magazine <i>Bon Appétit</i>.
Jun 2023	6. 12. IVE's first Japan album <i>Wave</i> topped the Oricon Weekly Album Chart. 6. 9. <i>The Roundup: No Way out</i> earned \$25.38 million (KRW 32.80365 billion), ranking fourth worldwide.
Jul 2023	7. 14. BTS Jung Kook's song <i>Seven</i> ranked first in Billboard's "Global Song of the Summer for 2023."
Aug 2023	8. 23. NewJeans's song <i>OMG</i> surpassed 100 million streams, earning "Platinum" certification from the Recording Industry Association of Japan. 8. 16. Naver Webtoon <i>Get Schooled</i> ranked first in Japan's LINE Manga Total Rankings. 8. 24. Disney+ original series <i>Moving</i> ranked first worldwide in the Disney+ TV show category on FlixPatrol. 8. 23. Netflix original series <i>Mask Girl</i> ranked second in the non-English TV category for viewing hours and views in the third week of August (Days 14-20).
Sep 2023	9. 18. Naver Webtoon <i>Mercenary Enrollment</i> achieved the highest monthly transaction volume in 2023 for a single work on Japan's LINE Manga service. 9. 2. TWICE Jihyo's mini-album <i>Zone</i> entered "Billboard 200" at 14th and "Artist 100" at 10th.
Oct 2023	10. 13. HiteJinro signed a contract to build its first overseas factory in the Vietnamese liquor market. 10. 22. <i>Doona!</i> ranked sixth in FlixPatrol's TV show category, first in Hong Kong, Indonesia, Japan, Malaysia, Qatar, Singapore, Taiwan, Vietnam, and Korea. 10. 24. Hwang Sok-yong's novel <i>Princess Bari</i> was published in Poland (Polish <i>Księżniczka Bari</i>).
Nov 2023	11. 25. Stray Kids' mini-album <i>樂-STAR</i> topped "Billboard 200." 11. 22. Netflix's original reality survival series <i>Squid Game: The Challenge</i> ranked first in Netflix's "Top 10 English Series" immediately after release. 11. 16. Taiwanese publisher Big Forest Publishing published Park Hyun-sook's <i>The Nine-Tailed Fox Restaurant 3: Promise Restaurant</i> (Taiwanese 九尾狐餐廳2: 約定的蔥薯料理).
Dec 2023	- BTS Jung Kook's song <i>Standing Next to You</i> ranked first on the Billboard Digital Song Sales Chart for 5 weeks. 12. 12. Lim Young-woong's <i>Do or Die</i> charted on the US Billboard Global Chart for 12 consecutive weeks. 12. 7. Kakao Webtoon ranked first in global comic app revenue in US data analysis company Sensor Tower's <i>2023 Global Comic App Market Insights</i> report from January to October 2023.



PART 2.

Survey Results



Status of Hallyu

- 1 Perception of Hallyu
- 2 Consumption of Hallyu
- 3 Influence of Hallyu



K-POP Dance
DJ CHEN X



한국문화재단
Korean Cultural Center NY



1

Perception of Hallyu

01 Favorability Toward Korean Cultural Content

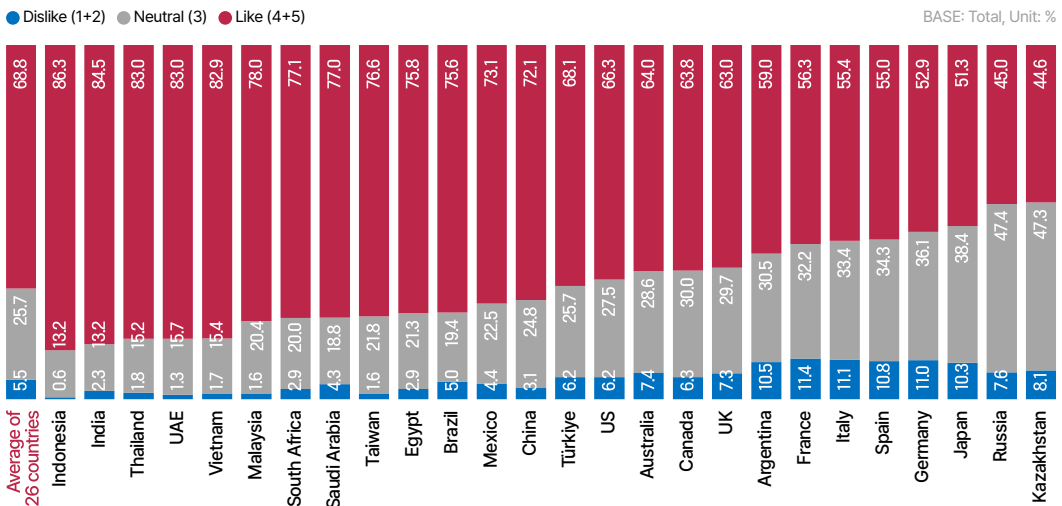
Seven out of 10 consumers with Hallyu experience felt favorably toward Korean cultural content.

Seven (68.8%) out of 10 consumers with Hallyu experience across 26 countries responded that they generally like Korean cultural content. The country with the highest favorability rate was Indonesia (86.3%), followed by India (84.5%), Thailand and the UAE (83.0%, respectively), and Vietnam (82.9%), consistent with the top five countries for favorability¹ in 2022. Conversely, Kazakhstan (44.6%), Russia (45.0%), Japan (51.3%), Germany (52.9%), and Spain (55.0%) showed low favorability. In European countries (France 11.4%, Italy 11.1%, etc.) and Japan (10.3%), the “dislike” rate exceeded 10%. Compared to 2022, except for beauty (▲

2.1%p) favorability has decreased by 0.6–3.4%p. Asia-Pacific, as well as the Americas and Europe, which showed a significant increase in interest and favorability toward Korean content with the release of *Squid Game*, experienced the highest decline; the Middle East and Africa maintained or showed increases in favorability.

Since around 2020, the top favorability content has shifted toward video content such as dramas, movies, and variety shows. For the top three categories in favorability by year, food, beauty, and fashion were generally within the top three until 2019. However, since 2020, video content such as dramas, variety shows, and movies have consistently ranked at the top.

Figure 2-1 Comparison of Overall Favorably Toward Korean Cultural Content by Country

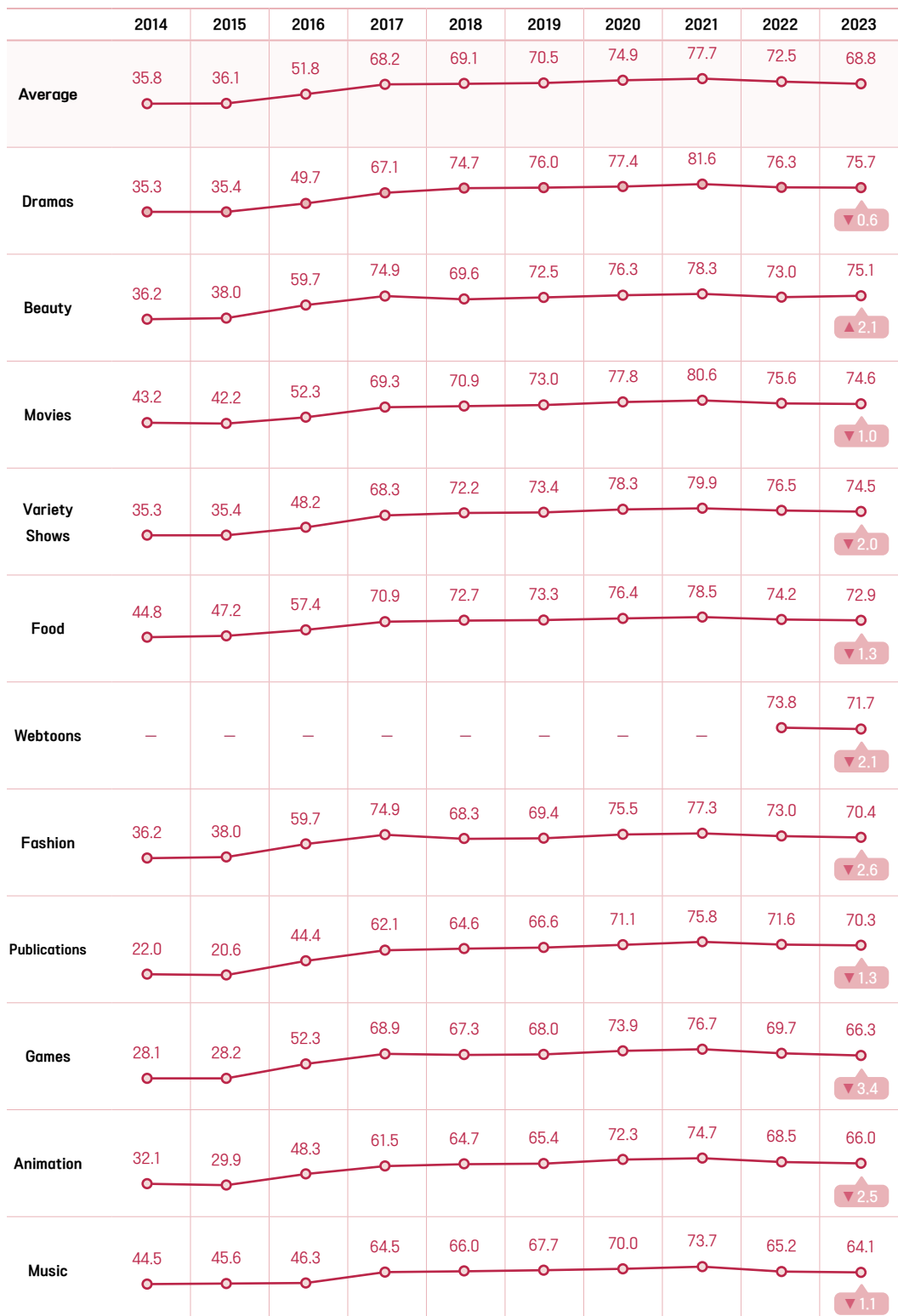


Q. Overall, how much do you like the Korean cultural content you have experienced?
Five-point scale : 1. Don't like it at all, 2. Don't like it, 3. Neutral, 4. Like it, 5. Like it very much

¹ The question about the “overall favorability toward Korean cultural content” was added to the 2023 survey. Thus, to compare with the previous year, the proportions of “like it very much” and “like it” for 11 types of cultural content were added and compared with the arithmetic mean.

Figure 2-2 Changes in Favorability Over the Last 10 Years by Type of Korean Cultural Content

BASE: Total (overall), consumers who have experienced Korean cultural content by type (by content type), Unit: Like (4+5)%, ▲▼ 2022~2023 %p



Note Webtoons had been included in publications until 2021 but have been separated since 2022.

02 Preferred Hallyu Content (Dramas, Movies)

The drama “Squid Game” has been ranked first for three consecutive years in terms of popularity in the Asia-Pacific region, followed by “The Glory”, ranking second.

Although the *Squid Game* syndrome has somewhat diminished, it remains the most preferred drama among those who have experienced Korean dramas. “Squid Game” (9.0%) has been

ranked first for three consecutive years as the most preferred Korean drama watched in 2023.

The percentage of respondents who chose “Squid Game” as their favorite has decreased from 21.2% in 2021 to 11.3% in 2022 and 9.0% in 2023, but the gap with other dramas remains significant. Notably, its popularity is higher in Europe (23.7%) and the Americas (8.3%), compared to Asia-Pacific (3.2%), the Middle East (5.0%), and Africa (7.6%).

Table 2 -1 Comparison of top Five Most Preferred Korean Dramas Over the Last 5 Years by Year

BASE: Consumers who experienced Korean dramas, Unit: %

	2019	2020	2021	2022	2023
1st	Hotel del Luna 8.2	Crash Landing on You 9.5	Squid Game 21.2	Squid Game 11.3	Squid Game 9.0
2nd	Descendants of the Sun 3.0	It's Okay to Not Be Okay 4.1	Crash Landing on You 2.2	Extraordinary Attorney Woo 2.8	The Glory 3.4
3rd	Jewel in the Palace 2.3	The World of the Married 2.8	Vincenzo 1.9	All of Us Are Dead 2.6	King the Land 2.6
4th	Kingdom 2.1	Itaewon Class 2.8	The Penthouse: War in Life 1.6	Business Proposal 1.9	Crash Landing on You 2.2
5th	Guardian: The Lonely and Great God 2.0	Kingdom 2.5	Hometown Cha-Cha-Cha 1.4	Crash Landing on You 1.9	Black Knight 1.6

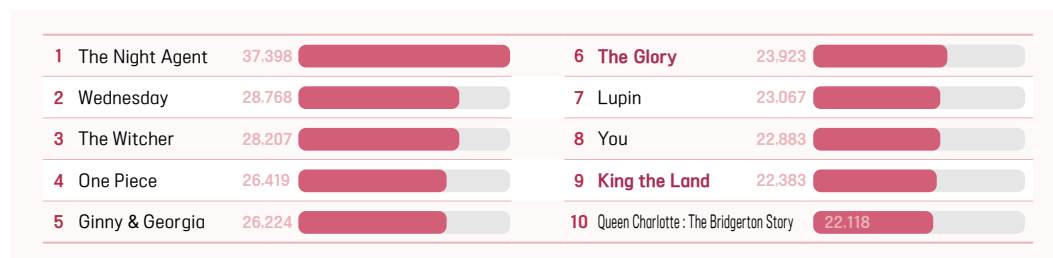
Q. What is your favorite Korean drama among those you watched this year? (Open-ended)

Table 2 -2 Comparison of top Five Most Preferred Korean Dramas by Continent

BASE: Consumers who experienced Korean dramas, Unit: %

	Asia-Pacific	Americas	Europe	Middle East	Africa
1st	The Glory 5.4	Squid Game 8.3	Squid Game 23.7	Squid Game 5.0	Squid Game 7.6
2nd	Squid Game 3.2	King the Land 5.8	King the Land 1.1	King the Land 1.6	Black Knight 4.8
3rd	King the Land 2.3	Crash Landing on You 3.5	Crash Landing on You 0.7	Crash Landing on You 3.8	Crash Landing on You/ Tomorrow 2.1
4th	Moving 2.2	Extraordinary Attorney Woo 3.1	Extraordinary Attorney Woo 1.1	Extraordinary Attorney Woo 0.6	King the Land/ Mouse 1.8
5th	Crash Landing on You 2.2	The Glory 2.1	The Glory 1.4	The Glory 2.1	Boys Over Flowers 1.7

Figure 2-3 FlixPatrol Top 10 TV Shows in 2023



"The Glory" (3.4%) and "King the Land" (2.6%) were ranked second and third, respectively, consistent with their rankings of sixth and ninth on FlixPatrol's "2023 TOP TV Shows" ranking global OTT contents. "The Glory" showed a higher preference in Asia-Pacific (5.4%) but a lower preference in the Americas (2.1%) and Europe (1.4%). A possible reason could be cultural differences, as the Americas and Europe view school violence extremely negatively, take strong measures, and cannot relate to the drama culturally. This was followed by "Crash Landing on You" (2.2%), ranking fourth, and then the 2023 new release "Black Knight" (1.6%), ranking fifth.

"Parasite" remained the most preferred movie for five consecutive years, with particularly higher preference in the Americas and Europe.

In the movie category, "Parasite" (7.9%) and "Train to Busan" (6.0%) continued to hold first and second place for five consecutive years, followed by the 2023 releases "Unlocked" (2.4%)

, "Ballerina" (2.0%), and "Phantom" (1.7%) in third to fifth places. "Parasite" remained popular in the Americas (12.6%) and Europe (10.7%), while "Train to Busan" maintained its popularity in Asia-Pacific (8.2%), particularly in Kazakhstan (13.3%). The Americas and Europe showed a greater preference for the drama *Squid Game* and the movie *Parasite* compared to other continents, reaffirming their high interest in these two works. "Unlocked" showed relatively high preference in Africa (4.4%) and the Middle East (3.5%).

Another feature observed from the most preferred Korean dramas and movies is that Korean works distributed through global OTT platforms are gaining popularity. Among the top-ranked dramas, three (*Squid Game*, *The Glory*, and *Black Knight*) are Netflix originals, and dramas aired by domestic broadcasters such as *King the Land* (JTBC) and *Crash Landing on You* (tvN) are globally streamed or exclusively distributed through Netflix. Excluding *Parasite* and *Train to Busan*, the movies *Unlocked* and *Ballerina* in the rankings are Netflix originals.

Table 2 -3 Comparison of top Five Most Preferred Korean Movies Over the Last 5 Years by Year

BASE: Consumers who experienced Korean movies, Unit: %

	2019	2020	2021	2022	2023
1st	Parasite 12.4	Parasite 18.4	Parasite 10.3	Parasite 9.1	Parasite 7.9
2nd	Train to Busan 7.9	Train to Busan 10.2	Train to Busan 6.8	Train to Busan 6.9	Train to Busan 6.0
3rd	Extreme Job 3.1	Peninsula 3.5	Seo Bok 1.5	Carter 2.5	Unlocked 2.4
4th	Along with the Gods 2.0	#Alive 2.1	Midnight 1.3	Hunt 2.0	Ballerina 2.0
5th	Exit 1.5	Time to Hunt 1.6	Space Sweepers 1.3	20th Century Girl 1.8	Phantom 1.7

Q What is your favorite Korean movie among those you watched this year? (Open-ended)

Table 2 -4 Comparison of top Five Most Preferred Korean Movies by Continent

BASE: Consumers who experienced Korean movies, Unit: %

	Asia-Pacific	Americas	Europe	Middle East	Africa
1st	Train to Busan 8.2	Parasite 12.6	Parasite 10.7	Parasite 4.1	Parasite 3.7
2nd	Parasite 5.5	Train to Busan 5.3	Train to Busan 4.1	Unlocked 3.5	Unlocked 4.4
3rd	Phantom 2.4	Unlocked 2.9	Ballerina 2.1	Phantom 3.5	Phantom 2.4
4th	Unlocked 2.1	Ballerina 2.7	Unlocked 1.9	Train to Busan 2.9	Train to Busan 3.8
5th	Soulmate 1.6	Jung_E 2.1	Jung_E 1.6	Oldboy 2.1	Oldboy 1.4

03 Preferred Hallyu Stars (Actors, Singers)

“Lee Min-ho” ranked first based on his popularity in Southeast Asia and the UAE.

“BTS” enjoyed widespread popularity in the Americas and Europe.

“BLACKPINK” ranked high in Asia and Mexico.

“Lee Min-ho” (6.4%) has ranked first in the actor category for 11 consecutive years since the item on Hallyu stars began to be included in the survey in 2014². He was particularly preferred in the Asia-Pacific region (7.7%) and Middle East (8.2%). However, his preference rate slightly decreased by 2.7%p from 9.1% in 2022 to 6.4% in 2023, as

he has not appeared in any works since the 2022 drama *Pachinko*. Next, “Hyun Bin” (3.4%) ranked second, showing especially high preference in the Middle East (5.6%) and Africa (5.8%). “Song Hye-kyo” (2.7%) remained in fourth place for three years since 2020 after the 2019 drama *Encounter* but rose to third place in 2023 following the success of the Netflix original series *The Glory*. The fact that the gap between the first and second places was nearly double and the overall response rates remained at around 2–3% suggests that overseas consumers were familiar with only a few Korean actors.

Table 2 -5 Comparison of top Five Most Preferred Korean Actors and Singers/groups Over the Last 5 Years by Year

BASE: Total (actors), consumers who experienced Korean music (singers/groups), Unit: %

Actors

	2019	2020	2021	2022	2023
1st	Lee Min-ho 7.6	Lee Min-ho 9.6	Lee Min-ho 9.3	Lee Min-ho 9.1	Lee Min-ho 6.4
2nd	Song Hye-kyo 3.4	Hyun Bin 3.5	Hyun Bin 3.1	Gong Yoo 2.7	Hyun Bin 3.4
3rd	Song Joong-ki 1.9	Gong Yoo 2.3	Gong Yoo 2.8	Hyun Bin 2.4	Song Hye-kyo 2.7
4th	Gong Yoo 1.8	Song Hye-kyo 2.1	Song Hye-kyo 2.2	Song Hye-kyo 2.0	Gong Yoo 2.2
5th	Suzy (Bae Suzy) 1.7	Lee Jong-suk 2.0	Song Joong-ki 2.1	Lee Jong-suk 1.5	Lee Jong-suk 2.0

Singers/groups

	2019	2020	2021	2022	2023
1st	BTS 15.2	BTS 22.0	BTS 26.7	BTS 31.3	BTS 29.1
2nd	BLACKPINK 6.5	BLACKPINK 13.5	BLACKPINK 10.4	BLACKPINK 10.8	BLACKPINK 13.1
3rd	PSY 5.7	PSY 2.9	IU 2.8	PSY 2.6	PSY 2.9
4th	TWICE 2.8	TWICE 2.4	Lisa 2.4	TWICE 1.8	Jung Kook 2.7
5th	BIGBANG 2.5	EXO 2.1	PSY 2.2	IU 1.7	IU 2.1

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

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

² In addition to the question about participants' favorite Hallyu actor among 26 countries, there was a question regarding “the first Korean actor that comes to mind.” The results were similar to the rankings of most preferred actors: “Lee Min-ho” (11.9%), “Song Hye-kyo” and “Hyun Bin” (4.5%, respectively), “Gong Yoo” (4.0%), and “Bae Suzy” (2.8%).

As for the most preferred singer, "BTS" (29.1%) and "BLACKPINK" (13.1%) ranked first and second, respectively. "Jung Kook," the last member of BTS to begin military service enlistment in December 2023, came in fourth place (2.7%) with the global popularity of his solo album. "PSY" (2.9%) and "IU" (2.1%) also remained among the top ranks. "BTS" and "BLACKPINK" showed high preference rates, exceeding 30% and 10%, respectively, while other singers hovered around 2%, showing a heavy concentration on specific

singers. "TWICE" and "EXO" temporarily entered the rankings but did not maintain their positions. "BLACKPINK" showed high preference in Asia-Pacific, whereas "BTS" showed evenly distributed popularity across the Americas, Europe, and the Middle East. Even considering the overall lower preference for Korean stars in China due to its ban on Hallyu, the Asia-Pacific region also showed a preference rate of 20%, which is not low.

Table 2 -6 Comparison of top Five Most Preferred Korean Actors and Singers/groups by Continent

BASE: Total (actors), consumers who experienced Korean music (singers/groups), Unit: %

Actors					
	Asia-Pacific	Americas	Europe	Middle East	Africa
1st	Lee Min-ho 7.7	Lee Min-ho 5.4	Lee Min-ho 4.8	Lee Min-ho 8.2	Lee Min-ho 6.2
2nd	Song Hye-kyo 4.6	Hyun Bin 2.9	Hyun Bin 2.9	Hyun Bin 5.6	Hyun Bin 5.8
3rd	Hyun Bin 3.2	Gong Yoo 2.7	Lee Jong-suk 2.1	Kim Soo-hyun 4.5	Kim Soo-hyun/ Lee Jong-suk 4.7
4th	Song Joong-ki 2.3	Suzy (Bae Suzy) 1.8	Gong Yoo 1.7	Lee Jong-suk 4.0	Park Seo-joon 2.6
5th	Gong Yoo 2.3	Song Hye-kyo 1.8	Ji Chang-wook 1.2	Ji Chang-wook 2.9	Jun Ji-hyun 2.5

Singers/groups					
	Asia-Pacific	Americas	Europe	Middle East	Africa
1st	BTS 22.2	BTS 37.3	BTS 33.1	BTS 29.9	BTS 32.7
2nd	BLACKPINK 17.1	BLACKPINK 10.4	BLACKPINK 11.0	BLACKPINK 7.5	Jung Kook 7.1
3rd	IU 3.4	PSY 3.2	PSY 4.1	Jung Kook 6.5	BLACKPINK 5.9
4th	TWICE 3.3	Jung Kook 2.5	Stray Kids 2.1	PSY 3.7	PSY 5.6
5th	Lisa 2.4	Stray Kids 1.2	Jung Kook 1.7	G-Dragon 2.2	G-Dragon 3.7

04 Change in Interest in Korean Cultural Content

Overall, 45.9% of participants responded that their interest compared to that before one year “increased,” and 43.5% responded that their interest is “similar.”

Respondents perceived that their “compatriots” were more interested in Hallyu than themselves.

When asked about changes in their interest in Korean cultural content compared to that in the previous year, 45.9% of respondents said that it had “increased,” and 43.5% said that it was “similar.” This indicates that a total of 89.4% of respondents experienced either an “increase” or no change in their interest, whereas 10.6% reported a “decrease.” responding that their interest has either “increased” or remained “similar,” while 10.6% reported that it had “decreased.” The result suggests that consumers with Hallyu experience perceived a greater increase in their compatriots’ in-

terest than in their own. This trend has been observed previously during the past five years (Figure 2-5).

When determining interest in Hallyu, consumers seem more likely to observe the reactions of those around them or encounter interest through media rather than openly expressing individual interest, showing a higher increase rate of interest by “compatriots.”

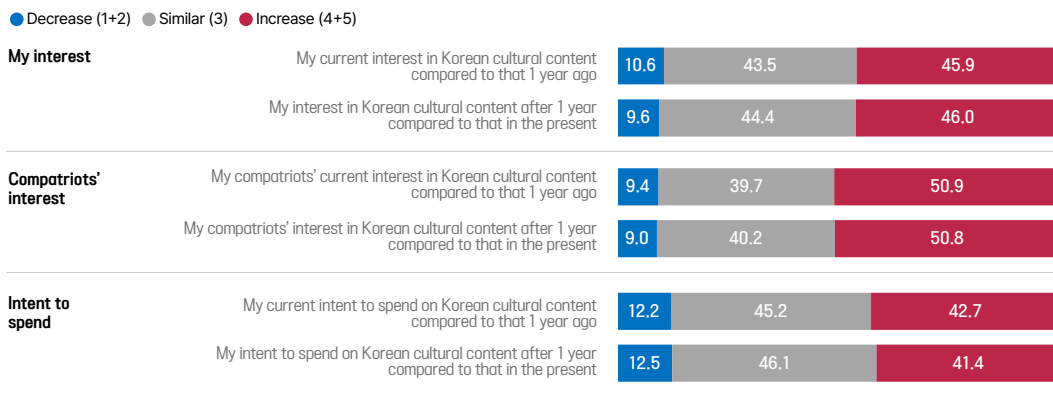
In total, 45.9% of participants responded that their interest after one year will “increase.”

Hallyu is expected to expand in a short period in the Islamic world and India.

When asked how their interest in Korean cultural content will change after one year, 46.0% of respondents said that their interest would “increase,” while 50.8% said that their compatriots’ interest would “increase,” with both figures hovering around or slightly exceed-

Figure 2-4 Changes in Interest in Korean Cultural Content

BASE: Total, Unit: %

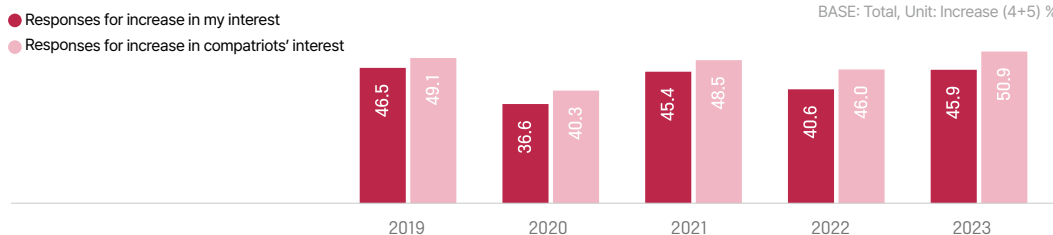


Q. Please read the following question regarding interest in Korean cultural content and choose the option with which you agree.

1. Significantly decrease / 2. Decrease / 3. Similar / 4. Slightly increase / 5. Significantly increase

Figure 2-5 Changes in the Increased Interest in Korean Cultural Content Over the Last 5 Years by Year

BASE: Total, Unit: Increase (4+5) %



ing the 50% mark. The gap between the “increase” in interest compared to that in the previous year and the expected “increase” after one year is less than 1%p, as is also true for “similar” and “decrease.” Countries where a high percentage of respondents indicated that their interest in Korean cultural content had “increased” compared to the previous year included Egypt (67.6%), India (67.1%), and Saudi Arabia (65.1%). In contrast, countries with lower percentages were Germany (26.6%), Japan (27.1%), and Kazakhstan (27.7%). The proportions for “increase” (41.4%) and “similar” (46.1%) regarding the intent to spend after one year were close to those from the previous year (“increase” 42.7%, “similar” 45.2%), with a difference of only 0.9-1.3%p.

Countries where a high percentage of respondents indicated that their intent to spend on Korean cultural content will “increase” after one year included Egypt (62.9%), India (62.0%), the UAE (60.9%), and Saudi Arabia (59.4%). In contrast, countries with lower percentages were Japan (21.7%), France (22.7%), and Germany (23.2%). Interest or spending did not seem to be changing significantly one year after or later, suggesting that interest in and spending on Hallyu will maintain the current level in the short run. Considering the countries showing high interest and intent to spend compared to those one year ago, the Islamic world (Egypt, Saudi Arabia, the UAE, Indonesia, etc.) and India were showing a promising outlook for Hallyu in the short term.

Figure 2-6 Comparison of Changes in Interest in Korean Cultural Content Compared to That a Year ago by Country

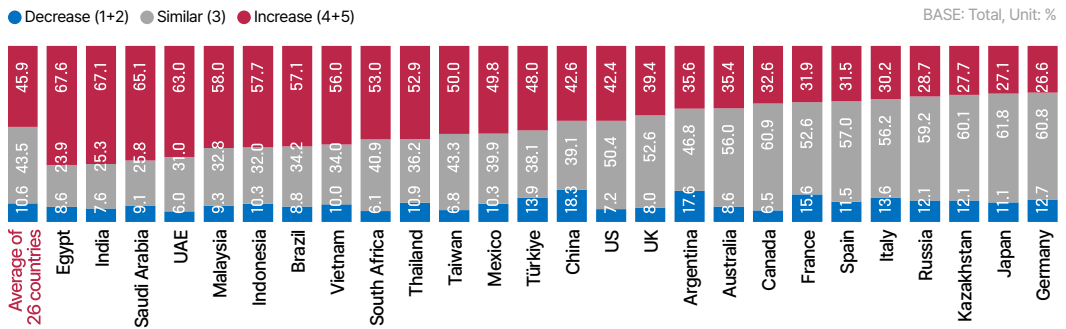


Figure 2-7 Comparison of Expected Changes in Interest in Korean Cultural Content After a Year by Country

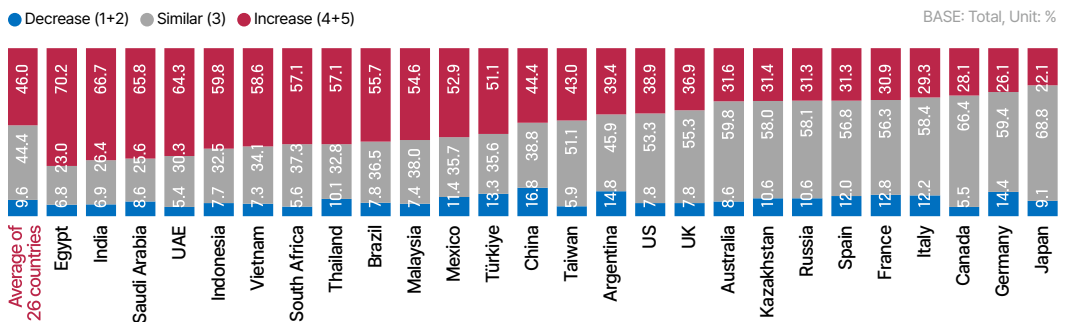
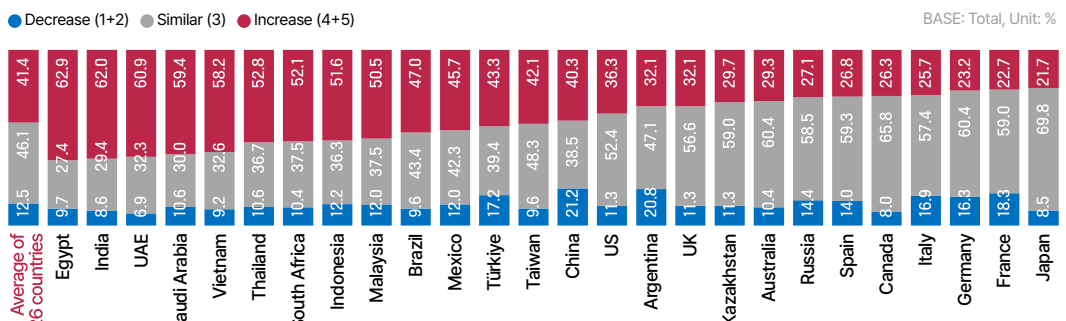


Figure 2-8 Comparison of Intent to Spend on Korean Cultural Content After a Year by Country



05 Popularity of Korean Cultural Content

More than half of the respondents said that Korean food and beauty are “widely popular.”

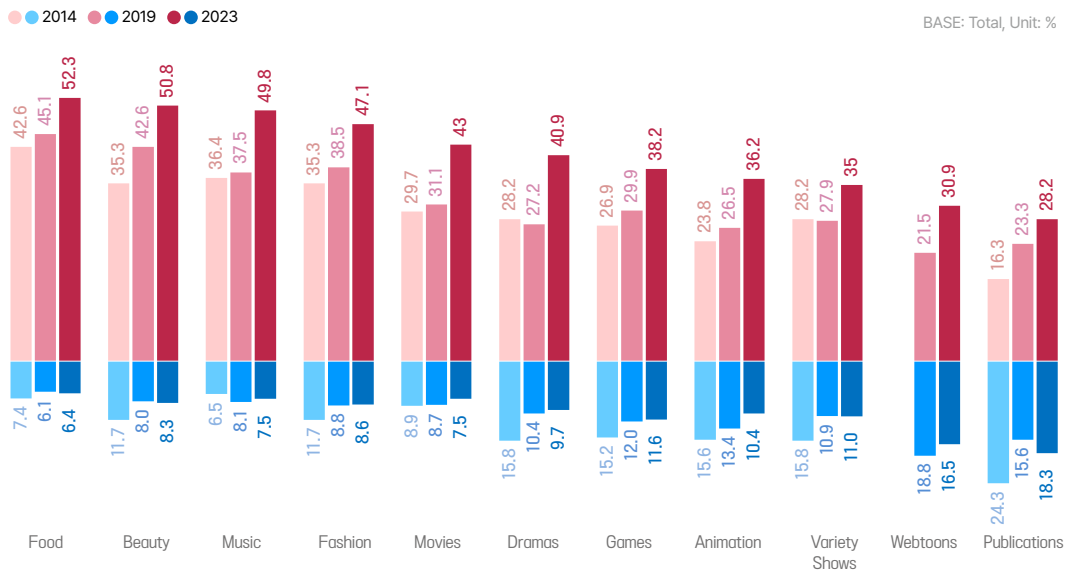
Regarding the popularity of each type of Korean cultural content in their country, most consumers with Hallyu experience responded that food (52.3%) was “widely popular,” followed by beauty (50.8%) and music (49.8%). Looking at the responses over five-year intervals, the percentage of those who indicated “widely popular” in 2014, 2019, and 2023 has gradually increased, while the percentage of those who responded “hardly used by anyone” has decreased. This suggests that the general popularity of Korean cultural content is steadily expanding. These results are consistent with the responses from KOFICE overseas correspondents and KOTRA trade officers regarding local news in 2023; the most accessible Korean cultural content for consumers mainly comprises food, beauty, and music. Desserts (e.g., croffle), bunsik (e.g., ramyeon, tteok-

bokki), and soju, which are frequently exposed in Korean dramas, movies, variety shows, or social media, are popular in many countries. Recently, consumers in some countries have been preparing Korean food themselves. There are noticeable increases in the number of Korean restaurants and locals shopping at local Korean supermarkets. K-pop constantly played in the streets and offline stores; the increased presence of Korean beauty brand products and retail outlets seems to have contributed to its widespread popularity.

Dramas, music, and movies showed particularly high awareness of the popularity.

To analyze the speed of Hallyu's diffusion, the gaps in the percentages of respondents claiming that each type of content was widely popular were compared by subtracting the percentage in 2014 from that in 2019 and the percentage in 2019 from that in 2023.

Figure 2-9 Comparison of Popularity Assessment Within the Country at 5-year Intervals by Type of Korean Cultural Content



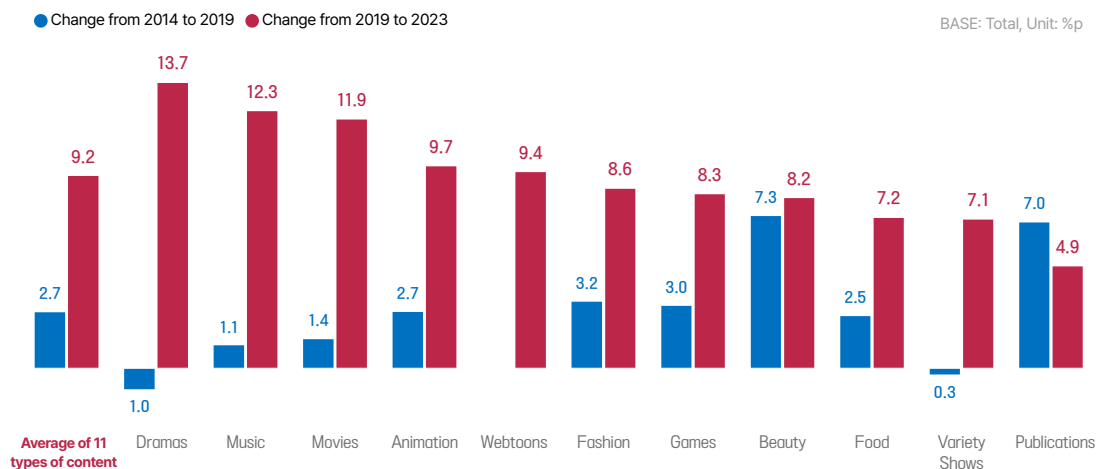
Q. How popular do you think Hallyu is in your country? Please indicate to what extent you agree.

1. Hardly used by anyone / 2. Popular among a niche audience / 3. Known by a niche audience and the general public / 4. Widely known among the general public with related products being sold / 5. Widely popular among the general public with smooth sales of related products

Regarding the average (arithmetic mean) across 11 content types, there was a 2.7%p increase from 2014 to 2019 and a 9.2%p increase from 2019 to 2023. Thus, the perception that Korean cultural content is “widely popular” has spread relatively quickly among respondents between 2014 and 2023.

By type of content, the gap from 2014 to 2019 is the largest in beauty (7.3%p), publications (7.0%p), and fashion (3.2%p). The gap from 2019 to 2023 is the largest in dramas (13.7%p), music (12.3%p), and movies (11.9%p). Therefore, the recent diffusion of Hallyu appears to be relatively rapid in dramas, music, and movies.

Figure 2-10 Gap in “very popular” Response Rates Within the Country at 5-year Intervals by Type of Korean Cultural Content



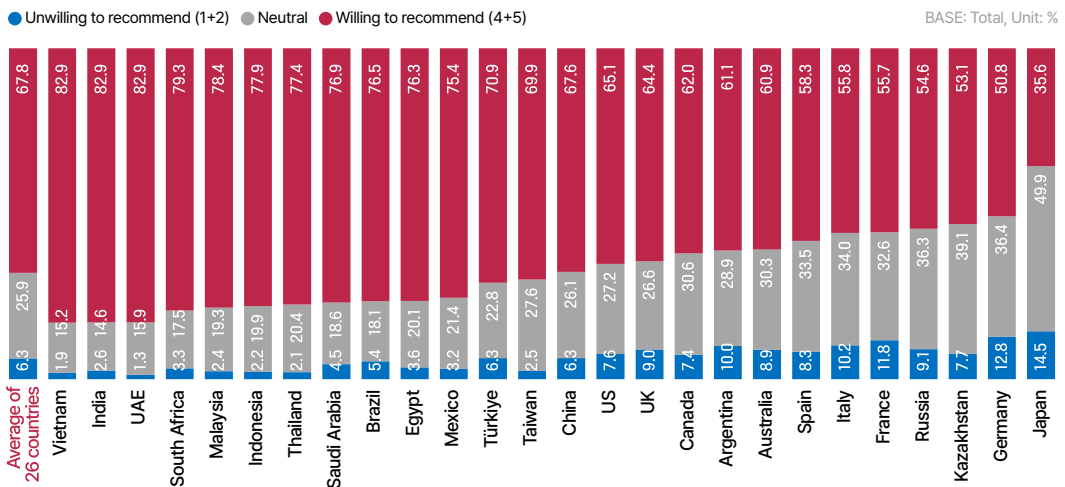
06 Willingness to Recommend Korean Cultural Content

In total, 67.8% of consumers with Hallyu experience were positive about recommending Hallyu to others.

Overall, 67.8% of respondents with Hallyu experience in 26 countries stated that they are “willing

to recommend” the Korean cultural content they have recently encountered to others. The countries with the highest percentages for “willing to recommend” were Vietnam, India, the UAE (82.9%, respectively), and South Africa (79.3%) On the other hand, the countries with the low-

Figure 2-11 Comparison of Overall Willingness to Recommend Korean Cultural Content by Country

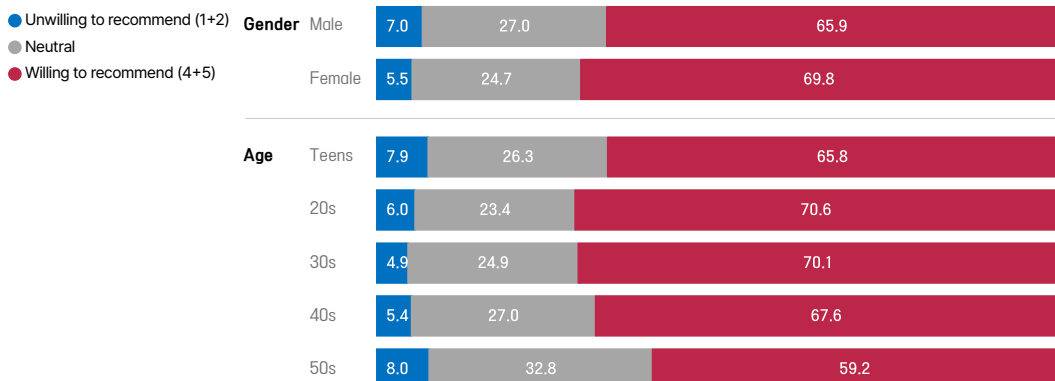


Q. Are you willing to recommend Korean cultural content you have recently experienced to others?

1. Definitely do not recommend / 2. Do not recommend / 3. Neutral / 4. Recommend / 5. Definitely recommend

Figure 2-12 Comparison of Overall Willingness to Recommend Korean Cultural Content by Gender and age

BASE: Total, Unit: %



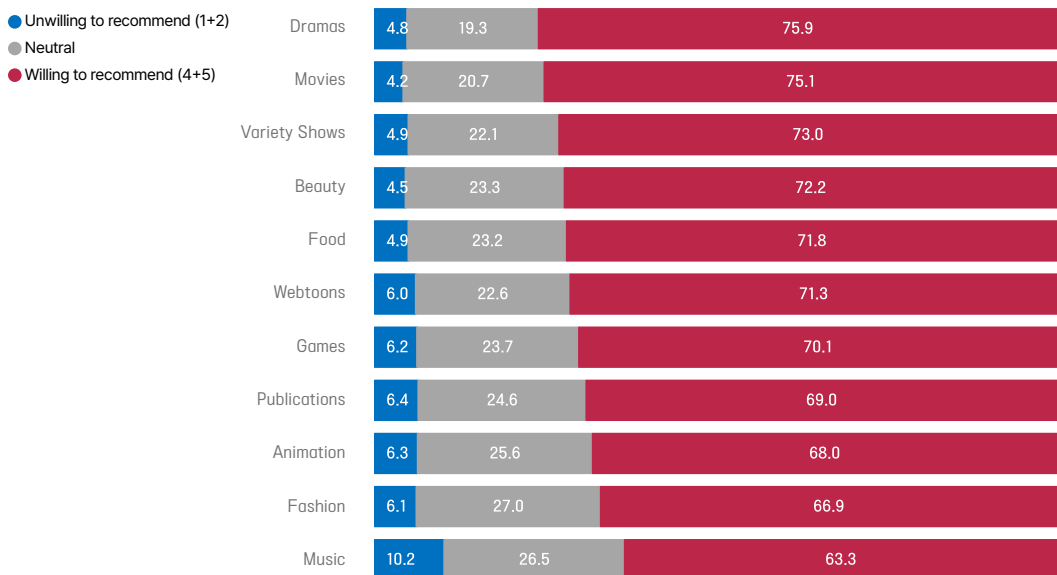
est percentages were Japan (35.6%), Germany (50.8%), and Kazakhstan (53.1%). In Japan, Germany, France, and Italy, the percentage of those who were “unwilling to recommend” exceeded 10%. Women (69.8%) and individuals in their 20s and 30s (70.6% and 70.1%, respectively) tended to be relatively more favorable toward making recommendations.

While favorability and willingness to recommend were high for dramas and movies, they were lowest for music among 11 types of content.

By content type, dramas (75.9%), movies (75.1%), and variety shows (73.0%) had high “willingness to recommend” rates, while music ranked the lowest among the 11 content types with a rate of 63.3%. The percentage of those “unwilling to recommend” exceeded 10% only for music.

Figure 2-13 Willingness to Recommend Korean Cultural Content by Type

BASE: Total, Unit: %



07 Agreement with Negative Perceptions Toward Hallyu and Reasons for Agreement

Among the respondents, 32.6% agreed with negative perceptions toward Hallyu.

When asked whether they agree with the negative perceptions toward Hallyu, 32.6% of participants responded that they “agree[d].” While there have been fluctuations each year, the agreement rate increased from 26.8% in 2019 to 32.6% in 2023. However, the percentage of respondents who “disagree[d]” decreased gradually from 28.1% to 21.3% over the same period, except for 2021. In 2021, the percentage of those who “disagreed” was the highest during the period at 48.2%, while the percentage

of those who “agree[d]” was also the second highest.

By age group, those in their 20s and 30s, who have recently shown an increasing Hallyu experience with and favorable attitude towards the Korean Wave, had higher rates of agreement. Conversely, those in their 40s and 50s, who have less experience, showed a higher percentage of disagreement.

Relatively higher negative perceptions were found in Saudi Arabia and Malaysia.

The countries with the highest levels of agree-

Figure 2-14 Comparison of Agreement With Negative Perceptions Toward Hallyu Over the Last 5 Years by Year

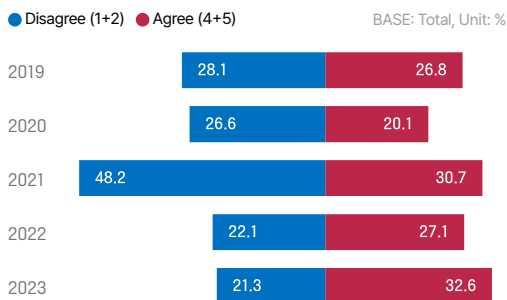
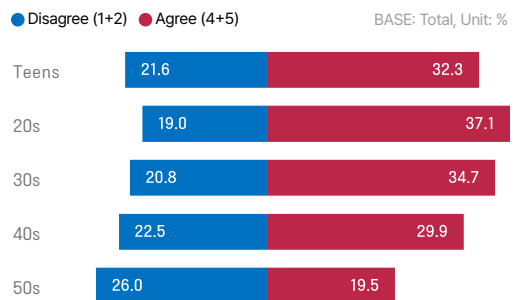


Figure 2-15 Comparison of Agreement With Negative Perceptions Toward Hallyu by age

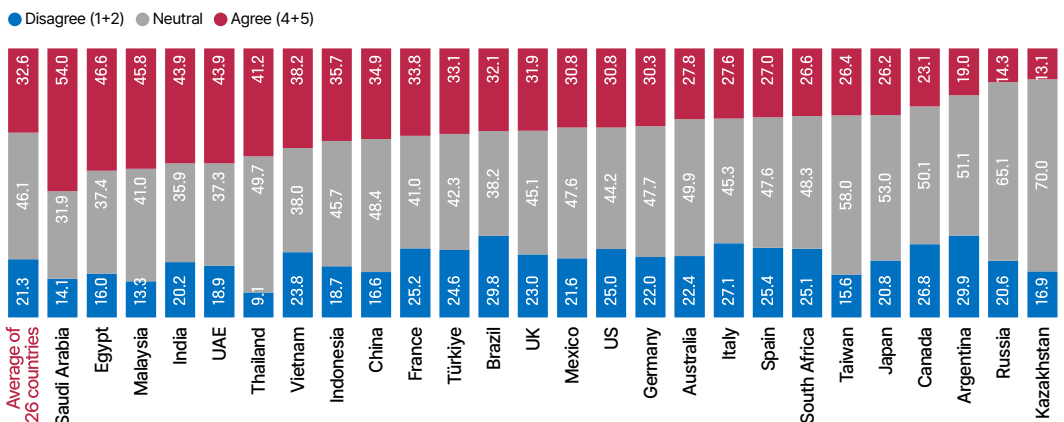


Q. Some may have negative perceptions toward “Hallyu.” How much do you agree or disagree with these negative perceptions?

1. Strongly disagree / 2. Disagree / 3. Neutral / 4. Agree / 5. Strongly agree

Figure 2-16 Comparison of Agreement With Negative Perceptions Toward Hallyu by Country

BASE: Total, Unit: %



ment with negative perceptions of Hallyu were Saudi Arabia (54.0%), Egypt (46.6%), and Malaysia (45.8%). The countries with the highest levels of “neutral” or “average” attitudes were Kazakhstan (70.0%), Russia (65.1%), and Taiwan (58.0%). Meanwhile, the countries with the highest levels of disagreement with negative perceptions were Argentina (29.9%), Brazil (29.8%), and Italy (27.1%). Generally, countries classified as being at the stage of Hallyu’s popularization showed higher levels of agreement with negative perceptions.

Two out of 10 respondents agreed with negative perceptions because Korean cultural content is “obscene/provocative.”

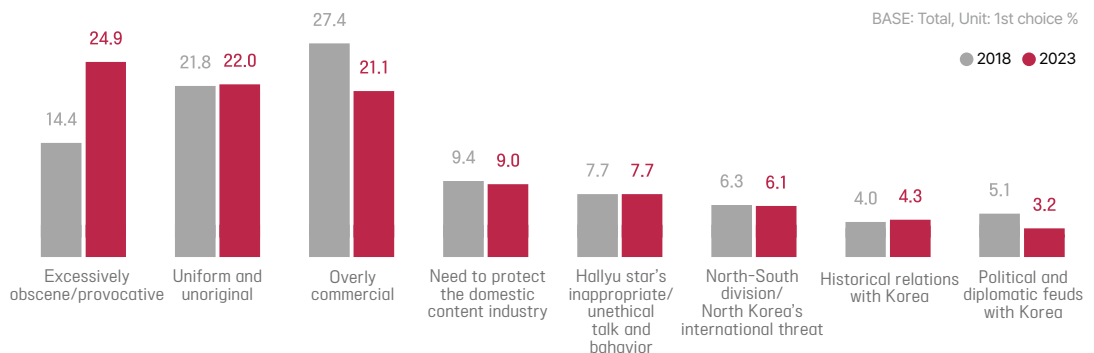
Regarding the reasons for agreeing with negative perceptions, most respondents mentioned content quality, such as “excessively obscene/provocative” (24.9%), “uniform and unoriginal” (22.0%), and “overly commercial” (21.1%). The perception that content is “excessively ob-

scene/provocative” has increased compared to five years ago (2018), while the view that it is “overly commercial” has decreased. Responses regarding external factors such as the “need to protect the domestic content industry,” “North-South division/North Korea’s international threat,” and “historical relations with Korea” have remained largely unchanged or shown little change.

Younger groups focused on quality, while older groups emphasized historical and political reasons for high negative perceptions.

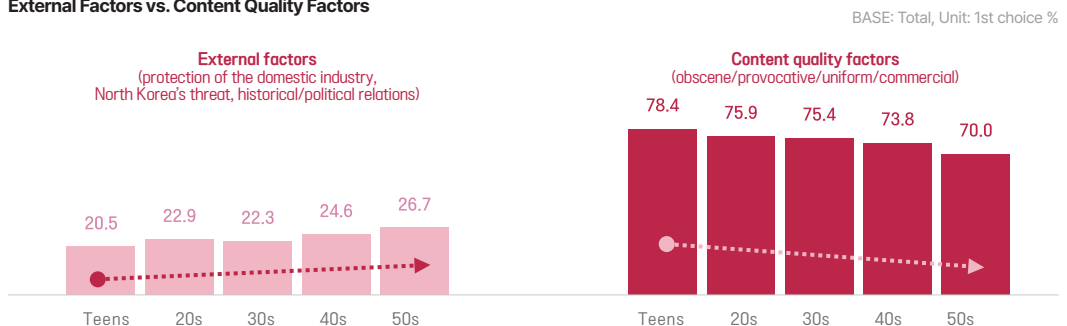
Classifying the reasons into content quality and external factors by age group shows that there was a tendency for younger age groups to place more emphasis on content quality, while this emphasis decreased in older age groups. In contrast, responses related to external factors such as the “need to protect the domestic content industry” and “North-South division/North Korea’s international threat” tended to increase with age.

Figure 2-17 Reasons for Agreement With Negative Perceptions Toward Hallyu: Comparison Between 2018 and 2023



Q. Why do you agree with negative perceptions toward Hallyu? Select the top two reasons, in order of importance, you think are the biggest reasons.

Figure 2-18 Comparison of Reasons for Agreement With Negative Perceptions Toward Hallyu: Comparison by age: External Factors vs. Content Quality Factors



08 Images Associated With Korea

The first image associated with Korea was "K-pop."

When asked about the first image that comes to mind when thinking of Korea, "K-pop" (17.2%) has ranked first for seven consecutive years. This was followed by "Korean food" (13.2%), "dramas" (7.0%), "IT products/brands" (6.3%), and "beauty products (cosmetics)" (5.2%). "Dramas" have fluctuated over the years but climbed to third place in 2023. Notably, images that had ranked first to third in the past, such as "IT products/services," "North Korea/nuclear issue," and "Korean War," were pushed down or gradually disappearing from the rankings, replaced by Hallyu-related images.

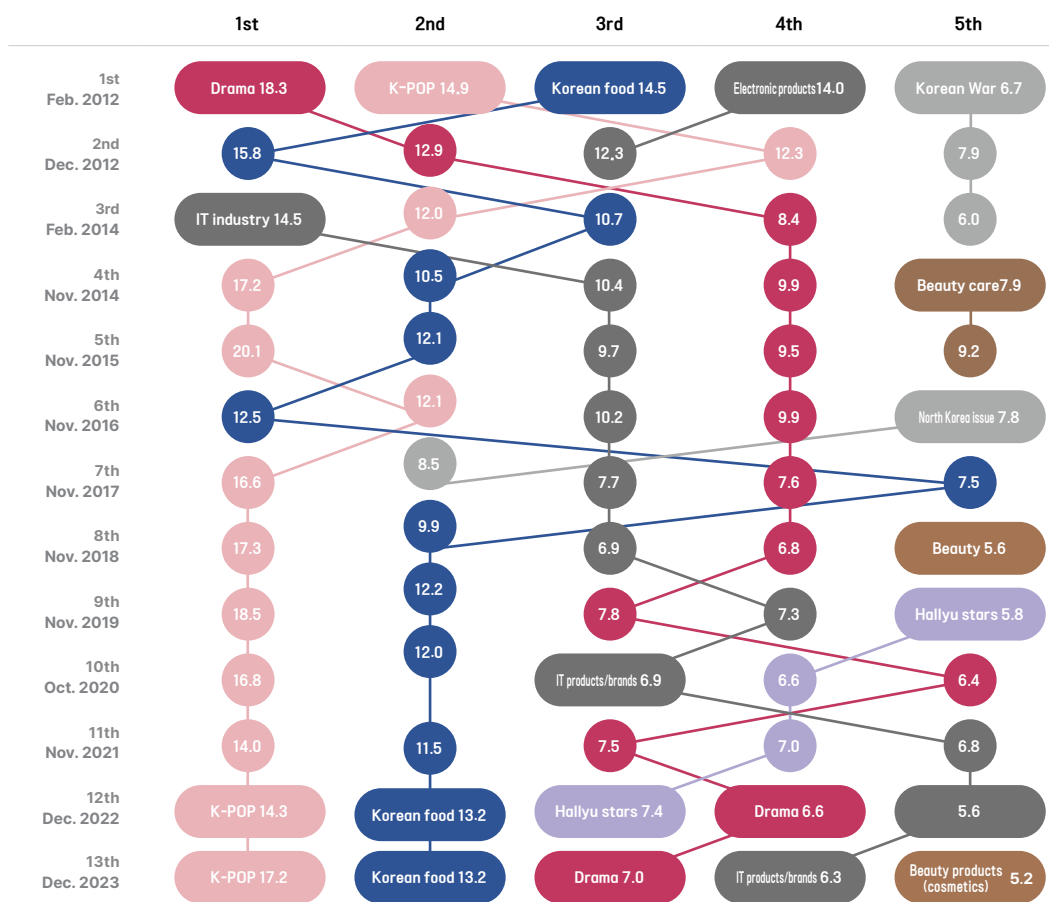
Moreover, "beauty products (cosmetics)," which ranked fifth in 2014 and 2015 but had not appeared in the rankings until 2022, re-entered the rankings in 2023. The interest was especially high among women with considerable beauty experience as well as respondents in their 20s and 30s. Beauty seemed to have risen due to the influence from and over other content types such as dramas, movies, and music.

Women more commonly associated Korea with Hallyu-related keywords.

Those in their teens and 20s thought of "K-pop," while those in their 40s and older were more likely to think of "Korean food."

Figure 2-19 Comparison of Images Associated With Korea by Year

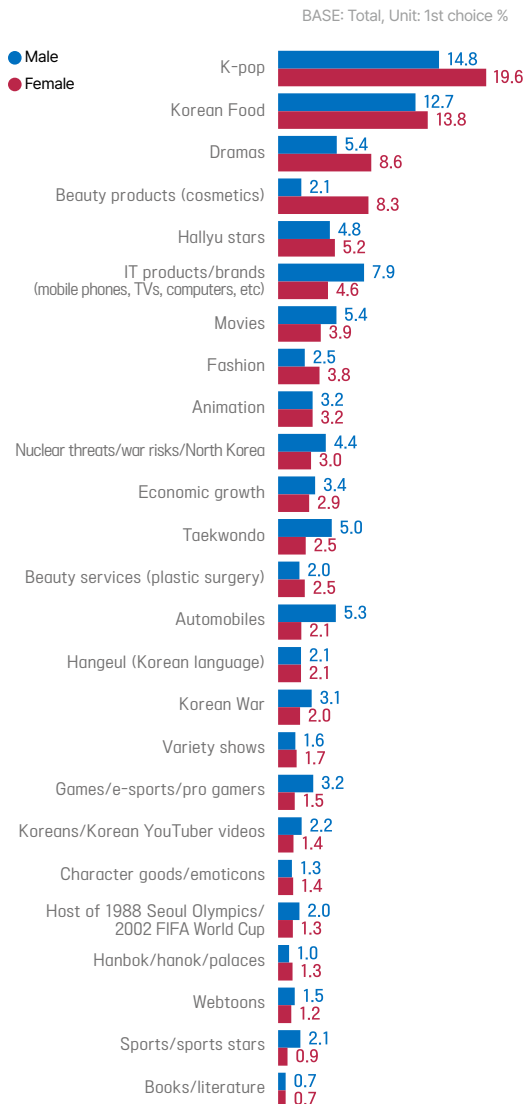
BASE: Total, Unit: 1st choice %



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

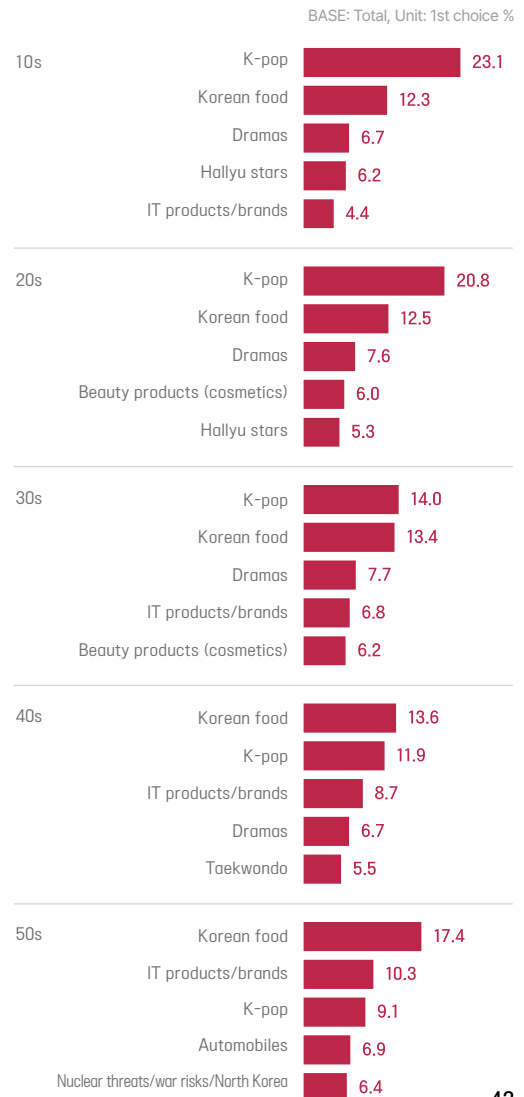
Women showed higher associations with images related to cultural content such as "K-pop" (19.6%), "dramas" (8.6%), "beauty products (cosmetics)" (8.3%), and "Korean food" (13.8%) compared to men. On the other hand, men showed a stronger association with non-cultural content-related images such as "IT products/brands" (7.9%), "taekwondo" (5.0%), "automobiles" (5.3%), and "sports/sports stars" (2.1%). This reveals the different levels of interest in Korean cultural content between men and women. By age group, those in their teens and 20s showed an overwhelmingly higher association with "K-pop" compared to other age groups. Additionally, unlike other age groups, "Hallyu stars" were included in their rankings, indicating a greater interest in Korean celebrities.

Figure 2-20 Comparison of Images Associated With Korea by Gender



For those in their 40s and 50s, "Korean food" and "IT products/brands" were more prominently associated with Korea compared to other age groups. Among those in their 40s, "taekwondo" (5.5%) was a notable keyword, while for those in their 50s, "automobiles" (6.9%) and "nuclear threats/war risks/North Korea" (6.4%) were included in the rankings. "Dramas" ranked third to fourth among those in their teens-40s, whereas it was not included in the rankings for those in their 50s. This indicates that younger age groups tended to associated Korea with topics like "music," "dramas," and "Hallyu stars," while older age groups more frequently associated it with "taekwondo," "IT products/brands," and "automobiles." This suggests that the images associated with Korea vary across age groups.

Figure 2-21 Comparison of Images Associated With Korea by age



09 Perception of Korea

Overall, 72.9% of respondents with Hallyu experience had a “positive” view.

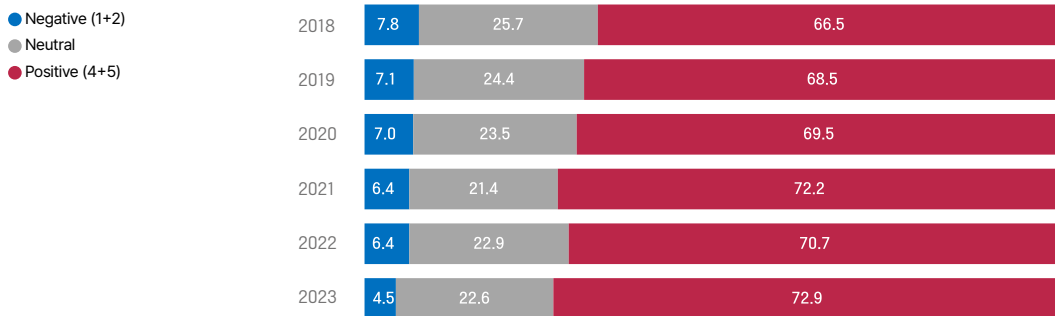
The Middle East, North Africa, and Southeast Asia were generally positive.

When asked about their overall perception of Korea, 72.9% of respondents said it was “positive,” showing an increase of 2.2%p from 2022. Looking at the changes over the years, the percentage of respondents with a “positive” view of Korea increased from 66.5% in 2018 to 72.9% in 2023, whereas the percentage of those with a “negative” perception decreased from 7.8% to 4.5% during the same period.

Countries with the highest levels of “positive” responses were mostly located in the Middle East (Saudi Arabia 89.5%, UAE 88.9%), North Africa (Egypt 88.3%), and Southeast Asia (Indonesia 86.8%, Vietnam 86.2%). Nevertheless, countries that have historically and diplomatically strained relations with Korea, such as Japan and China, showed lower levels of positive responses and notably higher levels of negative responses compared to other countries. Countries with low experience with and favorability towards Korean cultural content, such as Spain, Italy, and Germany, also tended to have lower levels of positive responses.

Figure 2-22 Comparison of Overall Perceptions Toward Korea Over the Last 6 Years by Year

BASE: Total, Unit: %



Q. What is your overall perception of Korea?

1. Very negative / 2. Negative / 3. Neutral / 4. Positive / 5. Very positive

Figure 2-23 Comparison of Overall Perceptions Toward Korea by Country

BASE: Total, Unit: %

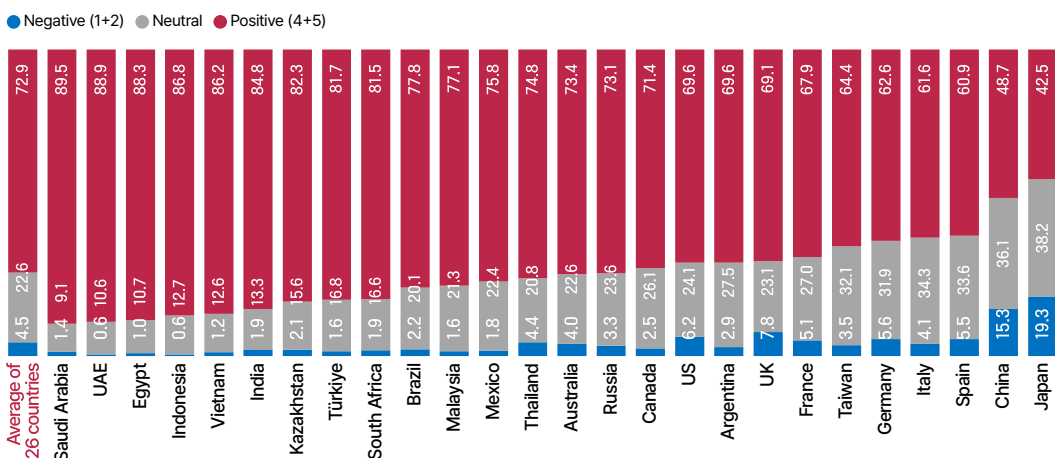
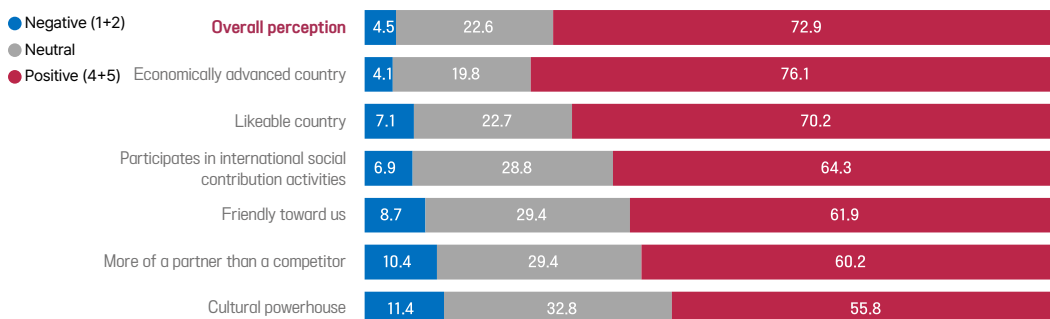


Figure 2-24 Comparison of Perceptions Toward Korea by Evaluation Item

BASE: Total, Unit: %



Q. What is your overall perception of Korea? 1. Very negative / 2. Negative / 3. Neutral / 4. Positive / 5. Very positive

Q. What do you generally think of Korea? 1. Strongly disagree / 2. Disagree / 3. Neutral / 4. Agree / 5. Strongly agree

Overall, 55.8% of participants agreed that Korea is a "cultural powerhouse."

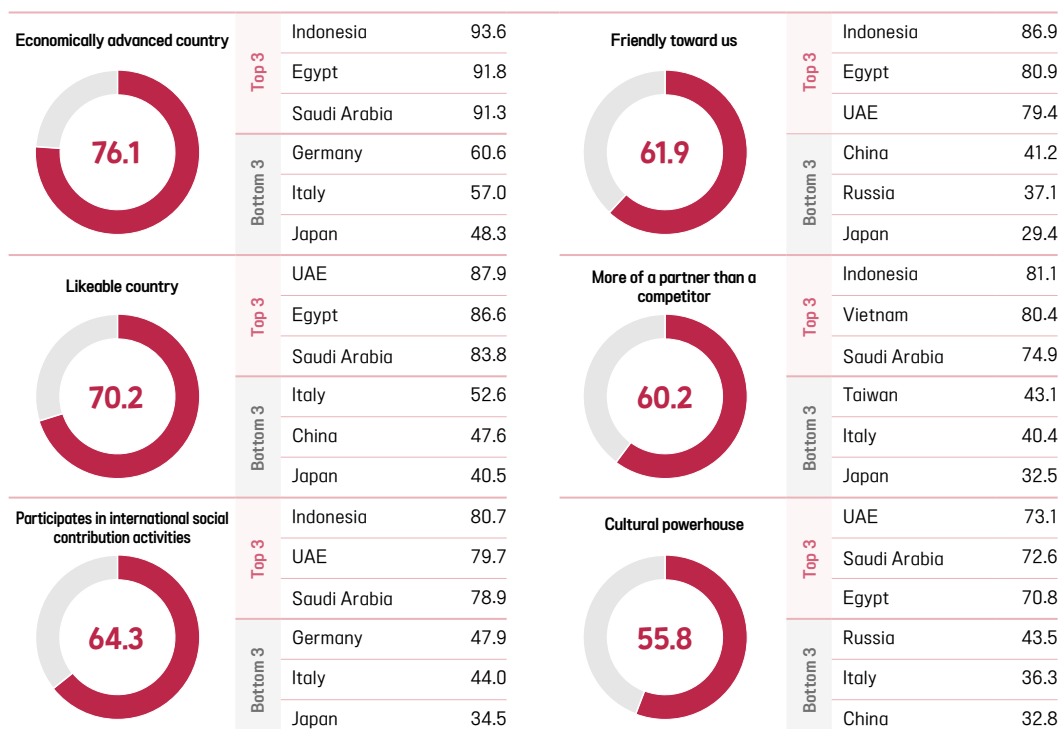
Rates were especially high in the UAE, Saudi Arabia, and Egypt.

Examining the perceptions of Korea by item, over 70% agreed with the statements "economically advanced country" (76.1%) and "likable country" (70.2%).

However, the agreement rate for "cultural powerhouse" was the lowest at 55.8%. For the top and bottom three countries in agreement rates by item, the results were similar to the overall perception. The Middle East, North Africa, and Southeast Asia ranked high overall, whereas Japan, China, and Europe ranked low. The agreement rate for "cultural powerhouse" was particularly high in the UAE, Saudi Arabia, and Egypt.

Figure 2-25 Countries With the Highest and Lowest Positive Response Rates Regarding Perceptions Toward Korea by Item

BASE: Total, Unit: Agree (4+5) %



Q. What do you generally think of Korea? 1. Strongly disagree / 2. Disagree / 3. Neutral / 4. Agree / 5. Strongly agree



2

Consumption of Hallyu

01 Consumption Volume of Korean Cultural Content

Respondents spent 4–6 hours more on dramas and variety shows.

Consumers with Hallyu experience from 26 countries reported an average monthly consumption of 11.6 hours of Korean content per person, a decrease of 3.4 hours from that in 2022. The average monthly consumption of dramas (16.9 hours) and variety shows (16.8 hours) was 4–6 hours higher than other content types, while publications (10.7 hours) and animation (10.8 hours) showed relatively lower consumption volumes at just over 10 hours. Respondents watched an average of 6.4 movies in the past three months. Women (12.3 hours) consumed 1.2 hours more than men (11.1 hours), while those in their 20s and 30s (12.5 and 12.2 hours, respectively) spent 1–2 hours more on Korean content than other age groups.

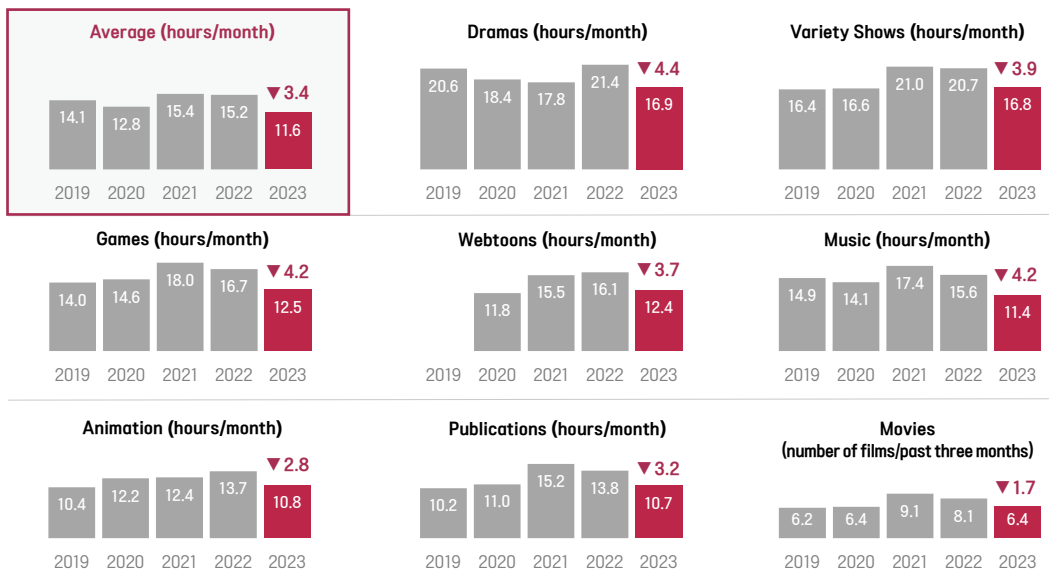
Dramas, games, and music showed a noticeable decrease in consumption.

Changes in consumption volume over the last five years by content type show that consumption generally decreased by 2–4 hours compared to that in 2022. The number of movies watched in the past three months decreased by 1.7 movies, with overall content consumption returning to the volume before 2021. Countries with significant declines in consumption were India (dramas, variety shows, games, etc.), the UAE (games, animation, variety shows, etc.), and Malaysia (dramas, music, variety shows, etc.). By age group, consumers in their teens–30s (teens–20s in music, 30s in games) showed a decrease.

According to local news, in India, where the the

Figure 2-26 Comparison of Average Time Spent per Person Using Each Type of Korean Cultural Content Over the Last 5 Years by Year

BASE: Consumers who have experienced Korean cultural content by type, Unit: () ▲▼ Fluctuations in 2022-2023



Q. What is your usual viewing volume, proportion, and average expenditure for Korean cultural content? (Viewing volume/average expenditure - Movies based on the past three months, other content types based on average per month)

Note 1 Since 2022, games have been categorized into "playing games" and "watching gameplay videos," and the data here are for "playing games."

Note 2 Movies were surveyed based on the monthly average number of films watched/viewed in 2018–2019 and the number of films watched/viewed in the past three months in 2020.

Note 3 The content average was calculated as the arithmetic mean of each type of content. For movies, the average obtained from the number of films was multiplied by the average runtime and converted to hours per month. The average runtime per movie was based on data from the Korean Film Council's "Average Runtime of Top 10 Korean Box Office Movies" and applied as 1.9 hours per movie.

Figure 2-27 Comparison of Average Consumption Volume of Korean Cultural Content Overall by Gender and age

BASE: Total, Unit: hours/monthly average

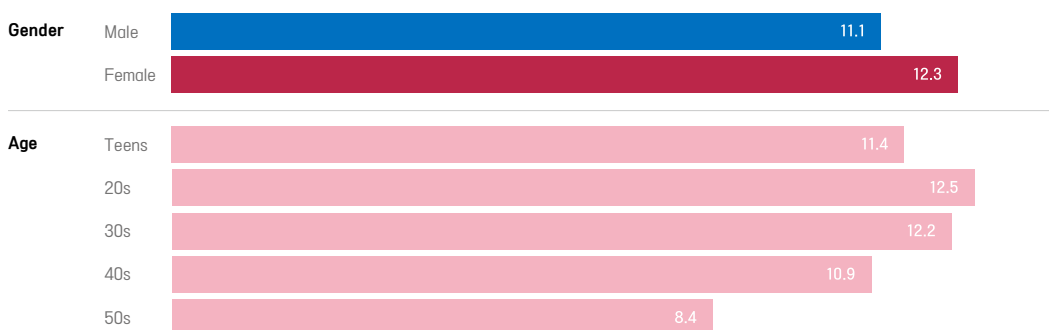


Table 2-7 Per Capita Average Consumption Volume of Total Cultural Content (all Countries) by Consumers who Have Experienced Korean Cultural Content*

BASE: Consumers who have experienced Korean cultural content by type, Unit: Movies-No. of films watched/viewed/past three months; other-hours/monthly average

By content type	2021	2022	2023	Gap (2022-2023)
Overall average***	94.2	93.3	81.7**	▼11.6
Dramas	114.5	122.9	109.1**	▼13.9
Variety Shows	116.4	107.1	96.8	▼10.3
Movies***	64.7	62.0	53.2	▼8.9
Music	97.6	97.0	81.1	▼15.9
Animation	89.4	99.4	83.6	▼15.8
Publications (books, ebooks)	86.8	94.9	82.0	▼12.8
Webtoons	103.1	87.9	80.4	▼7.5
Playing games	116.3	105.3	91.5	▼13.8
Watching gameplay videos	94.2	96.9	86.6	▼10.3

- This is the result of analysis by converting and analyzing the average consumption volume of overall cultural content using the survey results on consumption volume and proportion for each type of content.
- This is the average consumption volume of each content type by consumers who have experienced Korean cultural content—consumers who experienced Korean dramas spent an average of 109.1 hours on drama per month in 2023 and 81.7 hours on average for nine types of content.
- Movies were surveyed based on the number of films watched/viewed in the past three months, and the overall average is calculated by converting each film into 1.9 hours and analyzing the consumption time.

Q. What is your usual viewing volume, proportion, and average expenditure for Korean cultural content? (Movies based on the past three months, other content types based on average per month).

film industry is well-developed, the number of viewers enjoying domestic movies on weekends increased as theaters resumed screenings following the decline in COVID-19 cases. This may have led to the decrease in the number of people watching Korean dramas, movies, and variety shows. The decrease in the average consumption time of Korean cultural content per consumer with Hallyu experience is mainly due to the reduction in overall content consumption, as people returned to their daily routines after the pandemic. During the pandemic, content consumption increased

as office workers worked from home and students attended remote classes, resulting in more activities at home than outside. Nevertheless, as people gradually returned to their daily routines beginning in the second half of 2022, they spent less time at home and more time outside, which may have reduced the overall decrease in cultural content consumption. This can also be confirmed by the decrease in the average consumption volume of cultural content across all countries in Table 2-7.

Figure 2-28 Comparison of Average Expenditure per Person on Each Type of Korean Cultural Content Over the Last 5 Years by Year



Q. What is your usual viewing volume, proportion, and average expenditure for Korean cultural content? (Viewing volume/average expenditure - Movies based on the past three months, other content types based on average per month).

Note 1 Since 2022, games have been categorized into "playing games" and "watching gameplay videos," and the data here are for "playing games."

Note 2 Movies were surveyed based on the monthly average number of films watched/viewed in 2019 and the number of films watched/viewed in the past three months since 2020.

Note 3 The content average was calculated as the arithmetic mean of each type of content. For movies, expenditure in the past three months is converted to one month and reflected through the arithmetic mean.

Expenditure also decreased by 4.3 USD compared to 2022.

The average monthly expenditure decreased by 4.3 USD from 2022, down to 10.5 USD. Expenditure was highest for fashion (21.9 USD), beauty (21.4 USD), and food (18.2 USD) and lowest for music (4.5 USD), animation (6.7 USD), and webtoons (6.8 USD). Fashion, beauty, food, and publications had higher expenditure than other types of content due to the nature of the products.

Korean content consumption accounted for 25.6% of total content consumption volume. The proportion increased by 0.4%p despite the decline in consumption volume compared to last year.

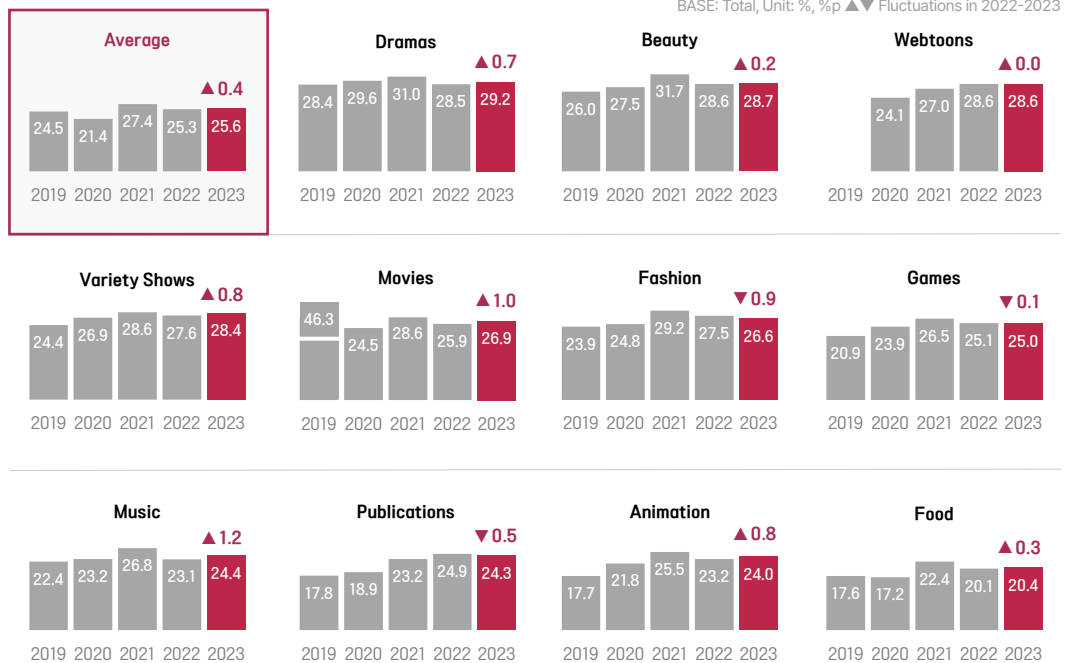
The proportion of Korean content consumption

among total consumption volume (across all countries) by content type increased by 0.4%p to 25.6% compared to 2022. This contrasts with overall consumption volume and expenditure, which started declining in 2022. The proportion increased by 0.2 to 1.0%p for dramas, beauty, webtoons, and variety shows, while it decreased by 0.1 to 0.9%p for fashion, gaming, and publications. Overall consumption volume by content type seems to have decreased due to an increase in outdoor activities, but the proportion seems to be maintained. The OTT market expanded due to increased online and mobile platform consumption worldwide during the COVID-19 pandemic, and the number of OTT productions from various countries, including Korea, also grew, leading to greater competition among content.³

Regarding music, concerts that had been sus-

³ The number of original Korean content productions funded by Netflix increased from 15 in 2021 to 25 in 2022 (Korea Creative Content Agency (2023). *Global OTT Trend Report. 2*, pp. 23-40.).

Figure 2-29 Comparison of Average Proportion of Consumption per Person for Each Type of Korean Cultural Content Over the Last 5 Years by Year



Q. What is your usual viewing volume, proportion, and average expenditure for Korean cultural content? (Viewing volume/average expenditure - Movies based on the past 3 months, other content types based on average per month)

Note 1 Since 2022, games have been categorized into "playing games" and "watching gameplay videos," and the data here are for "playing games."

Note 2 Movies were surveyed based on the monthly average number of films watched/viewed in 2019 and the number of films watched/viewed in the past 3 months beginning in 2020.

Note 3 The content average was calculated as the arithmetic mean of each type of content.

pended during the COVID-19 pandemic were mostly resumed by 2023.⁴ The fact that the proportion of Korean cultural content consumption among consumers with Hallyu experience remained similar to that in 2022 can be seen as a positive sign that interest in Hallyu has been sustained even after the pandemic.

The Hallyu consumption volume and proportion were highest in Asia, while they were relatively lower in Europe and the Americas.

For the average consumption volume of consumers who have experienced 11 types of Korean cultural content by country, the countries with higher consumption hours were India (18.6 hours), Thailand (18.4 hours), and Indonesia (17.0 hours), with a monthly average approaching 20 hours. Nev-

ertheless, Japan (4.4 hours), English-speaking countries (Canada 5.8 hours, Australia 6.2 hours), and Europe (France 6.3 hours, Italy 6.3 hours) had a monthly average of less than 10 hours.

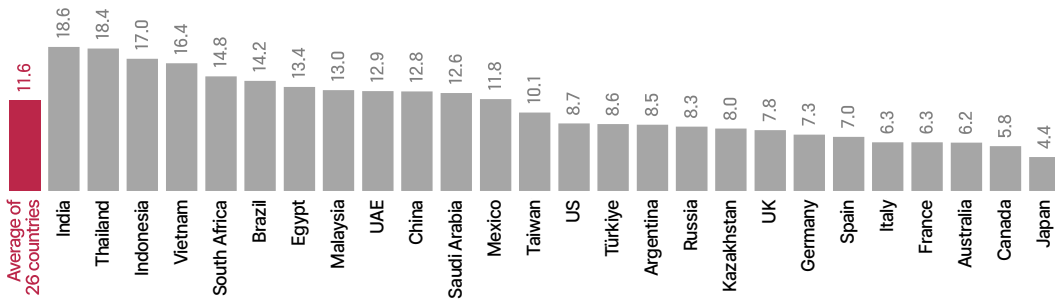
Countries with high spending were mainly the Middle Eastern countries (UAE 23.9 USD), along with the US and European countries, while China stood out with a spending amount of 17.8 USD, placing it among the top. In contrast, Argentina (3.7 USD), Indonesia (4.5 USD), and Japan (5.2 USD) had relatively low spending.

Countries with a high consumption ratio included Indonesia (36.1%), Vietnam (34.9%), and Malaysia (33.3%), which are Southeast Asian countries where Hallyu is relatively popular. On the other hand, Japan (18.1%), Europe, and the Americas had a lower proportion of Korean content consumption.

⁴ For example, the world tour of American singer-songwriter Taylor Swift and the Asian tour of British rock band Coldplay (Music of the Spheres Tour) were held.

Figure 2-30 Comparison of Average Time Spent on Overall Korean Cultural Content by Country

BASE: Total, Unit: hour/month



Q. What is your usual viewing volume, proportion, and average expenditure for Korean cultural content? (Viewing volume/average expenditure - Movies based on the past 3 months, other content types based on average per month)

Figure 2-31 Comparison of Average Proportion of Consumption on Overall Korean Cultural Content by Country

BASE: Total, Unit: %

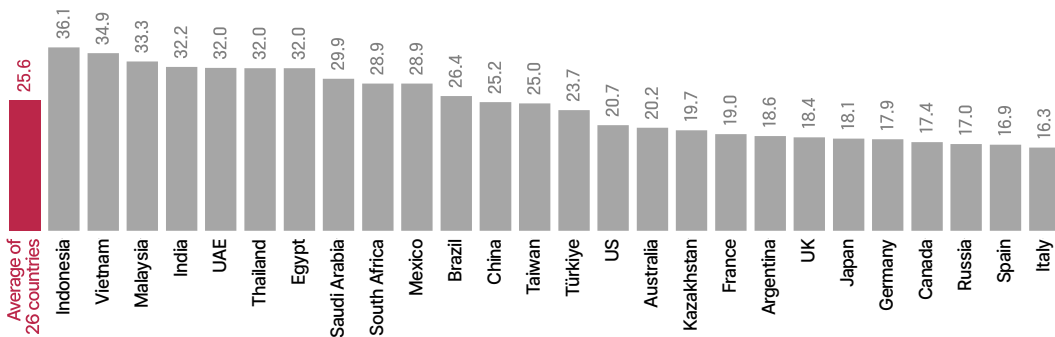
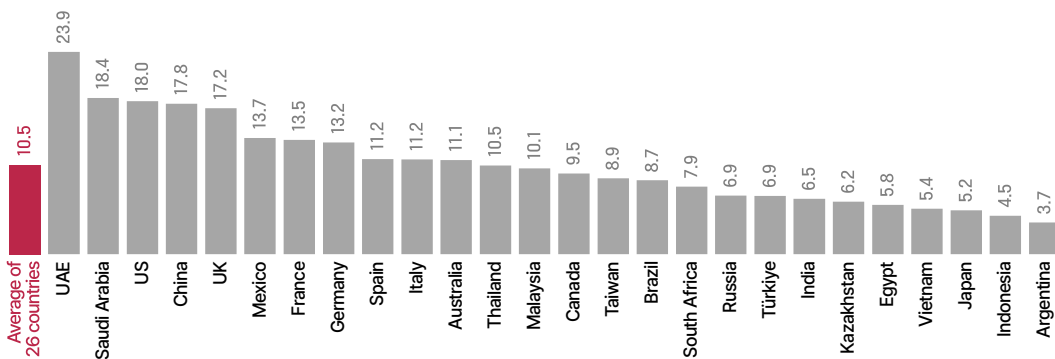


Figure 2-32 Comparison of Expenditure on Overall Korean Cultural Content by Country

BASE: Total, Unit: USD/month



02 Access Channels by Type of Korean Cultural Content

In total, eight to nine out of 10 consumers accessed content online.

The gap between "TV" and "online/mobile" continued to increase.

The results of a survey on how people accessed different types of Korean cultural content (with multiple responses allowed) showed that 38.1–47.0% of respondents watched video and music content through "TV." This was a gradual decrease from 52.6–64.7% in 2019. However, the percentage of respondents using "online/mobile platforms" increased from 67.5–77.5% in 2019 to 83.6–88.7% in 2023, indicating that eight to nine out of 10 respondents now access Korean video and music content via these platforms. As the access channel for video content shifted from "TV" to "online/mobile platforms," the gap in usage rates between the two was also widening. For example, the gap increased from 4.2% in 2019 to 42.1% in 2023 for dramas and from 9.2% to 43.7% for movies, showing a more

evident gap. A similar trend was found for variety shows, animation, and music.

Access to fashion, beauty, and food through dramas and movies increased. Fashion and beauty were mainly accessed through "SNS videos/photos" (63.5% and 61.6%, respectively) and "Korean video content" (51.9% and 41.1%, respectively). "Videos created by YouTubers" and "local shows/exhibitions, etc." received responses in the high 40% range and the low 30% range, respectively. "Local shows/exhibitions, etc." also increased from 15.4–18.0% in 2019 to 32.4–33.0% in 2023, likely due to the popularity of personal color experiences in the beauty and fashion sectors that became trendy in Korea and popular in Asia, as well as the participation of Hallyu stars in local events due to the market entry of Korean brands. The main access channels for food were "SNS videos/photos" (53.1%) and "videos created by YouTubers" (48.5%). The proportion of channels excluding "Korean video content" generally increased, indicating a significant increase in the overall content usage in these areas.

Figure 2-33 Comparison of Video Content Access Channels Over the Last 5 Years by Year

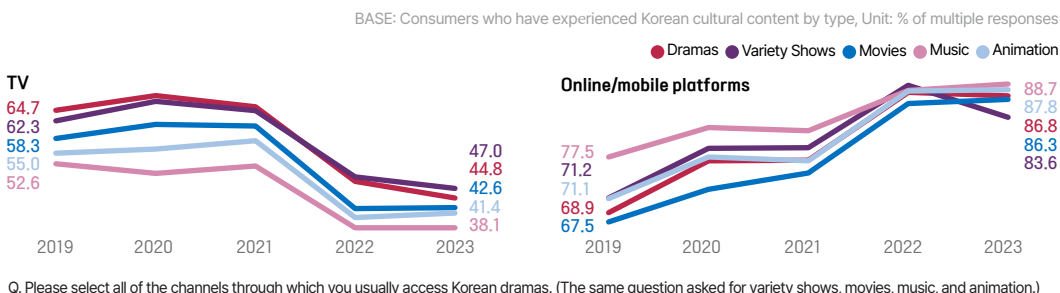
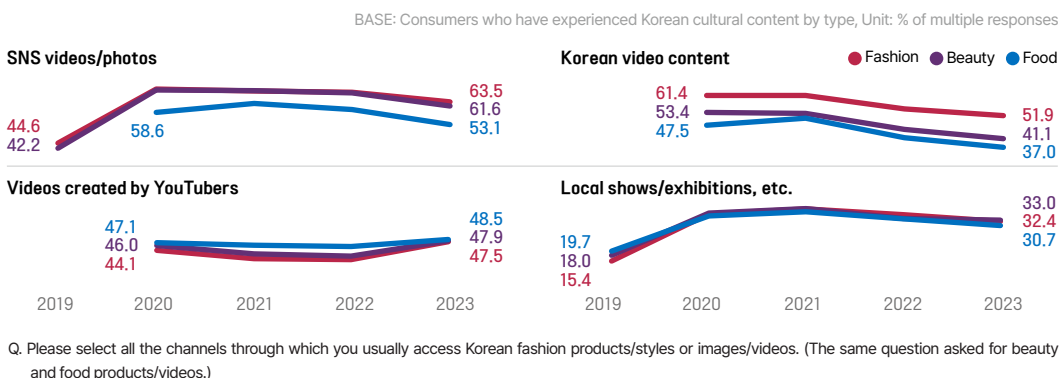


Figure 2-34 Comparison of Fashion/beauty/food Access Channels Over the Last 5 Years by Year



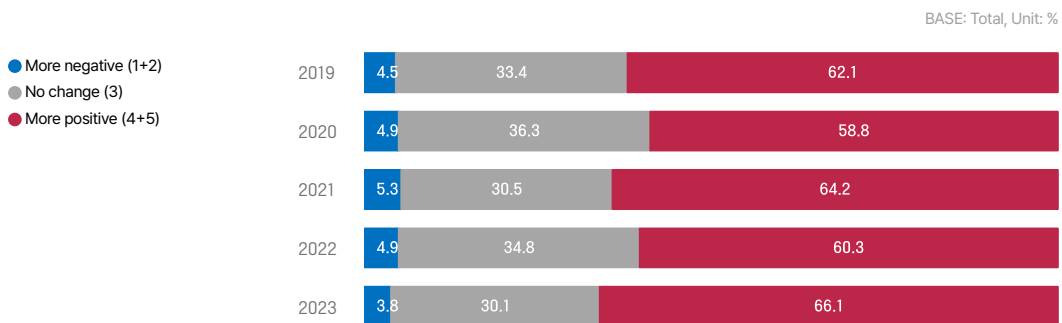
03 Changes in Perceptions Toward Korea After Encountering Korean Cultural Content

In total, 66.1% of participants experienced positive changes in perceptions toward Korea after encountering Hallyu.

When asked how their perceptions toward Korea have changed after engaging with Korean cultural content, 66.1% of respondents reported their perception became "more positive," 30.1% said there was "no change," and 3.8% shared that it became "more negative."

By country, the positive change was particularly strong in the UAE (85.9%), India (85.3%), and Vietnam (84.7%), while the positive change was lower in countries like Japan (38.8%) and Italy (48.7%). Japan and China showed unfavorable national sentiment due to historical and diplomatic relations, leading to different results. Japan had the highest percentage of neutral responses, with 55.3% choosing "no change," while China stood out with 12.1% of responses indicating "negative change," significantly higher than the 1-6% range observed in other countries.

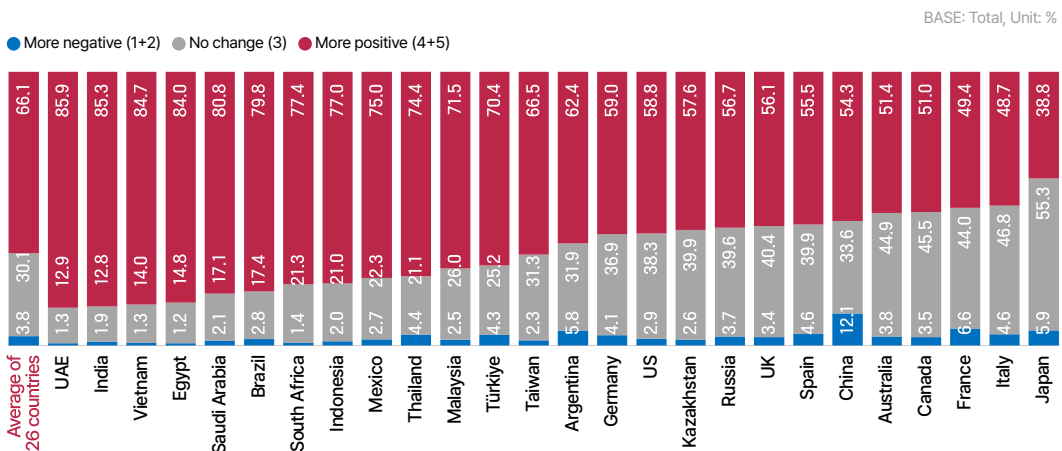
Figure 2-35 Comparison of Changes in Perceptions Toward Korea After Encountering Korean Cultural Content Over the Last 5 Years by Year



Q. How did your general perception toward Korea change after you encountered Korean cultural content?

1. Very negative / 2. Slightly negative / 3. No change / 4. Slightly positive / 5. Very positive

Figure 2-36 Comparison of Changes in Perceptions Toward Korea After Encountering Korean Cultural Content by Country



3

Influence of Hallyu

01 Korean Product/service Purchase Experience

Among the participants, 92.4% had purchased low involvement products in the past year.

In total, 92.4% of consumers with Hallyu experience responded that they have purchased low-involvement Korean products within the past year. This is high, although it is slightly lower than in 2021. The most commonly purchased items were "food" (82.0%), "dining at restaurants" (78.1%), and "cosmetics" (73.1%).

Of the participants, 69.1% purchased high-involvement products in the past four years.

Overall, 69.1% of consumers with Hallyu experience have purchased high-involvement Korean products over the past four years. When looking at specific categories, around half of them have bought "home appliances" (56.1%) and "mobile phones" (50.1%).

Products and services with lower accessibility or relatively longer purchase cycles, such as "hospital medical services" and "automobiles", had lower

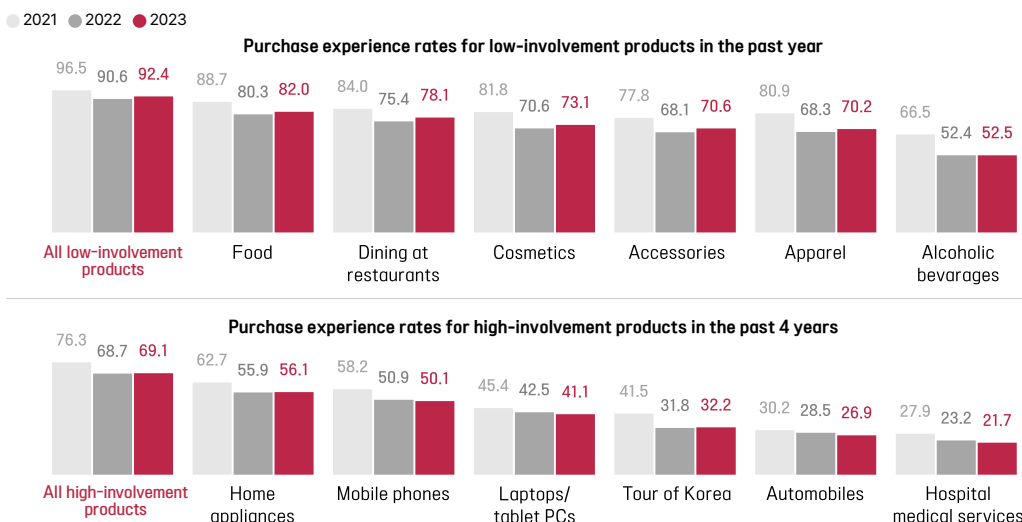
experience rates compared to other products/services.

Southeast Asia showed high purchase rates for low-involvement products; Vietnam and the Middle East showed high purchase rates for high involvement products.

By country, Vietnam (99.1%), Thailand (98.2%), and Taiwan (97.9%) had the highest purchase experience for low-involvement Korean products in the past year. However, Argentina (80.8%), Brazil (82.0%), and Türkiye (82.7%) had relatively lower purchase rates compared to other countries. For purchase rates for high-involvement products/services over the past four years, Vietnam (94.0%) also ranked first, followed by countries in the Middle East and North Africa, such as Egypt (90.6%), Saudi Arabia (90.4%), and the UAE (90.1%). On the other hand, Japan (30.9%) and English-speaking countries such as Canada (38.9%), Australia (44.3%), the US (48.5%), and the UK (49.9%) had lower purchase rates.

Figure 2-37 Comparison of Korean Product/service Purchase Experience Over the Last 3 Years by Year

BASE: Total, Unit: %



Q. Please indicate how frequently you have purchased Korean products in the past year for each of the following items by selecting the option closest to your purchase frequency.

1. Never purchased / 2. Occasionally purchased / 3. Neutral / 4. Frequently purchased / 5. Very frequently purchased

Q. How frequently have you purchased or visited the following Korean products/services in the past 4 years?

Figure 2-38 Comparison of Low-involvement Korean Product/service Purchase Experience Within 1 Year by Country

BASE: Total, Unit: % of purchase experience

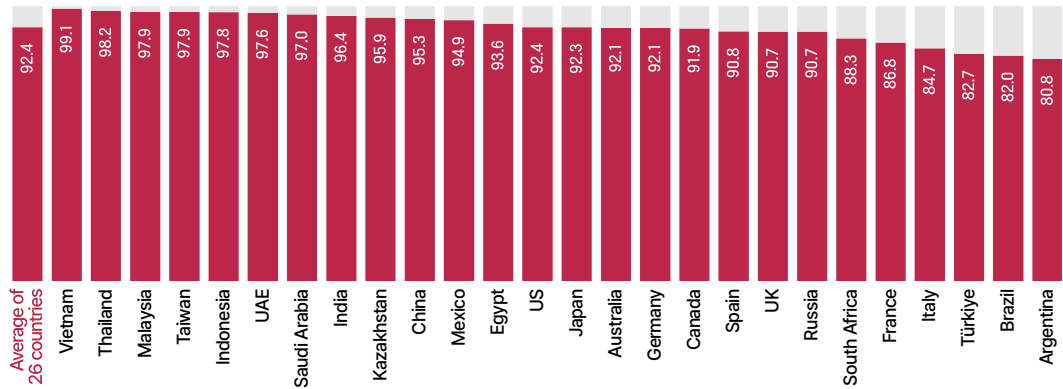
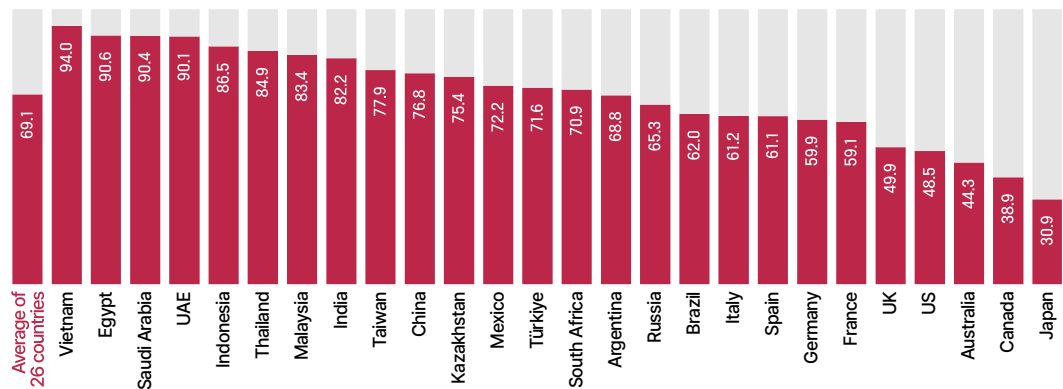


Figure 2-39 Comparison of High-involvement Korean Product/service Purchase Experience Within 4 Years by Country

BASE: Total, Unit: % of purchase experience



02 Intent to Purchase Korean Products/services

Overall, 50.7% of participants indicated an intent to purchase Korean products.

The Middle East and Africa, in particular, reported a high intent to purchase Korean products.

Those in their 30s and 40s with purchasing power generally demonstrated strong purchasing intentions.

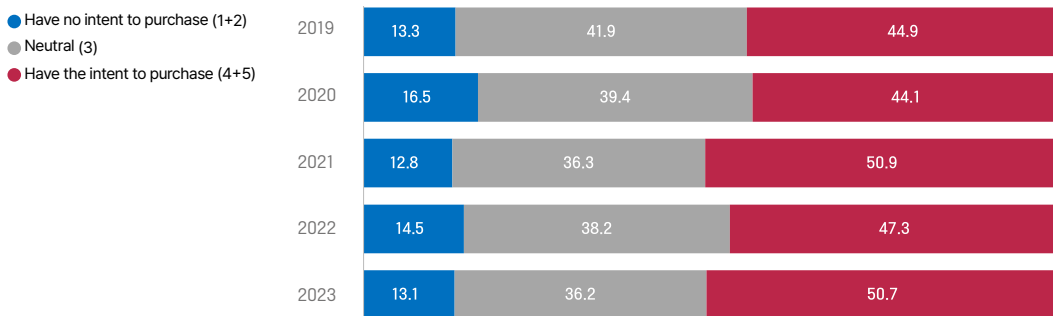
Regarding overall intent to purchase Korean products/services, 50.7% of consumers with Hallyu experience reported that they "have the intent to purchase," 36.2% were "neutral," and 13.1% said

they "have no intent to purchase."

Looking at the changes over the past five years, the percentage of respondents who "have the intent to purchase" fluctuated, moving from 44.9% in 2019 to 44.1% in 2020, 50.9% in 2021, 47.3% in 2022, and 50.7% in 2023. Despite yearly variations, the figure remained around 50% from 2021 to 2023, suggesting a short-term trend of increasing purchase intent. Countries with a high overall percentage of respondents expressing to "have the intent to purchase" Korean products were mostly in Africa and the Middle East, such as Egypt (75.6%) and Saudi Arabia

Figure 2-40 Comparison of Changes in Overall Purchase Intentions Regarding Korean Products/services Over the Last 5 Years by Year

BASE: Total, Unit: %

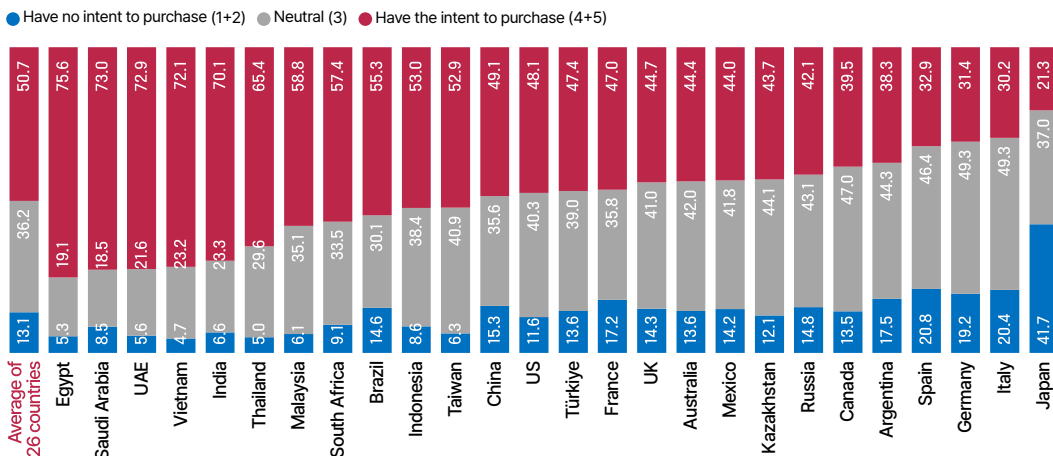


Q. Please indicate your intent to purchase Korean products and services in the future by item.

1. Strongly disagree / 2. Disagree / 3. Neutral / 4. Agree / 5. Strongly agree

Figure 2-41 Comparison of Overall Purchase Intentions for Korean Products/services by Country

BASE: Total, Unit: %



(73.0%), whereas countries with lower purchase intent included Japan (21.3%) as well as many nations in Europe and the Americas.

Japan had the highest rate of “have no intent to purchase” at 41.7%, nearly double that of other countries. In countries like Italy, Germany, Spain, Argentina, Canada, Russia, and Kazakhstan, the proportion of “neutral” responses exceeded that of “willing to purchase,” indicating a generally lower intent to purchase in these regions. The overall trend in the intent to purchase Korean products was similar across specific products and services. The rates for “have the intent to purchase” were similar between men and women at 50.2% and 51.0%, respectively. By age group, those in their 30s and 40s with relatively higher purchasing pow-

er showed greater intent to purchase (54.5% and 53.6%) compared to other age groups; 16.1% of the teens and 17.0% of the 50s responded that they have no intent to purchase.

Intention to purchase food and visit Korea was notably high.

By product, the highest intent to purchase was for “food” (64.7%) and the lowest intent to purchase was for “alcoholic beverages” (36.8%). By service, there were relatively high intentions for “visiting Korea” (61.8%) and “dining at restaurants” (61.4%), whereas the lowest intention was for “hospital medical services” (36.9%).

Figure 2-42 Comparison of Overall Purchase Intentions for Korean Products/services by Gender and age

BASE: Total, Unit: %

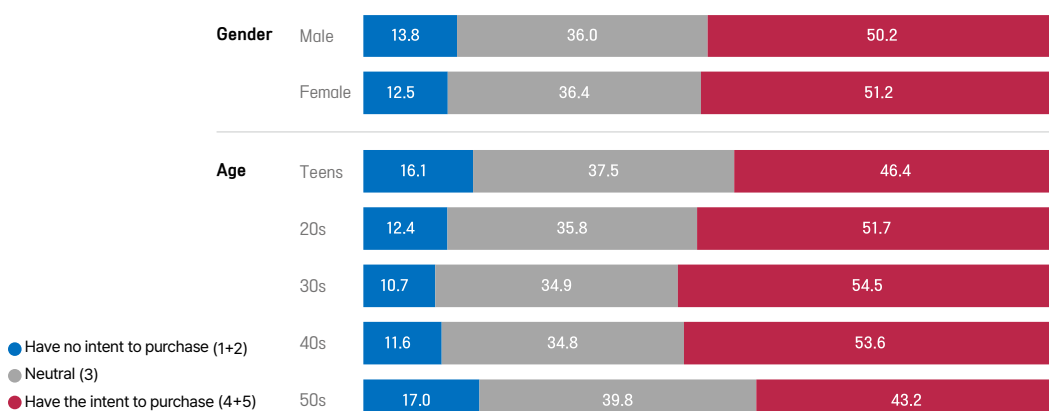
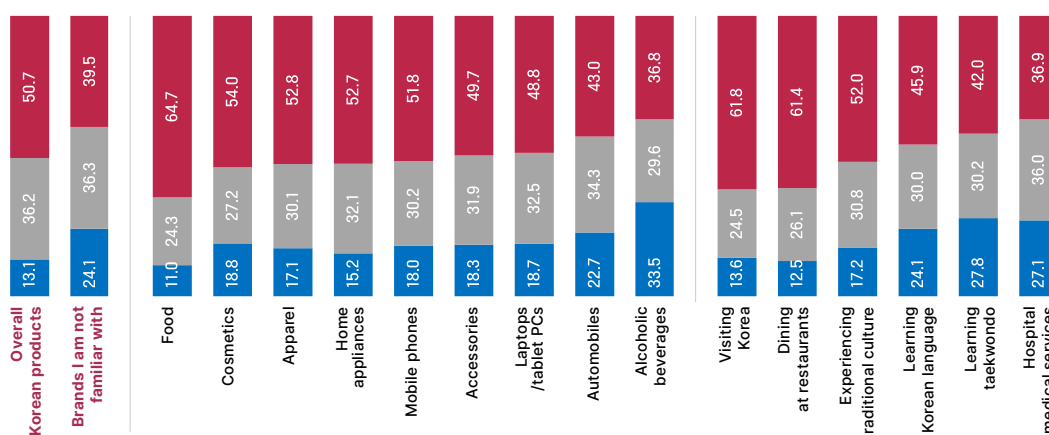


Figure 2-43 Purchase Intentions by Korean Products/services

BASE: Total, Unit: %

● Have no intent to purchase (1+2) ● Neutral (3) ● Have the intent to purchase (4+5)



03 Reasons for Purchasing Korean Products/services

In total, 17.1% of participants purchased Korean products owing to “appearance in movies and TV shows.”

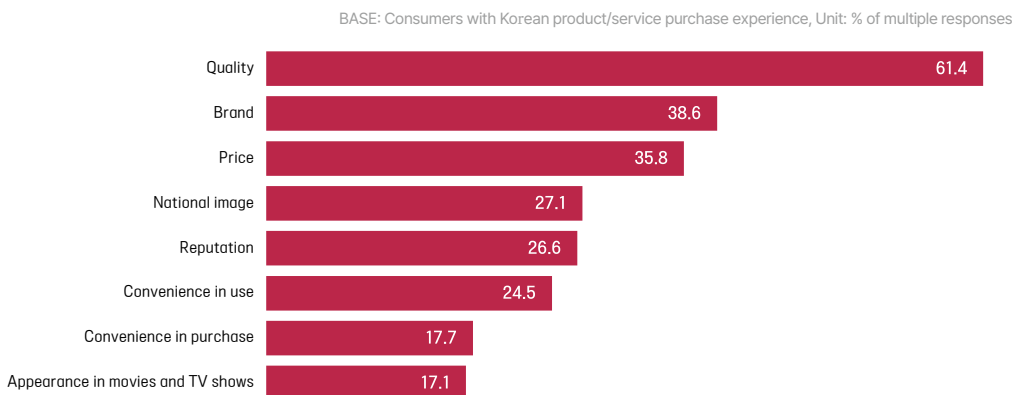
China and India were found to be relatively more influenced.

When asking consumers with experience purchasing Korean products to provide multiple responses for the reasons they purchased Korean products/services, the most common reason was “quality” (61.4%). This percentage was more than 1.5 times higher than those for “brand” (38.6%) and “price” (35.8%).

“Appearance in movies and TV shows” was the least influential among the seven reasons listed, mentioned by only 17.1% of respondents—it can be said that it has a less decisive impact on purchasing decisions.

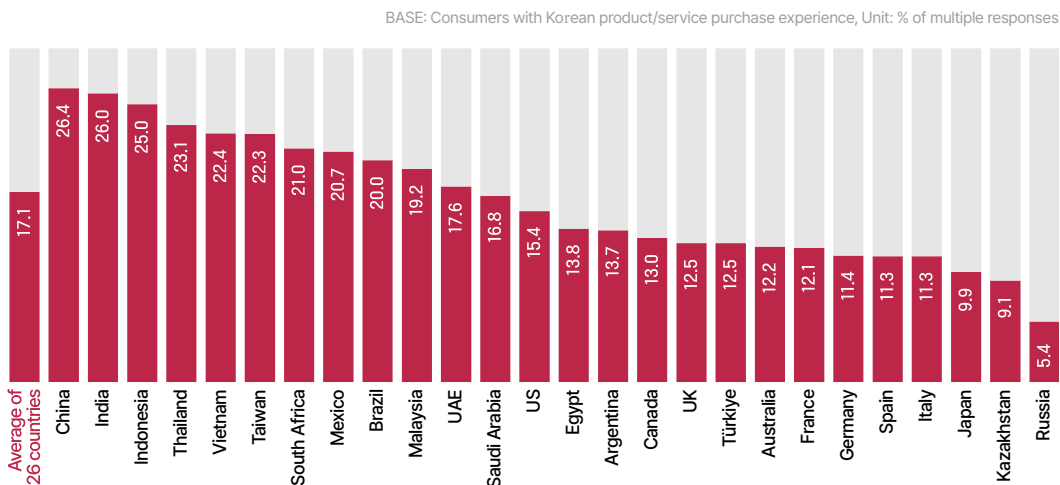
By country, “appearance in movies and TV shows” were commonly mentioned as the reason in Asian countries such as China (26.4%), India (26.0%), and Indonesia (25.0%). In contrast, this reason was less frequently mentioned in countries like Russia (5.4%), Kazakhstan (9.1%), and Japan (9.9%).

Figure 2-44 Reasons for Purchasing Korean Products/services



Q. What are your reasons for purchasing Korean brand products and services? Please select up to three reasons in order of importance.

Figure 2-45 Comparison of Proportions Choosing “Appearances in movies or TV programs” as a Reason for Purchasing Korean Products/services by Country



04 Influence of Hallyu on the use of Korean Products/services

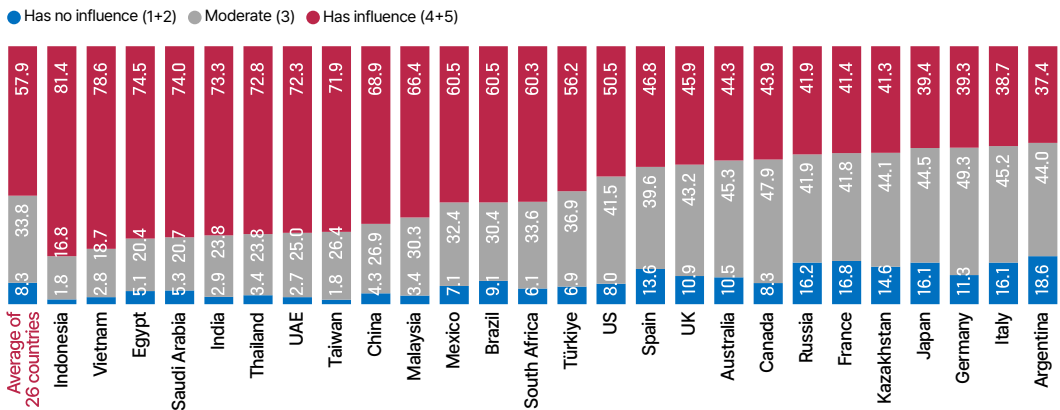
Indonesia and Vietnam perceived Hallyu as having a strong influence on Korean product purchases.

When asked how much Hallyu influences the use of Korean products/services, 57.9% of respondents said that it "has influence," while 33.8% described it as "moderate." The influence was particularly strong in countries like Indonesia (81.4%), Vietnam (78.6%), and Saudi Arabia (74.5%), while the pro-

portion of respondents who rated the influence as "moderate" was higher in Germany (49.3%), Canada (47.9%), and Australia (45.3%). Meanwhile, Argentina (18.6%), France (16.8%), and Russia (16.2%) had a higher percentage of respondents stating that Hallyu "has no influence" compared to other countries. Women (59.4%) and respondents in their 20s and 30s (61.6% and 60.0%, respectively) reported a stronger agreement with "has influence."

Figure 2-46 Comparison of Perceived Influence of Hallyu on the use of Korean Products/services by Country

BASE: Total, Unit: %

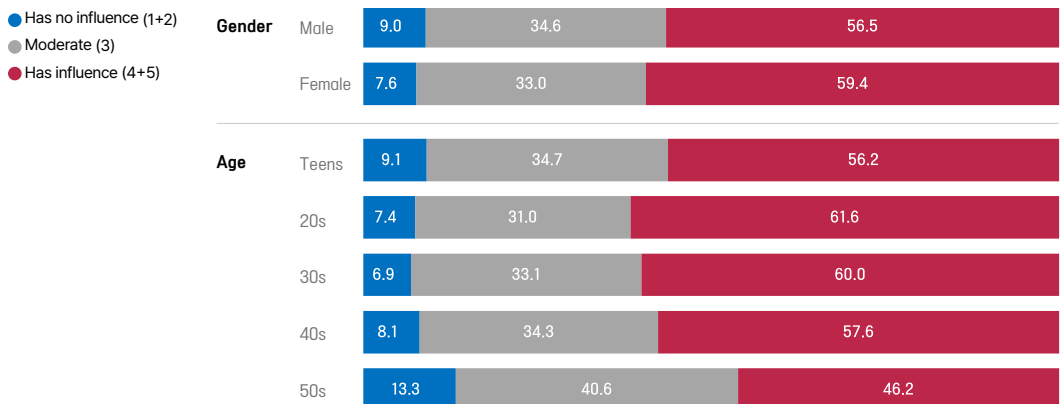


Q. To what extent do you think consumption of Korean cultural content influences the purchase and use of Korean brand products and services (including tourism)?

1. Has no influence at all / 2. Has no influence / 3. Moderate / 4. Has influence / 5. Has much influence

Figure 2-47 Comparison of the Perceived Influence of Hallyu on the use of Korean Products/services by Gender and age

BASE: Total, Unit: %



PART 2.

Survey Results

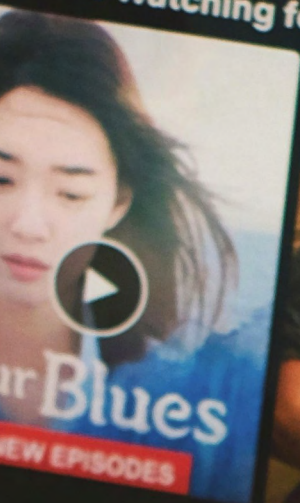
Hallyu by Category

- 1 Dramas
- 2 Variety Shows
- 3 Movies
- 4 Music
- 5 Animation
- 6 Publications
- 7 Webtoons
- 8 Games
- 9 Fashion
- 10 Beauty
- 11 Food

Award-winning Asian TV Shows



Continue Watching for Raviiii



1

Dramas

01 Experience Rate



Six to seven out of 10 respondents have experienced Korean dramas.

The experience rate for dramas was third highest among 11 types of Korean cultural content.

Southeast Asia, such as Indonesia and Vietnam, showed a particularly higher experience rate for Korean dramas.

Six to seven (65.1%) out of 10 consumers with Hallyu experience have watched Korean dramas, making it the third most experienced Korean cul-

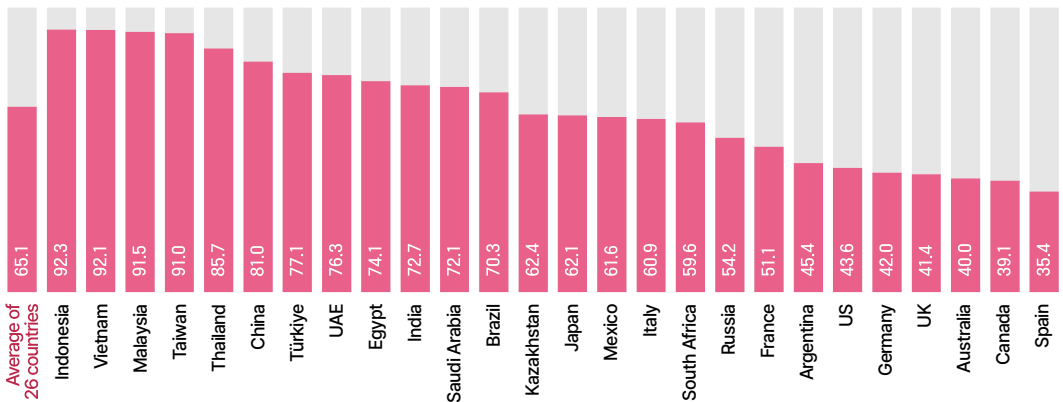
tural content out of 11 categories, following food and movies.

Countries with the highest rates of Korean drama viewership included Indonesia (92.3%), Vietnam (92.1%), and Malaysia (91.5%). However, Spain (35.4%), Canada (39.1%), and Australia (40.0%) showed lower viewership levels.

By gender, women (68.3%) had a higher experience rate than men (61.9%). By age, the experience rates were higher among those in their 20s (70.3%) and 30s (68.9%).

Figure 2-48 Comparison of Korean Drama Experience Rates by Country

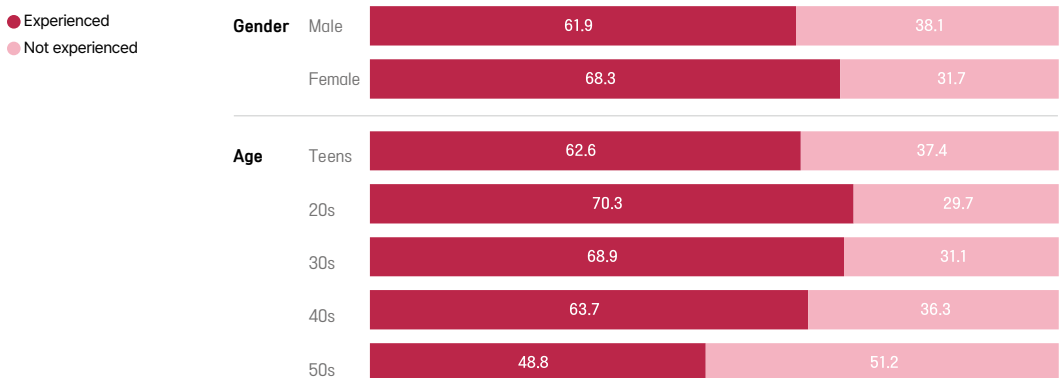
BASE: Total, Unit: %



Q. Please select all types of Korean cultural content that you have experienced.

Figure 2-49 Comparison of Korean Drama Experience Rates by Gender and age

BASE: Total, Unit: %



02 Popularity



Among the participants, 40.9% perceived Korean dramas as “widely popular.”

The “widely popular” rate increased by an annual average of 10.7% over the past five years.

When asked how popular Korean dramas are in their country, 40.9% of respondents with Hallyu experience reported that they are “widely popular,” such as “widely known among the general public with related products being sold” or “smooth sales of related products,” and 27.3% considered them “moderately popular,” while 22.2% said they are “popular among a niche audience.”

Over the past five years, the percentage of respondents indicating “hardly used” has remained steady at around 10-13%. However, the proportions of “popular among a niche audience” and “moderately popular” have decreased, while the percentage of “widely popular” has shown an upward trend.

Analysis of the compound annual growth rate (CAGR)⁵ of the “widely popular” rate for 11 types of Korean cultural content from 2019 to 2023 revealed

that Korean dramas showed the highest growth rate, increasing by an annual average of 10.7%.

More than half of respondents from Asia and the Middle East perceived Korean dramas as “widely popular.”

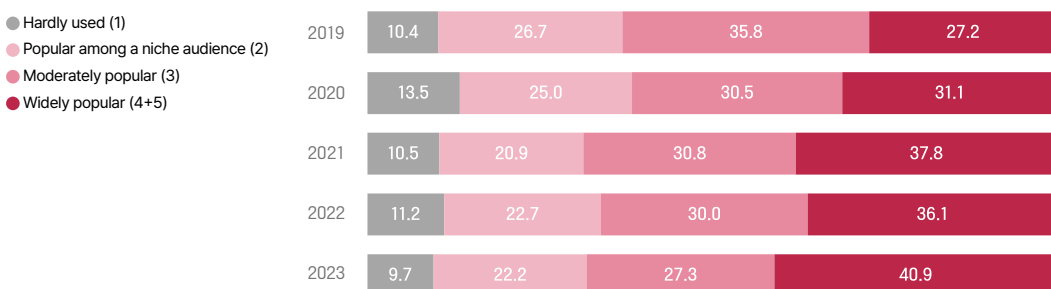
The “niche” and “moderately” rates were higher than that of “widely popular” in Europe and English-speaking countries.

The “widely popular” rates were higher in Asia (Taiwan 66.6%, Vietnam 57.2%, Malaysia 55.8%) and the Middle East (Saudi Arabia 55.5%, etc.) compared to other regions. Local reports indicating that popular Korean dramas are generally well-received in Taiwan, along with data from FlixPatrol showing that 8 out of the top 10 Netflix streaming TV programs in Taiwan in 2023 were Korean dramas, further support the high proportion of respondents who perceived them as “widely popular” in Taiwan.

According to FlixPatrol's 2023 Netflix Top 10 for streaming, seven out of the top 10 programs in

Figure 2-50 Comparison of Korean Drama Popularity Over the Last 5 Years by Year

BASE: Total, Unit: %



Q. How popular do you think Hallyu is in your country? Please indicate to what extent you agree.

1. Hardly used by anyone / 2. Popular among a niche audience / 3. Known not just by a niche audience but also by the general public /
4. Widely known among the general public with related products being sold / 5. Widely popular among the general public with smooth sales of related products

⁵ Compound annual growth rate (CAGR) is the mean annual growth rate over a period longer than one year and is calculated as follows:

$$\left[\frac{\text{Ending value}}{\text{Beginning value (1/ (End year-Start year))}} - 1 \right] \times 100\%$$

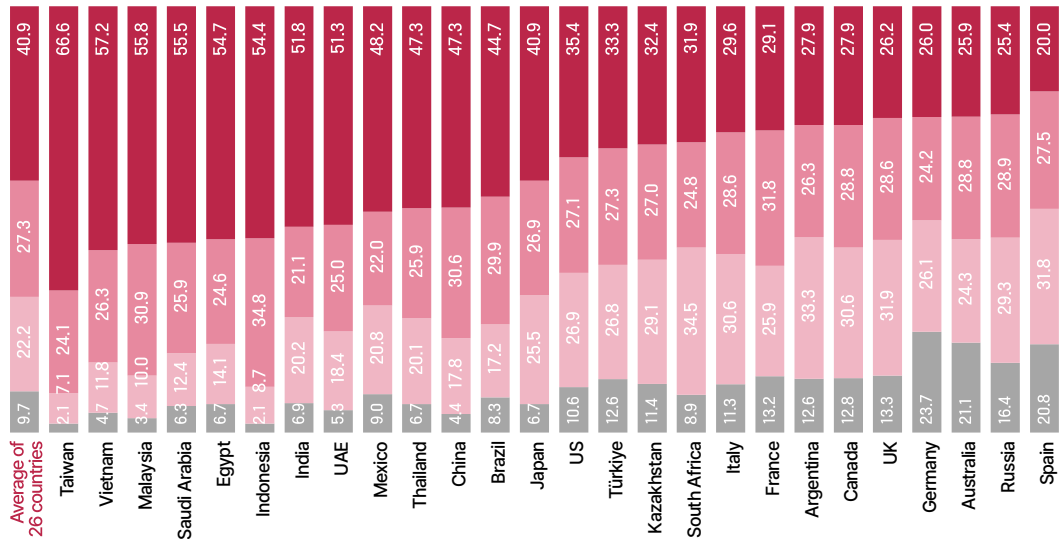
Vietnam and Malaysia were Korean dramas, which indicates the wide popularity of Korean dramas in Asia. In South Africa (34.5%), Italy (30.6%), Australia (33.3%), Canada (30.6%), the UK (31.9%), Germany (26.1%), Russia (29.3%), and Argentina (31.8%), Korean dramas were more popular “among

a niche audience,” while in France (31.8%) and Russia (28.9%) they were considered “moderately popular.” In Germany (23.7%), Spain (21.1%), and Argentina (20.8%), over 20% of respondents said they “hardly” watched Korean dramas.

Figure 2-51 Comparison of Korean Drama Popularity by Country

BASE: Total, Unit: %

● Hardly used (1) ● Popular among a niche audience (2) ● Moderately popular (3) ● Widely popular (4+5)



Local News

- “Dramas popular in Korea tend to be considerably popular in Taiwan as well. For example, the Netflix original drama *The Glory* has generated enthusiastic discussions among viewers regarding various mysteries and the ending of the drama due to continuous coverage of the drama’s interpretation and lead actors.” (Taiwan KOFICE overseas correspondent)
- “In 2023, various genres of Taiwanese dramas have aired, which, I believe, has led to a slight decrease in the viewing hours of Korean dramas.” (Taiwan KOTRA Taipei trade officer)
- “Recently, Thailand has tended to consume Hallyu content voluntarily. In particular, Hallyu content such as Netflix series, dramas, and movies seem to lead to the overall consumption of Korean products such as beauty, food, and fashion. Gimbap featured in *Extraordinary Attorney Woo* in 2022 was popular at the time, and soju sales increased due to the drama *Itaewon Class*, which made soju easily available in Thai convenience stores today. There are also increasing cases of local brands labeling their food products in Korean.” (Thailand KOTRA Bangkok trade officer)
- “One of the reasons Indonesians like Korean dramas is that they usually wrap up in 12–20 episodes with a fast-paced storyline, while Indonesian dramas tend to be long, with more than 100 episodes.” (Indonesia KOTRA Jakarta trade officer)
- “I think Korean pop culture has already become mainstream in Jakarta, but with the recent emergence of various contents from other countries, Indonesian viewers now have various options. For example, Thai dramas are gaining popularity, and some actors in these dramas resemble Korean actors visually.” (Indonesia KOTRA Jakarta trade officer)
- “Since the establishment of the Korean Language Department in 2005 at Ain Shams University, one of Egypt’s prestigious universities, it has consistently been one of the departments with high entrance scores, indicating the growing awareness and popularity of Korea. Recently, the biggest Middle Eastern OTT platform, Shahid, has begun offering Korean dramas such as *What’s Wrong with Secretary Kim?*, which highlights the growing popularity of Korean dramas.” (Egypt KOTRA Cairo trade officer)

03 Popular Foreign Dramas



Among foreign dramas, 39.6% chose dramas from "Korea."

It ranked 1st in the Asia-Pacific region, 2.3 times higher in popularity than "the US."

In Europe and Africa, "Korea" ranked 2nd after "the US."

Respondents who experienced Korean dramas claimed that their favorite foreign dramas (based on first-choice responses) were from "Korea" (39.6%) and "the US" (29.1%). "Korea" was first in the Asia-Pacific region, Americas, and the Middle East and second in Europe and Africa after "the US."

Comparing continents where "Korea" was ranked

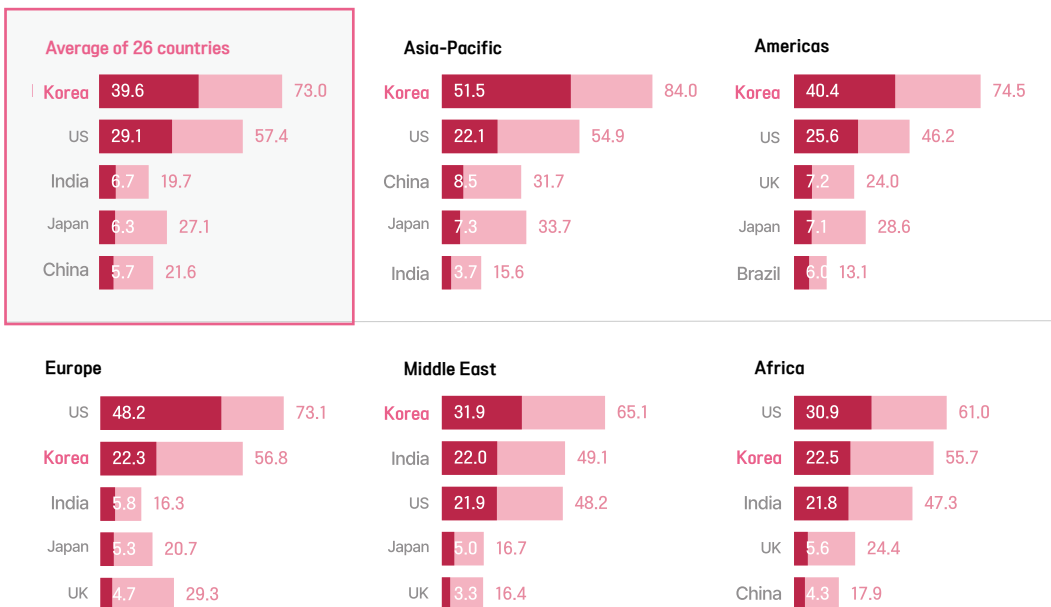
1st to 2nd place, in Asia-Pacific, "Korea" (51.5%) was 2.3 times more popular than "the US" (22.1%). In the Americas ("Korea" 40.4%, "the US" 25.6%), it was 1.6 times more popular, and in the Middle East ("Korea" 31.9%, "India" 22.0%), it was 1.5 times more popular. This shows an overwhelming preference in the Asia-Pacific region.

Nevertheless, in Europe, "the US" (48.2%) was 2.2 times more popular than "Korea" (22.3%), and "Korea" was 3.8 times more popular than "India" (5.8%), showing a significant gap. In Africa, "the US" (30.9%) was 1.4 times more popular than "Korea" (22.5%), while "Korea" was only 0.7%p more popular than "India" (21.8%).

Figure 2-52 Comparison of Popular Foreign Dramas by Continent

BASE: Consumers who experienced Korean dramas, Unit: %

● 1st choice ● 1st+2nd+3rd choices (multiple responses)



Q. Which country's dramas are popular in your country? Please select the top three in order (excluding your country).

Note Presented are the top five countries with the highest proportion of first-choice responses (in order).

04 Consumption Volume



India, Vietnam, and Thailand watched Korean dramas for nearly 30 hours per month.

Japan, France, and Australia watched Korean dramas less than 10 hours.

Respondents who experienced Korean dramas had an average monthly viewing time of 16.9 hours. Countries with the highest viewing hours included India (29.4 hours), Vietnam (27.8 hours), and Thailand (27.8 hours), with nearly 30 hours per month, close to double the average of the 26 countries surveyed. While the top rankings were mostly dominated by Asian countries, South Africa (24.6 hours), Brazil (20.8 hours), and the UAE (18.8 hours) also stood out, making notable appearances in the top five to seven.

In contrast, Japan (4.8 hours), France, and Australia (8.1 hours) were among the seven countries with viewing times below 10 hours, placing them in the lower ranks among the 26 countries. Countries with lower consumption time generally had lower levels of favorability as well. Korean dramas accounted for 29.2% of the overall drama consumption on average across the 26 countries. The share was highest in Indonesia (42.7%), Malaysia (39.7%), and Vietnam (39.5%), while it was lower in Italy (18.2%), France (18.5%), and Japan (18.7%). In terms of spending, Middle Eastern and English-speaking countries generally ranked higher, while Asian countries were on the lower end.

Figure 2-53 Comparison of Time Spent on Korean Dramas by Country

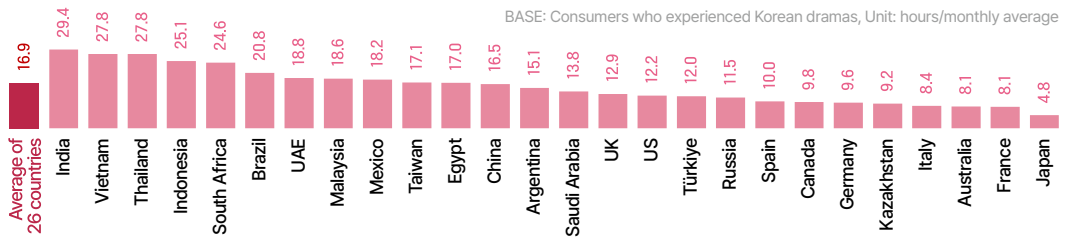


Figure 2-54 Comparison of the Proportion of Korean Drama Consumption by Country

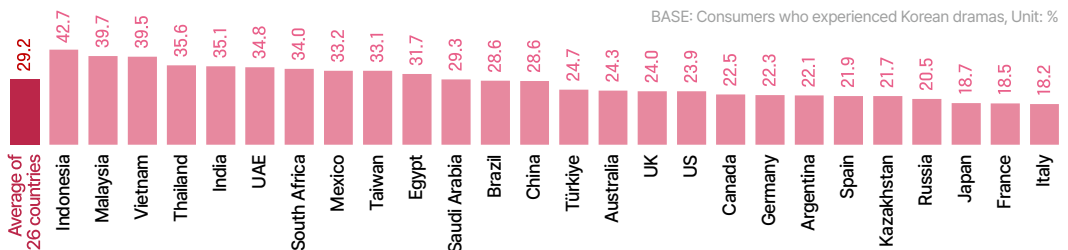
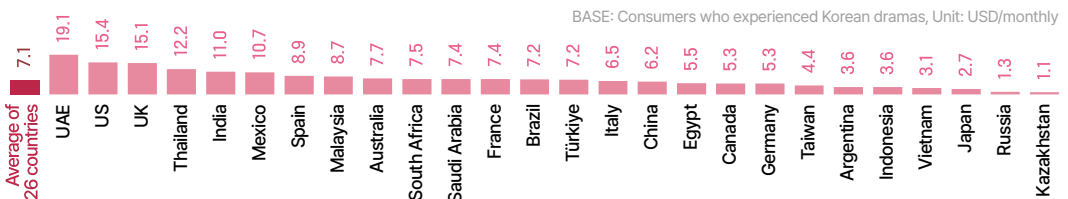


Figure 2-55 Comparison of Expenditure on Korean Dramas by Country



Q. What is your usual viewing volume, proportion, and average expenditure for Korean dramas? Please provide monthly average viewing hours and expenditure in the past year.

05 Favorability



Among the participants, 75.7% claimed they like Korean dramas.

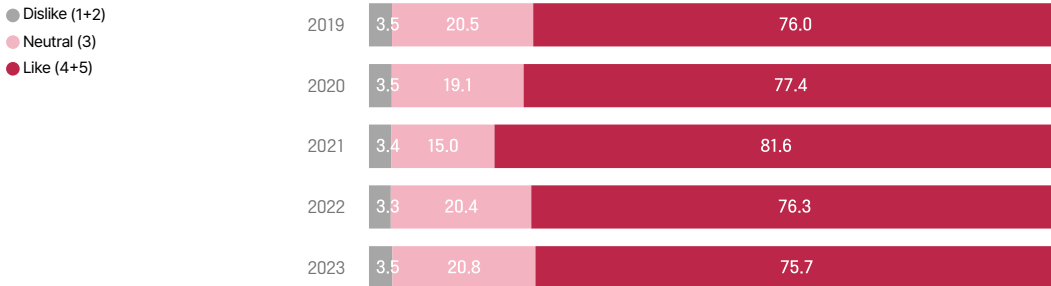
Overall, 75.7% of survey participants who experienced Korean dramas responded that they “like[d]” Korean dramas. Favorability has returned to previous levels after a sharp increase in 2021 owing to the *Squid Game* phenomenon, maintaining a mid-

to-higher 70% range over the past five years.

Countries where “like” is the highest were India (89.3%), the UAE (88.3%), Indonesia (88.1%), Thailand (86.7%), and Vietnam (85.8%), while the lowest included Kazakhstan (42.2%), Russia (47.2%), and Japan (57.6%). Notably, Kazakhstan (49.0%) and Russia (42.3%) showed significantly higher proportions of “neutral” responses.

Figure 2-56 Comparison of Favorability Toward Korean Dramas Over the Last 5 Years by Year

BASE: Consumers who experienced Korean dramas, Unit: %

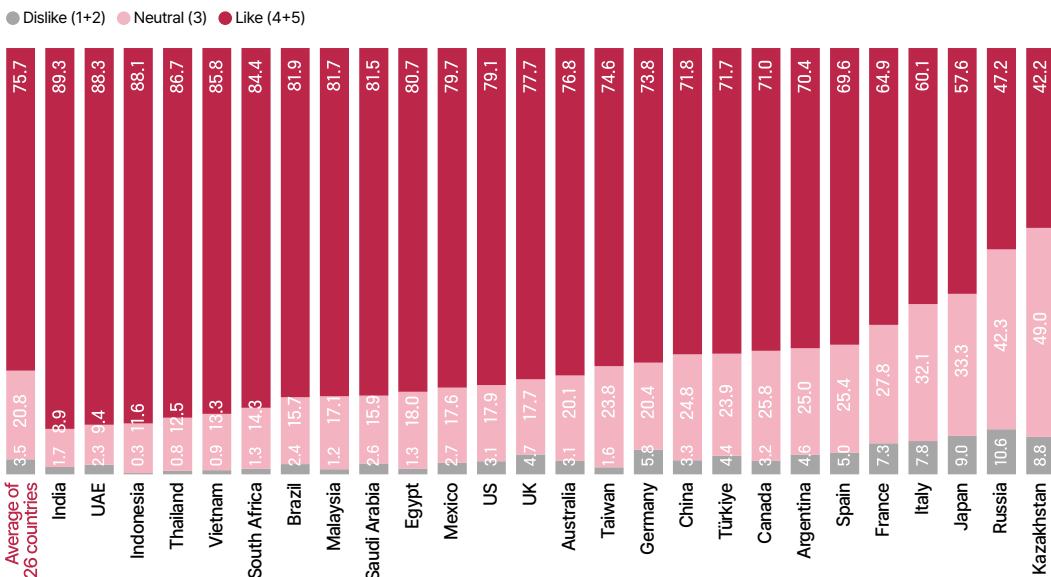


Q. Overall, how much do you like the Korean dramas that you have recently watched?

1. Don't like it at all / 2. Don't like it / 3. Neutral / 4. Like it / 5. Like it very much

Figure 2-57 Comparison of Favorability Toward Korean Dramas by Country

BASE: Consumers who experienced Korean dramas, Unit: %



06 Factors Promoting and Inhibiting Favorability

Asia-Pacific rated "stories" and "actors' looks" highly.

The Americas found the "innocence of love stories" unique.

Europe was attracted to the "culture," while the Middle East and Africa were attracted to "acting."

Primary reasons given for liking Korean dramas (based on multiple responses) were "The story is well-structured and solid" (26.1%), "The actors have attractive looks" (22.5%), and "The love stories are innocent" (22.3%).

By continent, the top factor promoting favorability was "The story is well-structured and solid" in the Asia-Pacific region (29.4%) and Europe (24.4%), "The love stories are innocent" (29.7%) in the Americas, and "The actors' acting ability is outstanding" in the Middle East (25.2%) and Africa (25.8%). When comparing with the average of 26 countries, the Asian-Pacific region rated "The actors have attractive looks" (27.0%) 4.5%p higher than the average. "The love stories are innocent" (29.7%) was 7.4%p higher than the average in the Americas, and "The actors' acting ability is outstanding" was 7.1%p and 7.7%p higher than the average in the Middle East (25.2%) and Africa (25.8%), respectively. "The actors have attractive looks" (16.9%) was 5.5%p lower than the average in Europe. In summary, Korean dramas were highly rated for their well-structured stories in Asia-Pacific based on actors' familiarity and appearance.

In the Americas, although actor familiarity was lower, the innocent romance narratives were viewed

as novel yet unique, while in the Middle East and Africa, the actors' acting ability was especially influential in attracting viewers.

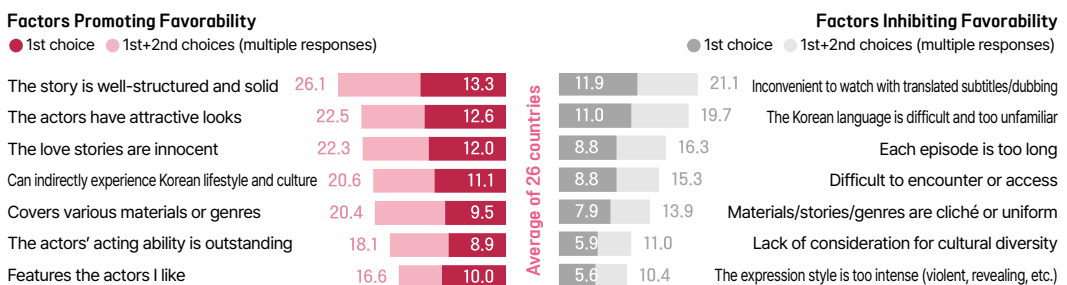
Language barriers were found to be inconvenient in Europe and Africa.

Asia and the Middle East expressed higher criticism for "uniformity."

When asked about factors inhibiting favorability, common top responses were language barriers, such as "Inconvenient to watch with translated subtitles/dubbing" (21.1%) and "the Korean language is difficult and too unfamiliar" (19.7%). Africa and Europe, in particular, seemed to perceive a greater language gap, with Africa's response of "the Korean language is difficult and too unfamiliar" (29.1%) and Europe's response of "Inconvenient to watch with translated subtitles/dubbing" (26.4%) higher than the average of 26 countries by 9.5%p and 5.3%p, respectively. "Covers various materials or genres" was included among factors promoting favorability in the Asia-Pacific region and the Middle East, but its percentages were lower than in other continents (19.7% and 18.1%, respectively). On the other hand, in terms of factors hindering favorability, "Materials/stories/genres are cliché or uniform" (16.6% and 14.2%, respectively) were higher. Additionally, "Each episode is too long" (19.3% in the Middle East) and "Lack of consideration for cultural diversity" (13.9% in the Middle East and 13.6% in Africa) were also reported at higher levels in the Middle East and Africa than other continents.

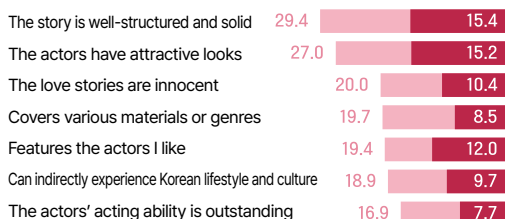
Figure 2-58 Comparison of Factors Promoting and Inhibiting Favorability Toward Korean Dramas by Continent

BASE: Consumers who experienced Korean dramas, Unit: %



Factors Promoting Favorability

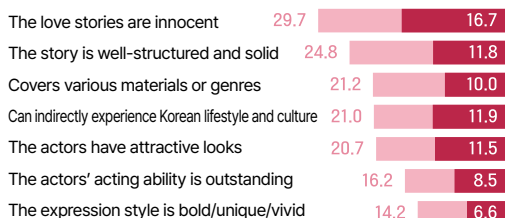
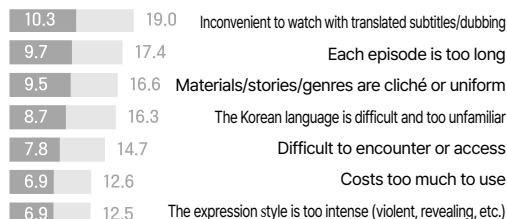
● 1st choice ● 1st+2nd choices (multiple responses)



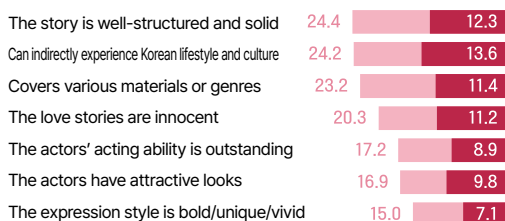
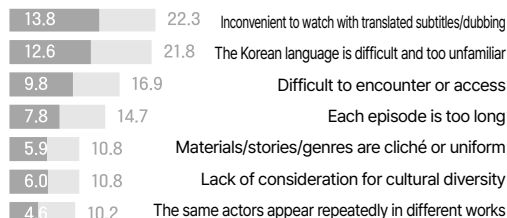
Asia-Pacific

Factors Inhibiting Favorability

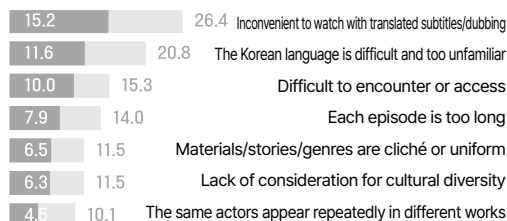
● 1st choice ● 1st+2nd choices (multiple responses)



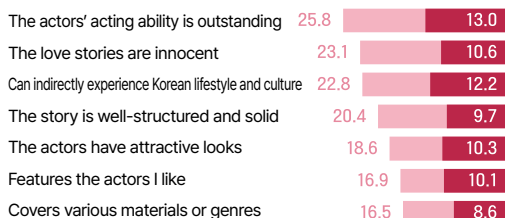
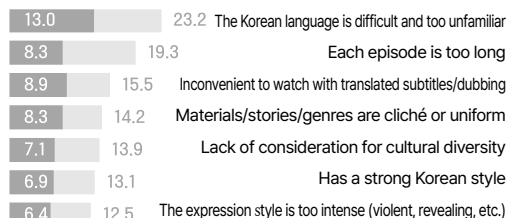
Americas



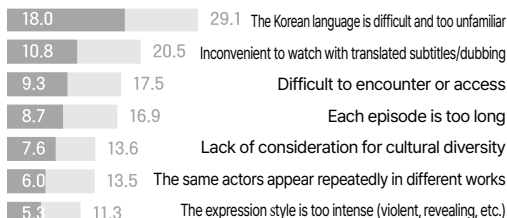
Europe



Middle East



Africa



Q. What do you think are the biggest factors promoting favorability of Korean dramas? Please select up to the second choice in order.

Q. What do you think are the factors inhibiting favorability of Korean dramas? Please select up to the second choice in order.

07 Preferred Dramas



"Squid Game" remained the most preferred drama for three consecutive years.

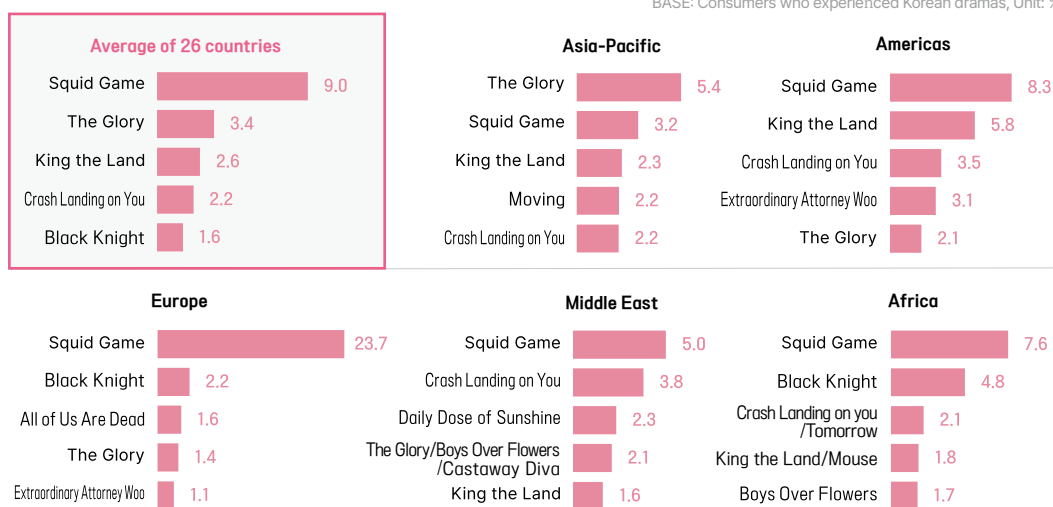
Europe showed a 2.6 times higher preference rate for "Squid Game" than average.

In 2023, the most preferred drama was "Squid Game" with 9.0% of respondents selecting it, ranking first for three consecutive years. Notably, in Europe, "Squid Game" was mentioned by 23.7% of respondents, which is 2.6 times higher than the average of 26 countries, and a significant gap with the next highest-ranked drama, indicating substantial local interest. In the Americas and Africa, "Squid Game" was also the favorite, with 8.3% and 7.6%, respectively, which were higher than the percentages in the Asia-Pacific region and the Middle East.

Asia-Pacific and the Middle East preferred various new releases.

In the Asia-Pacific region, "The Glory," which features Song Hye-kyo, who is highly recognizable in Asia, was most preferred with a 5.4% preference rate. It was particularly favored in China (14.1%), Taiwan (9.4%), and Indonesia (7.4%). Other new releases such as "King the Land" (2.3%) and "Moving" (2.2%) also ranked highly, and in the Middle East, 2023 works such as "Daily Dose of Sunshine" (2.3%), "The Glory" (2.1%), "Castaway Diva" (2.1%), and "King the Land" (1.6%) were included in the rankings. Thus, it can be said that the Asia-Pacific area and the Middle East tended to prefer newer shows. In the UAE, "Boys Over Flowers" (2.1%), which aired on the UAE's MBC Drama channel in 2012, ranked fourth in the Middle East. This is different from other continents where the oldest favored show was *Crash Landing on You* from 2019.

Figure 2-59 Comparison of top Five Most Preferred Korean Dramas by Continent



Q. What is your favorite Korean drama among those you have watched this year? (Open-ended)

Table 2-8 Top Five Countries in Preference Rates for Most Preferred Dramas

	1st	2nd	3rd	4th	5th
Squid Game	Italy 39.5	France 28.8	Russia 21.8	UK 21.3	Türkiye 16.8
The Glory	China 14.1	Taiwan 9.4	Indonesia 7.4	Argentina 3.6	Malaysia 3.5
King the Land	Brazil 10.9	Thailand 7.4	Mexico 5.9	Argentina 4.9	Indonesia 3.4
Crash Landing on You	Japan 8.9	Brazil 7.9	Saudi Arabia 4.0	Vietnam 3.8	UAE 3.6
Black Knight	South Africa 9.3	UK 6.7	Spain 3.3	Türkiye 3.3	Malaysia 2.9

08 Willingness to pay



The number of those not willing to pay decreased, and that of those willing to pay increased compared to five years ago.

Thailand, India, and Indonesia showed a high willingness to pay.

More than half of the respondents in Kazakhstan and Russia were not willing to pay.

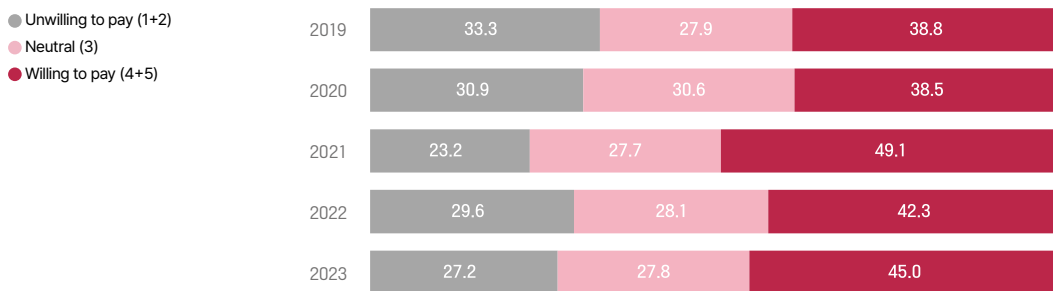
When asked about their willingness to pay for Korean dramas, 45.0% of respondents agreed; 27.8% were neutral, and 27.2% answered that they were not willing to pay. Looking at the trends since 2019, the proportion of people “unwilling to pay” has gradually decreased, while the number of those

“willing to pay” has gradually increased.

There was no significant change in the “neutral” group. In 2021, following the *Squid Game* phenomenon, the percentage of those “unwilling to pay” dropped significantly by 7.7%p from the previous year to 23.2%. By country, the willingness to pay was higher in Thailand (66.6%), India (65.9%), Indonesia (64.1%), the UAE (63.9%), and Saudi Arabia (62.8%). Conversely, it was lower in Kazakhstan (21.9%), Russia (22.3%), Germany (25.6%), and Spain (26.1%). Notably, in Kazakhstan (52.9%) and Russia (50.2%), more than half of the respondents indicated they were not willing to pay.

Figure 2-60 Comparison of the Willingness to pay for Korean Dramas Over the Last 5 Years by Year

BASE: Total, Unit: %

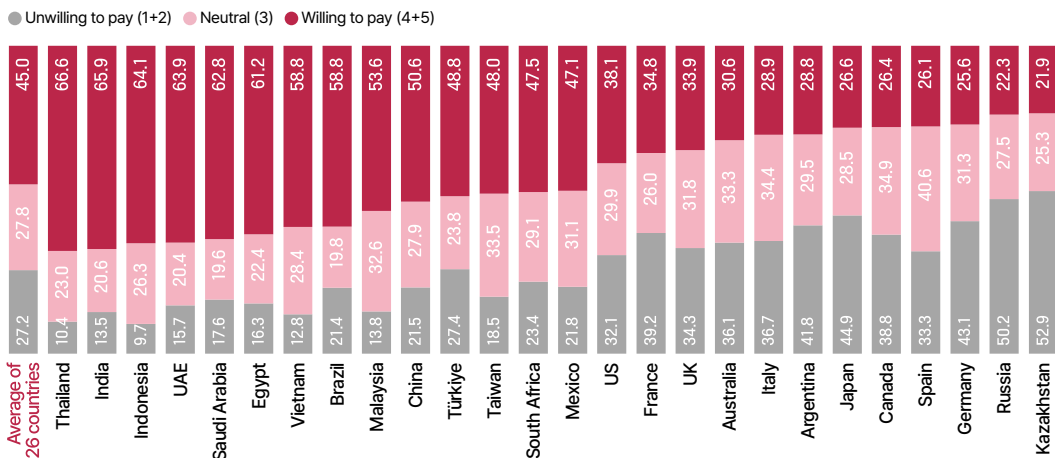


Q. Please indicate your level of willingness to pay for Korean cultural content in the future for each item.

1. Strongly disagree / 2. Disagree / 3. Neutral / 4. Agree / 5. Strongly agree

Figure 2-61 Comparison of the Willingness to pay for Korean Dramas by Country

BASE: Total, Unit: %



09 Willingness to Recommend



Among the participants, 75.9% claimed that they were willing to recommend Korean dramas.

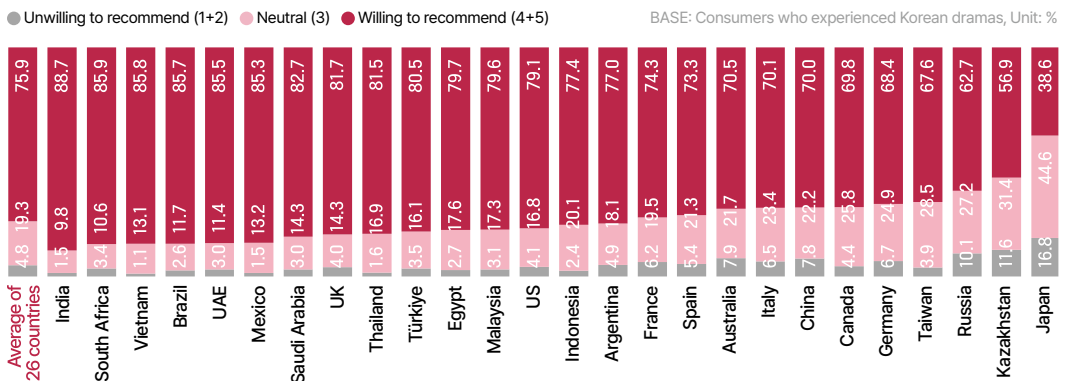
Respondents in their 20s and 30s from India and South Africa were particularly active in recommending.

Respondents from Japan, Kazakhstan, and Russia were less inclined to recommend.

In total, 75.9% of participants who experienced Korean dramas reported that they were willing to recommend Korean dramas; 19.3% were neutral, and only 4.8% were not willing to recommend. By country, India (88.7%), South Africa (85.9%), and

Vietnam (85.8%) showed higher levels of willingness to recommend, while Japan (38.6%), Kazakhstan (56.9%), and Russia (62.7%) had lower levels. In particular, Japan and Kazakhstan had relatively high percentages of people "unwilling to recommend" Korean dramas, with 16.8% and 11.6%, respectively, indicating a more reserved attitude toward recommending. Women (78.1%) were more enthusiastic about recommending Korean dramas compared to men (73.7%), and people in their 20s and 30s (78.2%, 78.7%) were more active in recommending than those in their teens (73.3%) or 50s (66.3%).

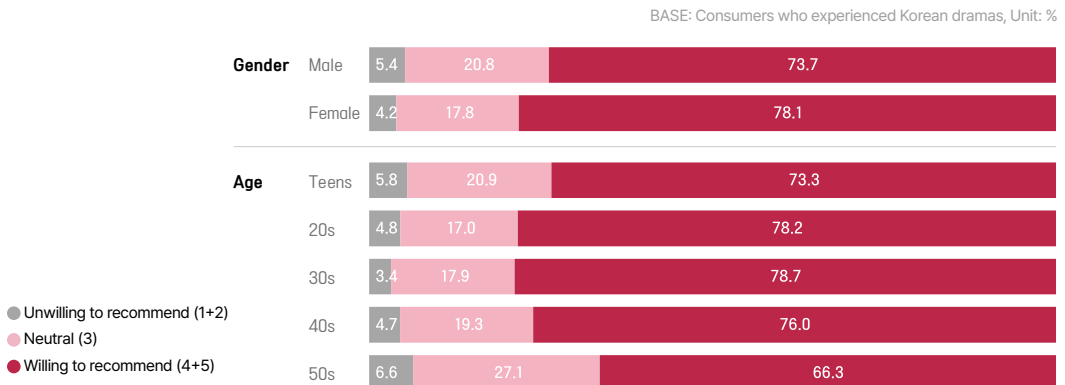
Figure 2-62 Comparison of the Willingness to Recommend Korean Dramas by Country



Q. Are you willing to recommend Korean dramas that you have recently experienced to others?

1. Definitely do not recommend / 2. Do not recommend / 3. Neutral / 4. Recommend / 5. Definitely recommend

Figure 2-63 Comparison of the Willingness to Recommend Korean Dramas by Gender and age



10 Ease of use



Ease of use improved from 56.4% in 2019 to 71.3% in 2023.

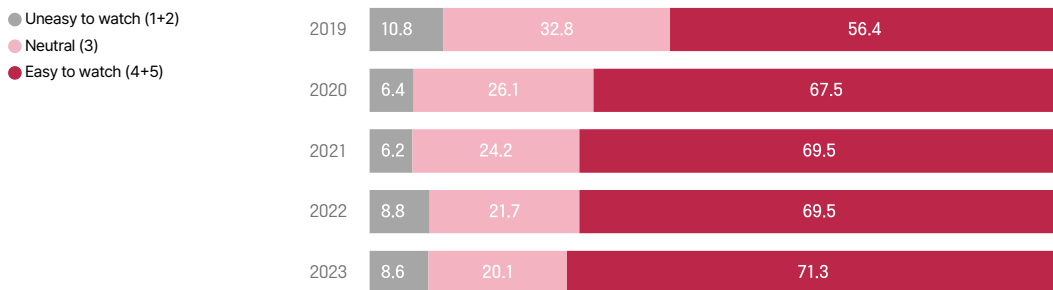
Southeast Asia and the Middle East showed particularly higher levels of ease of use.

Overall, 71.3% of respondents believed that Korean dramas were easy to consume, while 8.6% found it not easy. The percentage of people who found Korean dramas easy to watch has significantly increased from 56.4% in 2019 to 71.3% in 2023.

By country, Southeast Asia and the Middle East generally reported that they were easy to watch, with Malaysia (87.2%), Indonesia, and Saudi Arabia (86.2%) showing strong positive responses. However, Kazakhstan (49.6%) and Europe (Russia 51.2%, Germany 51.8%, etc.) perceived Korean dramas as not easy to consume.

Figure 2-64 Comparison of the Ease of Watching Korean Dramas Over the Last 5 Years by Year

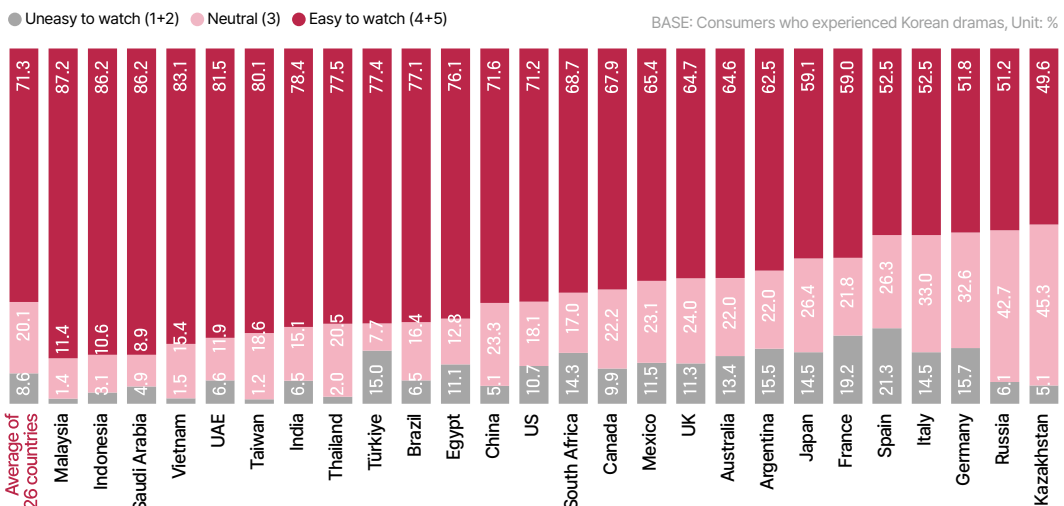
BASE: Consumers who experienced Korean dramas, Unit: %



Q. When you are about to watch Korean dramas, is it easy to access the Korean dramas you want?

1. Strongly disagree / 2. Disagree / 3. Neutral / 4. Agree / 5. Strongly agree

Figure 2-65 Comparison of the Ease of Watching Korean Dramas by Country



11 Access Channels



Most watched Korean dramas through “online/mobile” channels.

The Middle East and Africa also actively used “TV” and “CD/videos.”

In Europe, passive usage was prominent.

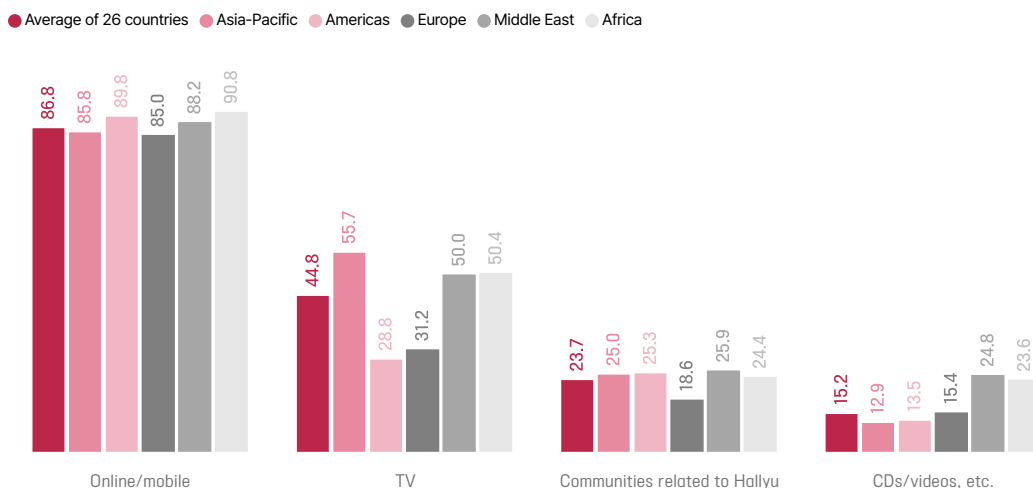
The primary access channel for Korean dramas was “online/mobile” (86.8%), with the Americas (89.8%) having the highest “online/mobile” usage compared to other regions. Asia-Pacific (55.7%), the Middle East (50.0%), and Africa (50.4%) also accessed much through “TV.” Additionally, the Middle East (24.8%) and Africa (23.6%) showed relatively high usage of “CDs/videos” for accessing

Korean dramas.

Access through “communities related to Hallyu” was 18.6% in Europe, which was the lowest among all regions. The Asia-Pacific region, the Middle East, and Africa had high levels of access across all channels—Korean dramas were accessed through multiple channels in these regions. However, Europe showed lower levels of access across all channels compared to other continents. Based on access patterns, Asia-Pacific, the Middle East, and Africa showed a more active engagement with Korean dramas, while Europe showed a lower usage rate of Korean dramas.

Figure 2-66 Comparison of Korean Drama Access Channels by Continent

BASE: Consumers who experienced Korean dramas, Unit: % of multiple responses



Q. Please select all the channels through which you usually access Korean dramas.

12 Online/mobile Access Platforms



"YouTube" and "Netflix" were the main platforms used.

The Americas and Europe mostly watched Korean dramas via "Netflix."

In total, 71.4% of those who watched Korean dramas through online/mobile platforms used "Netflix," followed by "YouTube" (62.4%). "Amazon Prime" (31.8%) and "Disney Plus" (24.4%) were still used at approximately half the level of "Netflix." There were regional differences in preferred platforms.

In Asia-Pacific, YouTube (65.8%) surpassed Netflix (61.7%), and iQIYI (30.7%) was among the highest ranked due to its influence in China, unlike other continents.

In the Americas (86.4%) and Europe (77.8%), Netflix usage was 31.8%p and 22.3%p higher than YouTube usage, respectively. In the Middle East and Africa, Netflix and YouTube had similar usage levels, with YouTube Premium showing higher usage rates at 26.9% and 27.0%, respectively, which were high compared to those in other continents.

Table 2 -9 Changes in Online/mobile Access Platforms for Korean Dramas Over the Last 6 Years by Year

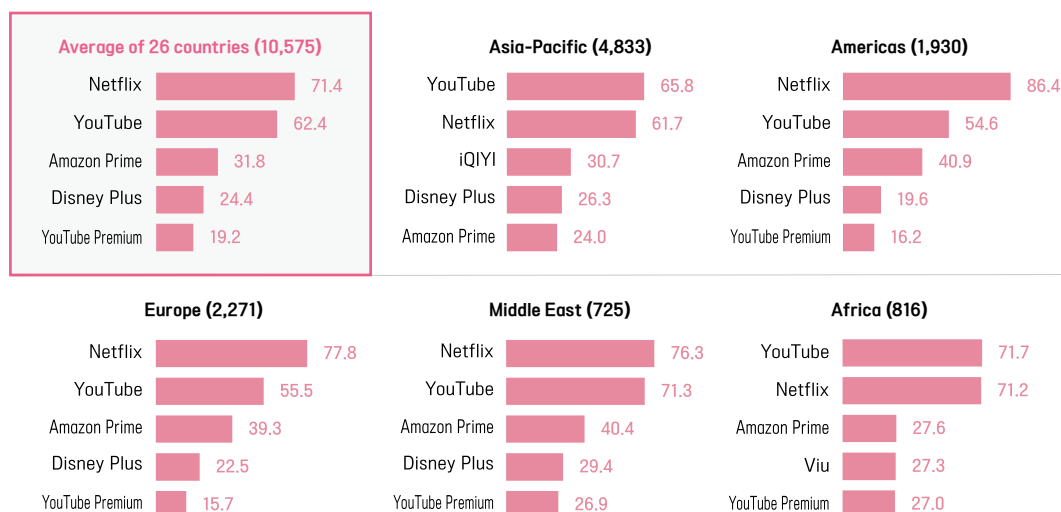
BASE: No. of online/mobile platform users for Korean dramas, Unit: % of multiple responses

Category	2018	2019	2020	2021	2022	2023
Netflix	51.1	49.0	63.2	68.0	69.9	71.4
YouTube	80.0	80.5	75.0	68.4	62.6	62.4
Amazon Prime	19.4	18.3	27.0	30.6	29.3	31.8
Disney Plus	-	-	-	-	23.2	24.4
YouTube Premium	13.3	10.2	21.2	23.8	18.1	19.2
iQIYI	20.6	20.0	18.6	22.9	15.2	17.0

Q. Please select all the online/mobile platforms you primarily use to watch Korean dramas. Exclude edited short videos.

Figure 2-67 Comparison of Online/mobile Access Platforms for Korean Dramas by Continent

BASE: No. of online/mobile platform users for Korean dramas; No. of cases= (), Unit: % of multiple responses, top five



2

Variety Shows

01 Experience Rate



Five out of 10 respondents have experienced Korean variety shows.

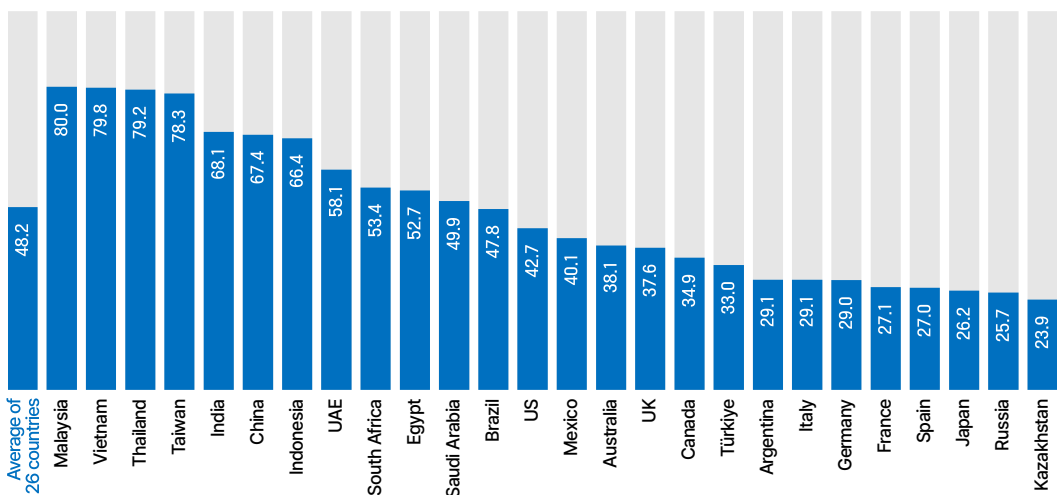
In Malaysia and Vietnam, the rate was around 80%.

Five (48.2%) out of 10 consumers with Hallyu experience said that they had watched Korean variety shows. The four countries with the highest experience rates for Korean variety shows were Malaysia (80.0%), Vietnam (79.8%), Thailand (79.2%), and Taiwan (78.3%).

(79.2%), and Taiwan (78.3%), with rates close to 80%. Kazakhstan (23.9%), Russia (25.7%), and Japan (26.2%) showed considerably low experience rates. The experience rates among those in their 20s and 30s were 54.7% and 52.3%, respectively, while other age groups had lower rates around 30–40%.

Figure 2-68 Comparison of Korean Variety Show Experience Rates by Country

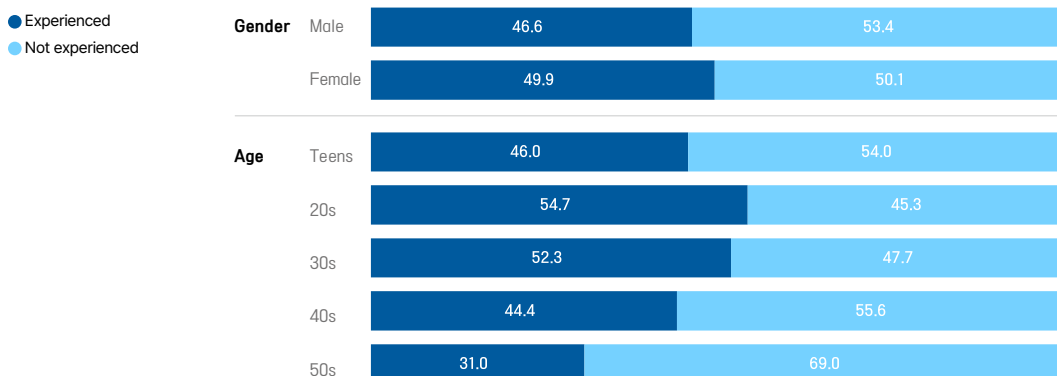
BASE: Total, Unit: %



Q. Please select all types of Korean cultural content you have experienced.

Figure 2-69 Comparison of Korean Variety Show Experience Rates by Gender and age

BASE: Total, Unit: %



02 Popularity



The awareness of the popularity of Korean variety shows has increased.

When asked about how popular Korean variety shows are in their countries, 35.0% of the respondents stated that they are “widely popular,” with responses such as “widely known among the general public with related products being sold” or “widely popular among the general public with smooth sales of related products,” marking a 3.5% increase from 2022. Overall, 26.5% considered them “moderately popular,” while 27.4% viewed them as “popular among a niche audience.” Over the past five years, the proportion viewing the shows as “widely popular” has increased by an average of 5.9% percentage points annually from 27.9% in 2019. During the same period, the percentage who reported that they “hardly” watched Korean variety shows remained steady at around 10–13%.

More than half of the respondents perceived Korean variety shows as “widely popular” in many countries, including Malaysia.

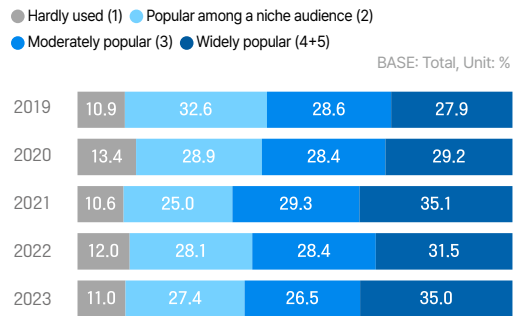
Thirteen countries, including Japan and Kazakhstan, perceived them as “popular among a niche audience” to a high degree.

In 13 countries, including Malaysia (54.5%), Saudi Arabia (54.1%), Taiwan (51.9%), Egypt (51.1%), Viet-

nam (49.8%), and India (46.9%), nearly or more than half of the respondents considered Korean variety shows “widely popular.”

In Japan (45.8%), Kazakhstan (38.7%), Russia (37.6%), Canada (37.4%), South Africa (37.1%), and Australia (35.4%), the proportion seeing them as “popular among a niche audience” was higher than those seeing them as “widely popular” and “moderately popular.” Conversely, in Argentina, Germany, Russia, and Spain, more than 20% indicated that they “hardly” watched Korean variety shows.

Figure 2-70 Comparison of Korean Variety Show Popularity Over the Last 5 Years by Year

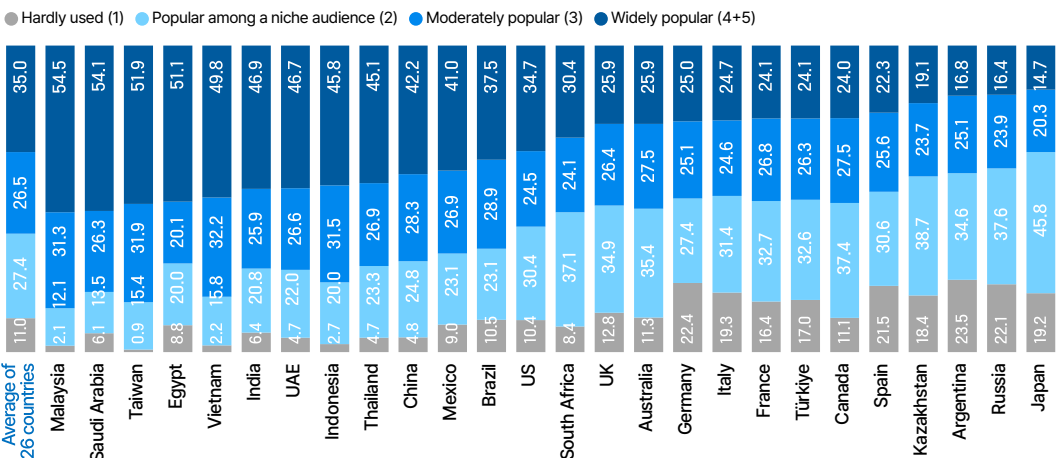


Q. How popular do you think Hallyu is in your country? Please indicate to what extent you agree.

1. Hardly used by anyone / 2. Popular among a niche audience /
3. Known by a niche audience and the general public / 4. Widely known among the general public with related products being sold / 5. Widely popular among the general public with smooth sales of related products

Figure 2-71 Comparison of Korean Variety Show Popularity by Country

BASE: Total, Unit: %



03 Popular Foreign Variety Shows



In total, 35.3% of respondents stated that the most popular variety shows in their own countries were Korean.

In the Asia-Pacific region, Korean variety shows were overwhelming popular, being 2.2 times more favored than shows from "the US."

Those who have experienced Korean variety shows chose "Korea" (35.3%) and "the US" (29.5%) as their favorite foreign variety shows

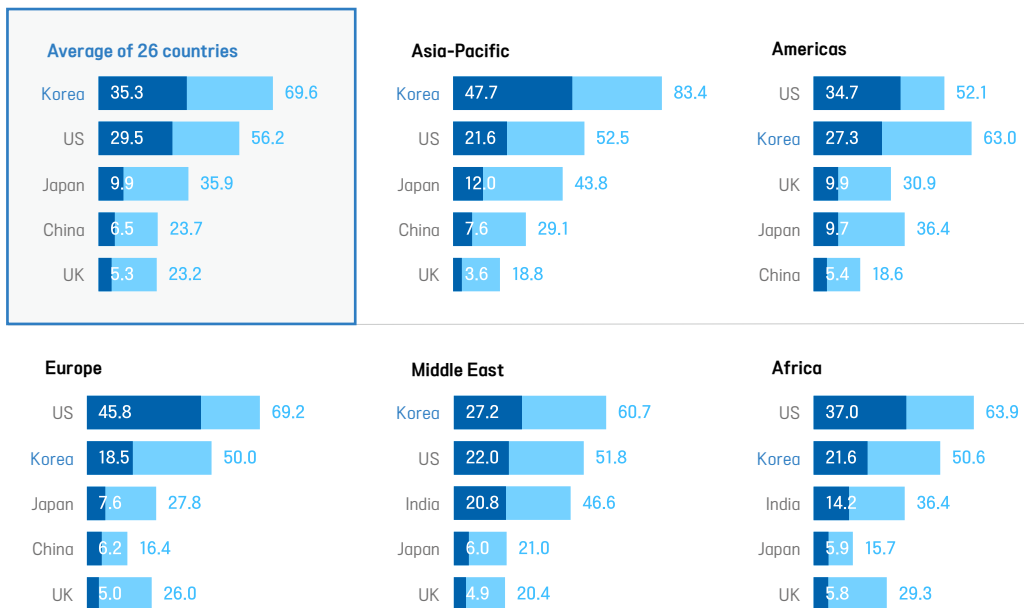
(based on their first preference). "Korea" ranked first in Asia-Pacific and Middle East and second in the Americas, Europe, and Africa.

In the Asia-Pacific region, "Korea" was 2.2 times more preferred than "the US." In the Middle East, the gap between "Korea" and "the US" in second place was not as wide. "Japan" ranked third in Asia-Pacific (12.0%) and Europe (7.6%), while "India" ranked third in the Middle East (20.8%) and Africa (14.2%).

Figure 2-72 Comparison of Popular Foreign Variety Shows by Continent

BASE: Consumers who experienced Korean variety shows, Unit: %

● 1st choice ● 1st+2nd+3rd choices (multiple responses)



Q. Which country's variety shows are popular in your country? Please select the top three in order (excluding your country).

Note Presented are the top five countries with the highest proportion of first-choice responses (in order).

Local News

- "Running Man is a long-running program popular for its entertaining talk segments and easy-to-understand games. One of the cast members, Song Ji-hyo, has gained considerable recognition in Malaysia to the extent that she even became a model for a Korean cosmetic brand there. *Street Woman Fighter 2* and *Single's Inferno 3* have also garnered attention." (Malaysia KOTRA Kuala Lumpur trade officer)

04 Consumption Volume



Consumption volume and proportion were higher in Asia and the Middle East, while expenditure was higher in the Middle East and the Anglosphere.

The average monthly viewing hours for Korean variety shows were reported to be 16.8 hours. Countries with high viewing hours included India (29.3 hours) and South Africa (28.3 hours), at nearly 30 hours per month. The top-ranking countries were mostly in Asia, while Japan (4.7 hours), France (8.5 hours), and Italy (9.0 hours) were among the lower ranks. This trend was similar to that observed in

the video content areas such as dramas, in which countries with lower consumption volume also tended to show lower levels of favorability.

The proportion of Korean variety show consumption out of total variety show content averaged 28.4%. Indonesia (37.7%) and Malaysia (36.7%) showed the highest proportions, while Italy (17.9%), Spain (19.5%), and France (19.8%) had the lower shares.

The average monthly spending across 26 countries was 8.3 USD, with the UAE, UK, and US in the higher range and Russia, Kazakhstan, and Japan in the lower range.

Figure 2-73 Comparison of Time Spent on Korean Variety Shows by Country

BASE: Consumers who experienced Korean variety shows, Unit: hour/monthly average

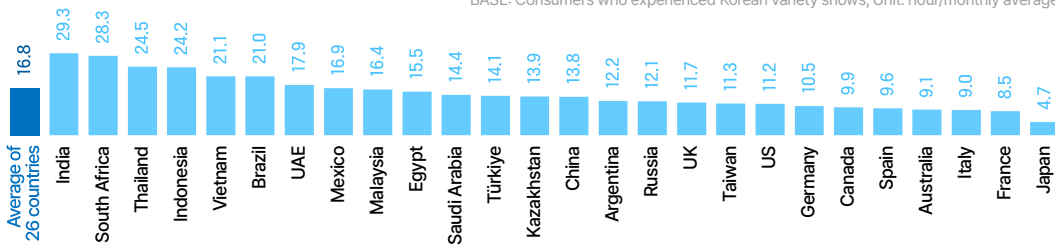


Figure 2-74 Comparison of the Proportion of Korean Variety Show Consumption by Country

BASE: Consumers who experienced Korean variety shows, Unit: %

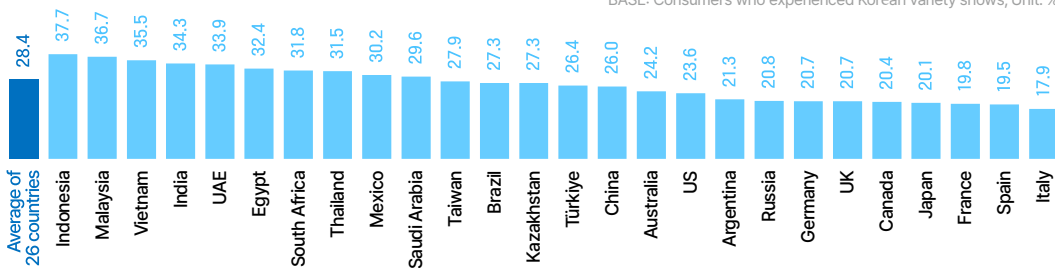
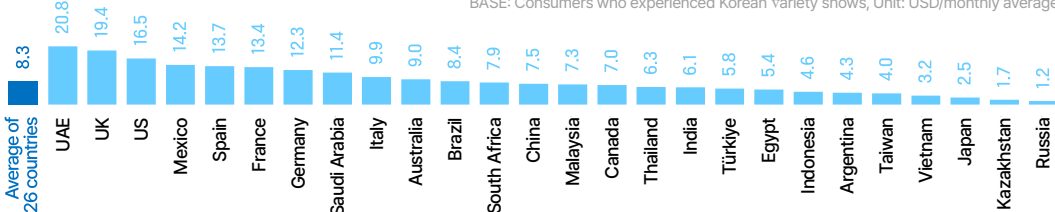


Figure 2-75 Comparison of Expenditure on Korean Variety Shows by Country

BASE: Consumers who experienced Korean variety shows, Unit: USD/monthly average



05 Favorability

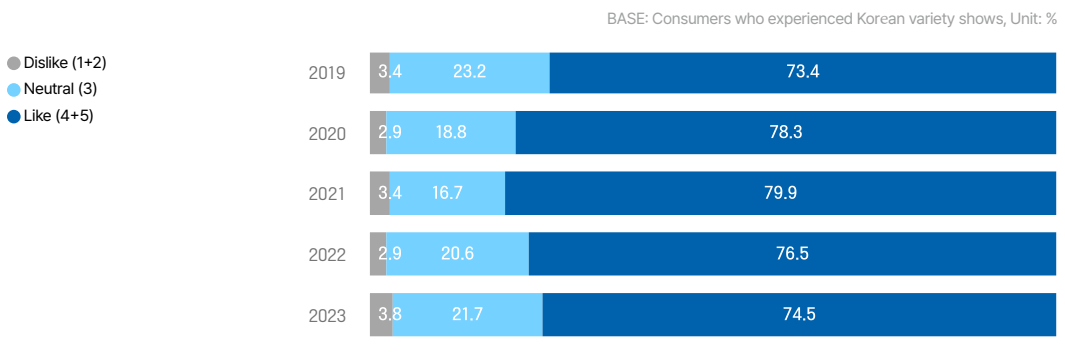


Overall, 74.5% of respondents liked Korean variety shows.

Among those who have experienced Korean variety shows, 74.5% claimed that they “like[d]” Korean variety shows, but there has been a slight decline in this figure since 2020.

By country, Indonesia (88.9%), the UAE (88.0%), India (85.7%), Thailand (82.9%), and Vietnam (82.8%) showed higher levels of “like,” whereas Kazakhstan (45.7%), Russia (48.4%), and Italy (57.3%) showed lower levels.

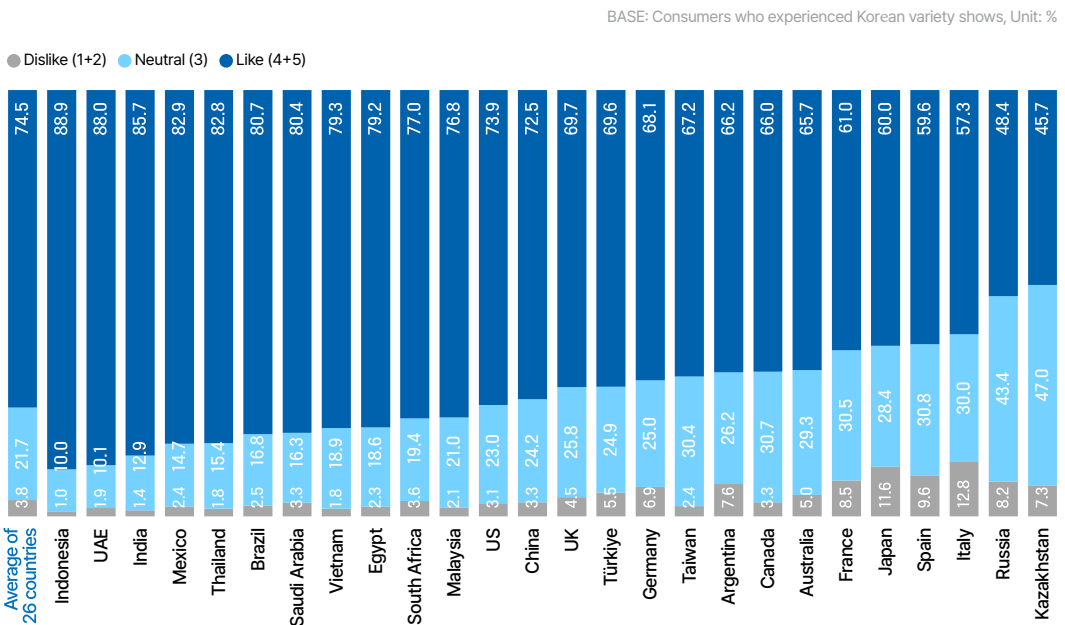
Figure 2-76 Comparison of Favorability Toward Korean Variety Shows Over the Last 5 Years by Year



Q. Overall, how much do you like the Korean variety shows you have recently watched?

1. Don't like it at all / 2. Don't like / 3. Neutral / 4. Like it / 5. Like it very much

Figure 2-77 Comparison of Favorability Toward Korean Variety Shows by Country



06 Factors Promoting and Inhibiting Favorability

Respondents in Asia and the Americas liked Korean variety shows primarily for their humor.

The Middle East and Africa appreciated the “indirect experience of Korea” and “trends” via Korean variety shows.

The primary reasons people liked Korean variety shows (with multiple responses allowed) were that “The content is fun/funny” (40.8%), “Can indirectly experience Korean lifestyle and culture” (24.7%), and “Use of interesting games and materials” (23.9%).

Examining appeal factors by continent, “The content is fun/funny” ranked first across all regions, with the highest preference observed in the Americas (43.0%). In the Asia-Pacific region, “Use of interesting games and materials” (25.3%) came second, and “Favorite stars appear as MCs or cast members” was also included in the rankings, unlike in other continents. The Middle East and Africa showed higher proportions of “Can indirectly experience Korean lifestyle and culture” (Middle East 28.8%, Africa 29.0%) and “Can see the latest trends in Korean fashion/beauty” (Middle East 21.8%, Africa 21.0%) compared to other continents. Additionally, “Outstanding teamwork among the cast members” was a key factor in Europe (16.3%) and the Middle East (16.6%).

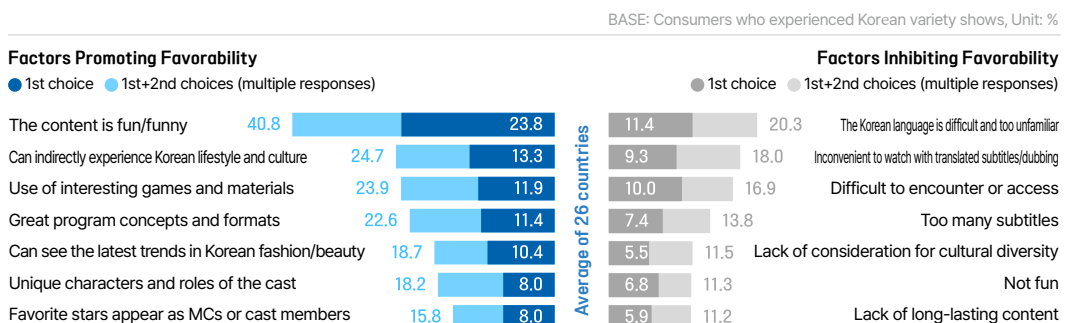
The Asia-Pacific region and the Americas had a particularly high preference for the fun aspect of the content, while the Middle East and Africa showed a greater desire to experience the Korean lifestyle indirectly and satisfy their curiosity about the latest trends through variety shows.

Language barriers and subtitles were major issues in experiencing Korean variety shows.

Similar to other genres of content, among factors inhibiting favorability, language barriers were listed among the top, such as “The Korean language is difficult and too unfamiliar” (20.3%) and “Inconvenient to watch with translated subtitles/dubbing” (18.0%). The third most-mentioned issue was “Difficult to encounter or access” (16.9%).

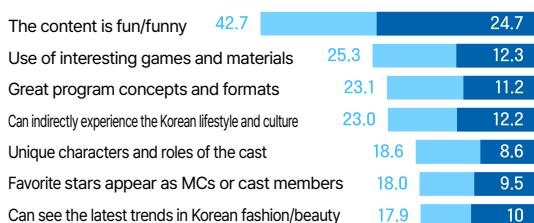
The complaint that “The Korean language is difficult and too unfamiliar” was particularly common in Africa (31.2%), while “Inconvenient to watch with translated subtitles/dubbing” was a significant factor in Europe (21.9%) and Africa (20.1%), “Too many formats that depend on guests talking” was commonly cited in the Middle East (13.0%), and “Lack of consideration for cultural diversity” was frequently chosen as a factor hindering enjoyment in the Middle East (14.5%) and Africa (16.4%) compared to other continents.

Figure 2-78 Comparison of Factors Promoting and Inhibiting Favorability Toward Korean Variety Shows by Continent by Continent

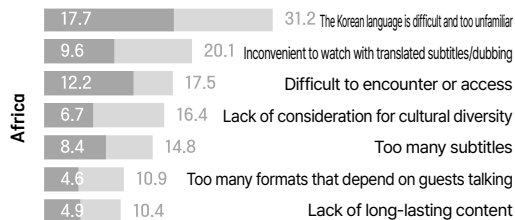
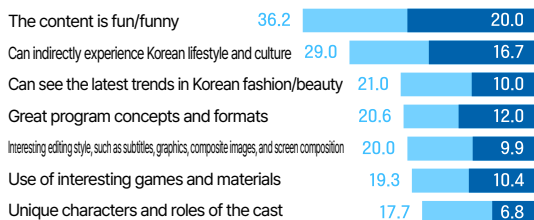
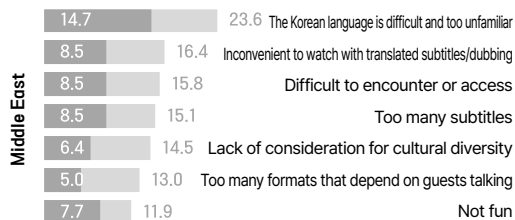
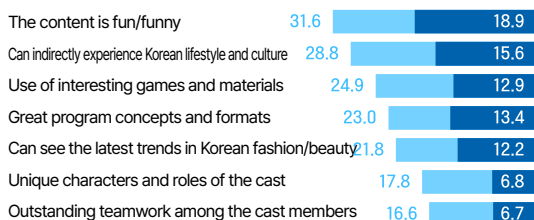
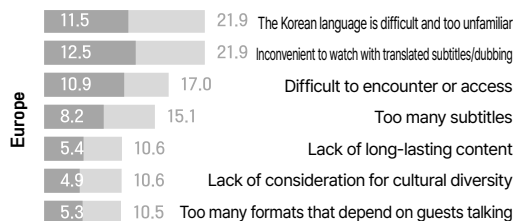
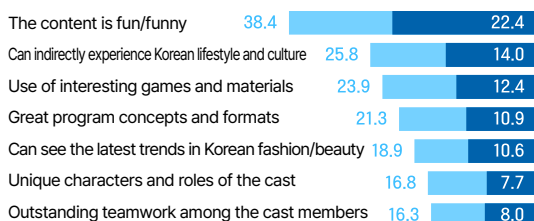
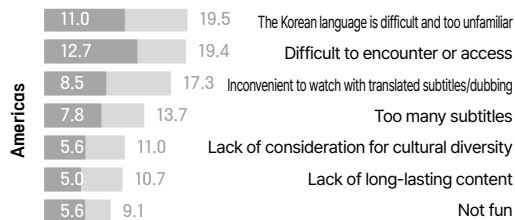
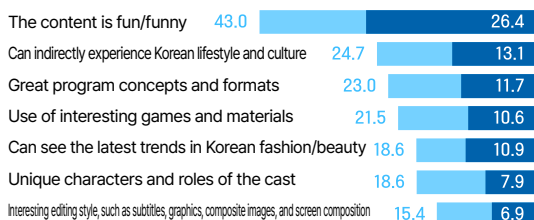
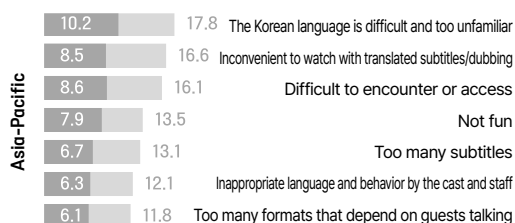


Factors Promoting Favorability

● 1st choice ● 1st+2nd choices (multiple responses)

**Factors Inhibiting Favorability**

● 1st choice ● 1st+2nd choices (multiple responses)



Q. What do you think are the biggest factors promoting favorability toward Korean variety shows? Please select up to the second choice in order.

Q. What do you think are the factors inhibiting favorability toward Korean variety shows? Please select up to the second choice in order.

07 Willingness to pay



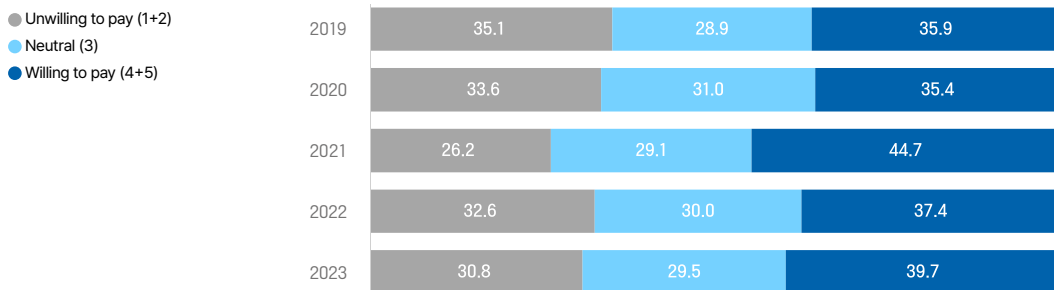
Rising trend continued with rather significant differences among countries.

When asked about their willingness to pay for Korean variety shows, 39.7% of the respondents expressed willingness, 29.5% were neutral, and 30.8% were unwilling. This shows an upward trend over the past five years, except for 2021, when willingness was particularly high.

The success of the drama *Squid Game* in 2021 may have influenced the willingness to pay for variety shows as well. By country, willingness to pay was high in India (62.8%), Saudi Arabia (60.4%), and Thailand (59.4%), whereas it was low in Kazakhstan (16.0%), Russia (16.6%), and Japan (17.0%).

Figure 2-79 Comparison of the Willingness to pay for Korean Variety Shows Over the Last 5 Years by Year

BASE: Total, Unit: %

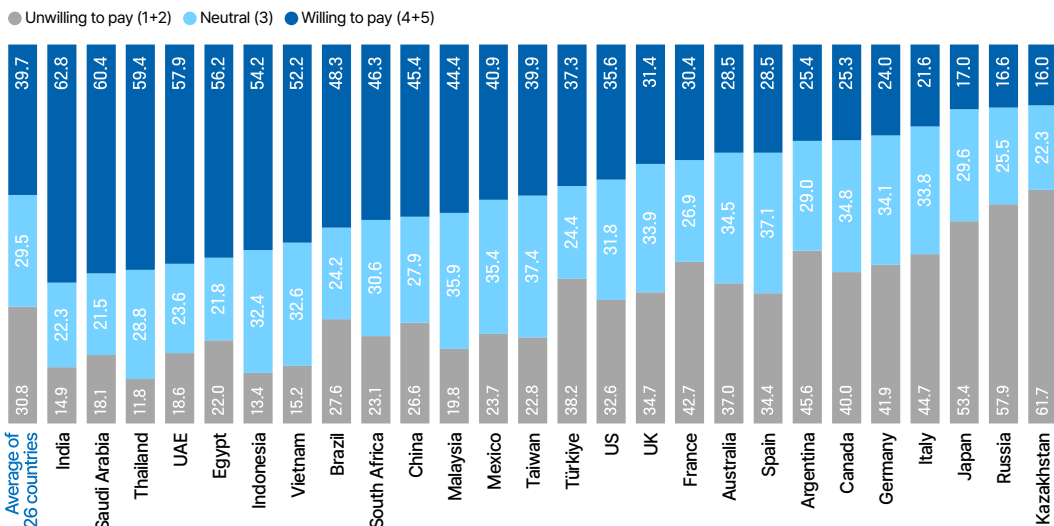


Q. Please indicate the level of your willingness to pay for Korean cultural content in the future for each item.

1. Strongly disagree / 2. Disagree / 3. Neutral / 4. Agree / 5. Strongly agree

Figure 2-80 Comparison of the Willingness to pay for Korean Variety Shows by Country

BASE: Total, Unit: %



08 Willingness to Recommend



In fourteen out of 26 countries, over 70% of respondents expressed a willingness to recommend Korean variety shows.

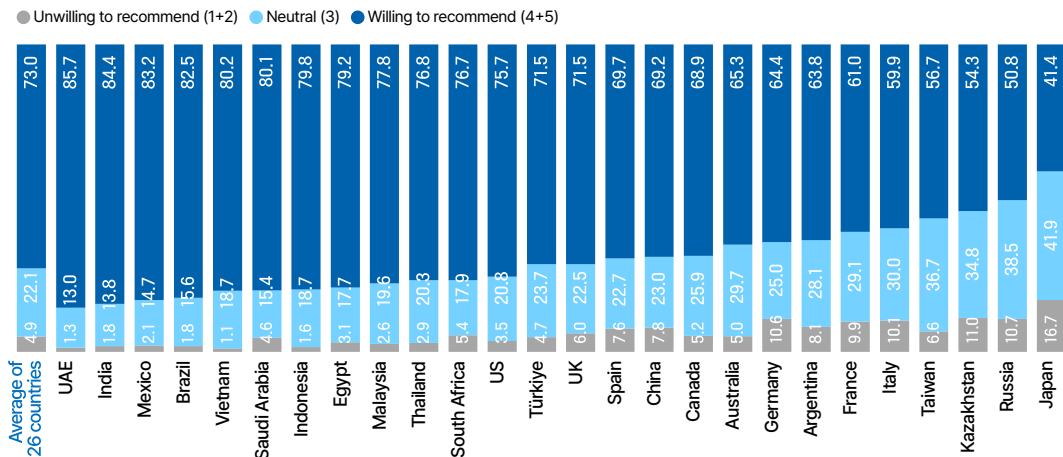
In total, 73.0% of the respondents reported that they were “willing to recommend” Korean variety shows to others, indicating high satisfaction. By country, the willingness was high in the UAE (85.7%), India (84.4%), Mexico (83.2%), Brazil (82.5%), Vietnam (80.2%), Saudi Arabia (80.1%), Indonesia (79.8%), Egypt (79.2%), Malaysia (77.8%), Thailand (76.8%), South Africa (76.7%), US (75.7%), Turkey (71.5%), UK (71.5%), Spain (69.7%), China (69.2%), Canada (68.9%), Australia (65.3%), Germany (64.4%), Argentina (63.8%), France (61.0%), Italy (59.9%), Taiwan (56.7%), Kazakhstan (54.3%), Russia (50.8%), and Japan (41.4%).

as Japan (41.4%), Russia (50.8%), and Kazakhstan (54.3%) had lower figures.

Notably, Japan was the only country to show a recommendation rate in the 40% range. The willingness to recommend was slightly higher among women (73.8%) than men (72.1%), and those in their 20s–40s (73.5%, 76.5%, and 75.0%, respectively) showed high willingness to recommend.

Figure 2-81 Comparison of the Willingness to Recommend Korean Variety Shows by Country

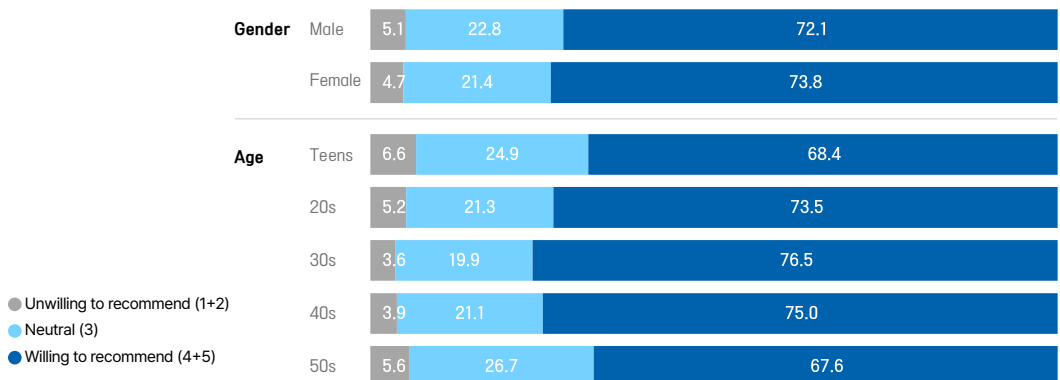
BASE: Consumers who experienced Korean variety shows, Unit: %



Q. Are you willing to recommend Korean variety shows you have recently experienced to others?
1. Definitely do not recommend / 2. Do not recommend / 3. Neutral / 4. Recommend / 5. Definitely recommend

Figure 2-82 Comparison of the Willingness to Recommend Korean Variety Shows by Gender and age

BASE: Consumers who experienced Korean variety shows, Unit: %



09 Ease of use



Ease of use has remained stagnant since 2020. High figures were found in Southeast Asia and the Middle East.

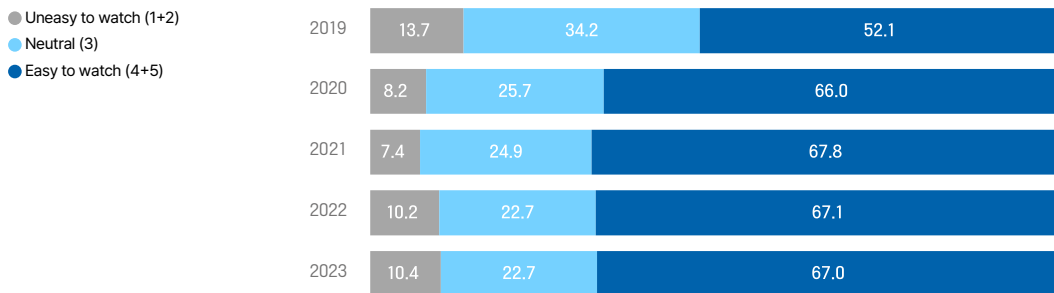
Overall, 67.0% of the respondents thought it was easy to access Korean variety shows, showing a 14.9p increase from 52.1% in 2019, but this rate remained stagnant at approximately 66–67%

since 2020.

By country, South Asia and the Middle East such as Indonesia (84.3%), Malaysia (79.9%), Egypt (77.2%), and the UAE (76.0%) showed high levels of “ease of use”, whereas Europe and the Americas, such as Russia (36.5%), Kazakhstan (36.6%), and Argentina (44.8%) had lower levels.

Figure 2-83 Comparison of the Ease of Watching Korean Variety Shows Over the Last 5 Years by Year

BASE: Consumers who experienced Korean variety shows, Unit: %

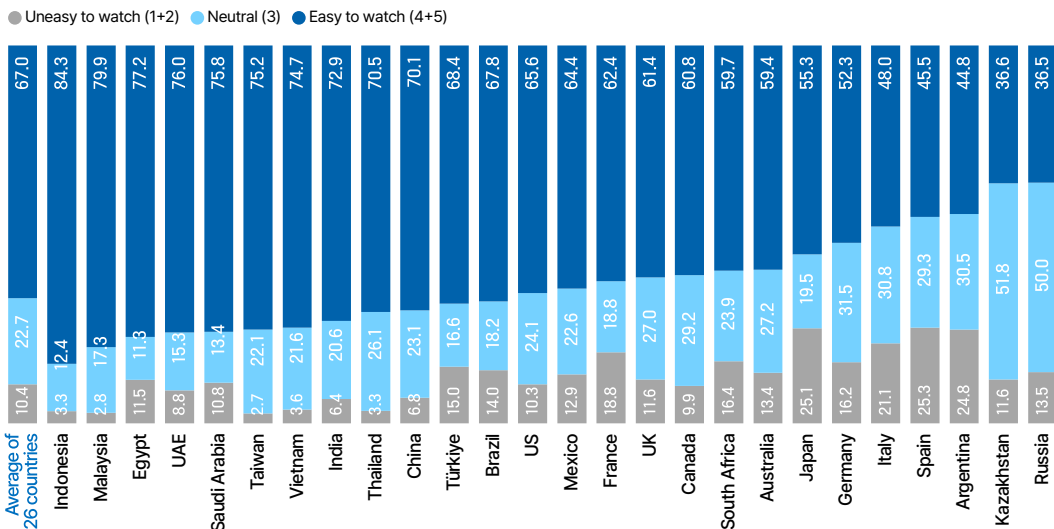


Q. When you are about to watch Korean variety shows, is it easy to access the Korean variety shows you want?

1. Strongly disagree / 2. Disagree / 3. Neutral / 4. Agree / 5. Strongly agree

Figure 2-84 Comparison of the Ease of Watching Korean Variety Shows by Country

BASE: Consumers who experienced Korean variety shows, Unit: %



10 Access Channels



Most participants accessed Korean variety shows through "online/mobile" channels and "TV." Many accessed indirectly through remakes.

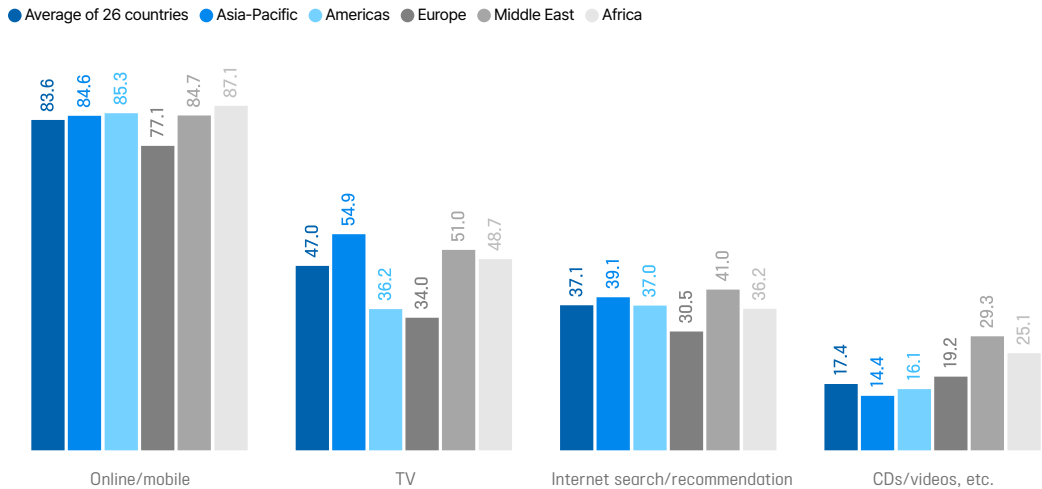
Similar to other genres, the primary access channel for Korean variety shows was "online/mobile" (83.6%), followed by "TV" (47.0%) and "Internet search/recommendations for remakes of Korean variety shows" (37.1%). The fact that nearly 40% cited "Internet search/recommendation of remakes

of Korean variety shows" reflects the growing trend of exporting Korean variety show formats abroad.

Overall, Europe showed generally low levels of access across channels, while "TV" was more popular in Asia-Pacific (54.9%), "Internet search/recommendations for remakes of Korean variety shows" was relatively high in the Middle East (41.0%), and "CDs/videos" had higher access rates in the Middle East (29.3%) and Africa (25.1%).

Figure 2-85 Comparison of Korean Variety Show Access Channels by Continent

BASE: Consumers who experienced Korean variety shows, Unit: % of multiple responses



Q. Please select all of the channels through which you usually access Korean variety shows.



"YouTube" and "Netflix" dominated across five continents.

"Amazon Prime" (the Americas, Europe, and the Middle East) and "Disney Plus" (Asia-Pacific) competed for third place.

Among those who watched Korean variety shows via online/mobile platforms, 68.4% used "YouTube," and 68.0% used "Netflix."

This was followed by "Amazon Prime" (33.2%) and "Disney Plus" (28.0%).

In Asia-Pacific and Africa, "YouTube" had the highest usage, while "Netflix" was the highest in the Americas, Europe, and the Middle East. "iQIYI" (29.1%) was listed among the top platforms in the Asia-Pacific area. The Americas, Europe, and the Middle East showed a notable preference for "Netflix" and "Amazon Prime."

Table 2 -10 Changes in Online/mobile Access Platforms for Korean Variety Shows Over the Last 6 Years by Year

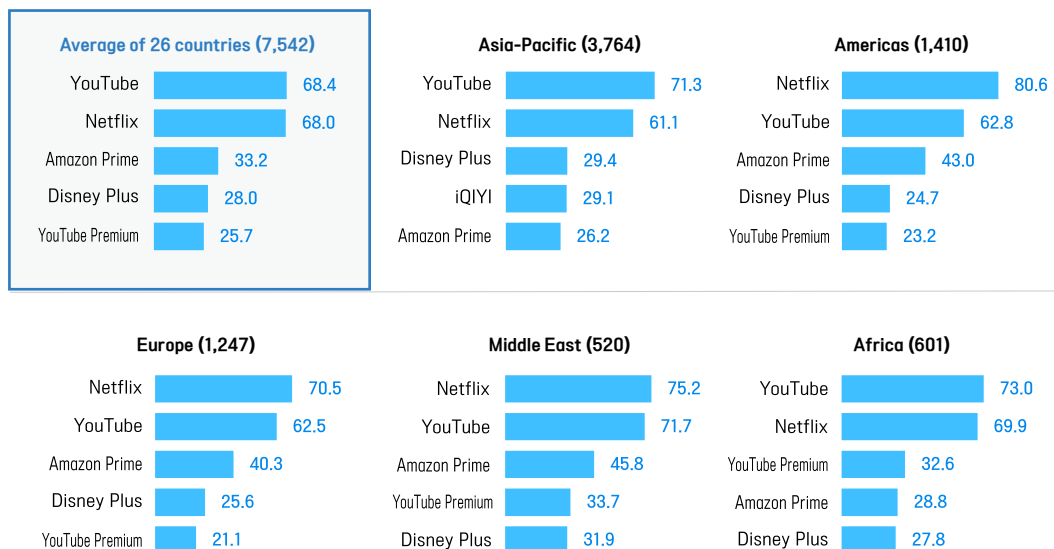
BASE: Online/mobile platform users for Korean variety shows, Unit: % of multiple responses

Category	2018	2019	2020	2021	2022	2023
YouTube	83.8	83.1	78.1	74.7	67.6	68.4
Netflix	44.0	40.8	56.8	64.0	64.0	68.0
Amazon Prime	17.9	17.2	25.8	30.5	29.4	33.2
Disney Plus	-	-	-	-	25.8	28.0
YouTube Premium	14.2	11.6	24.5	27.7	23.1	25.7
iQIYI	19.4	18.1	18.9	24.6	16.8	18.2

Q. Please select all the online/mobile platforms you primarily use to watch Korean variety shows. Exclude edited short videos.

Figure 2-86 Comparison of Online/mobile Access Platforms for Korean Variety Shows by Continent

BASE: Online/mobile platform users for Korean variety shows, No. of cases= (), Unit: % of multiple responses, top 5



3

Movies

01 Experience Rate



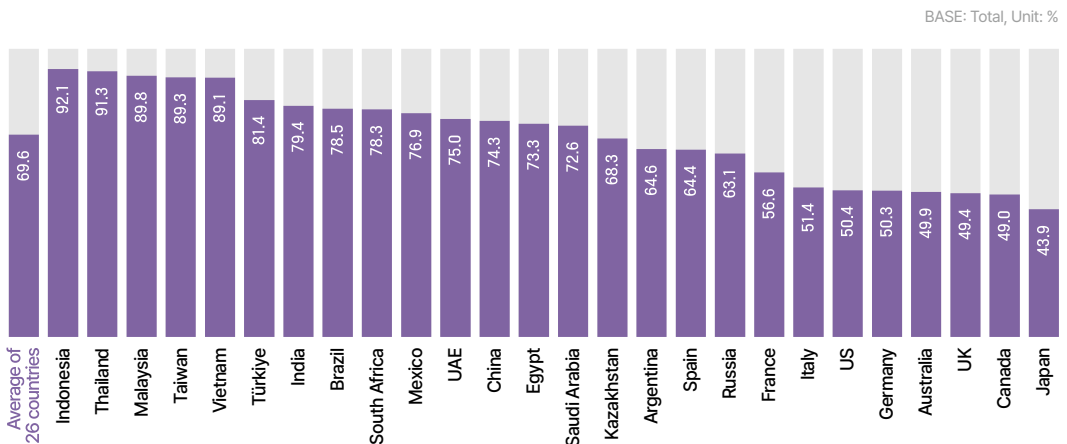
Seven out of 10 respondents have experienced Korean movies, which is second highest among the 11 types of content studied.

Overall, 69.6% of consumers with Hallyu experience (seven out of 10) stated they have watched Korean movies. This is the second highest after Korean food among the 11 types of Korean cultural content, showing a 1.9%p increase from 2022.

By country, Southeast Asia had the highest figures,

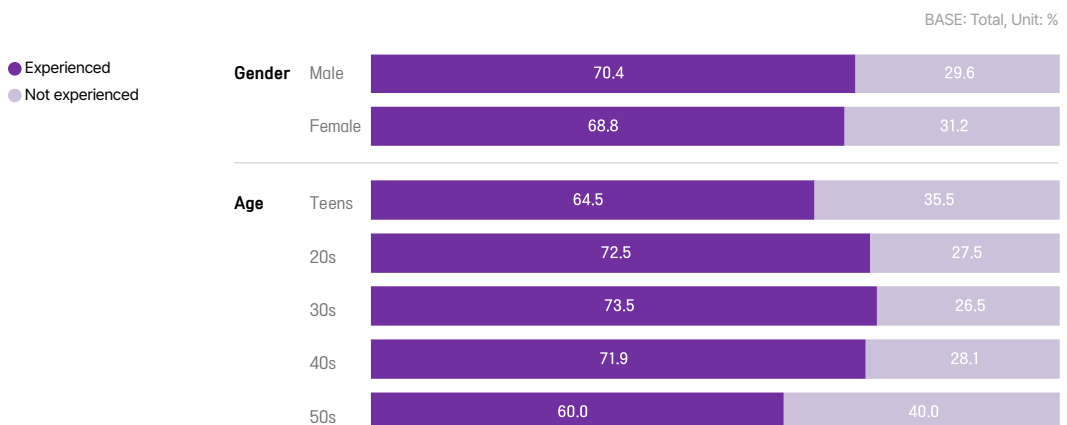
with Indonesia (92.1%), Thailand (91.3%), and Malaysia (89.8%) leading, while Japan (43.9%), Canada (49.0%), and the UK (49.4%) had lower figures. By gender, men (70.4%) showed a slightly higher rate than women (68.8%). By age group, those in their 20s, 30s, and 40s (72.5%, 73.5%, and 71.9%, respectively) showed rates above 70%, while those in their teens and 50s (64.5% and 60.0%, respectively) showed lower figures.

Figure 2-87 Comparison of Korean Movie Experience Rates by Country



Q. Please select all types of Korean cultural content you have experienced.

Figure 2-88 Comparison of Korean Movie Experience Rates by Gender and age



02 Popularity



In total, 43.0% of participants responded that Korean movies are “widely popular,” the highest rate in the past five years.

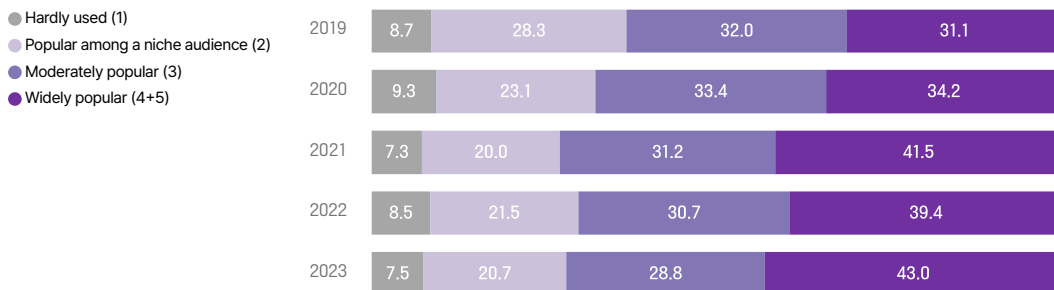
When consumers with Hallyu experience were asked how popular Korean movies were in their country, 43.0% responded that they were “widely popular,” an increase of 3.6%p from 2022. Moreover, 7.5% said they were “hardly” watched, while

20.7% claimed they were “popular among a niche audience.”

A comparison over the past five years shows that while the rates for “popular among a niche audience” and “moderately popular” have decreased, the “widely popular” rate has increased by an average of 8.5% annually since 2019, reaching 43.0% in 2023, the highest rate in the past five years. This suggests that Korean movies are steadily gaining popularity.

Figure 2-89 Comparison of Korean Movie Popularity Over the Last 5 Years by Year

BASE: Total, Unit: %



Q. How popular do you think Hallyu is in your country? Please indicate to what extent you agree.

1. Hardly used by anyone / 2. Popular among a niche audience / 3. Known not just by a niche audience but also by the general public / 4. Widely known among the general public with related products being sold / 5. Widely popular among the general public with smooth sales of related products



A clear difference between the top 12 and bottom 14 countries was found in terms of popularity of Korean movies.

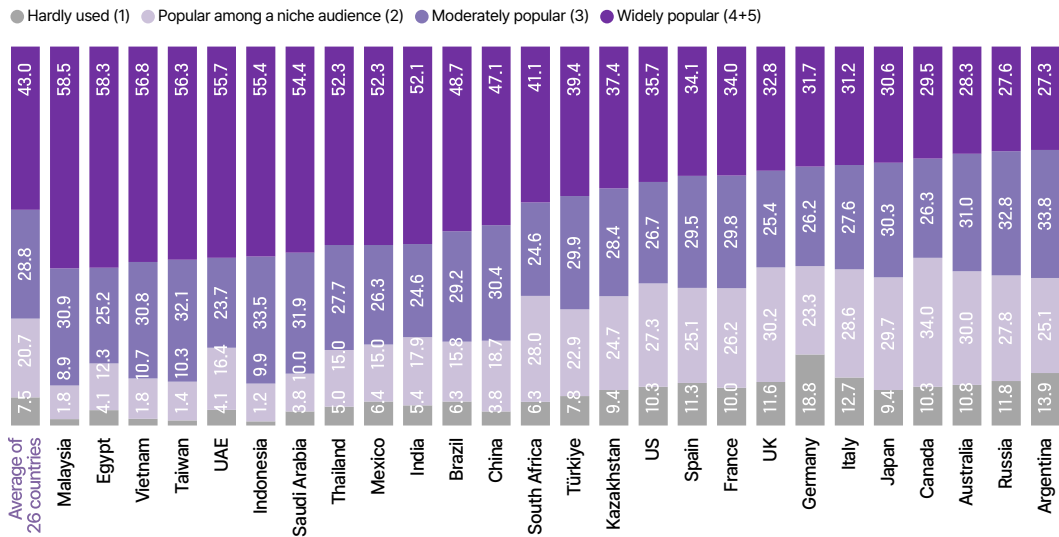
Countries with a high “widely popular” rate included Malaysia (58.5%), Egypt (58.3%), Vietnam (56.8%), and Taiwan (56.3%). In particular, Islamic countries (Malaysia, Indonesia, Egypt, UAE, Saudi

Arabia, etc.) showed higher rates.

In the top 12 countries, including China, nearly or more than half of the participants considered Korean movies to be “widely popular.” Meanwhile, in the bottom 14 countries, including South Africa, this proportion was generally around 40%, with some countries falling within the 20–30% range, highlighting a noticeable contrast.

Figure 2-90 Comparison of Korean Movie Popularity by Country

BASE: Total, Unit: %



Local News

- “The movie *Ballerina* ranked first in the movies category on Netflix in Taiwan as of October 9, 2023. Although it wasn’t widely felt, it received quite some attention from the media.” (Taiwan KOFICE overseas correspondent)
- “*The Outlaws*, *The Roundup*, and *The Roundup: No Way Out* surpassed 10 million Taiwanese dollars at the Taiwanese box office, becoming the top Korean movie in Taiwan in 2023. Taiwanese people loved the action scenes and humor.” (Taiwan KOTRA Taipei trade officer)
- “The awareness of Hallyu content seems to have increased overall in the past few years. Public interest has grown especially with the movie *Parasite* and the drama *Squid Game*. Mainly women, teenagers, and younger generations are showing more interest.” (Spain KOTRA Madrid trade officer)
- “As consumers in Türkiye do not have much purchasing power, Korean dramas and movies tend to be streamed illegally. Korea’s CGV owns the biggest movie chain, but the screening costs of Turkish and Hollywood movies are lower than those of Korean content, so Korean movies are rarely screened.” (Türkiye KOTRA Istanbul trade officer)

03 Popular Foreign Movies



Korean movies ranked second after US movies.

When respondents in 26 countries who had experienced Korean movies were asked to name their favorite foreign movies, "the US" (47.6%) and "Korean" (22.0%) movies ranked first and second. Next were "Indian" (6.6%), "Japanese" (6.1%), and "Chinese" (5.1%) movies. The preference for "Korean" movies was more than 3.3 times higher than that for the countries ranked third to fifth.

The gap with "the US" is narrowing.

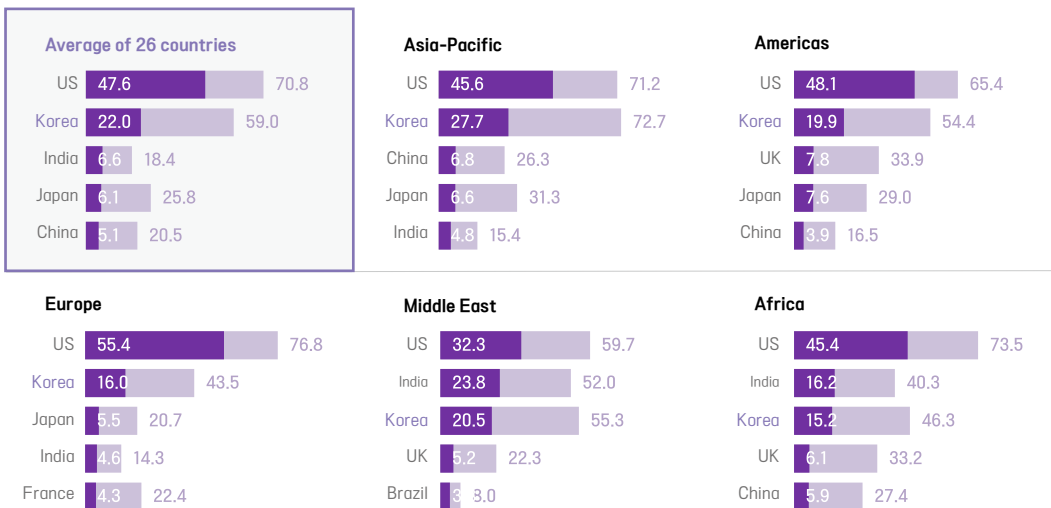
In the Americas, Europe, and Africa, "Korea" ranked second or third, while "the US" ranked first with preference rates that were 2.4, 3.5, and 3.0 times higher, respectively.

However, "Korea" ranked second (27.7%) in Asia-Pacific and third (20.5%) in the Middle East, while "the US" had a preference rate 1.6 times higher. This is lower than the figures observed in the Americas, Europe, and Africa, suggesting that Korea may have relatively stronger competitiveness in these regions. Comparing the top movie preferences between movies produced by "the US" and "Korea" from 2018 to 2023, the popularity of "the US" movies declined from 63.6% in 2018 to 47.6%, while "Korean" movies increased from 17.1% to 22.0% over the same period. Except for 2021, the preference for "Korean" movies has steadily increased, indicating their growing popularity.

Figure 2-91 Comparison of Popular Foreign Movies by Continent

BASE: Consumers who experienced Korean movies, Unit: %

● 1st choice ● 1st+2nd+3rd choices (multiple responses)

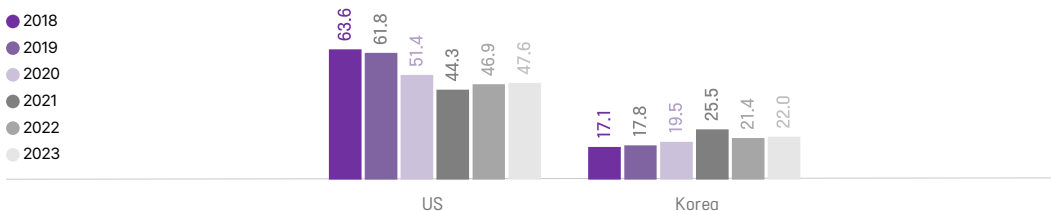


Q. Which country's movies are popular in your country? Please select the top three in order (excluding your country).

Note Presented are the top five countries with the highest proportion of first-choice responses (in order).

Figure 2-92 Popular Foreign Movies Over the Last 6 Years: A Comparison Between American and Korean Films

BASE: Consumers who experienced Korean movies, Unit: %



04 Consumption Volume



The Islamic cultural regions like Saudi Arabia and Egypt showed high consumption volume.

Korean movie viewers watched an average of 6.4 Korean movies per person over the past three months. Countries with high viewing counts included Saudi Arabia with an average of 11.0 movies, followed by Egypt (10.5 movies) and Thailand (10.2 movies), each exceeding 10 movies and ranking second and third in consumption volume. Taiwan (2.6 movies), Canada and Italy (3.3 movies each), and Japan (3.4 movies) recorded lower consumption of Korean movies. Notably, unlike dramas and variety shows, Islamic countries (Saudi Arabia, Egypt, the UAE, Malaysia, etc.)

showed high consumption of Korean movies.

The proportion of Korean movie consumption among all films consumed averaged 26.9% across 26 countries, and it was particularly high in Southeast Asia, such as Indonesia (41.6%), Vietnam (39.3%), and Malaysia (37.9%). Countries with high consumption, such as the UAE (33.9%), Egypt (33.8%), and Saudi Arabia (31.1%), also showed the proportion of consumption exceeding 30%, while Europe, Japan, and Latin America showed lower proportions.

Spending on Korean movies was generally high in the Middle East, English-speaking countries (the US, Australia, the UK, etc.), and Europe, whereas it was lower in Asian countries.

Figure 2-93 Comparison of Time Spent on Korean Movies by Country

BASE: Consumers who experienced Korean movies, Unit: hour/past 3 months

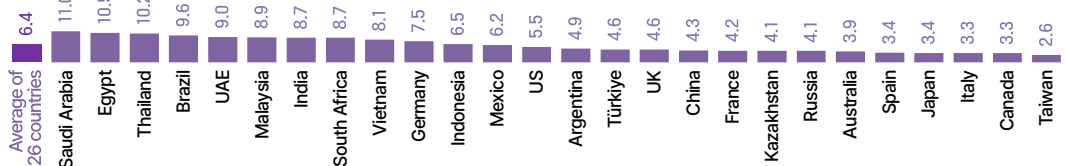


Figure 2-94 Comparison of Proportion of Korean Movie Consumption by Country

BASE: Consumers who experienced Korean movies, Unit: %

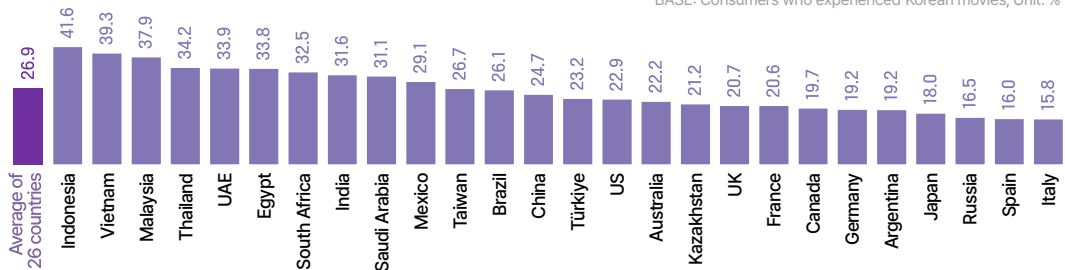
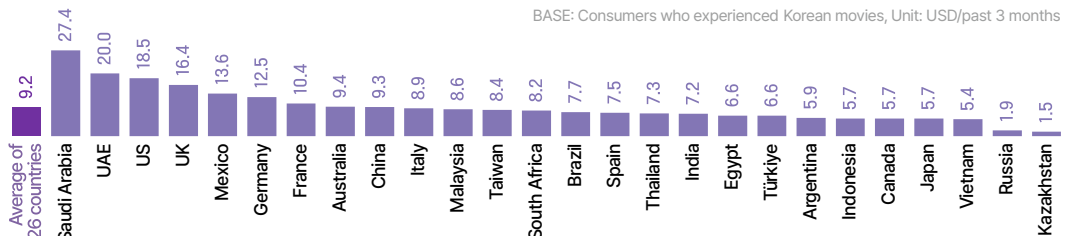


Figure 2-95 Comparison of Expenditure on Korean Movies by Country

BASE: Consumers who experienced Korean movies, Unit: USD/past 3 months



Q. What is your usual viewing volume, proportion, and average expenditure for Korean movies? Please provide the expenditure for the number of movies you watched in the past three months.

05 Favorability



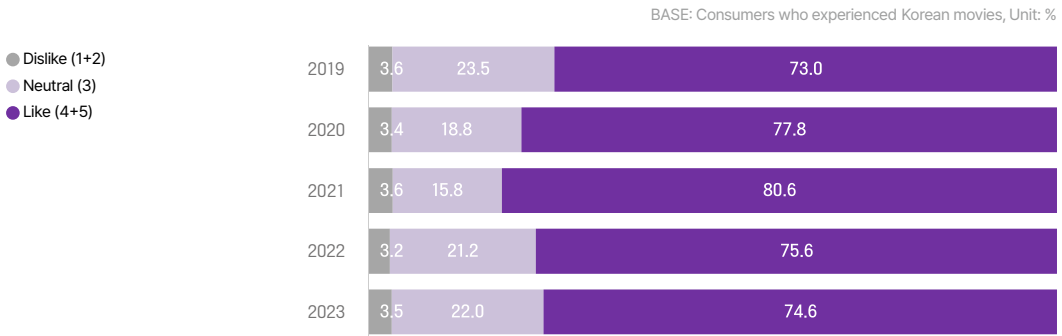
Seven out of 10 respondents liked Korean movies. High favorability was found in the UAE, Indonesia, and India, while favorability was lower in Russia and Kazakhstan.

Seven out of 10 (74.6%) respondents who have experienced Korean movies said they “like[d]” the Korean movies they watched recently, while two (22.0%) respondents shared that they were “neutral.” Comparing yearly data for the past five years, the percentage

of those who “like[d]” Korean movies increased until 2021 but dropped to the mid-70% range from 2022, largely due to an increase in “neutral” responses.

By country, the “like” rate was higher in the UAE (87.8%), Indonesia (87.7%), India (86.0%), and Thailand (83.8%), whereas they were relatively lower in Russia (49.1%) and Kazakhstan (50.5%). In terms of unfavorable responses, Japan, Spain, Russia, and France had higher rates.

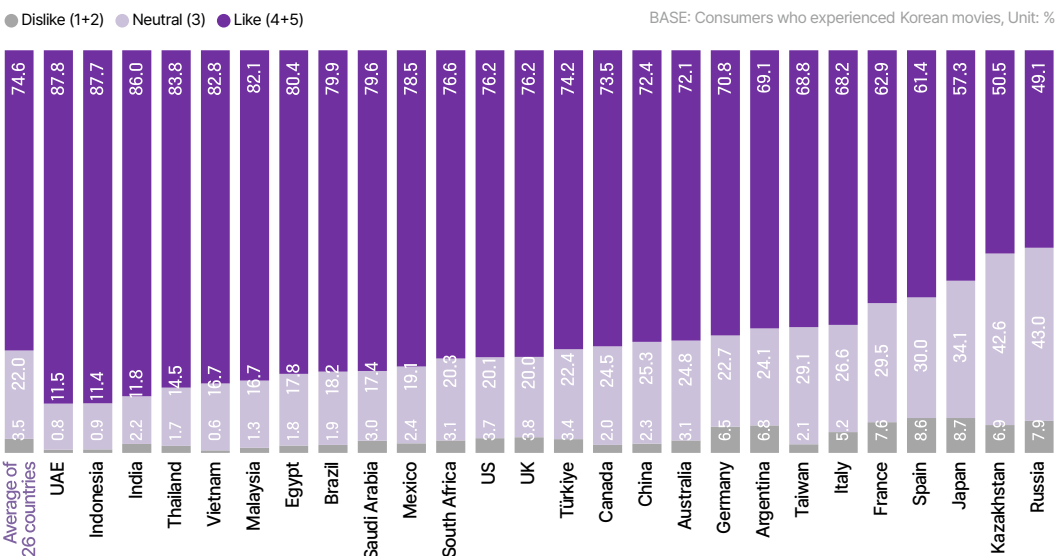
Figure 2-96 Comparison of Favorability Toward Korean Movies Over the Last 5 Years by Year



Q. Overall, how much do you like the Korean movies you have recently watched?

1. Don't like them at all / 2. Don't like it / 3. Neutral / 4. Like it / 5. Like them very much

Figure 2-97 Comparison of Favorability Toward Korean Movies by Country



06 Factors Promoting and Inhibiting Favorability

Asia liked “stories” and “actors’ looks.”

Europe was attracted to the “Korean culture,” while the Middle East and Africa were drawn to “acting.”

The primary reasons for liking Korean movies (based on multiple responses) were “The story is well-structured and solid” (26.9%), “The actors’ acting ability is outstanding” (21.8%), and “The actors have attractive looks” (20.0%).

By continent, the biggest positive factor in the Asia-Pacific region was “The story is well-structured and solid” (29.9%), followed by “The actors have attractive looks” (24.0%), which ranked higher than the average across countries by 4.0%p. In the Americas, the biggest factor promoting favorability was “The story is well-structured and solid” (27.7%), and “High cinematic quality, such as visual beauty and directing” (17.1%) was higher than the average. In Europe, the main reason for liking Korean movies was “Can indirectly experience Korean lifestyle and culture” (24.8%), which was 4.9%p higher than the average. The key factor promoting favorability in the Middle East (35.0%) and Africa (24.2%) was “The actors’ acting ability is outstanding,” with the Middle East standing out for its particularly positive evaluation of the actors’ performances.

In summary, the Asian-Pacific region appreciated Korean films primarily for their solid story structure, with a significant influence from the actors’ roles. The Americas were relatively more attracted to stories and

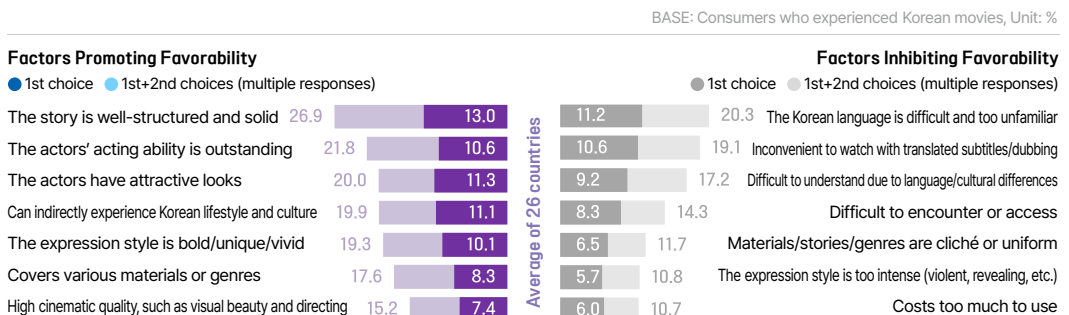
cinematic quality and Europe to indirect experience of Korean culture. The Middle East and Africa showed more favorability toward the actors’ acting ability than the story.

Language and cultural barriers hindered positive sentiment in the Americas and Europe.

The Middle East avoided Korean movies due to their “lack of cultural diversity” and “violent and revealing” content.

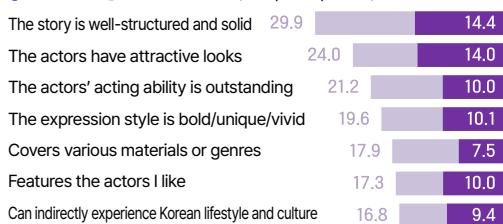
When asked about factors that detracted from their enjoyment, language and cultural barriers were listed among the top, such as “Korean language is difficult and too unfamiliar” (20.3%), “Inconvenient to watch with translated subtitles/dubbing” (19.1%), and “Difficult to understand due to language/cultural differences” (17.2%). The Middle East and Africa found the Korean language particularly unfamiliar. In the Americas, over 20% found Korean movies “Difficult to understand due to language/cultural differences,” a higher figure than in other regions. In addition, in the Middle East, “Lack of consideration for cultural diversity” (14.3%) was higher than in other regions (10–11%). The percentage of respondents who pointed out that “The expression style is too intense (violent, revealing, etc.)” were high in the Middle East (14.7%) and Asia-Pacific (10.8%). Aside from language, the factors inhibiting favorability were largely related to discomfort with Korean movies that conflicted with their own cultural or religious values.

Figure 2-98 Comparison of Factors Promoting and Inhibiting Favorability Toward Korean Movies by Continent



Factors Promoting Favorability

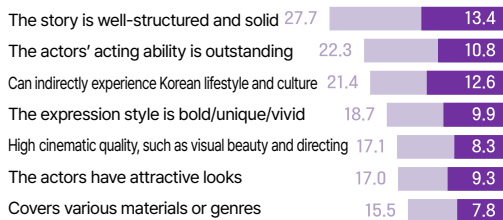
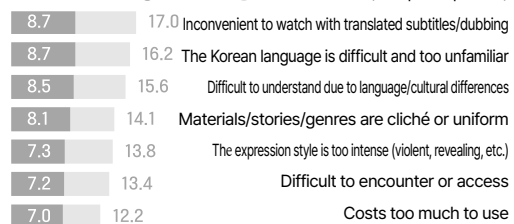
● 1st choice ● 1st+2nd choices (multiple responses)



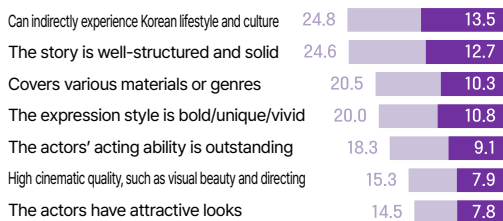
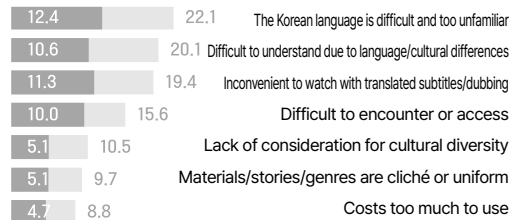
Asian-Pacific

Factors Inhibiting Favorability

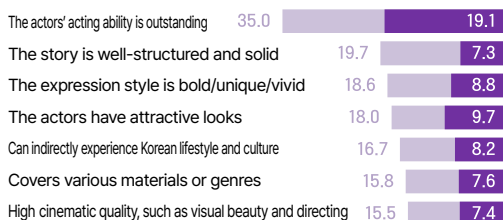
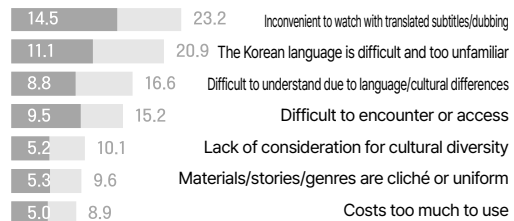
● 1st choice ● 1st+2nd choices (multiple responses)



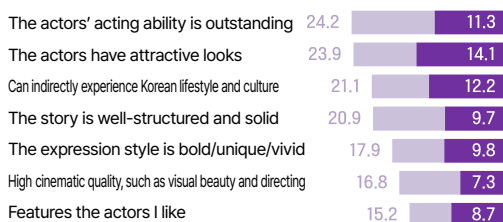
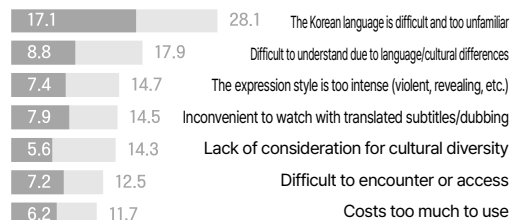
Americas



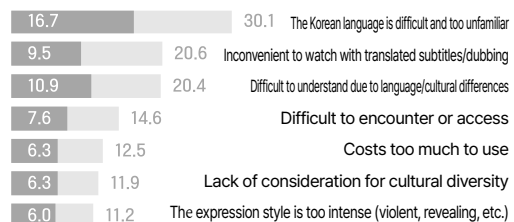
Europe



Middle East



Africa



Q. What do you think are the biggest factors promoting favorability toward Korean movies? Please select up to the second choice in order.

Q. What do you think are the factors inhibiting favorability toward Korean movies? Please select up to the second choice in order.

07 Preferred Movies



"Parasite" has remained the most preferred movie for five consecutive years.

"Parasite" showed a particularly high preference in the Americas and Europe.

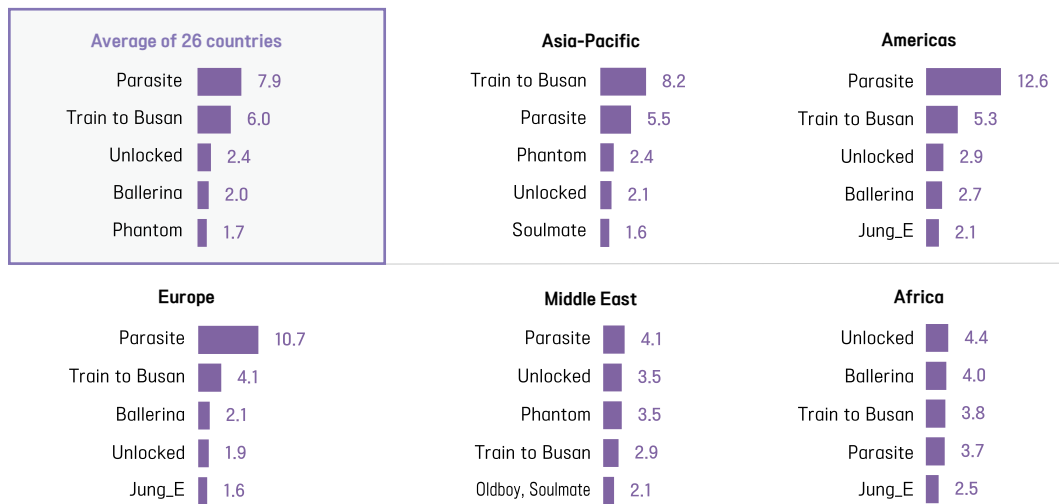
When asked about their favorite movie among those watched in 2023, "Parasite" (7.9%) and "Train to Busan" (6.0%) ranked first and second, respectively. The popularity of the first and second movies has gradually declined, with the movie next in the ranking not exceeding 3% preference. Thus, it can be suggested that no Korean movie has yet received the global attention "Parasite" garnered.

Movies based on content from other countries were popular.

Notably, remakes of novels or movies from other countries ranked among the top. The 2023 Netflix original movie "Unlocked" was based on a mystery novel by a Japanese author and starred Chun Woo-hee, Yim Si-wan, and Kim Hee-won; the movie gained significant popularity upon its release on February 17, ranking first in Taiwan, Vietnam, Malaysia, and Saudi Arabia. "Soulmate" (1.6%), released in Korea as well as in India, Hong Kong, Vietnam, and Taiwan in 2023, was a remake of the Chinese movie *Soul Mate*, and it ranked fifth in the Asia-Pacific region and the Middle East, with high preference rates in India (5.5%) and Indonesia (2.1%).

Figure 2-99 Comparison of Preferred Korean Movies by Continent

BASE: Consumers who experienced Korean movies, Unit: %



Q. What is your favorite Korean movie among those you watched this year? (open-ended)

Table 2-11 Top Five Countries in Preference Rates for Most Preferred Movies

BASE: Consumers who experienced Korean movies, Unit: %

	1st	2nd	3rd	4th	5th
Parasite	Japan 21.8	Argentina 15.1	Spain 13.0	Russia 12.9	Canada 12.4
Train to Busan	Kazakhstan 13.0	Russia 10.9	Malaysia 10.8	China 10.4	Indonesia 9.7
Unlocked	India 5.3	UAE 5.2	Australia 4.6	Egypt 4.5	South Africa 4.3
Ballerina	South Africa 7.4	Malaysia 5.6	Spain 4.0	Türkiye 3.8	Argentina 3.5
Phantom	India 10.6	UAE 6.3	South Africa 4.4	Spain 3.3	Australia 3.1

08 Willingness to pay



Nearly half of the respondents were willing to pay for Korean movies, with particularly high willingness seen in Thailand, India, and Indonesia.

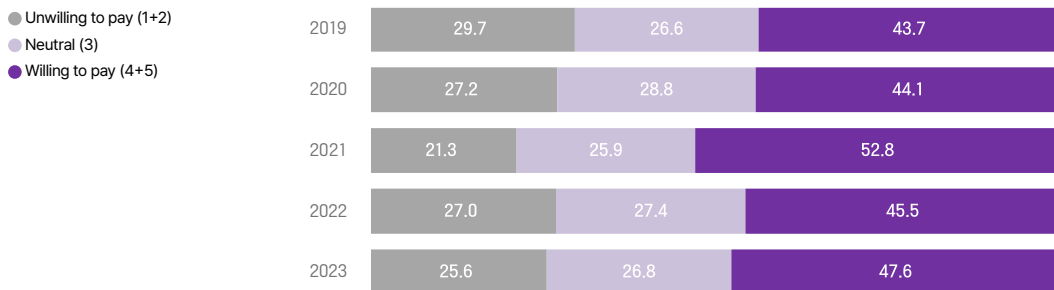
Half of the respondents in Kazakhstan and Russia expressed no willingness to pay.

Overall, 47.6% of the respondents with Hallyu experience stated they were willing to pay for Korean movies, while 26.8% were "neutral," and 25.6% responded negatively. Since 2019, the trend showed a decrease in the percentage of people "unwilling to pay", while those "willing to pay" has increased. The neutral group has remained relatively unchanged.

Notably, in 2021, the percentage of those "willing to pay" was 52.8%, showing an 8.7%p increase from the previous year, likely due to the increased consumption of video content during the COVID-19 pandemic as well as the popularity of *Squid Game* and BTS, which led to a peak in Hallyu's popularity. By country, Thailand (68.8%), India (67.8%), Indonesia (66.1%), the UAE (63.4%), and Saudi Arabia (63.1%) showed high willingness to pay, whereas in Japan (24.5%) and Kazakhstan (27.1%), the willingness to pay was less than 30%. Moreover, approximately half of the respondents in Kazakhstan (48.6%) and Russia (48.3%) claimed that they were not willing to pay for Korean movies.

Figure 2-100 Comparison of the Willingness to pay for Korean Movies Over the Last 5 Years by Year

BASE: Total, Unit: %

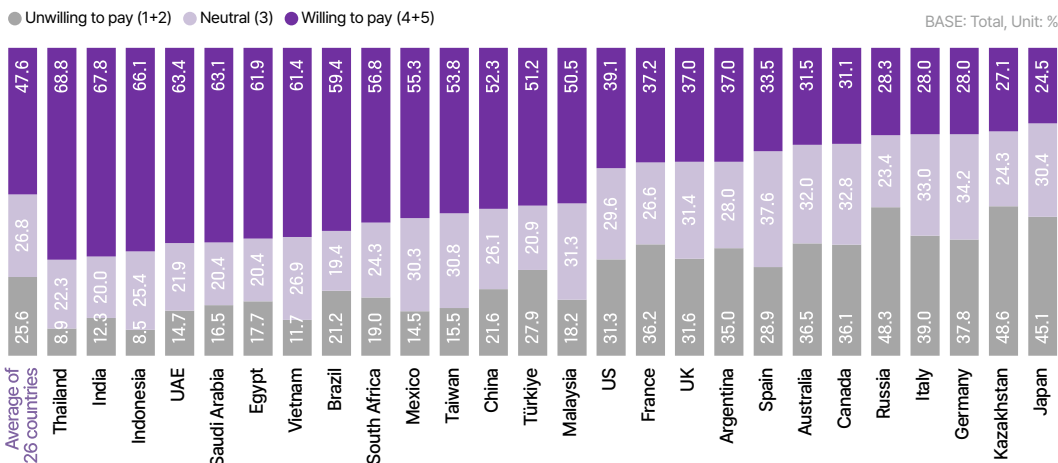


Q. Please indicate the level of your willingness to pay for Korean cultural content in the future for each item.

1. Strongly disagree / 2. Disagree / 3. Neutral / 4. Agree / 5. Strongly agree

Figure 2-101 Comparison of the Willingness to pay for Korean Movies by Country

BASE: Total, Unit: %



09 Willingness to Recommend



Among the respondents, 75.1% claimed that they were willing to recommend Korean movies.

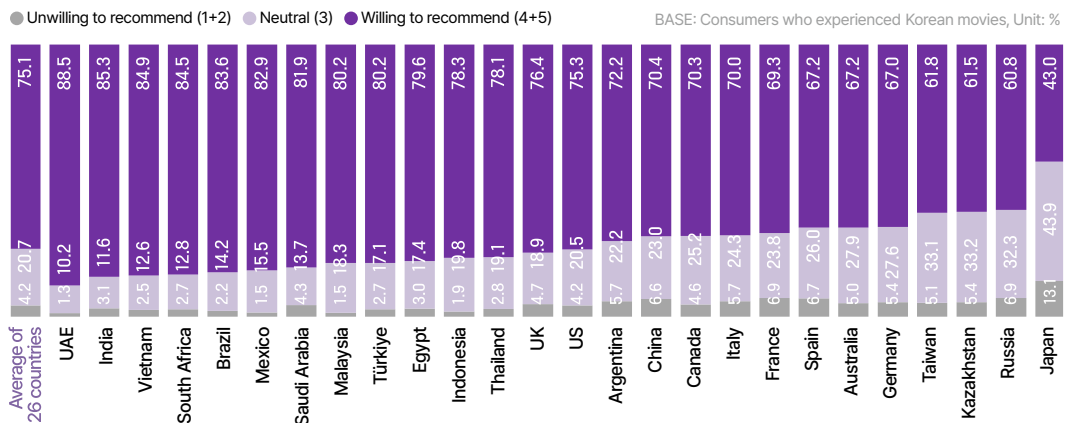
The UAE and India and those in their 20s and 30s were particularly active in recommending.

Respondents from Japan, Kazakhstan, and Russia were rather passive.

Overall, 75.1% of those who have experienced Korean movies said that they were "willing to recommend" Korean movies, while 20.7% were "neutral," and only 4.2% were "unwilling to recommend."

The countries with high willingness to recommend included the UAE (88.5%), India (85.3%), and Vietnam (84.9%), while lower levels were found in Japan (43.0%), Russia (60.8%), and Kazakhstan (61.5%). In Japan, 43.9% were "neutral," and 13.1% were "unwilling to recommend," showing a more neutral or unfavorable attitude compared to other countries. Gender difference was not considerable, with men at 74.9% and women at 75.3%, showing only a 0.4%p gap. Those in their 20s and 30s (77.5% and 77.8%, respectively) were relatively more active in recommending Korean movies.

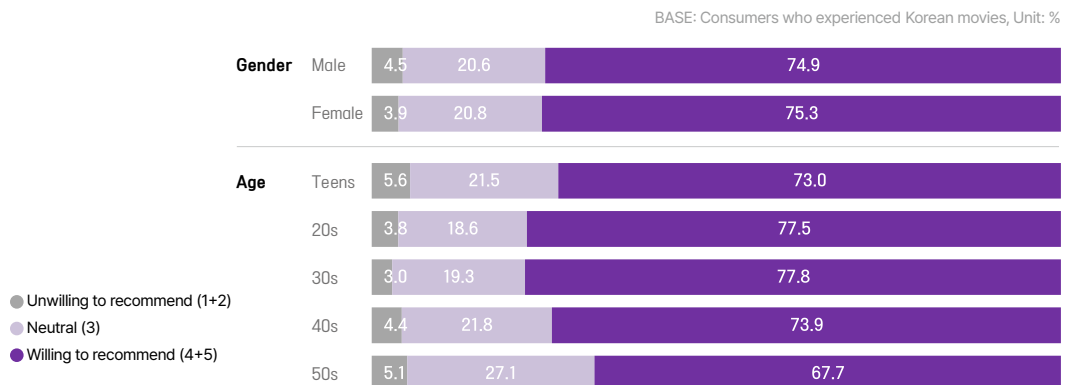
Figure 2-102 Comparison of the Willingness to Recommend Korean Movies by Country



Q. Are you willing to recommend Korean movies you have recently experienced to others?

1. Definitely do not recommend / 2. Do not recommend / 3. Neutral / 4. Recommend / 5. Definitely recommend

Figure 2-103 Comparison of the Willingness to Recommend Korean Movies by Gender and age



10 Ease of Use



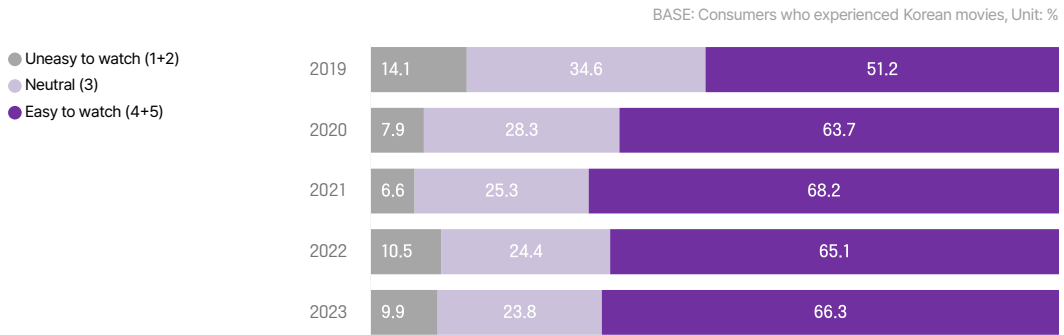
The results show 66.3% found Korean movies “easy to watch,” reflecting an increase from five years ago.

A coupling effect between experience and ease of use has been observed.

Overall, 66.3% of respondents shared that Korean movies were “easy to watch,” while 9.9% considered them “uneasy to watch.” The proportion of people who found them “easy to watch” increased significantly from 51.2% in 2019 to 66.3%.

By country, Southeast Asia and the Middle East, such as Indonesia (82.7%), Malaysia (78.1%), and the UAE (77.6%), generally found them easy to watch. Conversely, Russia (46.9%), Kazakhstan (47.4%), and Europe (Spain 47.4%, Germany 51.6%) perceived Korean movies as less accessible. Countries with lower experience also generally reported lower ease of use.

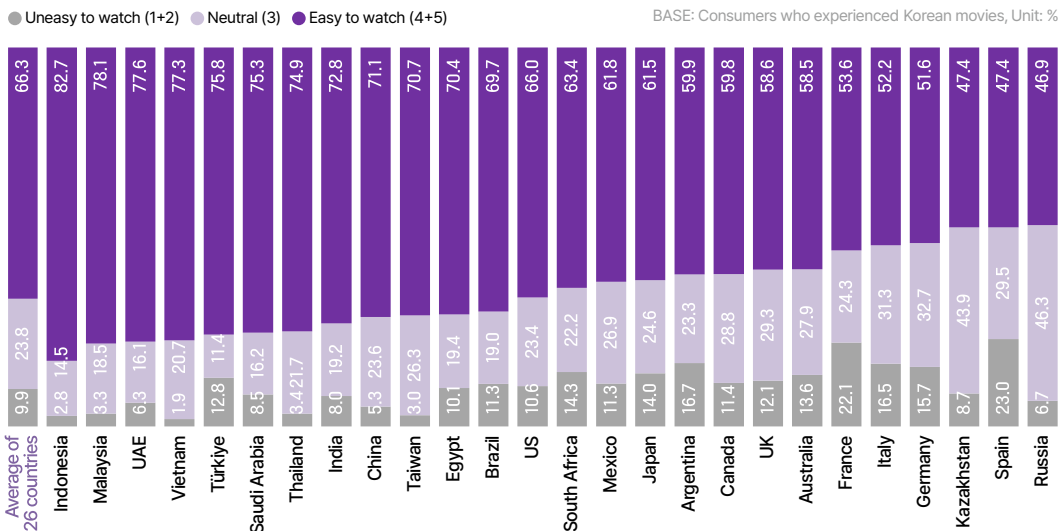
Figure 2-104 Comparison of the Ease of Watching Korean Movies Over the Last 5 Years by Year



Q. When you are about to watch Korean movies, is it easy to access the Korean movies you want?

1. Strongly disagree / 2. Disagree / 3. Neutral / 4. Agree / 5. Strongly agree

Figure 2-105 Comparison of the Ease of Using Korean Movies by Country



11 Access Channels



The Middle East showed a distinct tendency to access Korean movies through multiple channels. Asia actively used "TV" and "theaters."

Asia actively used "TV" and "theaters."

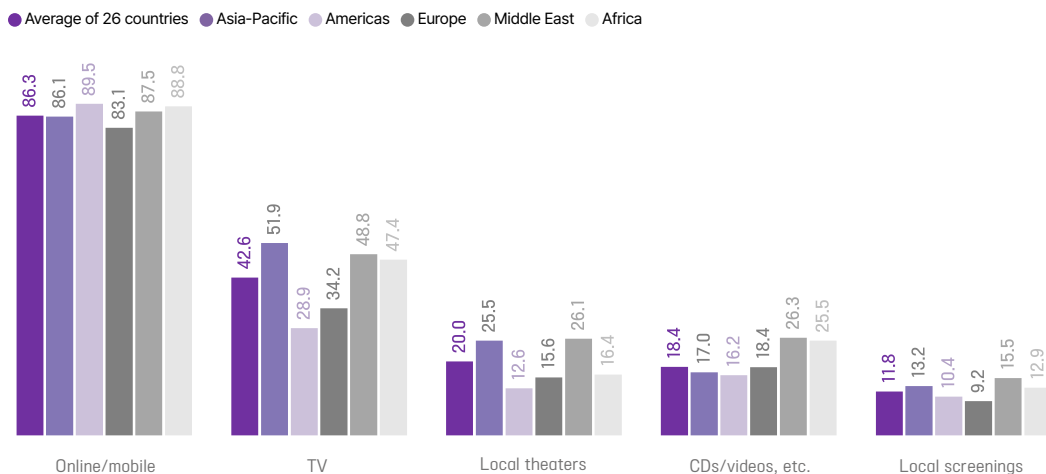
The Americas and Europe generally showed lower levels of access.

The main access channel for Korean movies was "online/mobile" (86.3%), which was overwhelmingly higher across all five continents compared to other channels. Asia-Pacific (51.9%), the Middle East (48.8%), and Africa (47.4%) showed higher access through "TV" compared to the average of 26 countries. Moreover, the Middle East (26.3%) and Africa (25.5%) showed relatively high access via physical media such as "CDs/videos." Asia-Pacific (25.5%) and the Middle East (26.1%), where simultaneous releases with Korea are more active, showed relatively higher access via "local theaters."

In the Middle East, while "online/mobile" access was similar to that of other continents, access via "TV," "local theaters," "CDs/videos," and "local screenings" was comparatively higher. This indicates that users in the Middle East engaged with Korean movies through a greater variety of channels than those in other continents. In fact, the UAE and Saudi Arabia in the Middle East were among the top seven of 26 countries in terms of consumption time and perceived ease of use (the proportion of respondents who said they are "easy to watch"). In contrast, the Americas and Europe showed lower engagement across all channels compared to other continents. Respondents in these regions demonstrated passive consumption behavior, with relatively low consumption volume and limited access channels.

Figure 2-106 Comparison of Korean Movie Access Channels by Continent

BASE: Consumers who experienced Korean movies, Unit: % of multiple responses



Q. Please select all the channels through which you usually access Korean movies.

12 Online/mobile Access Platforms

More than half of the respondents watched Korean movies through "Netflix" and "YouTube."

Eight out of 10 respondents in the Americas used "Netflix."

In Asia, "iQIYI" was more widely used, while "Viu" was more popular in Africa.

Overall, 71.2% of respondents who had watched Korean movies via online/mobile platforms claimed they used "Netflix," followed by "YouTube" at 57.7%. "Netflix" was 2.2 times more widely used than "Amazon Prime" (32.3%) and 3 times more than "Disney Plus" (22.9%), which ranked third and fourth, respectively. In the Asia-Pacific region, there was little difference in the usage of "Netflix" and

"YouTube," while "iQIYI" (26.5%), a China-based platform, ranked third, indicating the active use of local OTT services.

In the Americas, most people watched Korean movies through "Netflix" (84.6%). However, when combining "YouTube" (50.0%) and "YouTube Premium" (16.7%), "YouTube" also showed a significant market share close to that of "Netflix." Access through "Amazon Prime" was relatively high in the Americas (40.6%), Europe (39.0%), and the Middle East (37.6%). Similar to Asia-Pacific, Africa also used "Netflix" (71.9%) and "YouTube" (70.2%) as the main access channels, while "Viu" (23.5%), based in Hong Kong and offering services to South Africa and the Middle East, ranked fifth.

Table 2 -12 Changes in Online/mobile Access Platforms for Korean Movies Over the Last 6 Years by Year

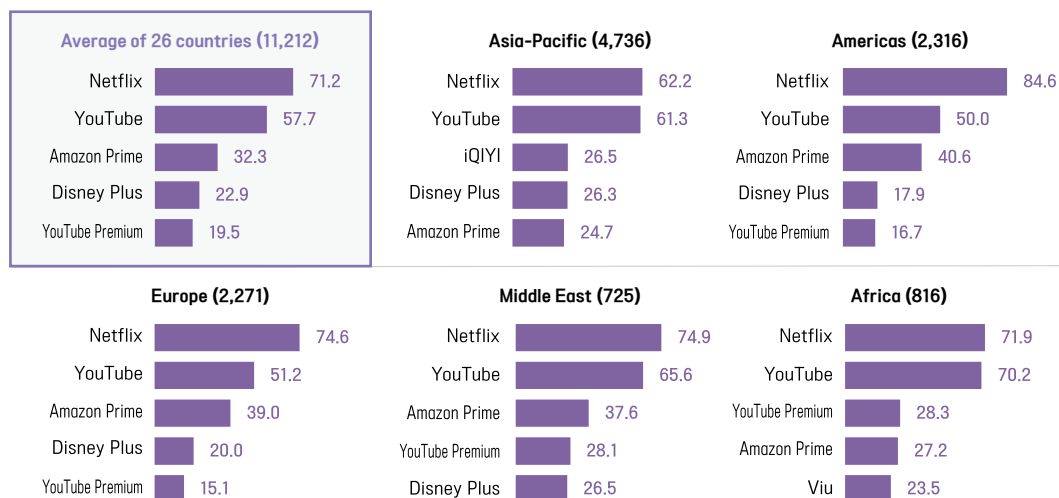
BASE: Online/mobile platform users for Korean movies, Unit: % of multiple responses

Category	2018	2019	2020	2021	2022	2023
Netflix	50.5	50.0	64.3	70.1	70.0	71.2
YouTube	78.8	77.9	70.3	67.1	60.0	57.7
Amazon Prime	20.0	19.0	26.9	31.1	30.3	32.3
Disney Plus	-	-	-	-	21.3	22.9
YouTube Premium	14.0	9.9	20.3	24.2	18.7	19.5
iQIYI	17.3	17.3	15.1	21.0	12.8	13.8

Q. Please select all the online/mobile platforms you primarily use to watch Korean movies. Exclude edited short videos.

Figure 2-107 Comparison of Online/mobile Access Platforms for Korean Movies by Continent

Base: Online/mobile platform users for Korean movies, No. of cases = (), Unit: % of multiple responses, top 5



4

Music



01 Experience Rate



Six out of 10 respondents have experienced K-pop, with particularly high levels in Southeast Asia. Japan exhibited a relatively higher experience.

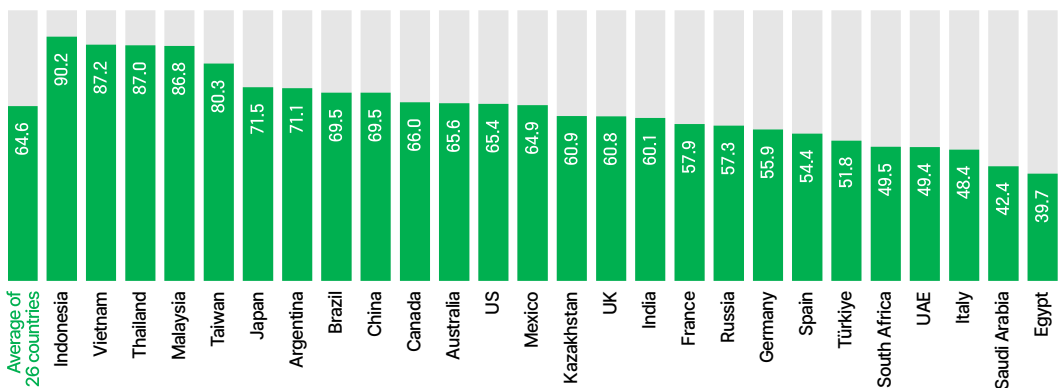
The K-pop experience stood at 64.6%, ranking fourth among 11 types of Korean cultural content. The countries with high K-pop experience were Indonesia (90.2%), Vietnam (87.2%), and Thailand (87.0%), while those with low experience were

countries in Africa, the Middle East, and Europe, such as Egypt (39.7%), Saudi Arabia (42.4%), and Italy (48.4%). Japan ranked sixth out of 26 countries in K-pop experience, contrary to its lower experience in Korean dramas and movies.

The experience levels were relatively higher among respondents in their teens and 20s (68.6% and 70.1%, respectively) and among women (67.5%).

Figure 2-108 Comparison of Korean Music Experience Rates by Country

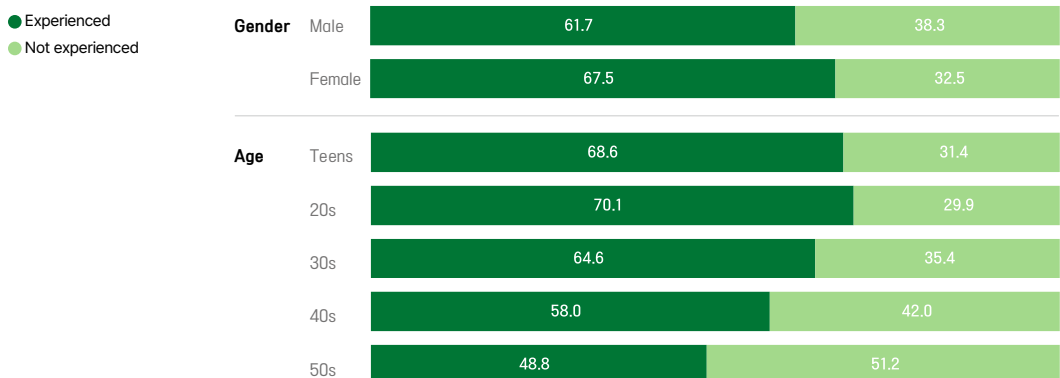
BASE: Total, Unit: %



Q. Please select all types of Korean cultural content you have experienced.

Figure 2-109 Comparison of Korean Music Experience Rates by Gender and age

BASE: Total, Unit: %



02 Popularity



Nearly half the respondents perceived K-pop as “widely popular.”

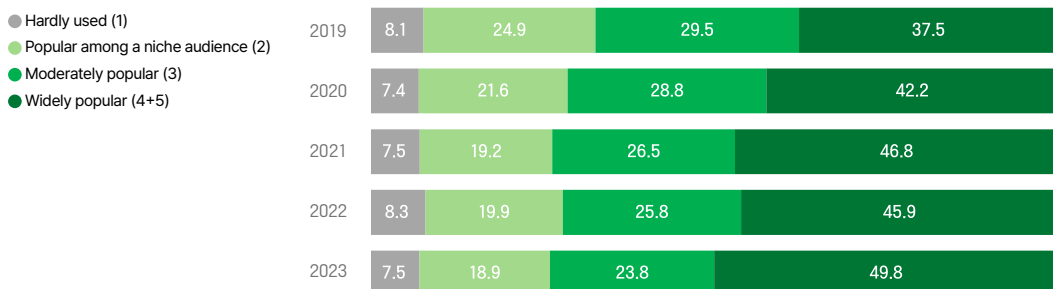
When asked how popular K-pop is in their country, 49.8% of the respondents with Hallyu experience shared that they are “widely popular,” which is the third highest among 11 types of Korean cultural content after food and beauty. Over the past five years, the percentage of people who answered “hardly used” has remained steady at around 7–8%, with little change. However, the percentages for “popular among a niche audience” and “moderately popular” have decreased, while the percentage for “widely popular” has increased.

K-pop was found to be particularly popular in Southeast Asia, Latin America, and the Middle East.

In all 26 countries, more respondents selected “widely popular” than “moderately popular” or “popular among a niche audience,” with Southeast Asia, such as Taiwan (65.3%), Vietnam (62.8%), and Malaysia (62.3%), among the highest, while Brazil (fifth), Mexico (sixth), and Saudi Arabia (seventh) were also in the top 10. In Japan, while “the widely popular” rate for variety shows, animation, publications, webtoons, and games mostly remained in the 10% range, and dramas, movies, fashion, and beauty ranged between 30–40%. Only music (56.9%) and food (65.4%) surpassed 50%. In countries like Germany, Italy, and Egypt, the percentage of those who answered “hardly used” was higher than in other countries.

Figure 2-110 Comparison of Korean Music Popularity Over the Last 5 Years by Year

BASE: Total, Unit: %



Q. How popular do you think Hallyu is in your country? Please indicate to what extent you agree.

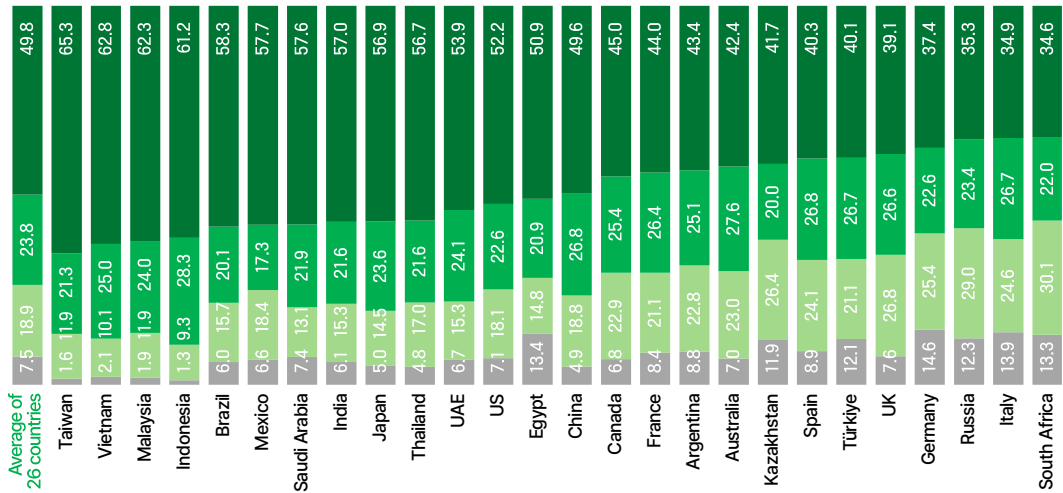
1. Hardly used by anyone / 2. Popular among a niche audience / 3. Known by a niche audience and the general public / 4. Widely known among the general public with related products being sold / 5. Widely popular among the general public with smooth sales of related products



Figure 2-111 Comparison of Korean Music Popularity by Country

BASE: Total, Unit: %

● Hardly used (1) ● Popular among a niche audience (2) ● Moderately popular (3) ● Widely popular (4+5)



Local News

- “Although BTS members have enlisted in the military, BTS’s popularity seems to remain strong. The BTS characters, BT21, have collaborated with various companies in Taiwan, offering various products. In 2023, they even partnered with McDonald’s to release products. It is interesting to see even singers like DPR IAN, who are not considered widely popular in Korea, are gaining attention here.” (Taiwan KOFICE overseas correspondent)
- “(G)I-DLE member Shuhua from Taiwan has secured a strong fanbase. The title track *Queencard* from their sixth mini-album, released in May 2023, became a meme in Taiwan because the line ‘I’m a queencard’ sounds similar to a phrase in Taiwanese meaning ‘Grandma puts her leg up,’ constantly creating a buzz.” (Taiwan KOTRA Taipei trade officer)
- “Some Indonesians feel the ‘K-pop fatigue,’ but groups such as BTS, BLACKPINK, NCT, and SEVENTEEN are still popular, which is proven by the fact that BLACKPINK’s concert in 2023 sold out, with around 70,000 attendees. K-pop has high public recognition because it is easy to listen to and catchy, and connects with their fans through social media.” (Indonesia KOTRA Jakarta trade officer)
- “According to a Facebook analysis report, over 15 million people in India consume Hallyu content like K-pop, and this number is constantly increasing. Interest in Hallyu is also leading to an increase in the interest in learning the Korean language.” (India KOTRA Mumbai trade officer)
- “We can easily hear K-pop in department stores, shopping malls, and cafes in Thailand, and the presence of Thai members, such as BLACKPINK’s Lisa, GOT7’s BamBam, NCT’s Ten, and (G)I-DLE’s Minnie, makes K-pop even more popular. Spotify’s Thailand TOP 50 list includes five Korean songs (as of February 6, 2024).” (Thailand KOTRA Bangkok trade officer)
- “In 2023, six Korean songs entered the top 10 of the “Billboard JAPAN Hot 100 Chart,” and four Korean groups (including SEVENTEEN) performed at NHK’s year-end song festival “NHK Kōhaku Uta Gassen,” which proves the solid foothold of Korean music in Japan.” (Japan KOTRA Tokyo trade officer)
- “K-pop has become more widespread than other types of Hallyu content in Spain as it is often heard in cafes or stores.” (Spain KOFICE overseas correspondent)

03 Popular Foreign Music



K-pop ranked second in popularity after American music in many countries.

In the Asia-Pacific region, K-pop was comparable to music from "the US" in popularity.

Those who experienced K-pop in 26 countries chose "the US" (49.1%) as their 1st choice for favorite foreign music, followed by "Korea" (26.5%).

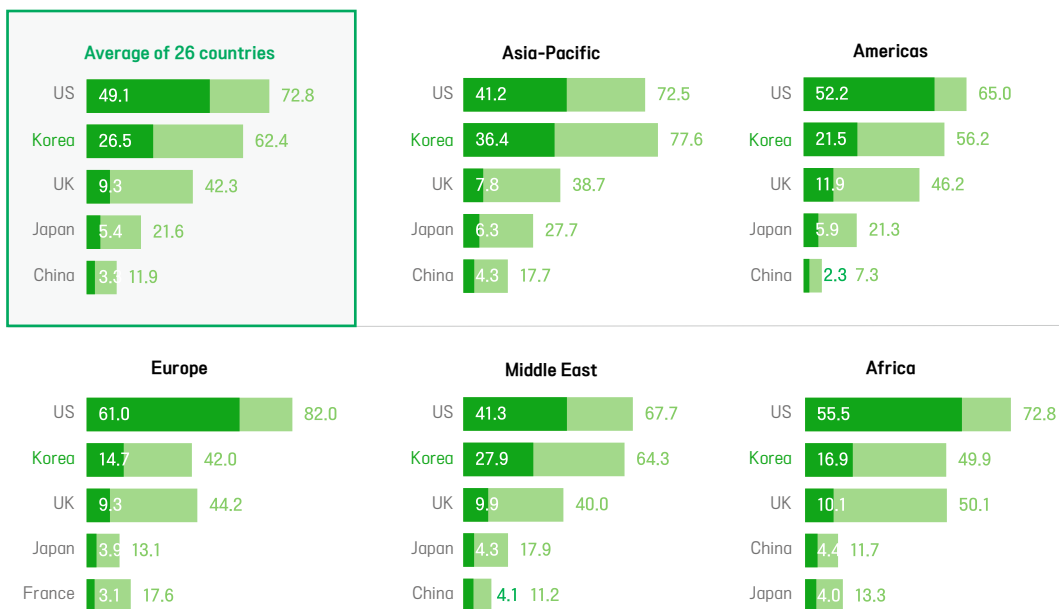
In all continents, "the US" ranked first, while "Korea"

came in second. In the Asia-Pacific region, "the US" (41.2%) held the top spot, with a narrow gap of 4.8%p over "Korea" (36.4%) in second place. In contrast, there was a significant gap between Korea and "the UK" (7.8%), "Japan" (6.3%), and "China" (4.3%), which ranked third to fifth, highlighting the strong popularity of K-pop in the region.

Figure 2-112 Comparison of Popular Foreign Music by Continent

BASE: Consumers who experienced Korean music, Unit: %

● 1st choice ● 1st+2nd+3rd choices (multiple responses)



Q. Which country's music is popular in your country? Please select the top three in order (excluding your country).

Note Presented are the top five countries with the highest proportion of first-choice responses (in order).

04 Consumption Volume



India, Vietnam, and Thailand spent nearly 20 hours per month listening to K-pop.

Japan, Canada, and Australia showed lower consumption.

Participants who experienced K-pop reported an average monthly consumption time of 11.4 hours per person. Countries with high consumption time included India (20.8 hours), Thailand (20.8 hours), and Vietnam (19.7 hours), averaging around 20 hours per month. The top ranking countries were mostly in Asia, with Egypt (15.6 hours) and the UAE (15.4 hours) notably in fifth and sixth places, respectively.

However, Japan (4.0 hours), Canada (4.6 hours), and Australia (4.8 hours) averaged below 5 hours per month, ranking among the lowest of the 26 countries surveyed. The average proportion of K-pop consumption out of total music consumption volume was 24.4%. The highest percentages were found in Indonesia (39.4%), Vietnam (37.4%), and Thailand (35.5%), while the lowest were in the UK (14.2%), Canada (14.9%), and Germany (15.2%).

In terms of spending, countries in the Middle East, the Americas, and Europe generally spent more on K-pop whereas countries in Asia spent less.

Figure 2-113 Comparison of Time Spent on Korean Music by Country

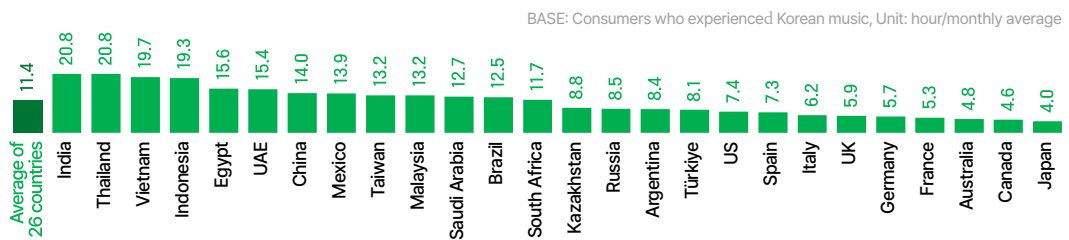


Figure 2-114 Comparison of Proportion of Korean Music Consumption by Country

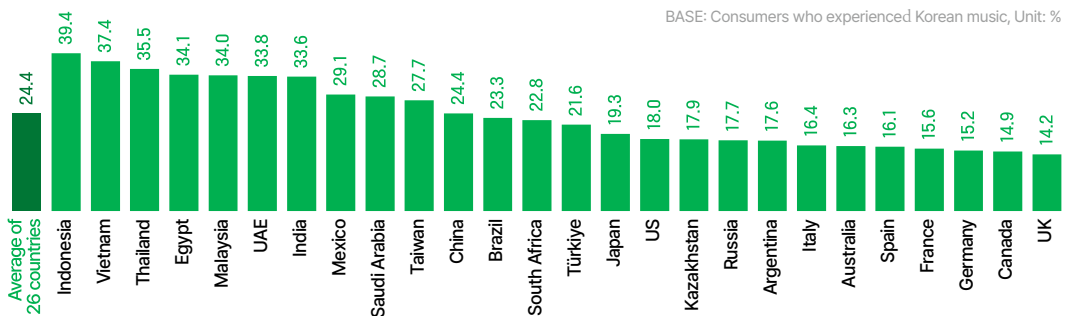
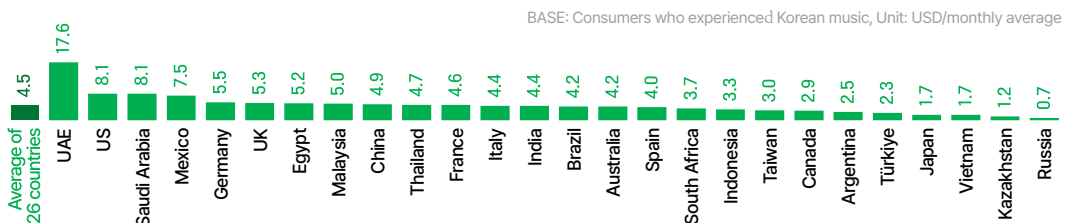


Figure 2-115 Comparison of Expenditure on Korean Music by Country



Q. What is your usual listening volume, proportion, and average expenditure for Korean music? Please provide monthly average consumption hours and expenditure in the past year.

05 Favorability



Favorability toward K-pop was on the decline.

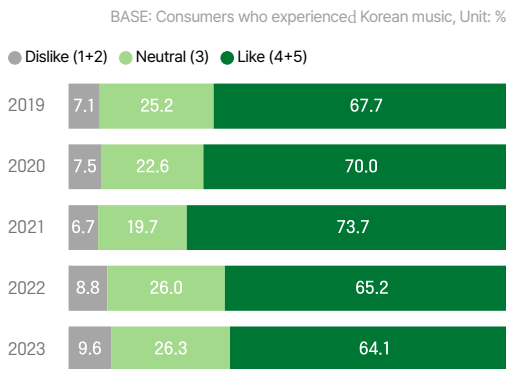
In total, 64.1% of the respondents who have experienced K-pop stated that they "like[d]" it. Favorability slightly increased from 2019 to 2021, but since then, the percentage for "neutral" has increased, while the percentage of those who "like[d]" it has gradually declined.

The countries with high levels of favorability included India (84.9%), Egypt (84.0%), and Indonesia

(82.1%), while those with lower levels of favorability were Russia (40.8%), Kazakhstan (41.8%), and the UK (46.4%). In particular, France (21.7%) had over 20% of respondents indicating "dislike," while Germany (18.6%) and Spain (18.1%) also showed a nearly 20% level of unfavorable sentiment.

By gender, women (67.2%) and people in their 20s (67.9%) and 30s (66.0%) showed relatively higher favorability.

Figure 2-116 Comparison of Favorability Toward Korean Music Over the Last 5 Years by Year



Q. Overall, how much do you like the Korean music you have recently listened to?
1. Don't like it at all / 2. Don't like it / 3. Neutral / 4. Like it / 5. Like it very much

Figure 2-117 Comparison of Favorability Toward Korean Music by Gender and age

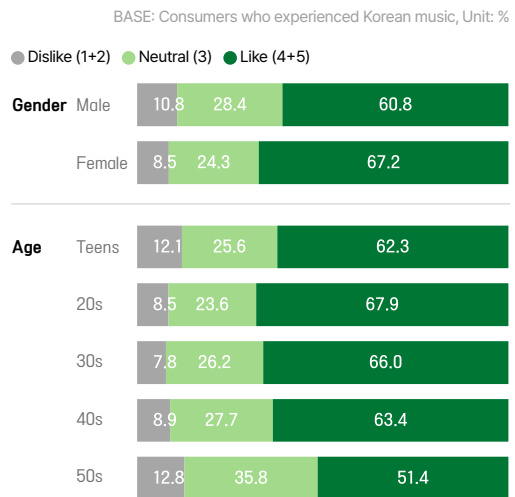
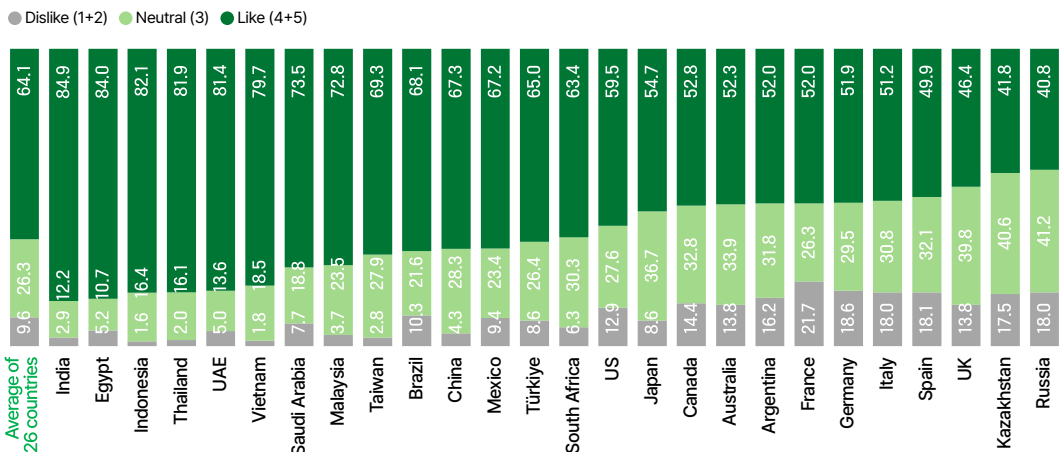


Figure 2-118 Comparison of Favorability Toward Korean Music by Country



06 Factors Promoting and Inhibiting Favorability

"The music itself is great" was the biggest reason for liking K-pop.

The Asia-Pacific area was attracted to "looks/style," and the Middle East and Africa were more drawn to "lyrics" and "universe."

The biggest reason for liking K-pop (based on multiple responses) for all continents was "The music itself is great" (43.0%), followed by "Outstanding performance" (30.3%) and "Attractive looks or style" (26.7%).

The differences between each continent and the average of 26 countries for each choice are as follows. In the Asia-Pacific region, 30.3% of respondents chose "Attractive looks or style," which is 3.6%p higher than the average. In contrast, neither the Americas nor Europe had any categories with percentages above the average. Instead, the Americas showed a lower-than-average proportion for "Attractive looks or style" (21.8%), while Europe had a lower-than-average proportion for "Outstanding performance" (25.8%).

In the Middle East, "Like the meaning conveyed by the lyrics" (21.3%) and "Like the K-pop universe/storytelling" (17.2%) were 6.3%p and 7.3%p higher than the average, respectively, while "The music itself is good" (37.1%) was lower than the average. In Africa, "Like the K-pop universe/storytelling" (15.2%) was above the average, but "The music itself is great" (38.3%) was below the average.

In summary, the Asia-Pacific region tended to be more attracted to K-pop artists' looks or style, while the Middle East and Africa found the lyrics and universe/storytelling original and appealing.

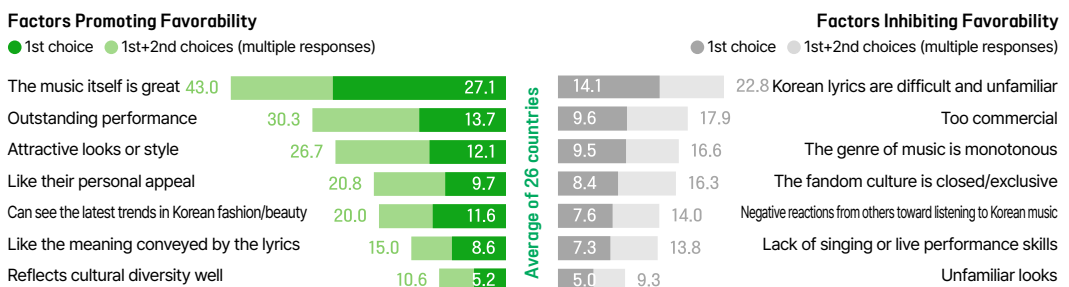
"Reactions from others" particularly inhibited favorability in the Americas, the Middle East, and Africa.

For factors inhibiting favorability, "Korean lyrics are difficult and unfamiliar" was at the top of the list, with an average of 22.8% across 26 countries and across all five continents. "Negative reactions from others toward listening to Korean music" was the second most common reason, with around 20% in the Americas (17.8%), the Middle East (19.6%), and Africa (21.9%), whereas it ranked sixth in Asia-Pacific (11.4%) and Europe (12.3%).

In Europe, the second most common reason was "The genre of music is monotonous" (19.5%), and in the Middle East, it was "Lack of singing or live performance skills" (17.9%), both of which were higher than the average. In Africa, "Korean lyrics are difficult and unfamiliar" (27.7%) was identified as the main factor inhibiting favorability.

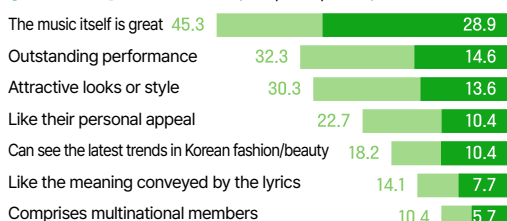
Figure 2-119 Comparison of Factors Promoting and Inhibiting Favorability Toward Korean Music by Continent

BASE: Consumers who experienced Korean music, Unit: %



Factors Promoting Favorability

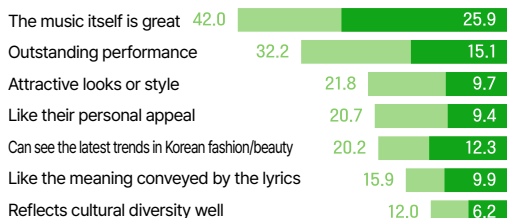
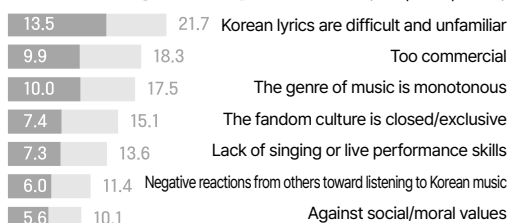
● 1st choice ● 1st+2nd choices (multiple responses)



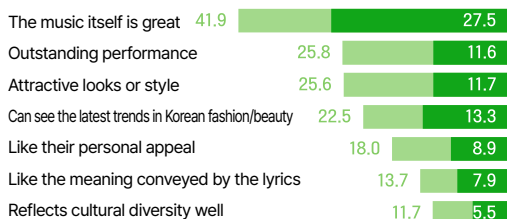
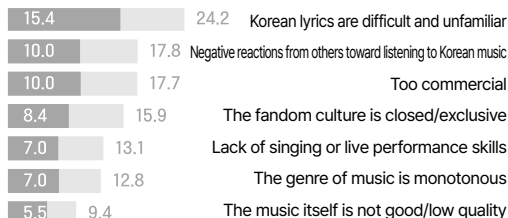
Asian-Pacific

Factors Inhibiting Favorability

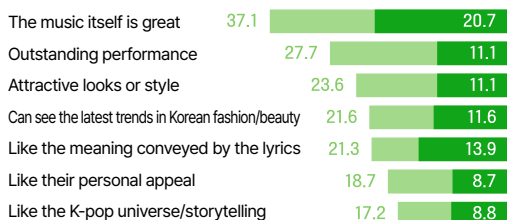
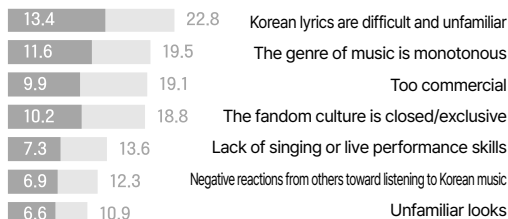
● 1st choice ● 1st+2nd choices (multiple responses)



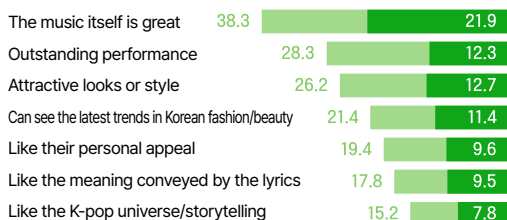
Americas



Europe



Middle East



Africa



Q. What do you think are the biggest factors promoting favorability toward Korean music? Please select up to the second choice in order.

Q. What do you think are the factors inhibiting favorability toward Korean music? Please select up to the second choice in order.

Those who disliked K-pop tended to be dissatisfied with the music itself.

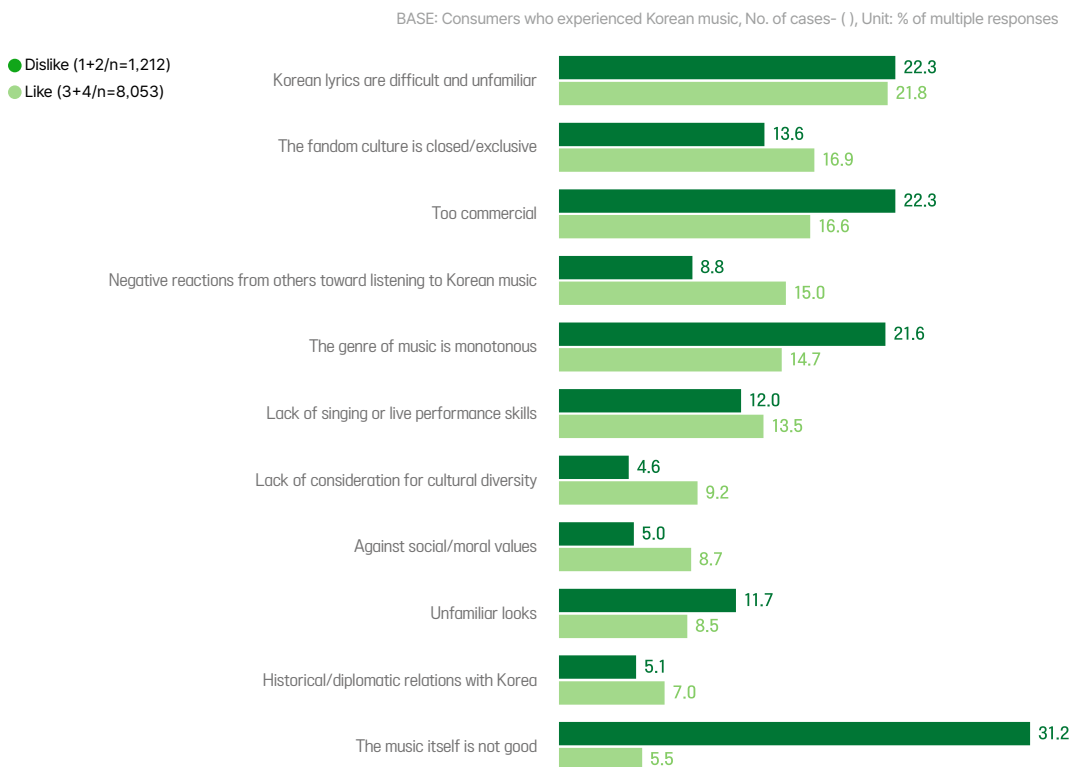
Those who felt favorable were particularly uncomfortable with negative social perceptions around them.

When analyzing the factors inhibiting favorability by dividing those who were favorable (respondents who chose "like") and those who were unfavorable (respondents who chose "dislike") toward Korean music, it was found that the latter were more likely

to feel that "The music itself is not good" (31.2%), "The genre of music is monotonous" (21.6%), and that it is "Too commercial" (22.3%).

On the other hand, the former were more likely to cite reasons such as "The fandom culture is closed/exclusive" (16.9%), "Negative reactions from others toward listening to Korean music" (15.0%), "Lack of consideration for cultural diversity" (9.2%), and "Against social/moral values" (8.7%).

Figure 2-120 Comparison of Factors Inhibiting Favorability Toward Korean Music Depending on Korean Music Favorability



07 Preferred Artists



"BTS" was widely preferred across five continents. "BLACKPINK" was most popular in the Asia-Pacific region, while "Jung Kook" ranked second and third in the Middle East and Africa.

When asked about their favorite Korean artist (based on first-choice responses), "BTS" (29.1%) and "BLACKPINK" (13.1%) ranked first and second for 6 and 5 consecutive years, respectively. "BTS" not only showed an overwhelming preference of 29.1%, but "Jung Kook," who debuted solo, also ranked fourth, demonstrating his strong fan base.

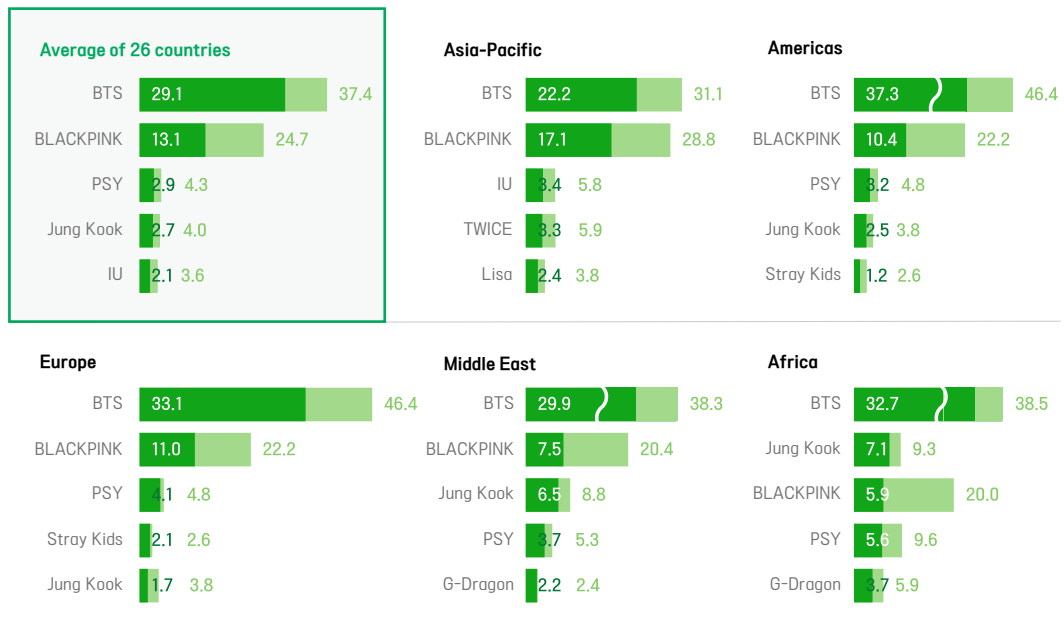
Unlike other artists/groups, "BTS" recorded around 20–30% across all five continents, indicating a globally balanced fan base.

"BLACKPINK" was relatively more popular in the Asia-Pacific region (17.1%) and had higher favorability in the Americas (10.4%) and Europe (11.0%), compared to the Middle East (7.5%) and Africa (5.9%).

"Jung Kook," who sang the official theme song *Dreamers* for the *FIFA World Cup Qatar 2022*, ranked third in the Middle East and second in Africa, with 6.5% and 7.1% favorability, respectively.

Figure 2-121 Comparison of Preferred Korean Artists by Continent

BASE: Consumers who experienced Korean music, Unit: %



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

Note Presented are the top 5 rankings by continent and the average across 26 countries, based on the highest percentage of first-choice responses.

08 Willingness to pay



Among the respondents, 41.2% showed willingness to pay, with a particularly high interest in Thailand, India, and Indonesia.

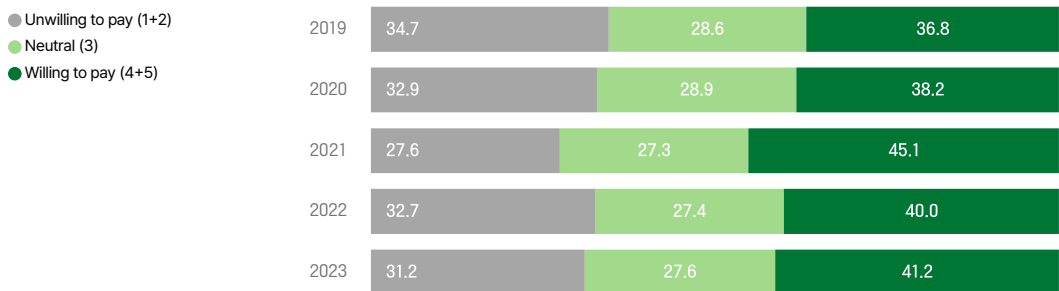
More than half of the respondents in Kazakhstan and Russia were not willing to pay for K-pop.

When asked about their willingness to pay for K-pop, 41.2% responded that they were "willing to pay," and 31.2% responded that they were not.

The percentage of those "willing to pay" increased significantly from 2019 to 2021 but has since shown a decline. By country, Thailand (65.0%), India (60.5%), Indonesia (60.3%), and Vietnam (58.1%) had higher levels of willingness to pay for K-pop, whereas in Kazakhstan (57.0%) and Russia (55.3%), more than half of the respondents said they were not willing to pay.

Figure 2-122 Comparison of the Willingness to pay for Korean Music Over the Last 5 Years by Year

BASE: Total, Unit: %

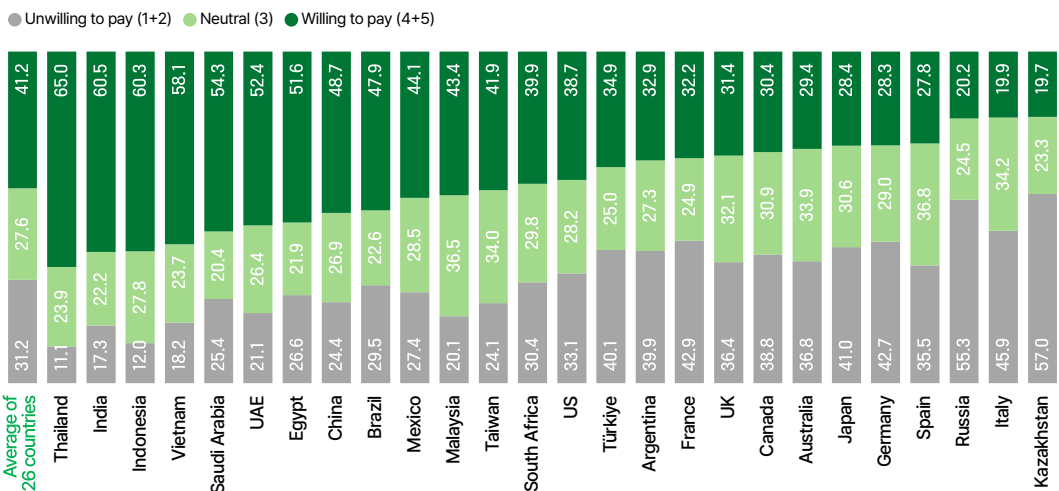


Q. Please indicate the level of your willingness to pay for Korean cultural content in the future for each item.

1. Strongly disagree / 2. Disagree / 3. Neutral / 4. Agree / 5. Strongly agree

Figure 2-123 Comparison of the Willingness to pay for Korean Music by Country

BASE: Total, Unit: %



09 Willingness to Recommend



Respondents in their 20s–30s from India, the Middle East, and Africa were active in recommending Korean music.

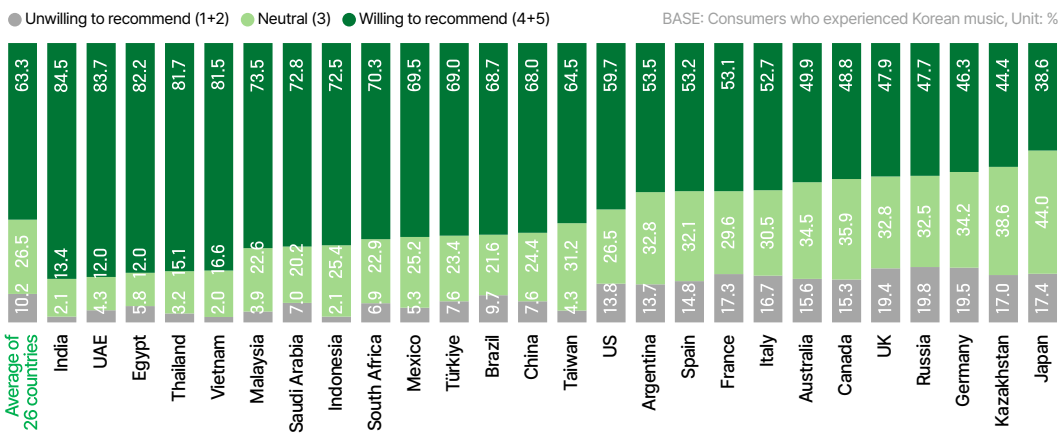
Respondents from Japan, Kazakhstan, and Germany were more passive.

Overall, 63.3% of those who have experienced K-pop responded that they were “willing to recommend” K-pop, while 26.5% were “neutral,” and 10.2% were “unwilling to recommend.” The percentage of those unwilling to recommend was relatively high compared to other 10 types of content, such as dramas and variety shows, where this

percentage was between 4–6%.

Countries showing high willingness included India (84.5%), the UAE (83.7%), and Egypt (82.2%), while the Middle East and Africa (the UAE 2nd, Egypt 3rd, Saudi Arabia 7th, South Africa 9th) were notably among the mid-to-high ranks. In contrast, Japan (38.6%), Kazakhstan (44.4%), and Germany (46.3%) showed lower levels of willingness to recommend. It was found that women (65.8%) were more enthusiastic regarding recommending K-pop than men (60.7%), and respondents in their 20s–30s (67.0%, 66.5%) were more active in recommending than those in their teens (60.7%) or 50s (49.8%).

Figure 2-124 Comparison of the Willingness to Recommend Korean Music by Country

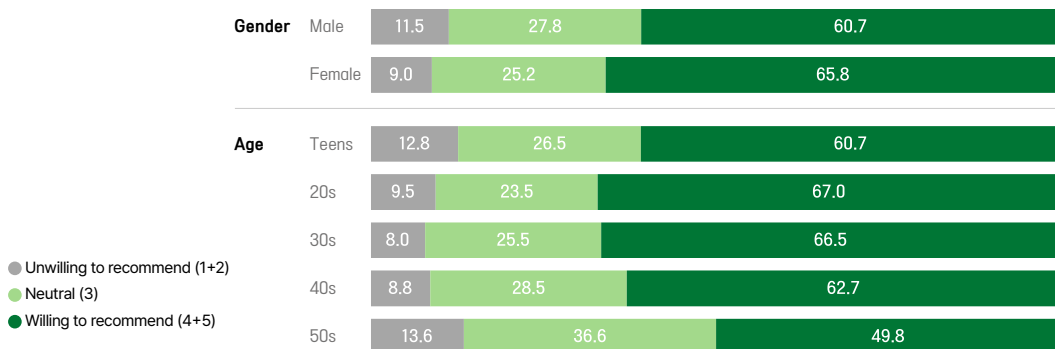


Q. Are you willing to recommend Korean music you have recently experienced to others?

1. Definitely do not recommend / 2. Do not recommend / 3. Neutral / 4. Recommend / 5. Definitely recommend

Figure 2-125 Comparison of the Willingness to Recommend Korean Music by Gender and age

BASE: Consumers who experienced Korean music, Unit: %



10 Ease of use



Among 11 types of Korean content, K-pop was perceived as the easiest to access.

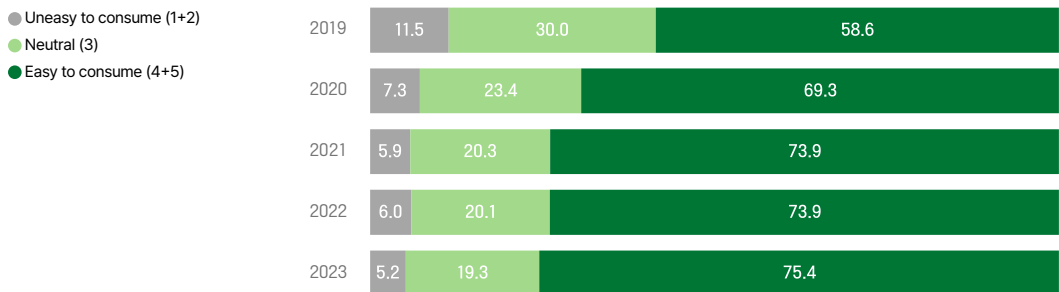
In total, 75.4% of respondents believed that Korean music was "easy to consume," showing the highest rate among 11 types of Korean cultural content, whereas only 5.2% responded that it was difficult to access. The percentage of those who perceived that Korean music was easy to consume has increased significantly from 58.6% in 2019 to 75.4%.

Japan, France, and the UK believed that Korean music was "uneasy to consume."

By country, Indonesia (88.6%) showed the highest percentage of people who found Korean music "easy to consume," followed by Egypt (85.3%) and Saudi Arabia (85.0%), while there were relatively more respondents in Japan (9.7%), France (9.1%), and the UK (8.9%) who thought Korean music was not easy to access.

Figure 2-126 Comparison of the Ease of Consuming Korean Music Over the Last 5 Years by Year

BASE: Consumers who experienced Korean music, Unit: %

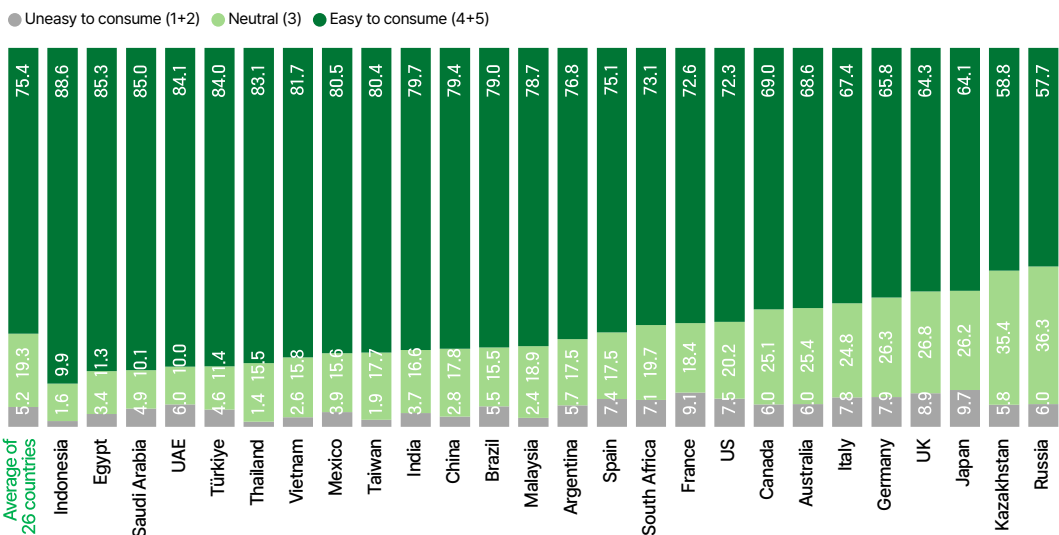


Q. When you are about to listen to or watch Korean music (K-Pop), is it easy to access the Korean music (K-Pop) you want?

1. Strongly disagree / 2. Disagree / 3. Neutral / 4. Agree / 5. Strongly agree

Figure 2-127 Comparison of the Ease of Consuming Korean Music by Country

BASE: Consumers who experienced Korean music, Unit: %



11 Access Channels



Nine out of 10 respondents accessed K-pop via “online/mobile” channels.

The Middle East and Africa showed higher usage of “TV” and “CDs/videos” to access K-pop, and the Asia-Pacific region were more likely to consume K-pop via “TV.”

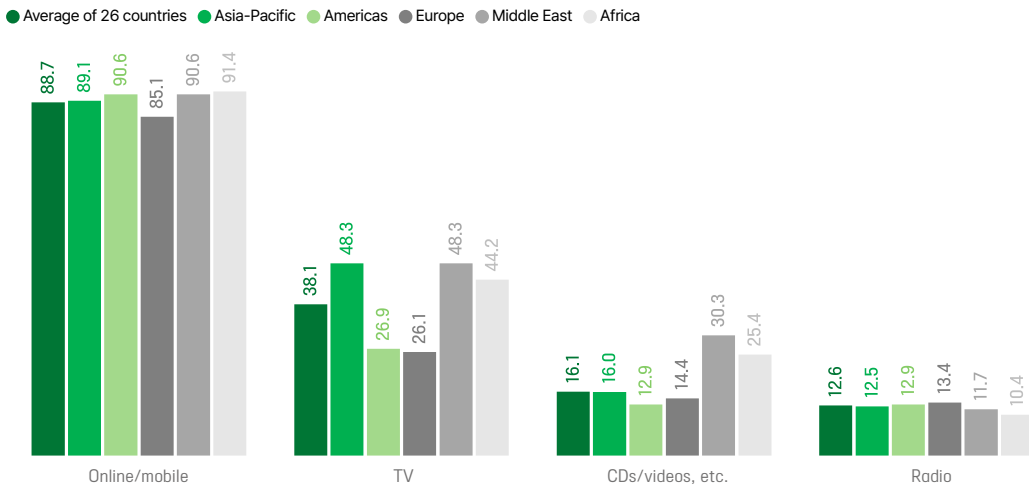
The primary access channel for Korean music was “online/mobile” (88.7%). The Asia-Pacific region (48.3%), the Middle East (48.3%), and Africa (44.2%) also showed high access rates through “TV.” Moreover, in the Middle East (30.3%) and Africa (25.4%), a relatively higher number of people

accessed K-pop through physical media such as “CDs/videos.”

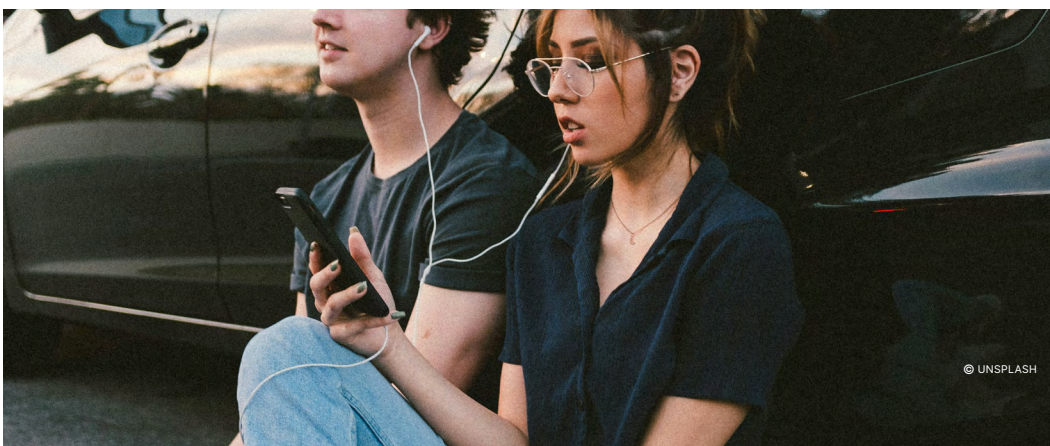
The Middle East and Africa generally showed higher usage rates for “online/mobile,” “TV,” and “CDs/videos” among all access channels compared to other continents, indicating that each user in these regions actively uses Korean music through multiple channels. Conversely, in Europe, the use of “online/mobile,” “TV,” and “CDs/videos” was below the average across 26 countries, except “radio” (13.4%), reflecting a more passive approach to accessing Korean music through media.

Figure 2-128 Comparison of Korean Music Access Channels by Continent

BASE: Consumers who experienced Korean music, Unit: % of multiple responses



Q. Please select all the channels through which you usually access Korean music.



12 Online/mobile Access Platforms



All five continents showed high “YouTube” access rates.

While the Americas and Africa actively used “Spotify,” the Middle East and Africa tended to use multiple platforms.

Among those who accessed Korean music via online/mobile platforms, 71.6% used “YouTube.” “Spotify” and “YouTube Music” also showed usage rates of 53.6% and 42.2%, respectively. The usage rates of “Amazon Music” (19.2%) and “Apple Music” (17.9%) were less than one-third that of “YouTube.”

“YouTube” ranked first on all five continents, while “Spotify” and “YouTube Music” were competing among the top. In particular, “Spotify” exhibited high usage rates exceeding 60% in the Americas and Africa, which were higher than other continents. “Apple Music” ranked fourth or fifth on each continent, with the Americas and Europe including “Amazon Music” and Asia-Pacific, the Middle East, and Africa including “Google Play Music (currently YouTube Music)” in the rankings. This highlights regional differences in access to K-pop.

Table 2-13 Changes in Online/mobile Access Platforms for Korean Music Over the Last 6 Years by Year

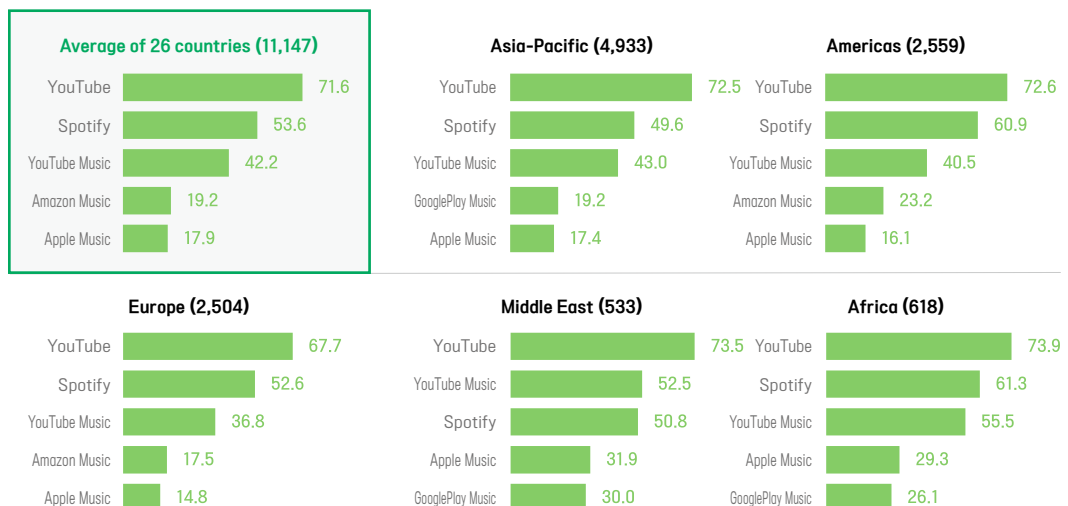
BASE: Online/mobile platform users for Korean music, Unit: % of multiple responses

Category	2018	2019	2020	2021	2022	2023
YouTube	90.6	84.6	81.9	80.3	81.1	71.6
Spotify	33.8	36.5	46.0	49.4	50.2	53.6
YouTube Music	15.2	16.8	18.3	23.2	20.7	42.2
Amazon Music	31.8	24.7	24.1	27.8	19.2	19.2
Apple Music	20.2	16.8	19.0	20.1	18.3	17.9

Q. Please select all the online/mobile platforms you primarily use to listen to Korean music.

Figure 2-129 Comparison of Online/mobile Access Platforms for Korean Music by Continent

BASE: Online/mobile platform users for Korean music, No. of cases= (), Unit: % of multiple responses, top five





5

Animation

01 Experience Rate



Five out of 10 respondents have experienced Korean animation.

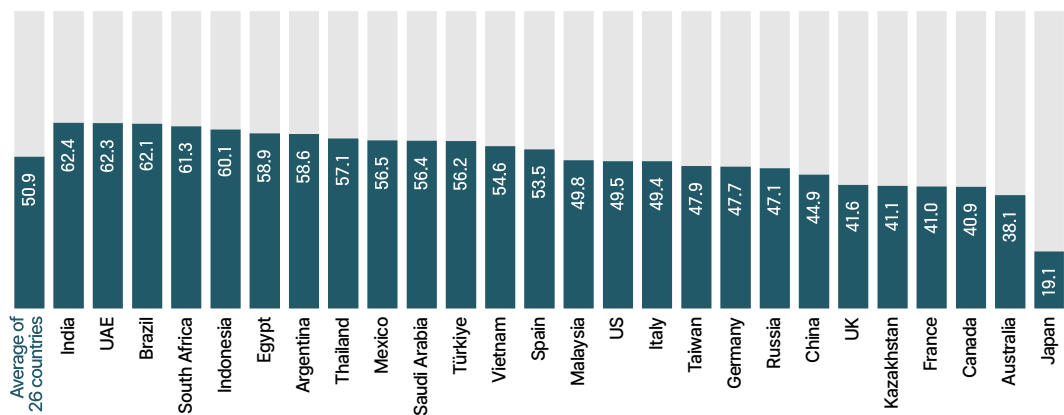
Experience rates in top five countries, including India and the UAE, exceeded 60%.

Among those familiar with Korean pop culture, 5 out of 10 respondents (50.9%) said that they had watched Korean animation, which is the seventh highest among 11 types of Korean cultural content. Countries with high levels of experience included

India (62.4%), the UAE (62.3%), and Brazil (62.1%), while Japan (19.1%) and the English-speaking countries (e.g., Australia 38.1%, Canada 40.9%) as well as Europe (e.g., France 41.0%) were in the lower ranks. The age groups with relatively high experience rates were those in their 20s and 30s (54.0% and 54.2%, respectively).

Figure 2-130 Comparison of Korean Animation Experience Rates by Country

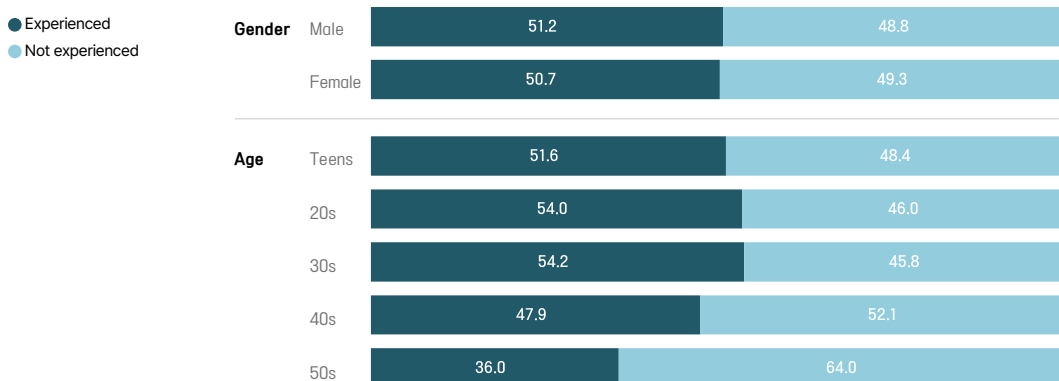
BASE: Total, Unit: %



Q. Please select all types of Korean cultural content you have experienced.

Figure 2-131 Comparison of Korean Animation Experience Rates by Gender and age

BASE: Total, Unit: %



02 Popularity



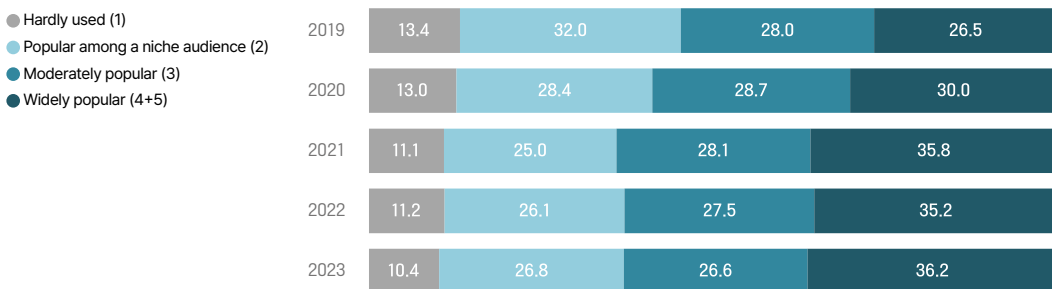
Among the respondents, 36.2% claimed that Korean animation is “widely popular.”

When asked how popular Korean animation is in their country, 36.2% of those with Hallyu experience responded that it is “widely popular”, while

26.6% considered it “moderately popular,” and 26.8% claimed that it is “popular among a niche audience.” Compared to 2019, the “popular among a niche audience” and “generally popular” categories have decreased, while the “widely popular” rate has increased by an average of 8.1% per year.

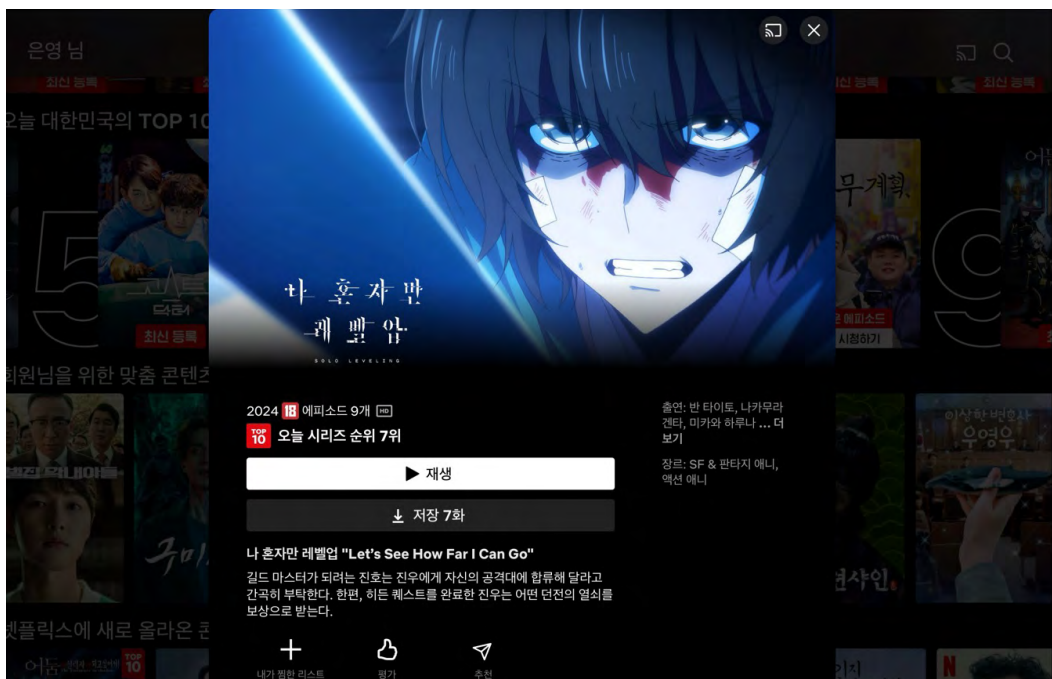
Figure 2-132 Comparison of Korean Animation Popularity Over the Last 5 Years by Year

BASE: Total, Unit: %



Q. How popular do you think Hallyu is in your country? Please indicate to what extent you agree.

1. Hardly used by anyone / 2. Popular among a niche audience / 3. Known not just by a niche audience but also by the general public / 4. Widely known among the general public with related products being sold / 5. Widely popular among the general public with smooth sales of related products



Rates for “widely popular” were especially high in Egypt and Saudi Arabia.

Animation was notably the most popular among Korean video content in the US.

More than half of the respondents in Egypt (52.3%) and Saudi Arabia (51.9%) claimed that Korean animation is widely popular. The rates for “widely popular” were high in the UAE (47.0%), Mexico (46.7%),

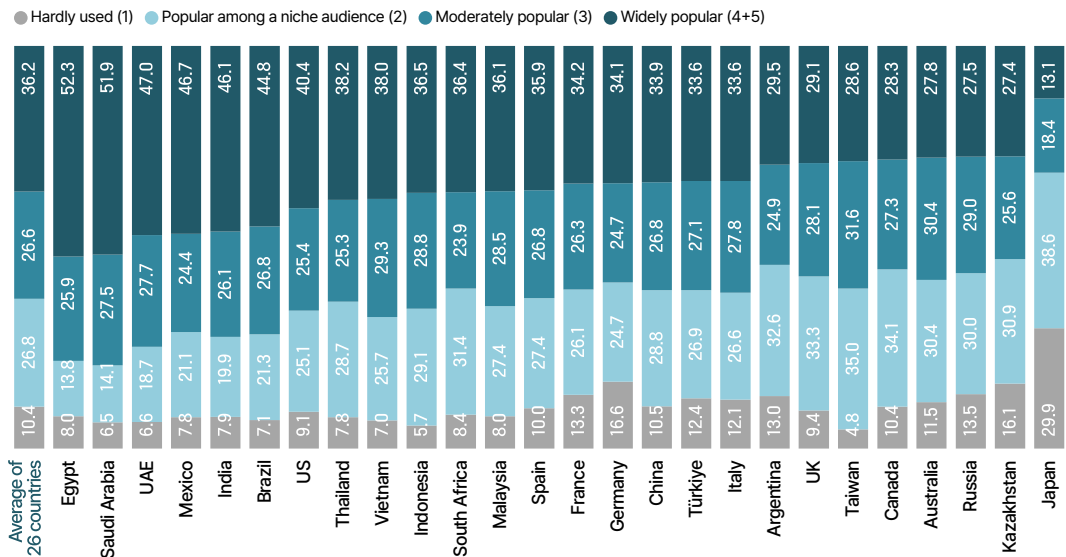
and India (46.1%).

The US ranked seventh among the 26 countries, with a 40.4% rate for “widely popular,” the highest among Korean video content (e.g., movies 35.7%, dramas 35.4%, variety shows 34.7%) in the US.

Japan, Taiwan, Canada, the UK, Argentina, Kazakhstan, Australia, and Russia showed higher rates for “popular among a niche audience” than “widely popular.”

Figure 2-133 Comparison of Korean Animation Popularity by Country

BASE: Total, Unit: %



Local News

- “The character ‘Zanmang Loopy’ from *Pororo* is considered to have reached a second peak of popularity in China in 2023. There were many products made in collaboration with the animation character IP Loopy, along with other collaborations in various fields, such as blind box figures with Pop Mart and milk tea with XI CHA.” (China KOTRA Beijing trade officer)
- “The animation *Solo Leveling* (co-invested/planned by Korea, the US, and Japan, produced in Japan, and released in January 2024), based on a Korean web novel and webtoon, ranked first in the Korean video category on IMDb, which is a website providing information on movies, actors, dramas, and video games.*” (US KOTRA New York trade officer)
- “There were no major issues other than the fact that Korean animation was invited to the 47th Annecy International Animation Film Festival held in June 2023 in Annecy, a city in southeastern France.” (France KOTRA Paris trade officer)

* It remains unclear why there is a high rate for “widely popular” for Korean animation in the US, but the Korean webtoon *Solo Leveling* (based on a Korean web novel) gained significant popularity in North America, as proven by a petition for its animation adaptation on the US online petition site Change.org, which garnered over 220,000 participants. This may be related to the fact that it is a collaborative project among Korea, Japan, and the US (invested/planned by Korea, the US, and Japan, and produced in Japan). However, as this was aired from January 2024, it is not aligned with the survey period.

03 Popular Foreign Animation



Animation from "Korea" competed with that from "Japan" and "the US."

When asked about their first choice for favorite foreign animation, 26% of respondents who had experienced Korean animation selected "Japan" (31.0%),

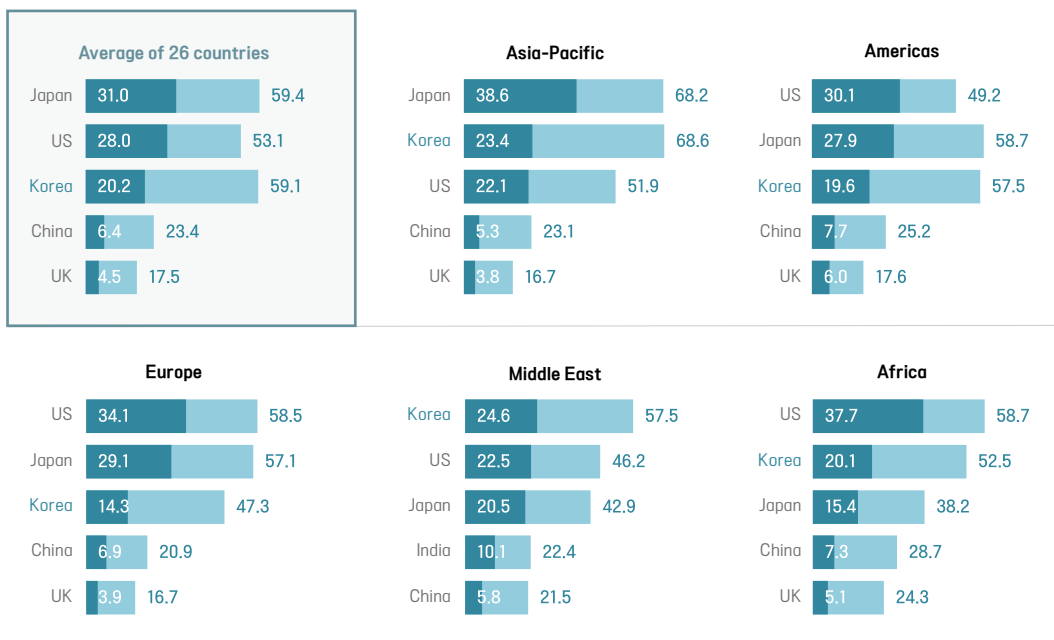
followed by "the US" (28.0%) and "Korea" (20.2%).

There were regional differences in the preference for Korean animation. "Korea" ranked first with a rate of 24.6% in the Middle East, second (23.4%) after "Japan" (38.6%) in Asia-Pacific, and third after "the US" (38.6%) and "Japan" in the Americas and Europe.

Figure 2-134 Popular Foreign Animation

BASE: Consumers who experienced Korean animation, Unit: %

● 1st choice ● 1st+2nd+3rd choices (multiple responses)



Q. Which country's animation is popular in your country? Please select the top three in order (excluding your country).

Note Presented are the top five countries with the highest proportion of first-choice responses.

04 Consumption Volume



Thailand, India, and Vietnam spent fewer than 20 hours per month consuming Korean animation.
The US ranked in the middle with 7.8 hours.

The average monthly viewing hours for Korean animation per person were reported to be 10.8 hours. The countries with high viewing hours for Korean animation included Thailand (19.2 hours), India (17.4 hours), and Vietnam (16.5 hours), all consuming less than 20 hours. The countries with relatively lower viewing hours were Japan (4.2 hours), Canada (4.8 hours), and Australia (5.9 hours). The US ranked 14th, with 7.8 hours, placing it in the middle tier. When

asked about the proportion of Korean animation out of their total animation consumption, the average across the 26 countries was 24.0%. Countries with high proportions included Vietnam (34.4%), Indonesia (31.7%), and Egypt (31.3%), while those with lower proportions were Russia (15.2%), Italy (15.6%), and Germany (15.8%).

Spending was remarkably high in the UAE (18.6 USD), followed by Saudi Arabia (12.3 USD) and the US (12.0 USD). On the other hand, spending was lower in Kazakhstan (0.9 USD), Russia (0.9 USD), and Vietnam (1.7 USD).

Figure 2-135 Comparison of Time Spent on Korean Animation by Country

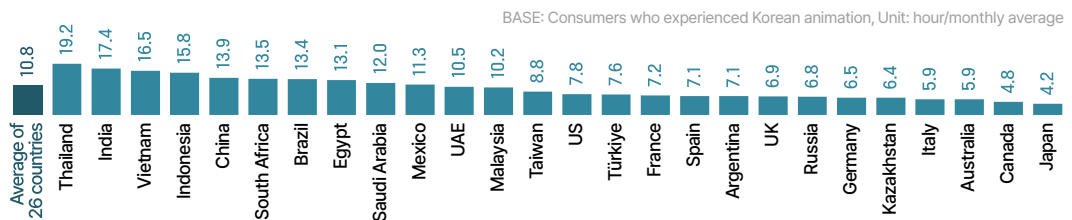


Figure 2-136 Comparison of the Proportion of Korean Animation Consumption by Country

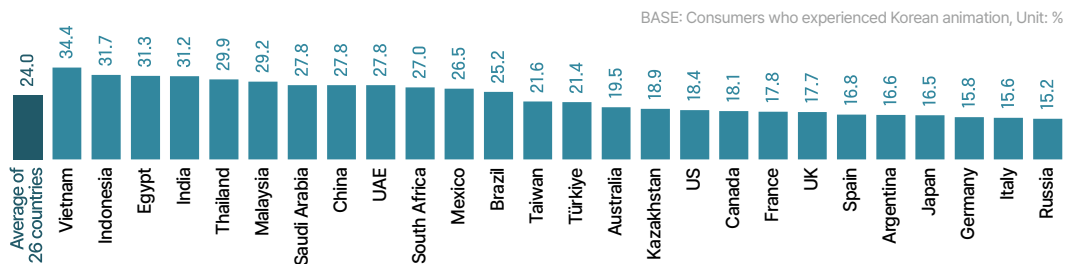
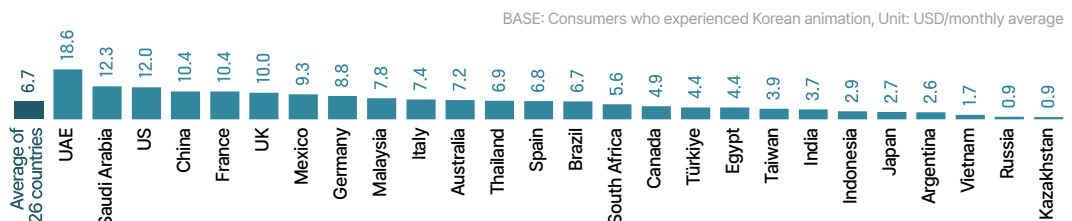


Figure 2-137 Comparison of Expenditure on Korean Animation by Country



Q. What is your usual viewing volume, proportion, and average expenditure for Korean animation? Please provide monthly average viewing hours and expenditure in the past year.

05 Favorability



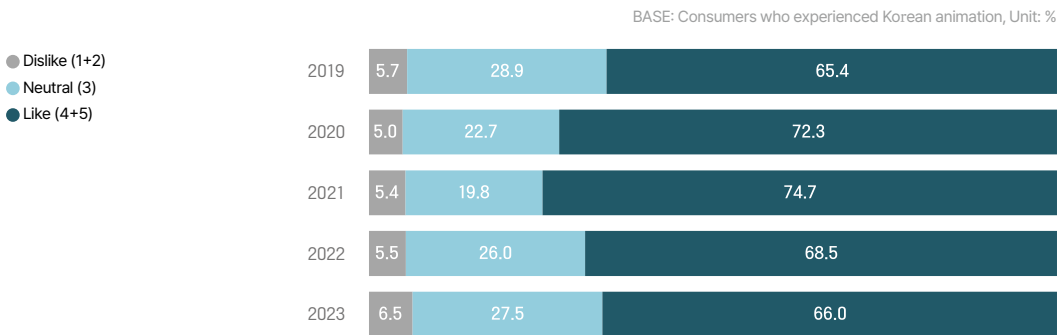
Overall, 66.0% of respondents liked Korean animation.

India and Indonesia recorded high rates for "like."

In total, 66.0% of the survey participants who have experienced Korean animation said they "like[d]" it. The percentage of "neutral" responses decreased, while the "like" responses increased from 2019 to 2021, but both have decreased since 2022.

India (82.6%), Indonesia (80.6%), Saudi Arabia (77.5%), Thailand (77.1%), and the UAE (76.2%) showed high satisfaction rates, while Kazakhstan (34.7%), Russia (41.7%), and Japan (52.6%) had lower rates. In Kazakhstan (54.0%) and Russia (49.6%), more than half or nearly half of the respondents chose "neutral," indicating that a degree of indifference.

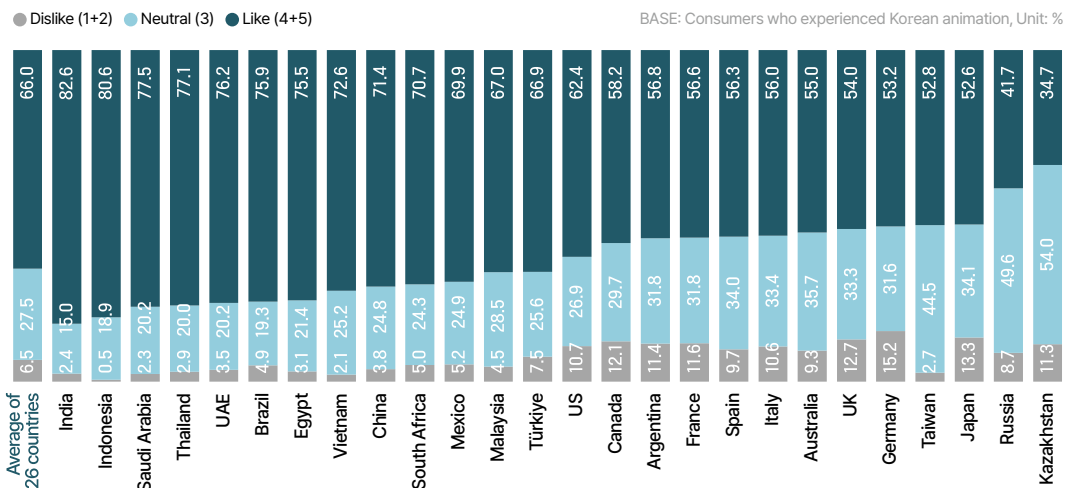
Figure 2-138 Comparison of Favorability Toward Korean Animation Over the Last 5 Years by Year



Q. Overall, how much do you like the Korean animation you have recently watched?

1. Don't like it at all / 2. Don't like it / 3. Neutral / 4. Like it / 5. Like it very much

Figure 2-139 Comparison of Favorability Toward Korean Animation by Country



06 Factors Promoting and Inhibiting Favorability

"Visual beauty" and "characters" were the main reasons for the favorability toward Korean animation. Europe valued "cultural diversity," while the Middle East valued "matching cultural code" and "usability in education" compared to other continents.

The primary reasons for liking Korean animation (with multiple responses allowed) included "Has good visual beauty" (36.5%), "Like the personalities/roles of the characters" (33.0%), and "Like the looks of the characters" (31.8%). Although ranking and percentages varied slightly, the top 1-6 factors were consistently chosen across all five continents.

By continent, the biggest preferred factor promoting favorability was "Has good visual beauty" for all continents except the Middle East, where the biggest factor was "Like the looks of the characters" (35.3%). In the Asia-Pacific region and Americas, there were no significant differences with variations within $\pm 3\%$ compared to the average of 26 countries. However, in Europe, "Covers various materials or genres" (26.3%) was 3.2%p higher than the average, suggesting that Europe was relatively more attracted to Korean animation due to cultural diversity. In the Middle East, "Fits well with my country's/my culture-

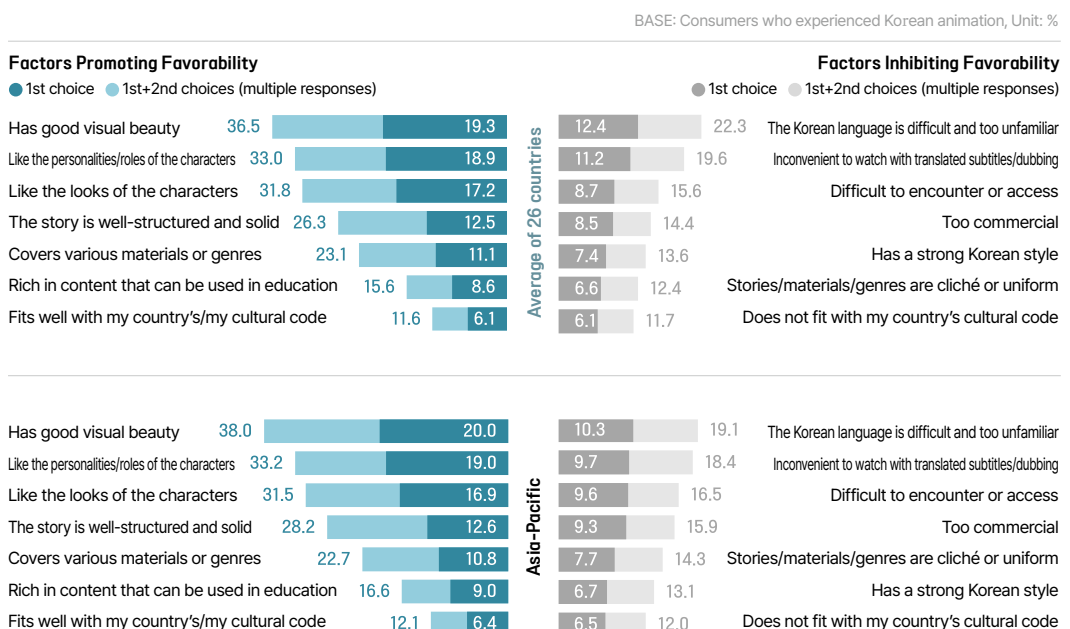
al Code" (17.2%) and "Rich in content that can be used in education" (18.9%) were 3.3-5.6%p higher than the average. In Africa, "Rich in content that can be used in education" (19.7%) and "Contains little violent/revealing content" (14.9%) were 4.1%p and 4.0%p higher than the average, respectively.

"Unfamiliar language" and "subtitles/dubbing" mostly inhibited favorability.

Africa showed unfavorability due to the "strong Korean style."

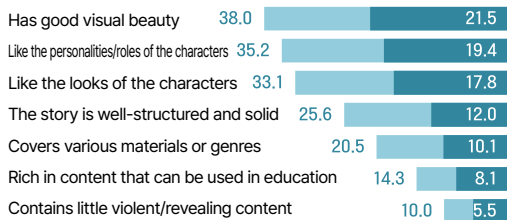
Language barriers were the main deterrents, with "The Korean language is difficult and too unfamiliar" (22.3%) and "Inconvenient to watch with translated subtitles/dubbing" (19.6%) ranking first and second. In particular, in the Middle East and Africa, "Korean language is difficult and too unfamiliar" scored 28.8% and 29.5%, respectively, which were 6.5%p and 7.2%p higher than the average, suggesting a relatively high level of discomfort. Africa also showed a higher percentage for "Has a strong Korean style" (17.4%) compared to other continents.

Figure 2-140 Comparison of Factors Promoting and Inhibiting Favorability Toward Korean Animation by Continent



Factors Promoting Favorability

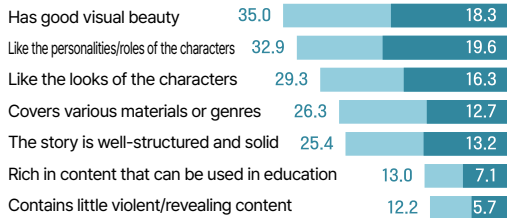
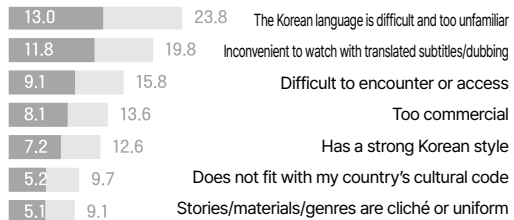
● 1st choice ● 1st+2nd choices (multiple responses)



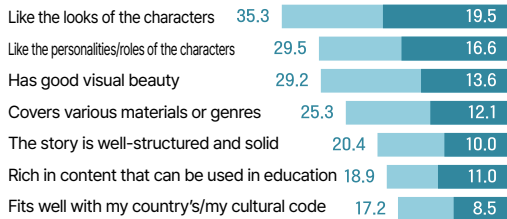
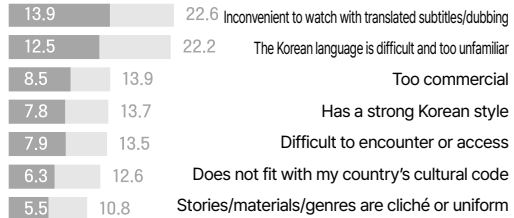
Americas

Factors Inhibiting Favorability

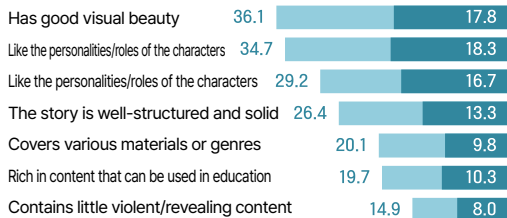
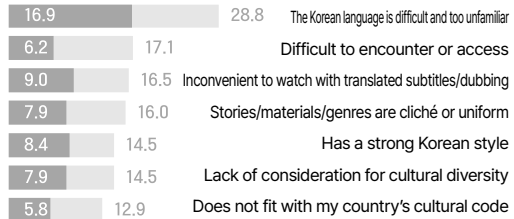
● 1st choice ● 1st+2nd choices (multiple responses)



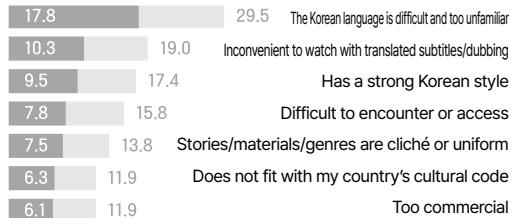
Europe



Middle East



Africa



Q. What do you think are the biggest factors promoting favorability toward Korean animation? Please select up to the second choice in order.

Q. What do you think are the factors inhibiting favorability toward Korean animation? Please select up to the second choice in order.

07 Preferred Animation



"Larva" was chosen as the most preferred animation.

"The Haunted House" was especially popular in Europe and Africa.

When asked about their current favorite animation (based on first-choice responses), "Larva" ranked first with 7.3%, moving up two ranks from 2022. "The Haunted House," which entered the rankings at third

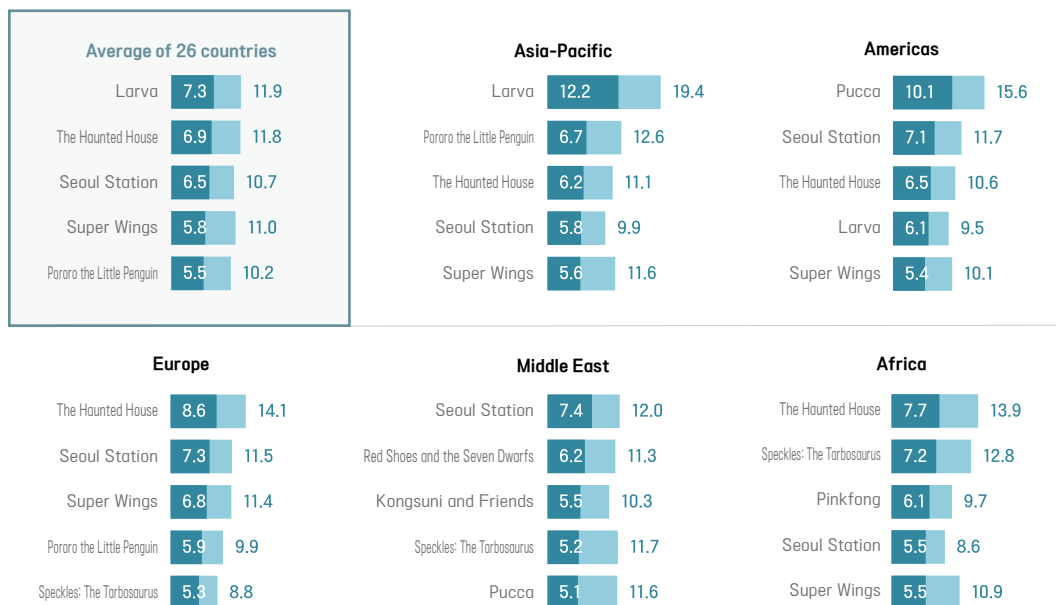
place in 2021, ranked second in 2023 with 6.9%, which was followed by "Seoul Station" (6.5%).

By continent, the most popular animation was "Larva" (12.2%) in Asia-Pacific, "Pucca" (10.1%) in the Americas, "The Haunted House" in Europe (8.6%) and Africa (7.7%), and "Seoul Station" (7.4%) in the Middle East.

Figure 2-141 Comparison of top Five Preferred Korean Animation Works by Continent

BASE: Consumers who experienced Korean animation, Unit: %

● 1st choice ● 1st+2nd choices (multiple responses)



Q. What is your favorite Korean animation among those you watched this year?

08 Willingness to Pay



In total, 37.3% of respondents were willing to pay for Korean animation.

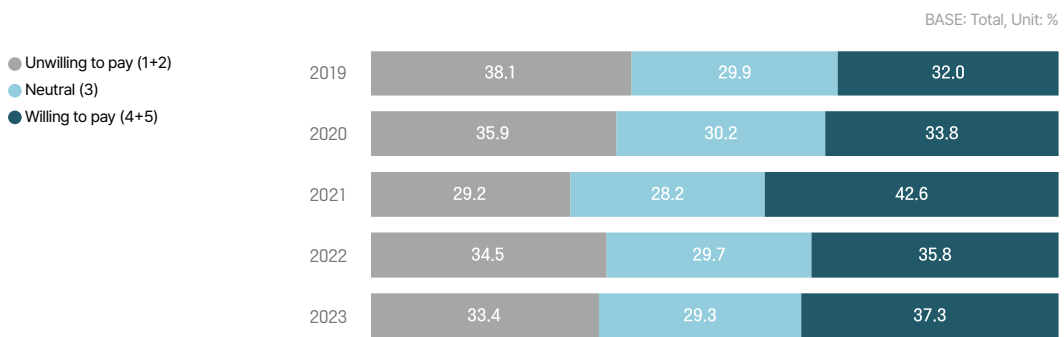
Egypt, India, and Saudi Arabia demonstrated high willingness to pay, whereas Kazakhstan, Japan, and Russia showed low willingness to pay.

When asked whether they were willing to pay for Korean animation, 37.3% of respondents expressed interest, while 33.4% stated that they would not, showing a 3.9%p difference between the two.

Over the past five years, the “willing to pay” rate increased significantly from 32.0–33.8% in 2019–2020 to 42.6% in 2021, which then dipped to around 35% in 2022–2023.

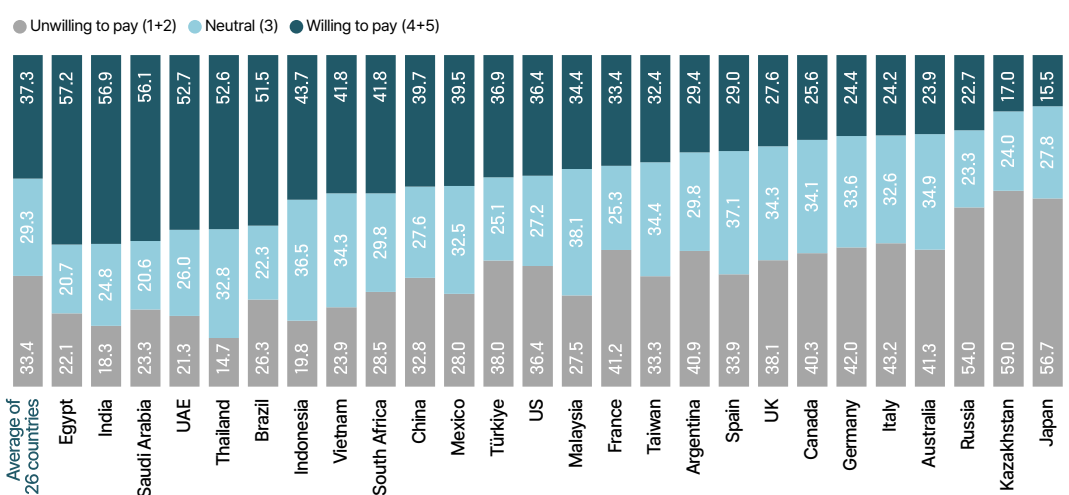
Egypt (57.2%), India (56.9%), and Saudi Arabia (56.1%) showed high willingness to pay, whereas Kazakhstan (59.0%), Japan (56.7%), and Russia (54.0%) had a notably higher percentage of respondents “unwilling to pay” compared to other countries.

Figure 2-142 Comparison of the Willingness to pay for Korean Animation Over the Last 5 Years by Year



Q. Please indicate the level of your willingness to pay for Korean cultural content in the future for each item.
1. Strongly disagree / 2. Disagree / 3. Neutral / 4. Agree / 5. Strongly agree

Figure 2-143 Comparison of the Willingness to pay for Korean Animation by Country



09 Willingness to Recommend



India and Vietnam and those in their 20s–30s were eager to recommend.

Japan, Germany, and the UK were less enthusiastic.

In total, 68.0% of those with experience watching Korean animation said that they would “recommend” it to others, while 25.6% were “neutral,” and 6.3% were “unwilling to recommend.” Countries most positive about recommending were India (81.2%)

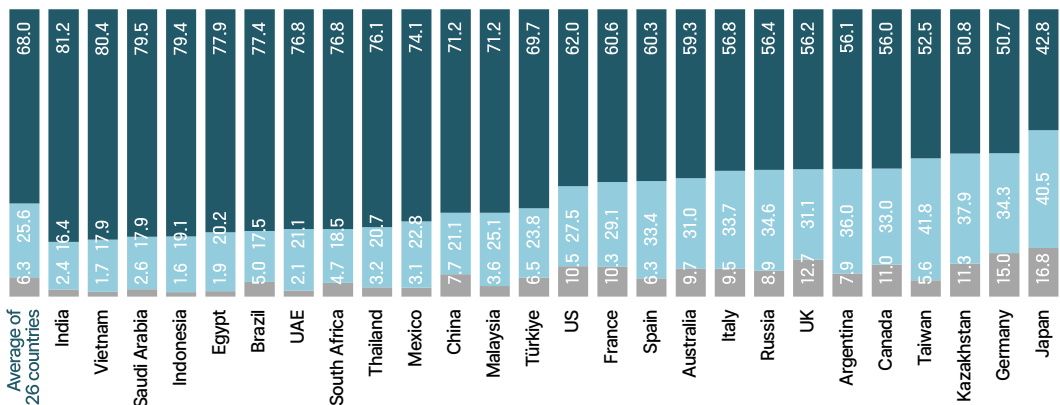
, Vietnam (80.4%), and Saudi Arabia (79.5%), with a recommendation rate around 80%.

Japan (42.8%), Germany (50.7%), and Kazakhstan (50.8%) showed relatively low willingness to recommend. There was no significant difference between men (68.3%) and women (67.7%) in the levels of willingness, and those in their 20s and 30s (70.3% and 70.8%, respectively) were the most positive about recommending Korean animation.

Figure 2-144 Comparison of the Willingness to Recommend Korean Animation by Country

BASE: Consumers who experienced Korean animation, Unit: %

● Unwilling to recommend (1+2) ● Neutral (3) ● Willing to recommend (4+5)

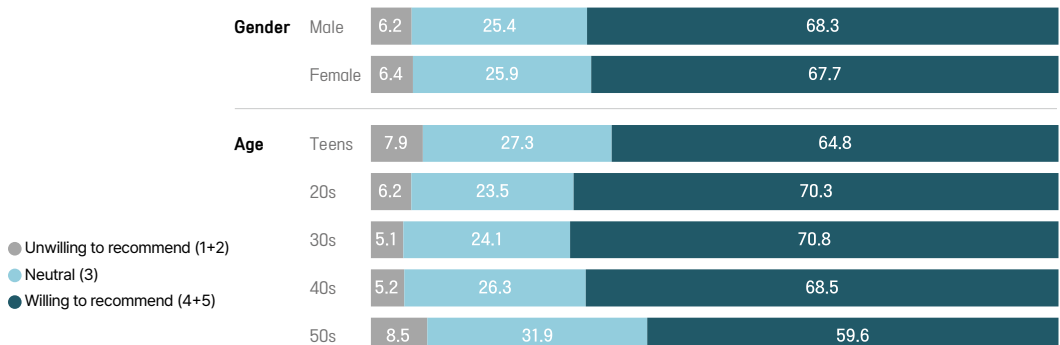


Q. Are you willing to recommend Korean animation you have recently experienced to others?

1. Definitely do not recommend / 2. Do not recommend / 3. Neutral / 4. Recommend / 5. Definitely recommend

Figure 2-145 Comparison of the Willingness to Recommend Korean Animation by Gender and age

BASE: Consumers who experienced Korean animation, Unit: %



10 Ease of Use



Among respondents, 62.8% found Korean animation easy to access.

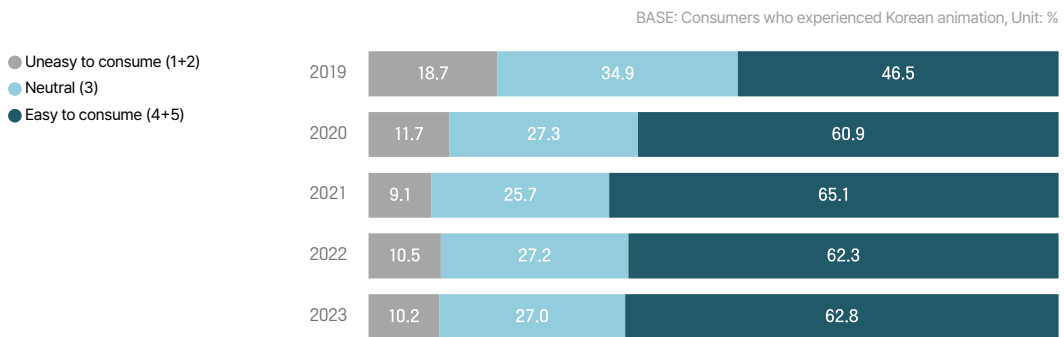
Accessibility has improved since 2020.

Indonesia and Saudi Arabia particularly thought Korean animation was easy to access.

Overall, 62.8% of respondents believed that Korean animation is "easy to consume," while 10.2% thought it is "not easy to consume." The proportion of respondents who perceived it as "easy to consume"

increased significantly in 2020 from 46.5% in 2019, remaining at over 60% until 2023. Countries with high percentage describing Korean animation as "easy to consume" were those in Southeast Asia and the Middle East, such as Indonesia (80.2%), Saudi Arabia (77.5%), and Egypt (76.2%), while Kazakhstan (37.9%) and Europe (e.g., Russia 43.3%, Italy 46.2%) perceived that Korean animation is not easy to consume.

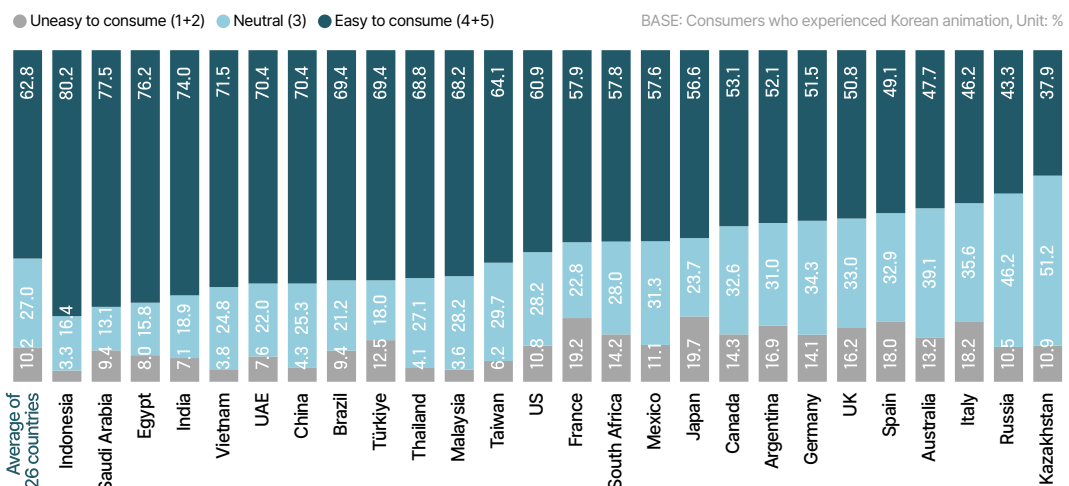
Figure 2-146 Comparison of the Ease of Consuming Korean Animation Over the Last 5 Years by Year



Q. When you are about to watch Korean animation, is it easy to access the Korean animation you want?

1. Strongly disagree / 2. Disagree / 3. Neutral / 4. Agree / 5. Strongly agree

Figure 2-147 Comparison of the Ease of Consuming Korean Animation by Country



11 Access Channels



Nearly 90% accessed Korean animation through "online/mobile" channels.

The Asia-Pacific region, the Middle East, and Africa also actively used "TV."

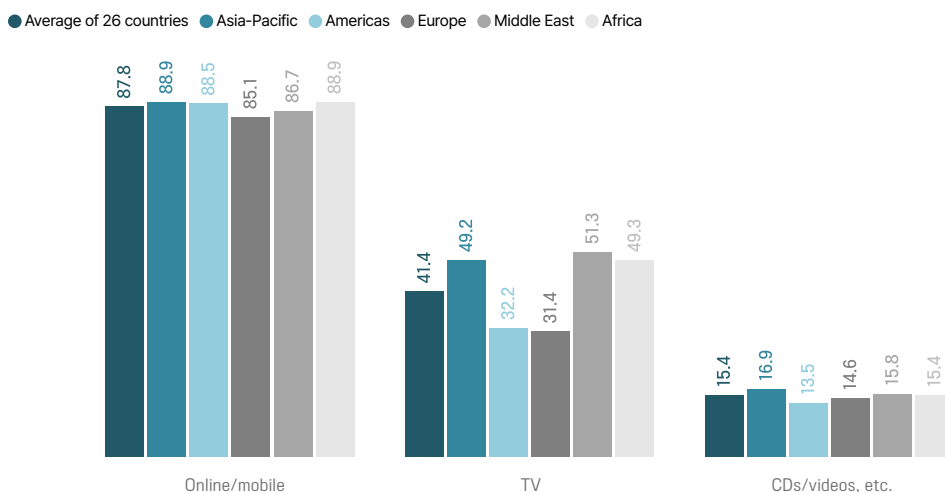
Access channels for Korean animation were mainly "online/mobile" (87.8%), and Asia-Pacific (49.2%)

, the Middle East (51.3%), and Africa (49.3%) were also actively using "TV" compared to the Americas and Europe.

Europe generally exhibited low access rates for all channels compared to other continents, such as "online/mobile" (85.1%), "TV" (31.4%), and "CDs/videos, etc." (14.6%).

Figure 2-148 Comparison of Korean Animation Access Channels by Continent

BASE: Consumers who experienced Korean animation, Unit: % of multiple responses



Q. Please select all the channels through which you usually access Korean animation.



12 Online/mobile Access Platforms



The Asia-Pacific region used "YouTube," and the Americas used "Netflix" to access Korean animation.

In total, 64.8% of respondents who watched Korean animation via online/mobile platforms used "YouTube," followed by "Netflix" at 60.4%. "YouTube" was 4.4%p higher than "Netflix," but the gap widened when including "YouTube Premium" (22.9%). "Amazon Prime" (29.1%) and "Disney Plus" (25.0%)

still fell short of half of the popularity of "YouTube." By region, "YouTube" ranked first in Asia-Pacific (68.4%), the Middle East (67.2%), and Africa (70.8%), while "Netflix" took the lead in the Americas (71.1%) and Europe (60.8%).

Table 2 -14 Changes in Online/mobile Access Platforms for Korean Animation Over the Last 6 Years by Year

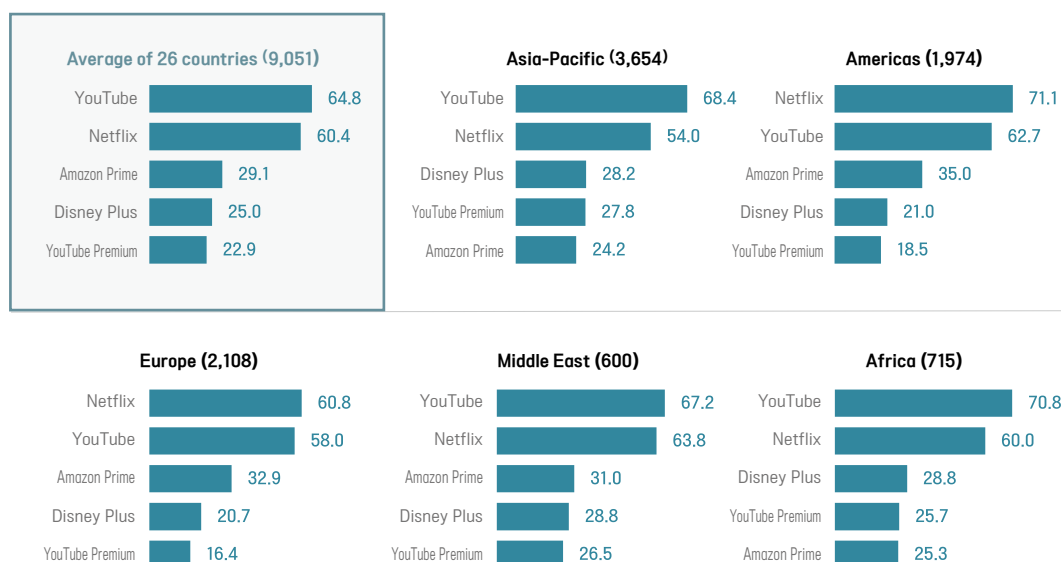
BASE: Online/mobile platform users for Korean animation, Unit: % of multiple responses

Category	2018	2019	2020	2021	2022	2023
YouTube	82.6	80.1	78.0	72.7	66.1	64.8
Netflix	44.2	39.1	53.2	59.4	58.7	60.4
Amazon Prime	17.8	16.8	24.1	29.8	27.5	29.1
Disney Plus	-	-	-	-	24.4	25.0
YouTube Premium	17.2	12.6	22.8	27.9	20.1	22.9

Q. Please select all the online/mobile platforms you primarily use to watch Korean animation. Exclude edited short videos.

Figure 2-149 Comparison of Online/mobile Access Platforms for Korean Animation by Continent

BASE: Online/mobile platform users for Korean animation, No. of cases= (), Unit: % of multiple responses, top five



6

Publications

Books/e-books

01 Experience Rate



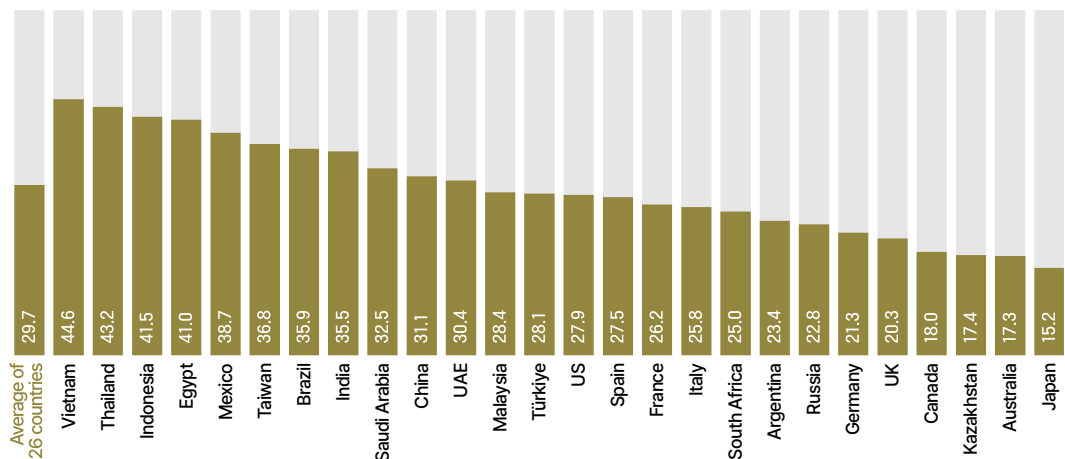
Three out of 10 respondents have experienced Korean publications.

The experience rate for Korean publications was 29.7%, which was 0.8%p higher than in 2022. The publication experience rate was the lowest among 11 types of Korean cultural content.

The countries with high experience rates included Vietnam (44.6%), Thailand (43.2%), and Indonesia (41.5%), while those with low experience rates were Japan (15.2%), Australia (17.3%), and Kazakhstan (17.4%). The experience rates exceeded 30% among those in their 20s and 30s, while they did not among those in their teens, 40s, and 50s.

Figure 2-150 Comparison of Korean Publication Experience Rates by Country

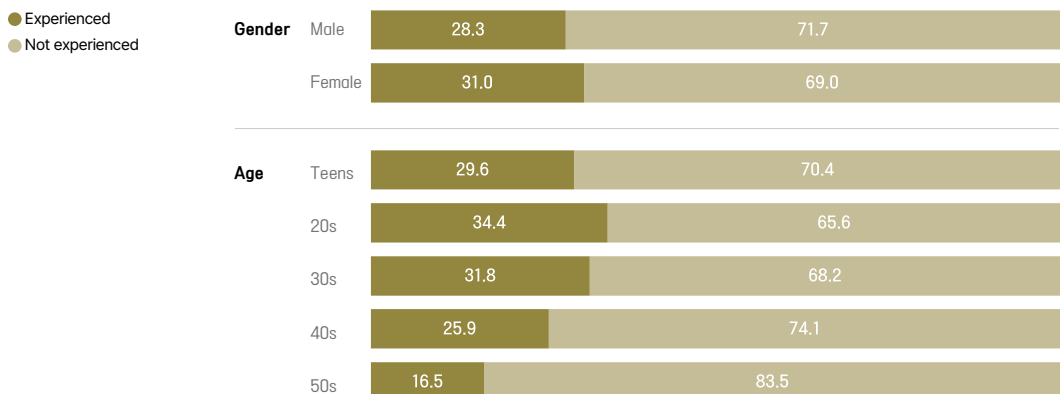
BASE: Total, Unit: %



Q. Please select all types of Korean cultural content you have experienced.

Figure 2-151 Comparison of Korean Publication Experience Rates by Gender and age

BASE: Total, Unit: %



02 Popularity



The percentage of respondents who reported that Korean publication was “popular among a niche audience” was highest at 29.6%.

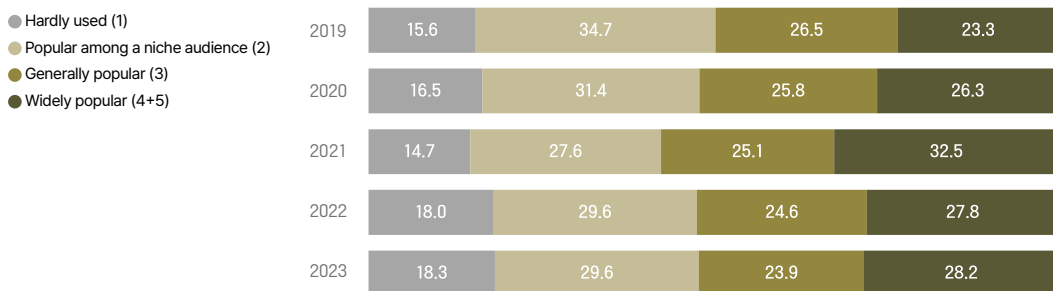
When asked how popular Korean publications are in their country, 29.6% of consumers with Hallyu experience responded that they are “popular among a niche audience,” 28.2% stated that they are “widely popular,” and 18.3% said that they are

“hardly used.”

The countries with high responses for “widely popular” were Saudi Arabia (46.8%), Egypt (45.2%), and Vietnam (38.9%), and those with high responses for “popular among a niche audience” were Canada (38.8%), Australia (36.5%), and South Africa (36.0%). Japan (33.5%) and South Africa (26.4%) showed relatively high rates for “hardly used.”

Figure 2-152 Comparison of Korean Publication Popularity Over the Last 5 Years by Year

BASE: Total, Unit: %

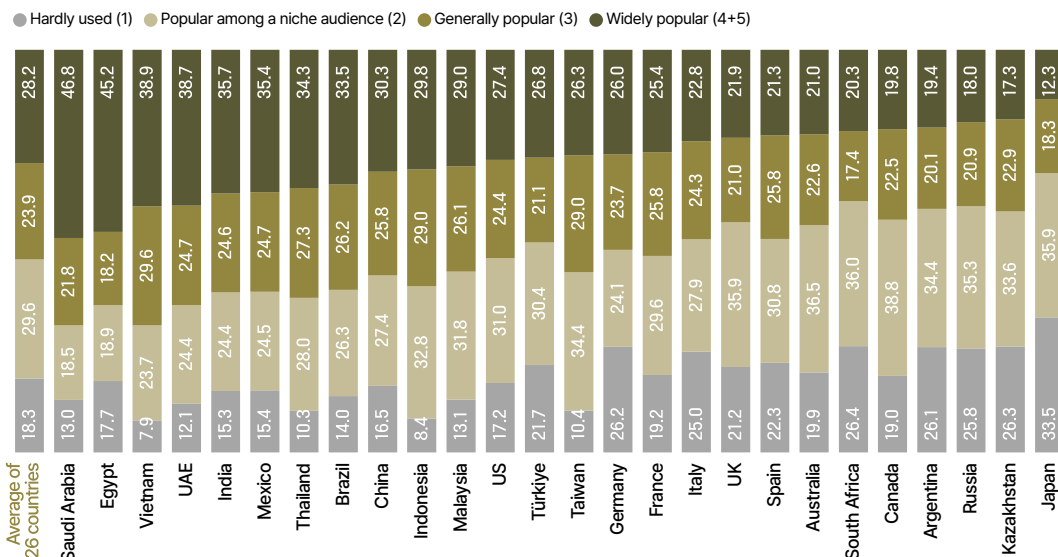


Q. How popular do you think Hallyu is in your country? Please indicate to what extent you agree.

1. Hardly used by anyone / 2. Popular among a niche audience / 3. Known by a niche audience and the general public / 4. Widely known among the general public with related products being sold / 5. Widely popular among the general public with smooth sales of related products

Figure 2-153 Comparison of Korean Publication Popularity by Country

BASE: Total, Unit: %



03 Popular Foreign Publications



The most popular foreign publications were from “the US,” followed by “Korea.”

“The US” and “Korea” were competing by a narrow margin in Asia-Pacific and the Middle East.

When asked which country the most popular foreign publications in their country are from (based on first-choice responses), most respondents selected “the US” (29.5%), followed by “Korea” (19.7%). In the Middle East, “Korea” was the most popular with 20.9%, surpassing “the US” (18.3%) by 2.6%p. “Korea” ranked second following “the US” in Asia-Pacific (24.1%), the Americas (17.8%),

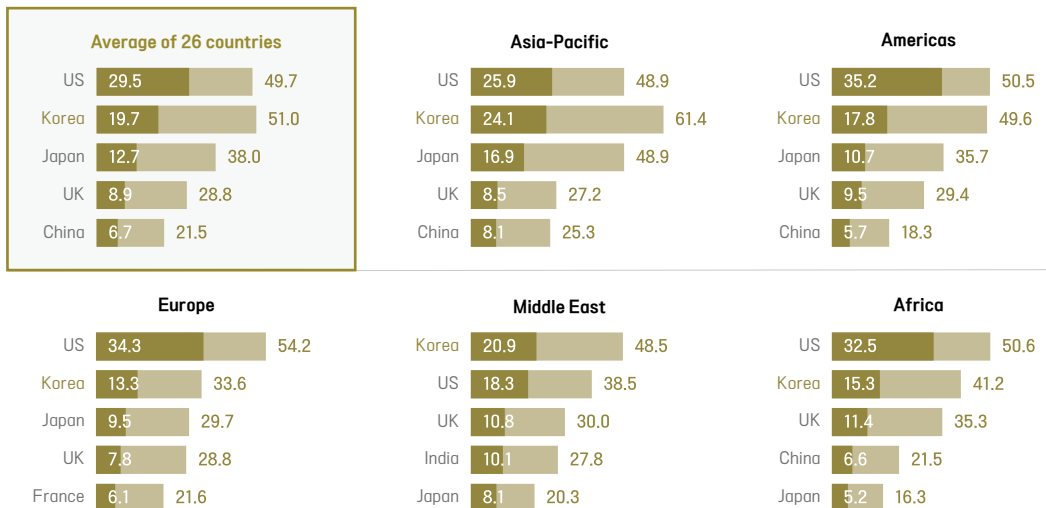
Europe (13.3%), and Africa (15.3%).

When considering multiple responses that allowed respondents to choose up to their third choice, the rate for “Korea” was higher than that for “the US” in Asia-Pacific, unlike the result for the first choice. In the Americas, the gap was narrower than that between “the US” and “Korea” in first-choice responses. Thus, while Korea was included in the range of preferred countries for publications by consumers who have experienced Korean publications, it had relatively low priority in terms of choice.

Figure 2-154 Popular Foreign Publications

BASE: Consumers who experienced Korean publications, Unit: %

● 1st choice ● 1st+2nd+3rd choices (multiple responses)



Q. Which country's publications are popular in your country? Please select the top three in order (excluding your country).

Note Presented are the top five countries with the highest proportion of first-choice responses (in order).

Local News

- “The Korean Cultural Center in Egypt held a Korean Literature Month event in March–April 2023. The translated version of Sohn Won-Pyung’s novel *Almond* was introduced, but it received less attention compared to dramas and movies. Most English translations sold in Egypt are magazines related to BTS, Korean language textbooks, and travel guide books.” (Egypt KOTRA Cairo trade officer)
- “Korean books have formed their own market due to the Korean language learning boom. It is generally difficult to find translated books, but things got better in literature with the recent increase in English translations. *Beyond the Story: 10-Year Record of BTS* was so popular, selling 25,000 copies on the first day of release.” (India KOTRA New Delhi/Mumbai trade officer)
- “Korea was invited as the guest of honor for the first time in the Arab world at the Sharjah International Book Fair in November 2023. Han Kang’s works are also widely known.” (UAE KOTRA Dubai trade officer)

04 Consumption Volume



Korean publications were used for an average of 10 hours per month, with India spending the most time at 16 hours.

Consumers who experienced Korean publications reported an average monthly usage time of 10.7 hours per person. The countries with high usage time were India (16.1 hours), Indonesia (13.7 hours), and China (13.4 hours), while Japan (4.8 hours), Italy (5.0 hours), and Canada (5.5 hours) had lower usage times.

When asked about the proportion of Korean publications in their total publication consumption, the average of the 26 countries was 24.3%. The highest proportions were in the UAE (31.7%), Malaysia (31.5%), and India (31.3%), while the lowest were in Italy (15.7%), Spain (16.0%), and Canada (16.6%). In terms of expenditure, the Middle East (the UAE and Saudi Arabia), the Anglosphere (the UK, the US, and Australia), and Europe generally ranked higher, whereas Asia and Russia ranked lower.

Figure 2-155 Comparison of Time Spent on Korean Publications by Country

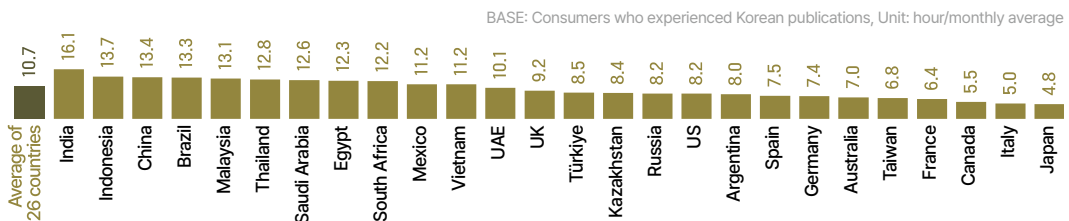


Figure 2-156 Comparison of the Proportion of Korean Publication Consumption by Country

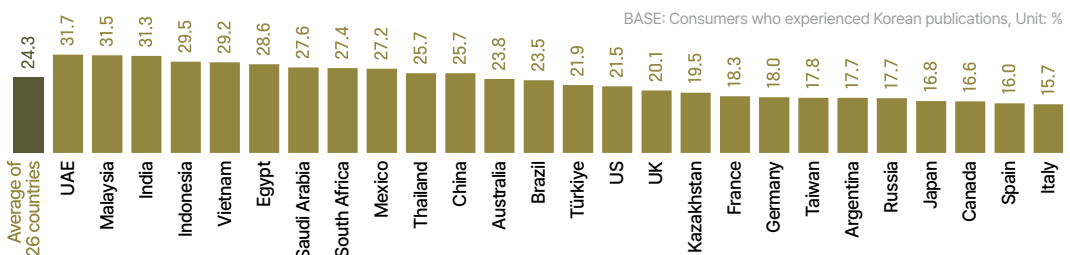
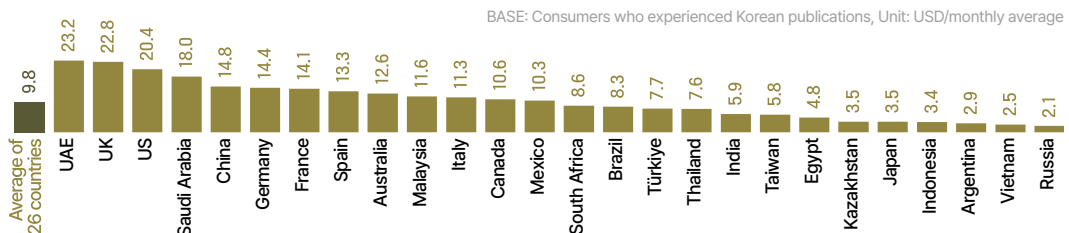


Figure 2-157 Comparison of Expenditure on Korean Publications by Country



Q. What is your usual consumption volume, proportion, and average expenditure for Korean publications? Please provide monthly average viewing hours and expenditure in the past year.

05 Favorability

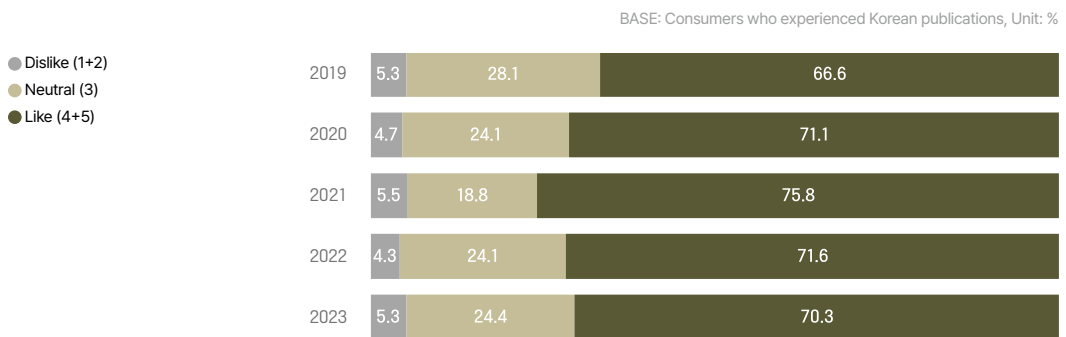


In total, 70.3% of respondents liked Korean publications.

Overall, 70.3% of consumers who had experienced Korean publications stated that they “like[d]” them. This percentage entered the 70% range, rising from 66.6% in 2019 to 71.1% in 2020,

and remained in that range until 2023. Countries with high favorability rates included India (87.2%), the UAE (85.8%), and Egypt (82.5%), while those with low rates were Kazakhstan (43.3%), France (52.0%), and Russia (54.0%).

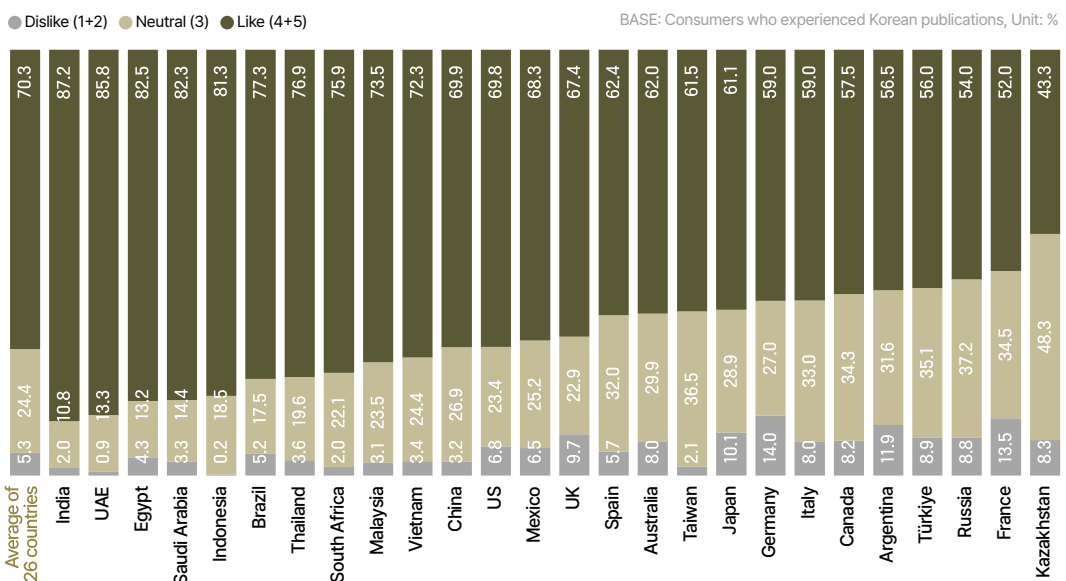
Figure 2-158 Comparison of Favorability Toward Korean Publications Over the Last 5 Years by Year



Q. Overall, how much do you like the Korean publications you have recently read?

1. Don't like them at all / 2. Don't like them / 3. Neutral / 4. Like them / 5. Like them very much

Figure 2-159 Comparison of Favorability Toward Korean Publications by Country



06 Factors Promoting and Inhibiting Favorability

The Asia-Pacific region and the Middle East liked Korean publications because they were “originals for Hallyu content.”

Europe was attracted to “diversity” Korean publications offered.

The primary reason for liking Korean publications (based on multiple responses) was “The stories are good” (36.8%), ranking first in all regions. By continent, “The original for popular Hallyu content” ranked second in Asia-Pacific (27.3%) and the Middle East (26.9%), with higher rates compared to other continents. “Increasing interest in/demand for learning the Korean language” was higher in Asia-Pacific (18.3%), the Middle East (19.6%), and Africa (21.5%) compared to other continents, and “Award-winning work” (Asia-Pacific 13.9%) and “Like the author” (the Americas and Europe 16.3%, respectively, the Middle East 21.8%) were among the ranks for some continents. “Covers various materials or genres” showed percentages of 25.5% and 24.8% in Asia-Pacific and Europe, respectively. This suggests that the Asia-Pacific region and the Middle East were more attracted to Korean publications because they

were the originals for Hallyu content. Simultaneously, there was a certain level of interest in learning Korean language and in Korean authors.

“Difficult to purchase” and “The translation is inadequate” were the main reasons for reducing favorability.

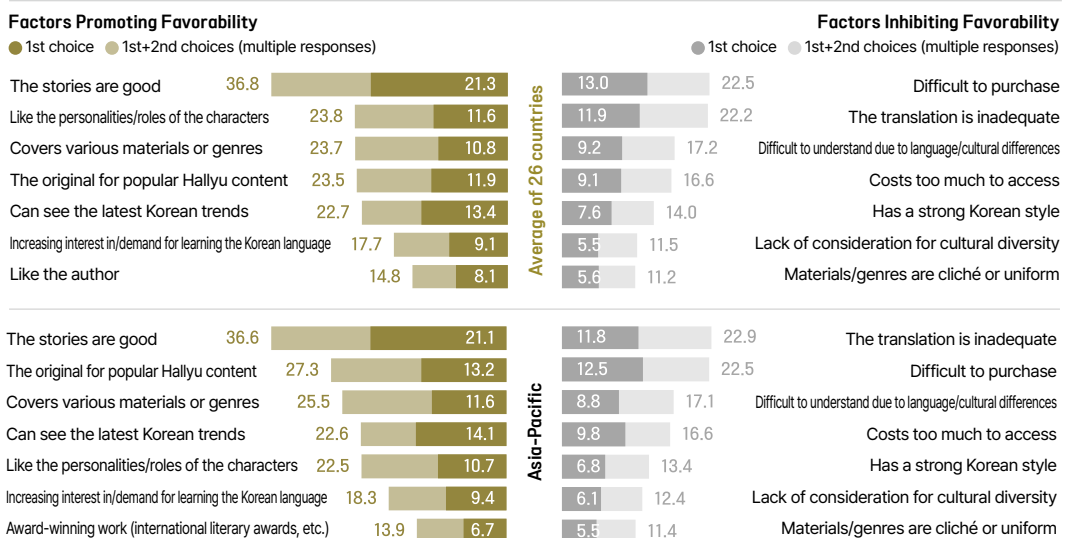
“Cultural differences” inhibited favorability in the Middle East and Africa.

When asked about factors inhibiting favorability, “Difficult to purchase” (22.5%) and “The translation is inadequate” (22.2%) ranked first and second, exceeding 20%. These factors were included among the top two on all five continents, although the ranks may vary, indicating considerable difficulties in translation and purchase, especially in Africa, where the percentage was higher than others.

“Has a strong Korean style” (17.8%) and “Lack of consideration for cultural diversity” (17.2%) in the Middle East and “Has a strong Korean style” (19.9%) in Africa exhibited higher percentages than on other continents, suggesting that low cultural intimacy further inhibited favorability.

Figure 2-160 Comparison of Factors Promoting and Inhibiting Favorability Toward Korean Publications by Continent

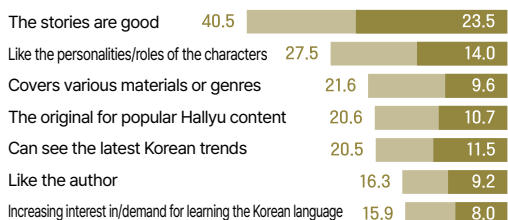
BASE: Consumers who experienced Korean publications, Unit: %



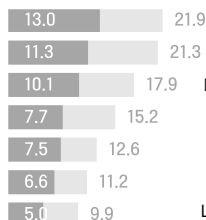
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Factors Promoting Favorability

● 1st choice ● 1st+2nd choices (multiple responses)

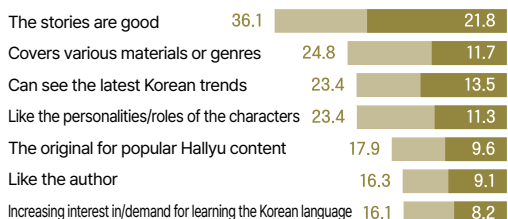
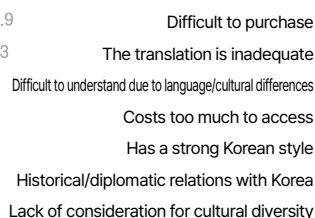


Americas

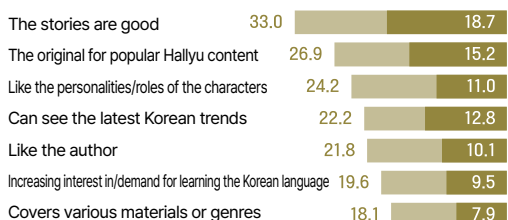
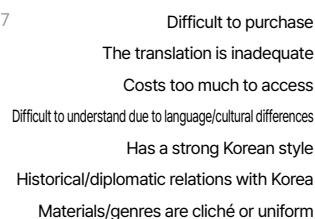
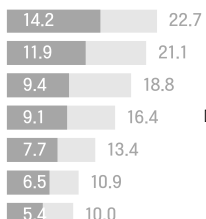


Factors Inhibiting Favorability

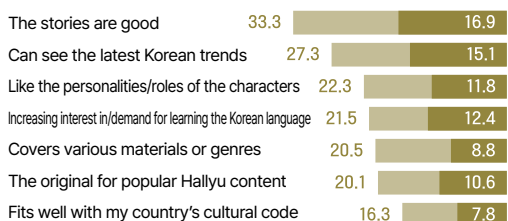
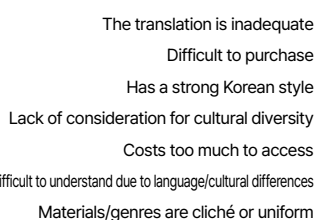
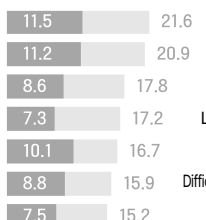
● 1st choice ● 1st+2nd choices (multiple responses)



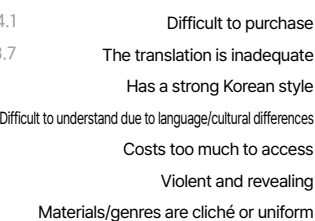
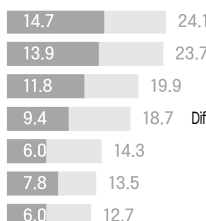
Europe



Middle East



Africa



Q. What do you think are the biggest factors promoting favorability toward Korean publications? Please select up to the second choice in order.

Q. What do you think are the factors inhibiting favorability toward Korean publications? Please select up to the second choice in order.

07 Genres Used



The Asia-Pacific region frequently enjoyed different genres.

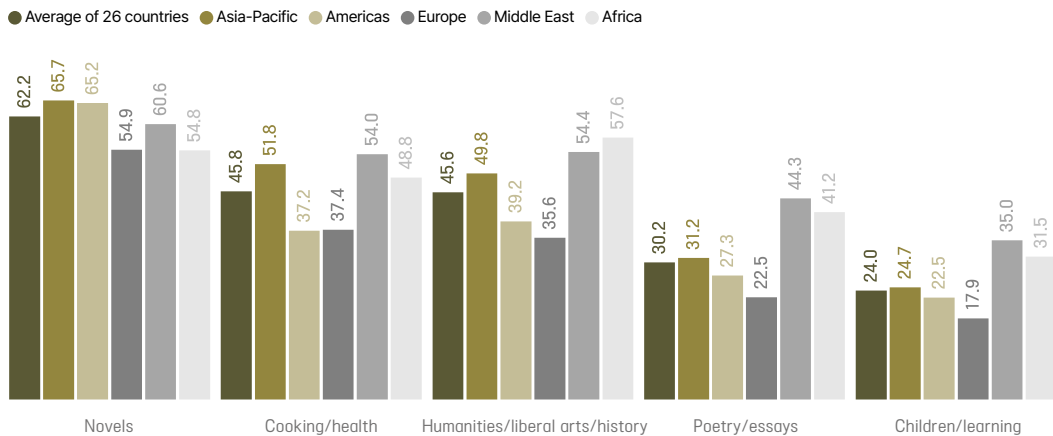
The Middle East and Africa particularly showed high usage rates for “children/learning,” indicating strong enthusiasm for the Korean language.

Among the genres of Korean publications that users have experienced, “novels” ranked the highest at 62.2%, followed by “cooking/health” (45.8%) and “humanities/liberal arts/history” (45.6%). The

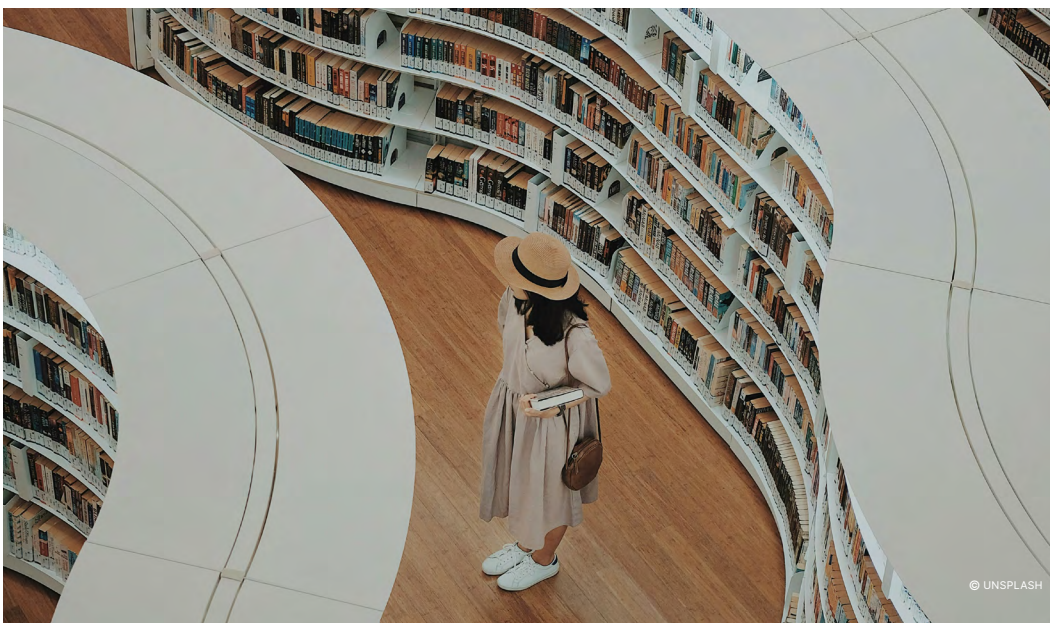
Asia-Pacific region generally showed higher percentages for all genres, including “novels” and “cooking/health,” than the average of 26 countries. The Middle East and Africa showed higher-than-average rates for “cooking/health,” “humanities/liberal arts/history,” “poetry/essays,” and “children/learning.” The Middle East and Africa exhibited high percentages across all genres except novels, reflecting strong interest in Korean publications and enthusiasm for the Korean language.

Figure 2-161 Comparison of Korean Publication Genres Experienced by Continent

BASE: Consumers who experienced Korean publications, Unit: % of multiple responses



Q. Which genres of Korean publications have you experienced? Please select all.



08 Willingness to pay



Three out of 10 respondents were willing to pay; four were not willing to pay.

Willingness to pay in Egypt and Saudi Arabia exceeded 50%.

In 10 countries, including Japan and Kazakhstan, there were more respondents unwilling to pay than those willing to pay.

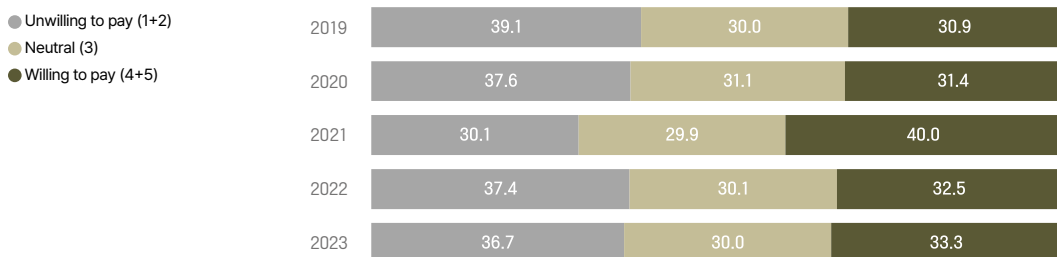
When asked about their willingness to pay for Korean publications, 33.3% responded that they were "willing to pay," indicating three out of 10 respondents were positive toward Korean publications. Meanwhile, 30.0% of respondents were "neutral," and 36.7% were "unwilling to pay." The proportion of people indicating "willingness to pay" was the highest in 2021 over the past five

years but has since declined to the 30% range.

Egypt (52.2%) and Saudi Arabia (51.5%) had the highest percentages of respondents who were "willing to pay." Ten countries, including Egypt, Saudi Arabia, and India, showed a higher proportion of people indicating "willingness to pay" compared to those indicating "unwillingness to pay." However, Malaysia and Spain had higher rates of "neutral" responses compared to "willing to pay" and "unwilling to pay," suggesting they were generally indifferent toward Korean publications. The countries where the rates for "unwilling to pay" were higher than those for "neutral" and "willing to pay" were Japan (56.0%), Kazakhstan (55.4%), and Russia (54.3%).

Figure 2-162 Comparison of the Willingness to pay for Korean Publications Over the Last 5 Years by Year

BASE: Total, Unit: %



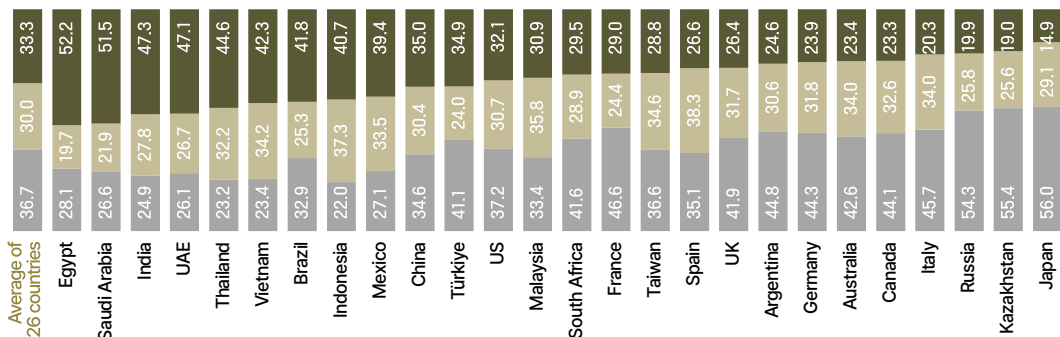
Q. Please indicate the level of your willingness to pay for Korean cultural content in the future for each item.

1. Strongly disagree / 2. Disagree / 3. Neutral / 4. Agree / 5. Strongly agree

Figure 2-163 Comparison of the Willingness to pay for Korean Publications by Country

BASE: Total, Unit: %

● Unwilling to pay (1+2) ● Neutral (3) ● Willing to pay (4+5)



09 Willingness to Recommend



The UAE, Saudi Arabia, and India were more willing to recommend Korean publications.

Respondents in their teens were less willing to recommend Korean publications (63.1%) than those in their 20s–40s.

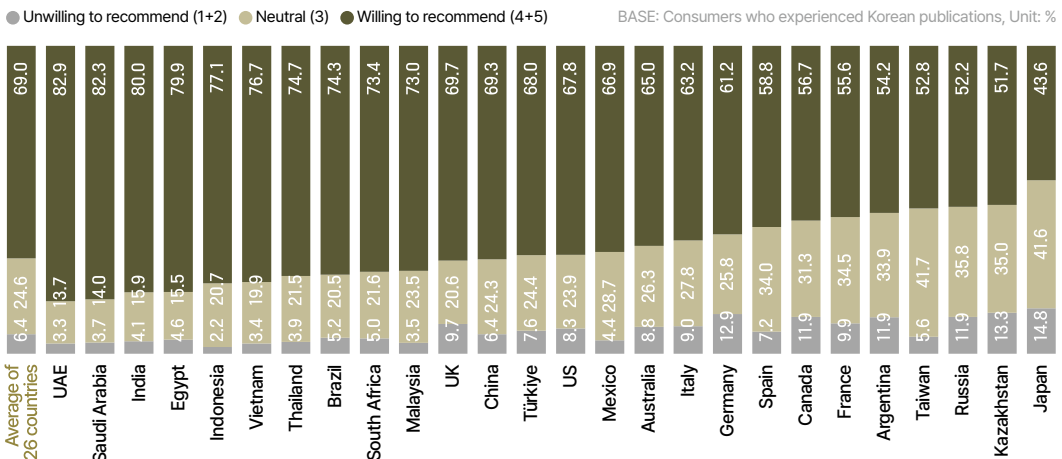
In total, 69.0% of consumers who experienced Korean publications responded that they were “willing to recommend” them, while 24.6% were “neutral,” and 6.4% were “unwilling to recom-

mend.”

The countries most positive toward recommending were the UAE (82.9%), Saudi Arabia (82.3%), and India (80.0%), whereas Japan (14.8%), Kazakhstan (13.3%), and Germany (12.9%) had a higher proportion of people indicating they were “unwilling to recommend” compared to other countries.

By age group, respondents in their teens (63.1%), who had low experience and favorability rates, also showed relatively low willingness to recommend.

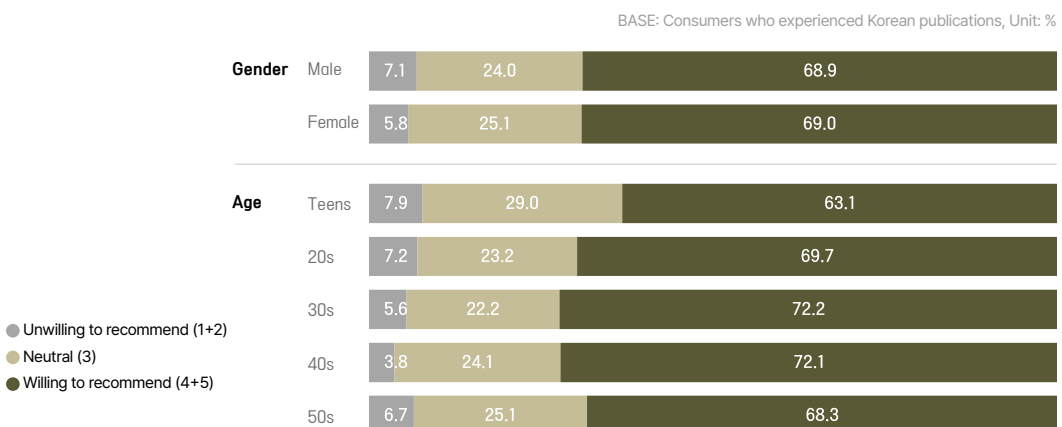
Figure 2-164 Comparison of the Willingness to Recommend Korean Publications by Country



Q. Are you willing to recommend Korean publications you have recently experienced to others?

1. Definitely do not recommend / 2. Do not recommend / 3. Neutral / 4. Recommend / 5. Definitely recommend

Figure 2-165 Comparison of the Willingness to Recommend Korean Publications by Gender and age



10 Ease of Use



Among the respondents, 59.9% found Korean publications “easy to consume,” and 40.1% found them difficult or were neutral.

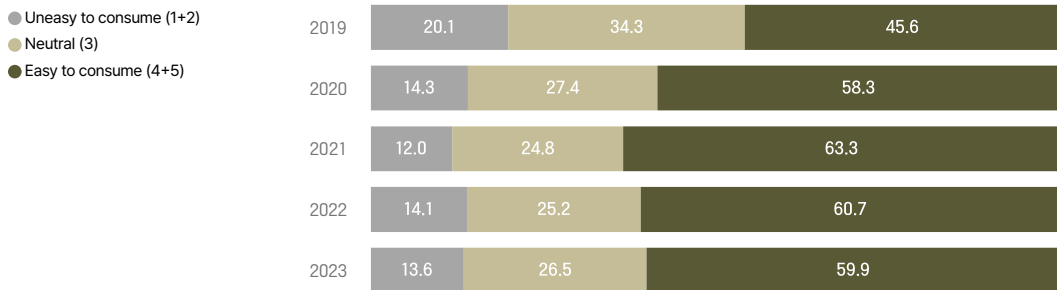
In total, 59.9% of respondents found Korean publications “easy to consume,” which is the lowest rate among 11 types of Korean cultural content. Meanwhile, 13.6% found them “uneasy to use,” and 26.5% answered “neutral,” with a total of 40.1% indicating it

was either difficult to use or neutral.

The countries where a high proportion of people found Korean publications “easy to consume” were Egypt (74.3%), Saudi Arabia (71.6%), and the UAE (71.6%). Eight countries, including Argentina (26.6%), Kazakhstan (23.3%), and France (22.4%), had more than 20% of respondents reporting Korean publications were “uneasy to consume.”

Figure 2-166 Comparison of the Ease of Consuming Korean Publications Over the Last 5 Years by Year

BASE: Consumers who experienced Korean publications, Unit: %

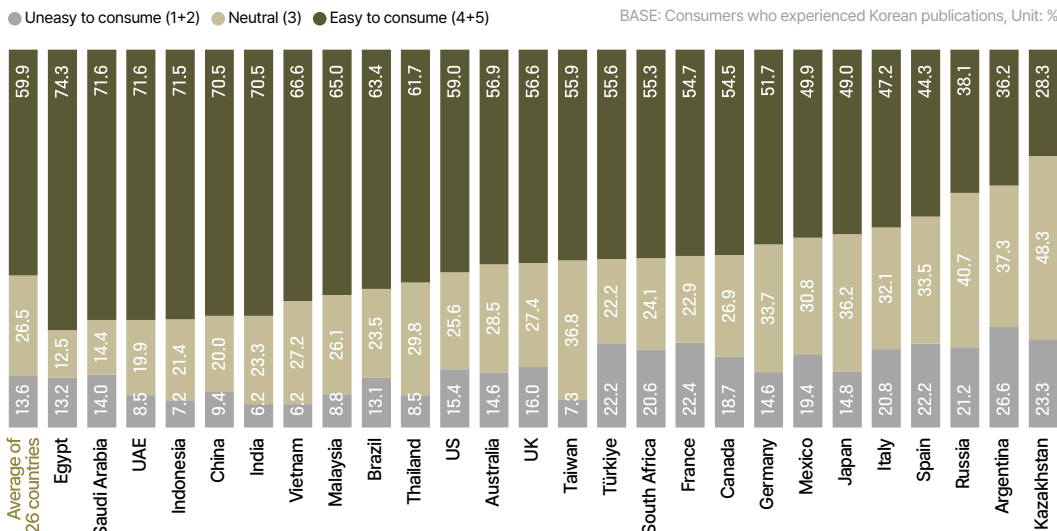


Q. When you are about to read Korean publications, is it easy to access the Korean publications you want?

1. Strongly disagree / 2. Disagree / 3. Neutral / 4. Agree / 5. Strongly agree

Figure 2-167 Comparison of the Ease of Consuming Korean Publications by Country

BASE: Consumers who experienced Korean publications, Unit: %



11 Access Channels

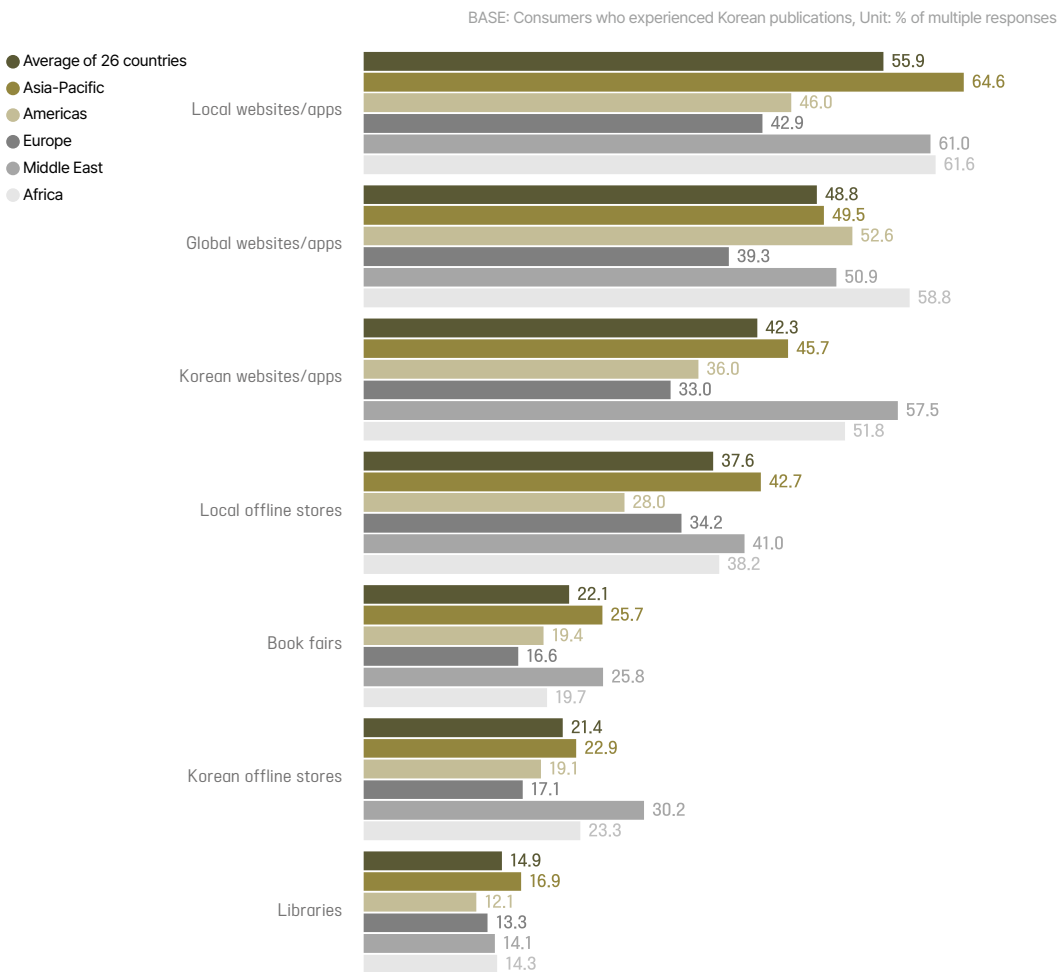


More than half of the respondents accessed Korean publications through "local websites/apps." The Americas and Europe used relatively fewer channels.

The primary access channel for Korean publications was online, with "local websites/apps" at 55.9%, "global websites/apps" at 48.8%, and "Korean websites/apps" at 42.3%. Most consumers who purchased Korean publications offline used

"local offline stores" (37.6%), followed by "book fairs" (22.1%), "Korean offline stores" (21.4%), and "libraries" (14.9%). The Middle East showed higher access through "Korean websites/apps" (57.5%), "book fairs" (25.8%), and "Korean offline stores" (30.2%). In Africa, "global websites/apps" (58.8%) had the highest access rate, while in the Asia-Pacific region, "local websites/apps" (64.6%) recorded higher access rates compared to other continents.

Figure 2-168 Comparison of Korean Publication Access Channels by Continent



Q. Please select all the channels through which you usually access Korean publications.

7

Webtoons[•]

- Webtoon experience had been included in publications from 2018 to 2021 but has been separated since 2022. Publications include various genres such as books, e-books, webtoons, and web novels, which may lead to different results from webtoon experience rates; thus, this section provides the survey results from 2022 onward.

01 Experience Rate



Three out of 10 respondents have experienced Korean webtoons.

Thailand and Indonesia recorded experience rates of approximately 65%.

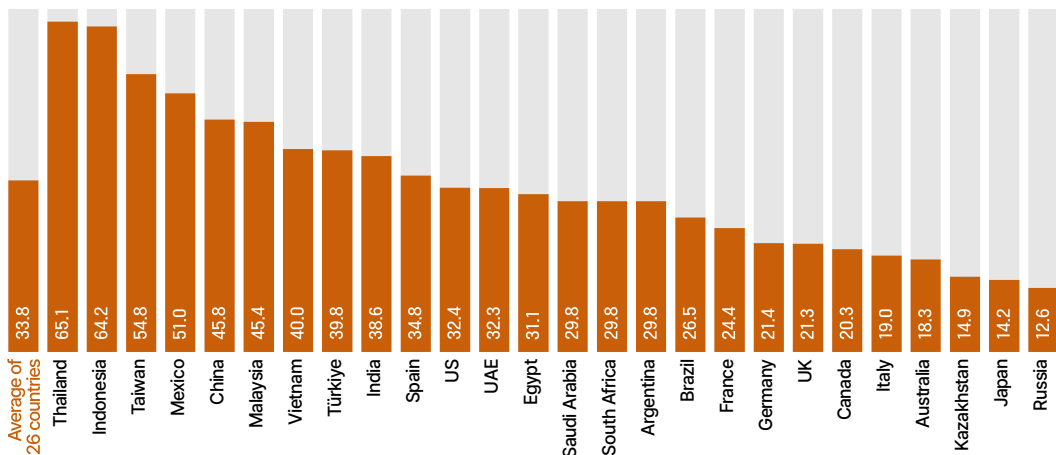
Mexico and Türkiye also ranked among the top 10 in experience rates.

Overall, 33.8% (three out of 10) of consumers with Hallyu experience responded that they have consumed Korean webtoons. Countries with the

highest experience rates were primarily in Asia, such as Thailand (65.1%), Indonesia (64.2%), and Taiwan (54.8%). Notably, Mexico (Latin America) and Türkiye (Europe) were also among the top 10, ranking fourth and eighth respectively. Countries with low experience rates included Russia (12.6%), Japan (14.2%), and Kazakhstan (14.9%). By age group, respondents in their 30s or below (teens 37.0%, 20s 40.5%, and 30s 34.0%) showed high experience rates.

Figure 2-169 Comparison of Korean Webtoon Experience Rates by Country

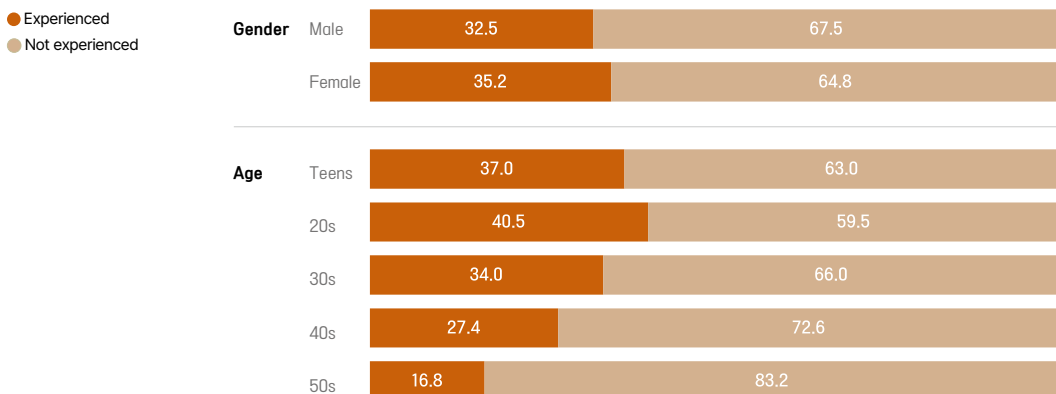
BASE: Total, Unit: %



Q. Please select all types of Korean cultural content that you have experienced.

Figure 2-170 Comparison of Korean Webtoon Experience Rates by Gender and age

BASE: Total, Unit: %



02 Popularity



The popularity of Korean webtoon increased from “niche” to “widely popular.”

In Egypt and Saudi Arabia, approximately half of the participants indicated that Korean content is “widely popular.”

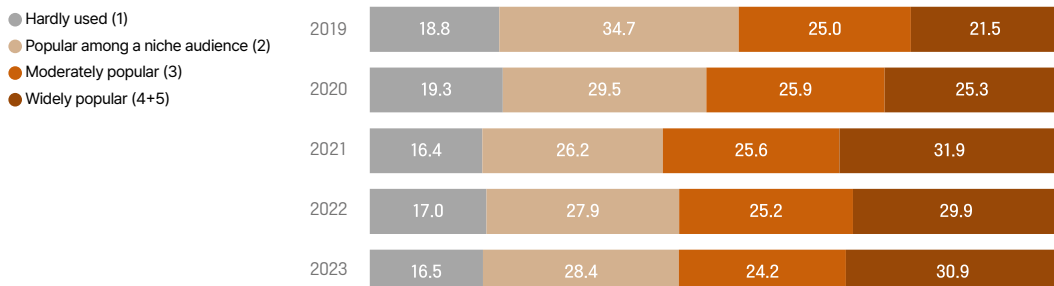
In Russia, 30% of participants indicated “hardly used,” which was noticeably higher compared to other countries.

When asked about the popularity of Korean webtoons in their countries, 30.9% of respondents said they were “widely popular,” 24.2% responded that they were “moderately popular,” 28.4% reported that they were “popular among a niche audience,” and 16.5% indicated that they were “hardly used.” Over

the past five years, the percentage of respondents who viewed Korean webtoons as “popular among a niche audience” was highest in 2019 at 34.7% but has gradually declined to below 30%. In contrast, the percentage of those who considered them “widely popular” has increased by an average of 9.5% per year. This trend indicates that Korean webtoons have become increasingly popular compared to the past. Countries showing high rates for “widely popular” included Egypt (52.9%), Saudi Arabia (48.0%), and Thailand (42.1%). Countries showing high rates for “popular among a niche audience” were Canada (39.8%), Australia (37.1%), and the UK (36.0%). Japan, Russia (33.2%), and Kazakhstan (32.9%) recorded higher rates for “hardly used.”

Figure 2-171 Comparison of Korean Webtoon Popularity Over the Last 5 Years by Year

BASE: Total, Unit: %

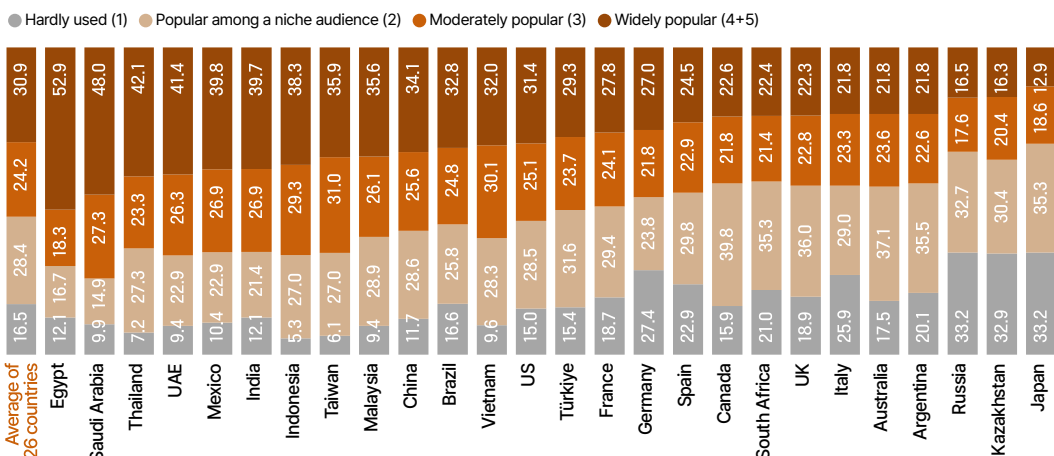


Q. How popular do you think Hallyu is in your country? Please indicate to what extent you agree.

1. Hardly used by anyone / 2. Popular among a niche audience / 3. Known by a niche audience and the general public / 4. Widely known among the general public with related products being sold / 5. Widely popular among the general public with smooth sales of related products

Figure 2-172 Comparison of Korean Webtoon Popularity by Country

BASE: Total, Unit: %



03 Popular Foreign Webtoons



Most popular webtoons were from “Japan” (first) and “Korea” (second).

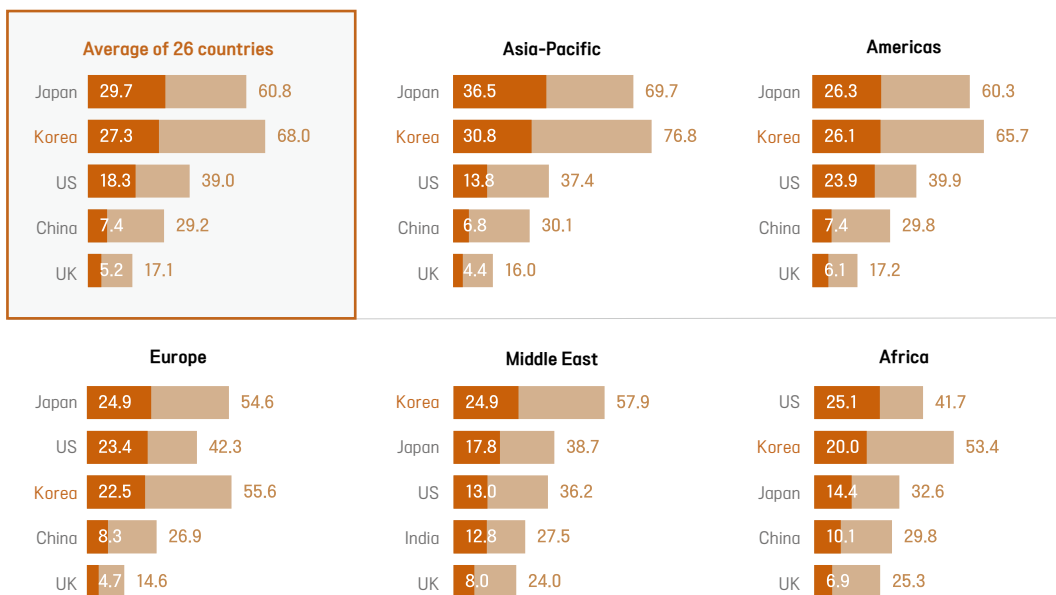
When asked about their favorite foreign webtoons, consumers who had experienced Korean webtoons selected “Japan” (29.7%) as their top

choice, followed by “Korea” (27.3%) in second place. “Korea” ranked first in the Middle East, whereas it was second after “Japan” in the Asia-Pacific region and the Americas, second after “the US” in Africa, and third after “Japan” (24.9%) and “the US” (23.4%) in Europe.

Figure 2-173 Comparison of Popular Foreign Webtoons by Continent

BASE: Consumers who experienced Korean webtoons, Unit: %

● 1st choice ● 1st+2nd+3rd choices (multiple responses)



Q. Which country's webtoons are popular in your country? Please select the top three in order (excluding your country).

Note Presented the top five countries in order of the highest response rate for the first choice

Local News

- “India is one of the countries where Korean webtoons are popular, but recently, their popularity seems to have stagnated.” (India KOTRA New Delhi trade officer)
- “Popular Korean webtoons in Vietnam in 2023 were *All of Us Are Dead*, *Hellbound*, and *Sweet Home*. It seems that webtoons adapted into dramas are more loved than the webtoons themselves. Works that are the originals of movies and dramas are mostly popular.” (Vietnam KOFICE overseas correspondent, Vietnam KOTRA Hanoi trade officer)
- “There is a preference for webtoons that have been adapted into web dramas, such as *My ID is Gangnam Beauty*.” (Mexico KOTRA Mexico City trade officer)
- “*Solo Leveling* is considered the most popular webtoon in Brazil, and *The Breaker*, *High School King*, and *Sweet Home* are also very popular.” (Brazil KOTRA São Paulo trade officer)

04 Consumption Volume



The 26 surveyed countries spent an average of 12.4 hours per month on Korean webtoons.

Consumption was higher in Saudi Arabia, Thailand, and India compared to other countries.

Consumers who experienced Korean webtoons spent a monthly average of 12.4 hours per person. Countries with high consumption volume included Saudi Arabia (17.3 hours), Thailand (17.1 hours), and India (16.5 hours), while Japan (4.7 hours), Canada (6.8 hours), and France (7.3 hours) were among the lower ranks.

When asked about the proportion of Korean webtoons in their overall webtoon consumption, respondents across 26 countries reported an average of 28.6%. The highest proportions were found in the UAE (36.0%), Indonesia (35.8%), and Egypt (35.4%), while Spain (17.5%), Japan (20.2%), and Italy (20.9%) exhibited low proportions.

In terms of expenditure, the Middle East and Europe generally had higher spending, whereas Russia (1.4 USD) and Asia (e.g., Vietnam 1.6 USD) had lower spending.

Figure 2-174 Comparison of Time Spent on Korean Webtoons by Country

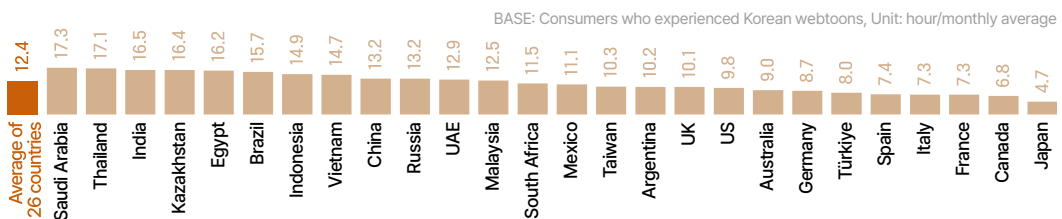


Figure 2-175 Comparison of Proportion of Korean Webtoon Consumption by Country

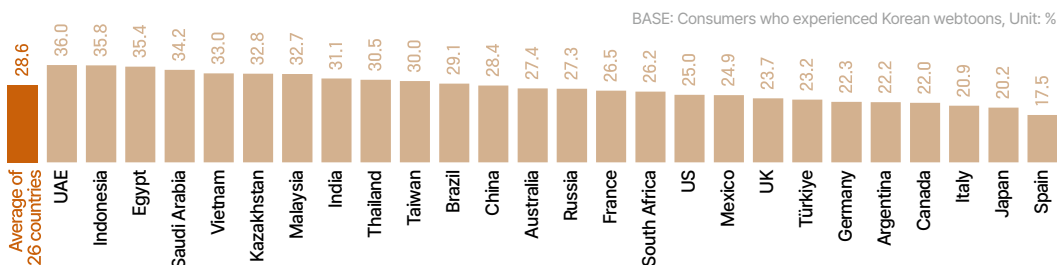
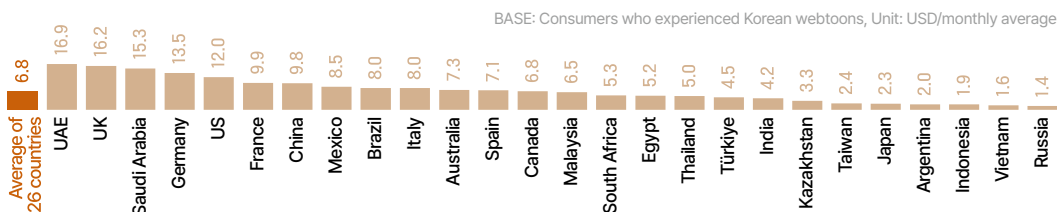


Figure 2-176 Comparison of Expenditure on Korean Webtoons by Country



Q. What is your usual consumption volume, proportion, and average expenditure for Korean webtoons? Please provide monthly average viewing hours and expenditure in the past year.

05 Favorability



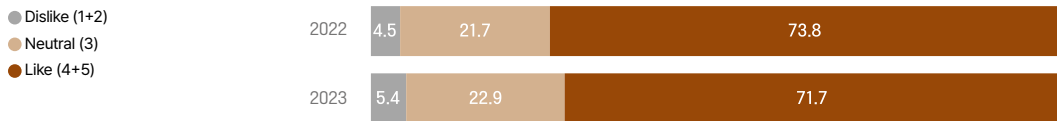
A total of 71.7% expressed a liking for Korean webtoons.

Among consumers who experienced Korean webtoons, the proportion of those indicating they

"like[d]" them decreased by 2.1%p from last year to 71.7%. Countries with high favorability rates included Egypt (88.9%), the UAE (85.4%), and Brazil (84.7%), while those with low favorability rates were Russia (48.0%), Spain (51.0%), and Italy (51.2%).

Figure 2-177 Comparison of Favorability Toward Korean Webtoons Over the Last 2 Years by Year

BASE: Consumers who experienced Korean webtoons, Unit: %

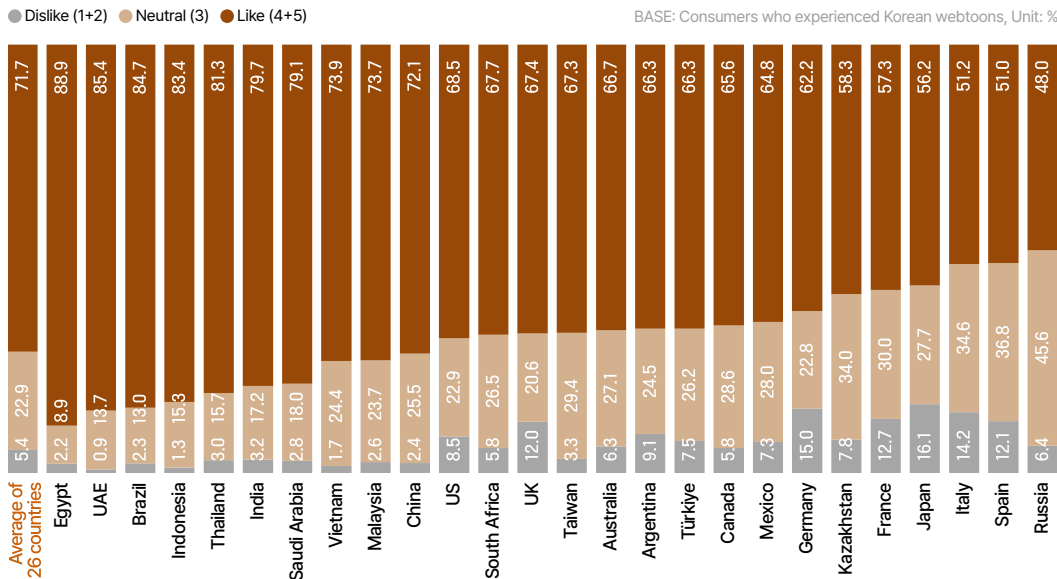


Q. Overall, how much do you like the Korean webtoons you have recently read?

1. Don't like them at all / 2. Don't like them / 3. Neutral / 4. Like them / 5. Like them very much

Figure 2-178 Comparison of Favorability Toward Korean Webtoons by Country

BASE: Consumers who experienced Korean webtoons, Unit: %



06 Factors Promoting and Inhibiting Favorability

High favorability was mainly due to “story structure” and “realistic illustrations.”

The Asia-Pacific region and Middle East liked Korean webtoons because they are “originals for Hallyu content.”

The primary reasons for liking Korean webtoons (based on multiple responses) were “The story is well-structured and solid” (29.3%), “The illustrations are realistic and detailed” (29.0%), and “Covers various materials or genres” (24.6%).

By continent, “The story is well-structured and solid” ranked first and “The illustrations are realistic and detailed” ranked second in Asia-Pacific, and these two factors were included among the top three in other continents as well. The Asia-Pacific region had a higher proportion of participants selecting “Covers various materials or genres” (26.4%) and “The original for popular Hallyu content” (25.7%) compared to the average of 26 countries. The Americas showed the highest proportions for “The story is well-structured and solid” and “The illustrations are realistic and detailed,” followed by “Like the personalities/roles of the characters,” “Covers various materials or genres,” and “The storyline and scene transitions are fast-paced”—they rated the quality of webtoons highly in general. Realistic illustrations and story structure ranked first and second in the Middle East respectively, with a relatively higher proportion of participants selecting “The storyline and scene transitions are fast-paced” (24.3%) and “The original for popular Hallyu content” (22.2%). Unlike other continents, “The user environment is convenient” ranked second in Africa. Notably, the story

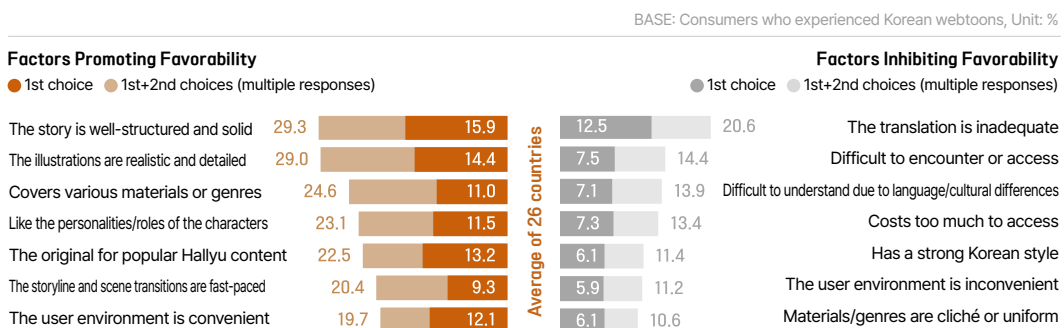
and illustration style were perceived as key attraction factors for Korean webtoons. The Asia-Pacific region was attracted more to the diversity of materials and originals for Hallyu content, the Middle East to a fast-paced storyline and originals for Hallyu content, and Africa to the convenient user environment.

“Inadequate translation” was commonly pointed out as an issue, causing low accessibility in Asia-Pacific, the Americas, and Europe.

The strong Korean style inhibited favorability in the Middle East and Africa.

The biggest factor inhibiting favorability was “The translation is inadequate” (20.6%), ranking first across all continents, where translation was considered the greatest inconvenience. In Asia-Pacific, the Americas, and Europe, “Difficult to encounter or access” ranked second. Europe had a higher proportion of participants selecting “Costs too much to use” (14.6%), while the Middle East showed higher figures for “Has a strong Korean style” (14.4%) and “The user environment is inconvenient” (14.4%). In Africa, “Has a strong Korean style” (16.8%), “Difficult to understand due to language/cultural differences” (15.0%), and “Lack of consideration for cultural diversity” (14.2%) were more frequently chosen compared to other continents. With inadequate translation identified as the biggest factor inhibiting favorability across all continents, Asia-Pacific, the Americas, and Europe were relatively more dissatisfied with low accessibility, Europe with cost, and the Middle East and Africa with the strong Korean style.

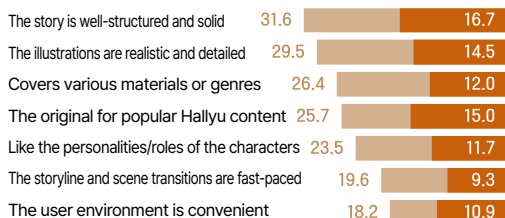
Figure 2-179 Comparison of Factors Promoting and Inhibiting Favorability Toward Korean Webtoons by Continent



Continued ----->

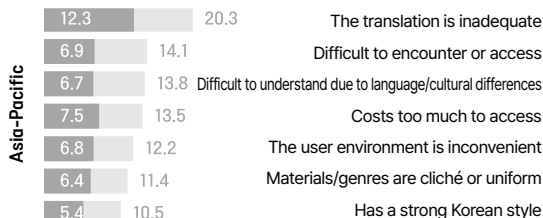
Factors Promoting Favorability

● 1st choice ● 1st+2nd choices (multiple responses)

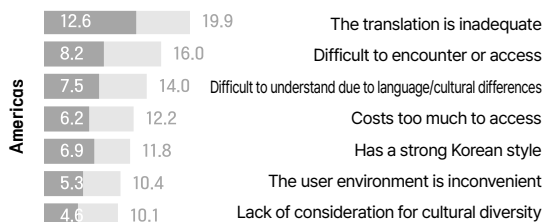
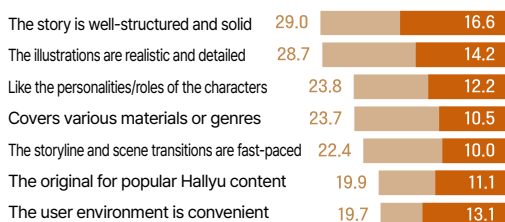


Factors Inhibiting Favorability

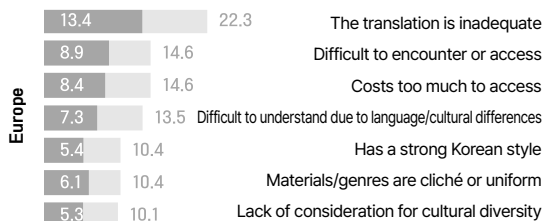
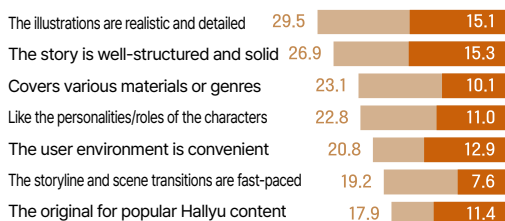
● 1st choice ● 1st+2nd choices (multiple responses)



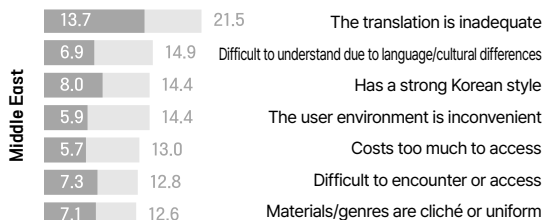
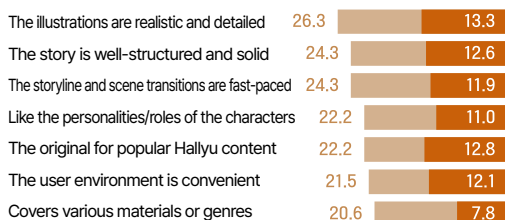
Asia-Pacific



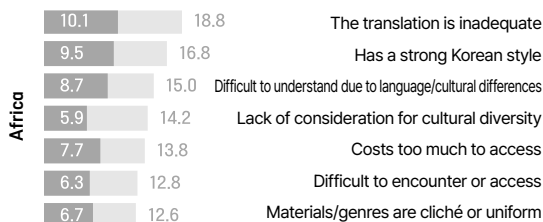
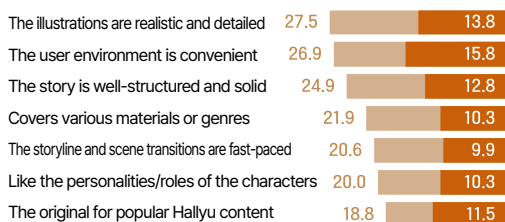
Americas



Europe



Middle East



Africa

Q. What do you think are the biggest factors promoting favorability toward Korean webtoons? Please select up to the second choice in order.

Q. What do you think are the factors inhibiting favorability toward Korean webtoons? Please select up to the second choice in order.

07 Usage Pattern



Among the respondents, 64.9% read Korean webtoons regularly, while 29.7% read them irregularly.

In Europe, 35.6% of respondents read Korean webtoons irregularly, showing a particularly high rate of irregular use.

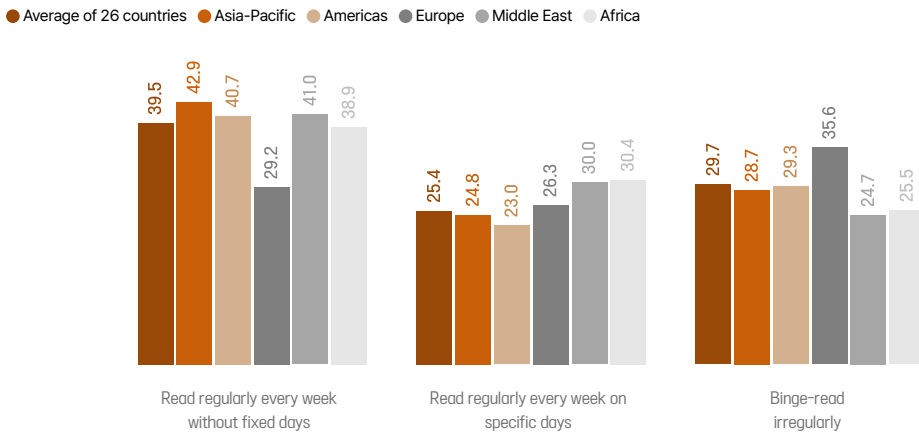
When asked when they read Korean webtoons, 39.5% of respondents said they “read regularly

every week without fixed days,” and 25.4% said they “read regularly every week on specific days,” indicating that 64.9% of respondents read webtoons regularly, while 29.7% said they “binge-read irregularly.”

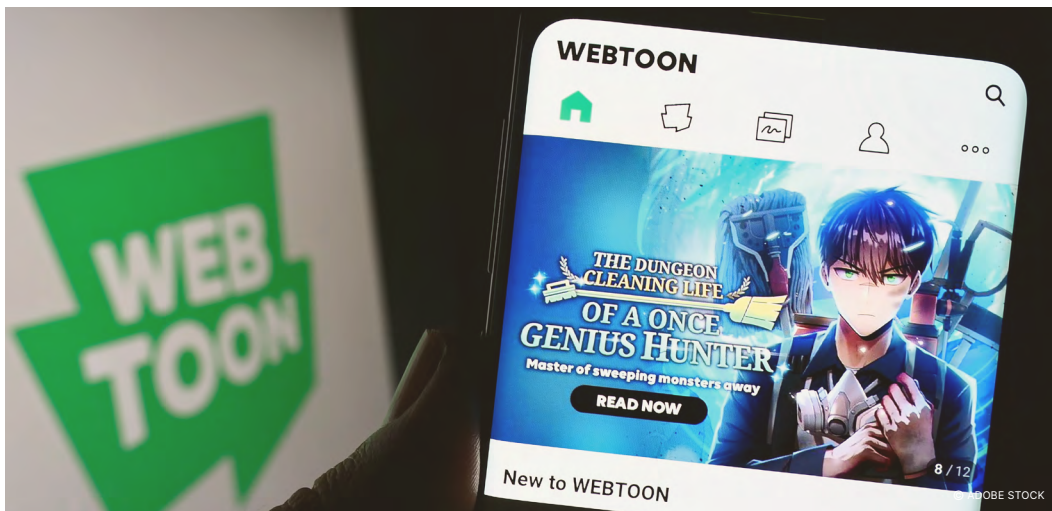
The proportion of participants selecting “read regularly every week without fixed days” was generally high, while Europe had the highest percentage for “binge-read irregularly” (35.6%).

Figure 2-180 Comparison of When Users Read Webtoons by Continent

BASE: Consumers who experienced Korean webtoons, Unit: % of multiple responses



Q. When do you usually read Korean webtoons?



08 Willingness to pay



More than half of the respondents in Thailand, Saudi Arabia, and Egypt were willing to pay.

A total of 14 countries, including Kazakhstan, had a higher proportion of participants indicating “unwilling to pay” compared to those indicating “willing to pay.”

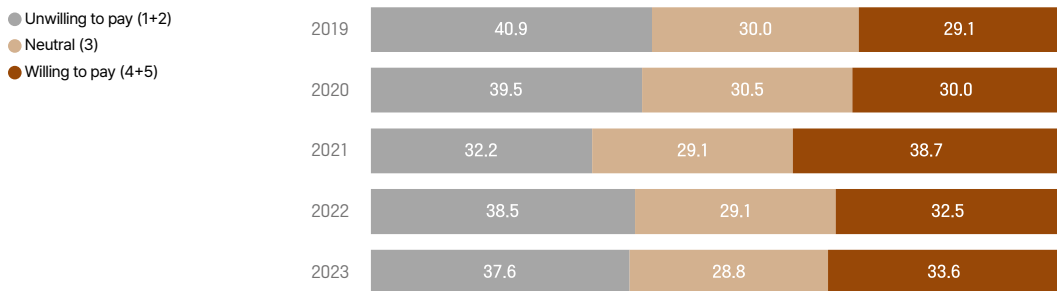
When asked about their willingness to pay for Korean webtoons, 33.6% of respondents said they were willing, while 37.6% said they were not willing, indicating a higher proportion of those not willing to pay. Over the past five years, the trend

shows a gradual decline in “unwilling to pay” and “neutral,” while “willing to pay” has been increasing, albeit slowly.

The only countries where the proportion of participants indicating “willing to pay” exceeded 50% were Thailand (54.0%), Saudi Arabia (51.0%), and Egypt (50.4%). In contrast, 14 countries, including Japan, Kazakhstan, and Russia, had more participants selecting “unwilling to pay” than “neutral” or “willing to pay.” Among the 11 types of Korean cultural content, webtoons had the highest proportion of participants who indicated being “unwilling to pay.”

Figure 2-181 Comparison of the Willingness to pay for Korean Webtoons Over the Last 5 Years by Year

BASE: Total, Unit: %

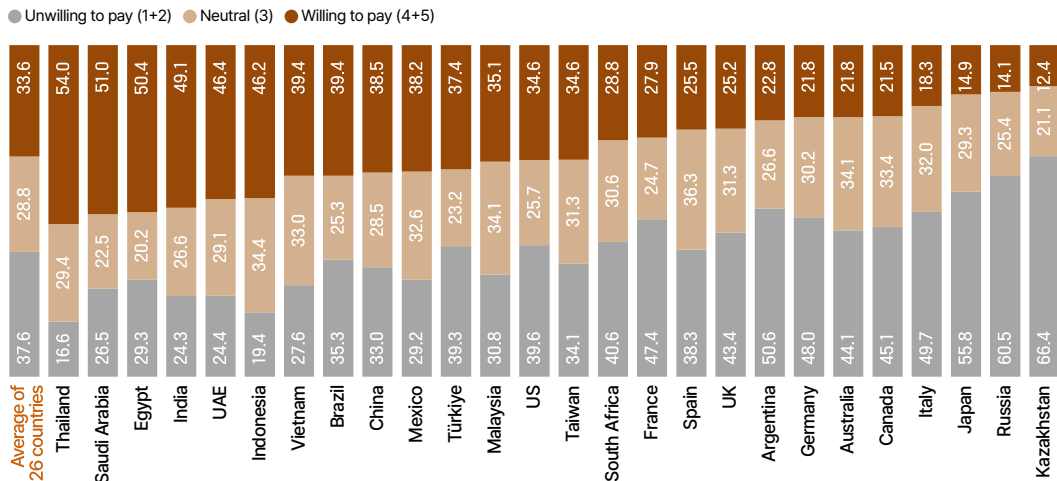


Q. Please indicate your level of willingness to pay for Korean cultural content in the future for each item.

1. Strongly disagree / 2. Disagree / 3. Neutral / 4. Agree / 5. Strongly agree

Figure 2-182 Comparison of the Willingness to pay for Korean Webtoons by Country

BASE: Total, Unit: %



09 Willingness to Recommend



In total, 71.3% of respondents were willing to recommend Korean webtoons.

Egypt and Saudi Arabia as well as those in their 20s were positive toward recommending Korean webtoons.

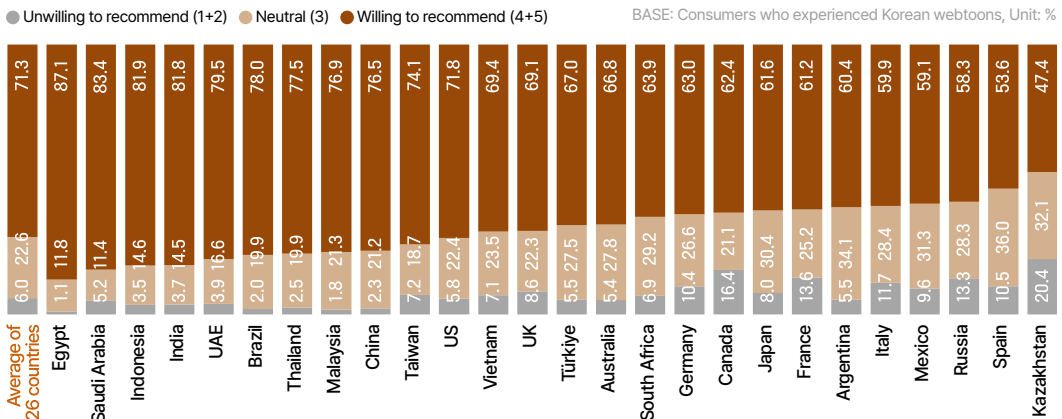
Japan and Spain showed the lowest willingness to recommend.

Overall, 71.3% of consumers who experienced Korean webtoons responded that they were "willing to recommend" Korean webtoons, 22.6% were "neutral,"

and 6.0% were "unwilling to recommend." Countries with the highest proportions of participants indicating "willing to recommend" were Egypt (87.1%), Saudi Arabia (83.4%), and the UAE (81.9%), while the lowest proportions were observed in Japan (47.4%), Spain (53.6%), and Germany (58.3%).

By age group, respondents in their 20s (73.8%) had the highest proportion indicating "willing to recommend" (73.8%), while those in their teens had the lowest at 68.7%. Additionally, teenagers had the highest proportion for "unwilling to recommend" at 7.3%.

Figure 2-183 Comparison of the Willingness to Recommend Korean Webtoons by Country

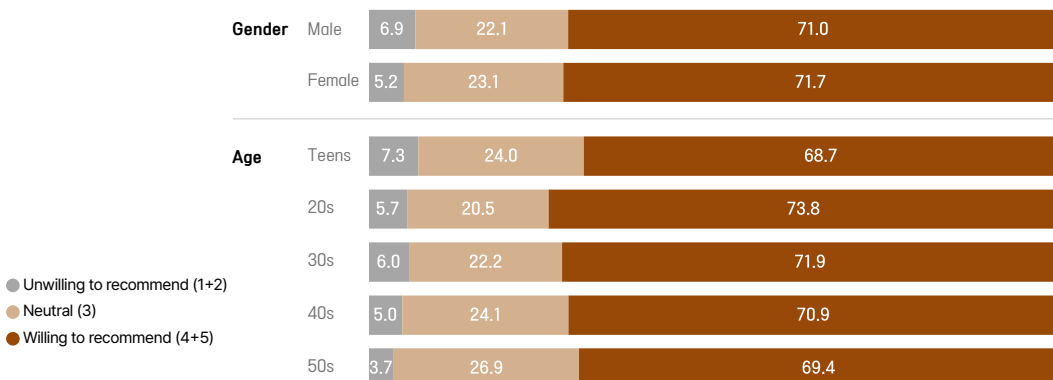


Q. Are you willing to recommend Korean webtoons you have recently experienced to others?

1. Definitely do not recommend / 2. Do not recommend / 3. Neutral / 4. Recommend / 5. Definitely recommend

Figure 2-184 Comparison of the Willingness to Recommend Korean Webtoons by Gender and age

BASE: Consumers who experienced Korean webtoons, Unit: %



10 Ease of Use



Overall, 67.9% of respondents found Korean webtoons "easy to consume."

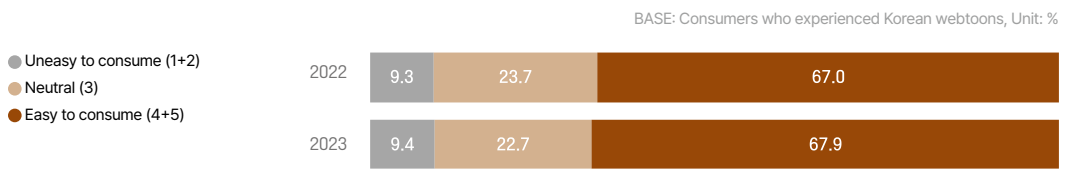
Rates of "easy to consume" exceeded 80% in Egypt and Saudi Arabia.

Kazakhstan and Spain showed relatively lower accessibility.

The proportion of respondents who found Korean

webtoons "easy to consume" increased by 0.9%p from the previous year, reaching 67.9%, while 9.4% of respondents found them "uneasy to consume." Countries where the highest proportions of participants found content "easy to consume" were Egypt (85.6%), Saudi Arabia (80.6%), and Indonesia (79.7%), while those with the lowest proportions were observed in Europe, such as Kazakhstan (45.6%).

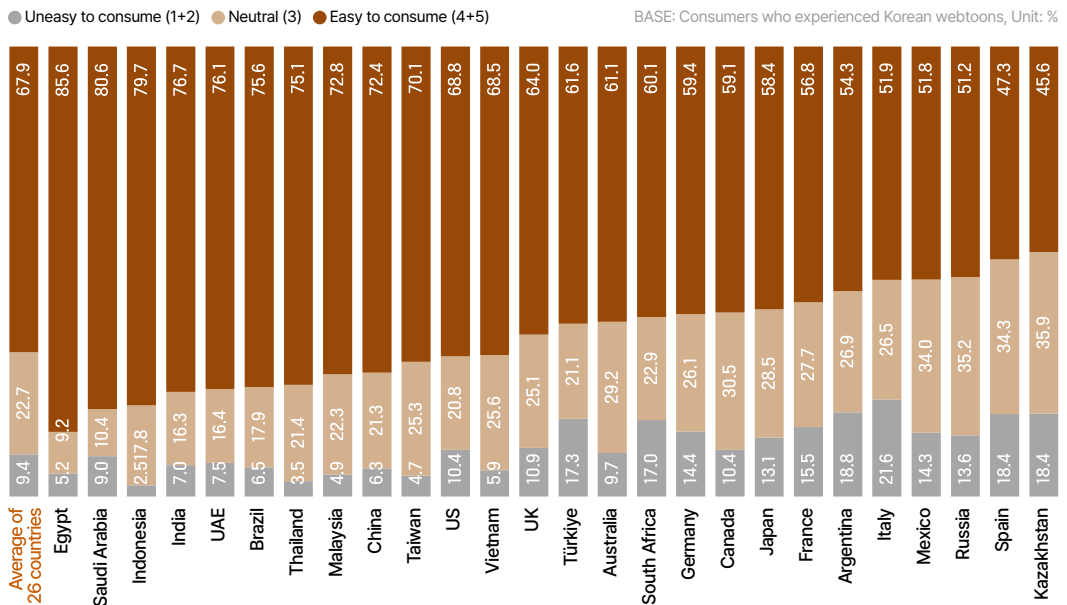
Figure 2-185 Comparison of the Ease of Consuming Korean Webtoons Over the Last 2 Years by Year



Q. When you are about to read Korean webtoons, is it easy to access the Korean webtoons you want?

1. Strongly disagree / 2. Disagree / 3. Neutral / 4. Agree / 5. Strongly agree

Figure 2-186 Comparison of the Ease of Consuming Korean Webtoons by Country



11 Access Channels



More than half of the respondents accessed Korean webtoons via "Naver Webtoon."

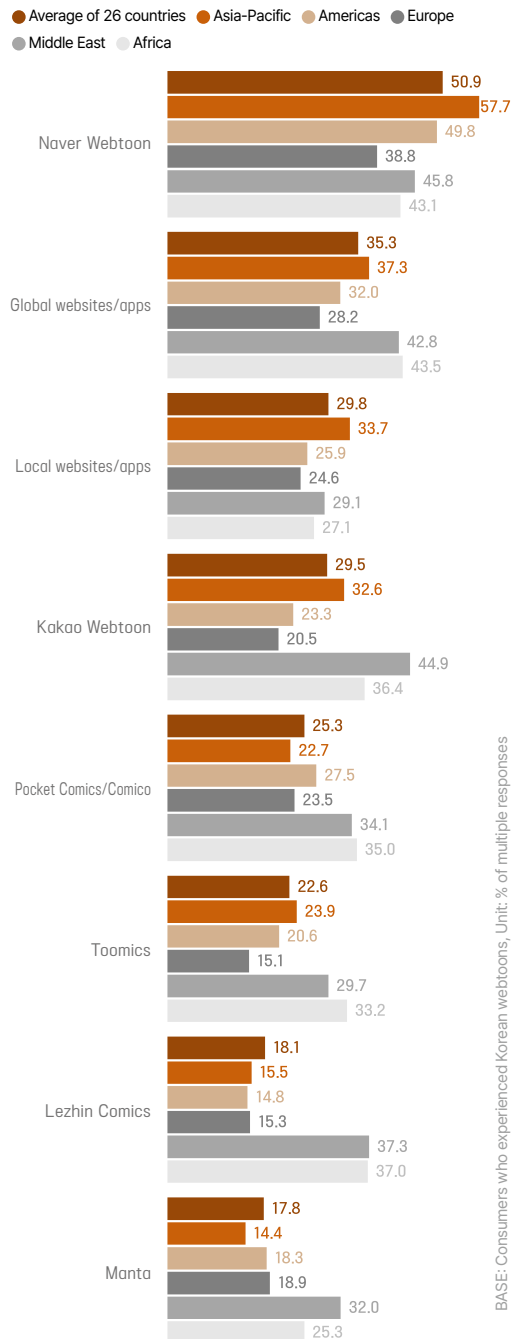
The Asia-Pacific region, the Middle East, and Africa actively used multiple channels.

The primary access channel for Korean webtoons was "Naver Webtoon" (50.9%), followed by "global websites/apps" (35.3%), "local websites/apps" (29.8%) and "Kakao Webtoon" (29.5%).

The Asia-Pacific region had relatively higher usage rates for "Naver Webtoon" (57.7%) and "local websites/apps" (33.7%) compared to other continents, and the Middle East and Africa showed higher access rates for most platforms, such as "global websites/apps" (42.8%), "Kakao Webtoon," "Toomics," "Pocket Comics/Comico," "Lezhin Comics," and "Manta" compared to other continents.

The Americas exhibited lower access rates for most channels except "Toomics" (27.5%), and Europe demonstrated lower rates except "Manta" (18.9%) compared to the average across 26 countries. These regions accessed Korean webtoons using fewer channels compared to other continents. Nonetheless, Asia-Pacific, the Middle East, and Africa used a relatively greater variety of channels to access Korean webtoons, with Asia-Pacific showing high usage rates for "Naver Webtoon" and "Kakao Webtoon" and Africa for "Naver Webtoon" and "global websites/apps."

Figure 2-187 Comparison of Korean Webtoon Access Channels by Continent



Q. Please select all the channels through which you usually access Korean webtoons.

8

Games

01 Experience Rate



Five out of 10 consumers with Hallyu experience have played Korean games.

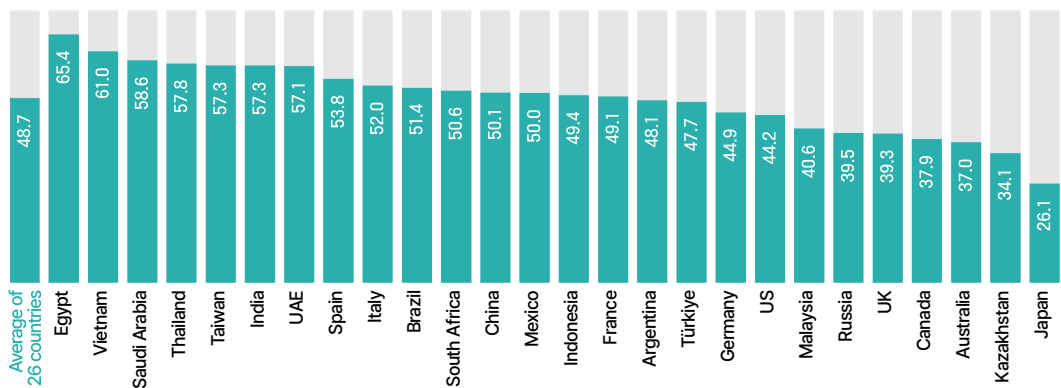
Egypt, Vietnam, and Saudi Arabia showed particularly high experience rates, while Malaysia exhibited a lower rate compared to other content genres.

Overall, 48.7% (approximately 5 out of 10) consumers with Hallyu experience responded that they have played Korean games, which is a 1.2%p increase from 2022. Countries with high experience

rates included Egypt (65.4%), Vietnam (61.0%), and Saudi Arabia (58.6%), and those with lower experience rates were Japan (26.1%), Kazakhstan (34.1%), and Australia (37.0%). Malaysia ranked 20th out of 26 countries, which is in contrast to the fact that other genres of Korean cultural content (except animation and publications) generally showed Malaysia ranking high, within the top six. The experience rates were high among men (55.8%) and among those in their 20s and 30s (52.3% and 52.6%, respectively).

Figure 2-188 Comparison of Korean Game Experience Rates by Country

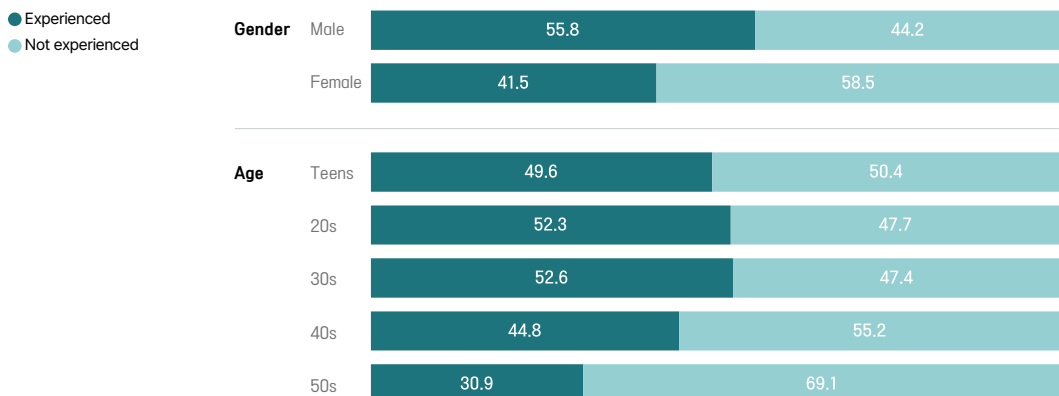
BASE: Total, Unit: %



Q. Please select all types of Korean cultural content that you have experienced.

Figure 2-189 Comparison of Korean Game Experience Rates by Gender and age

BASE: Total, Unit: %



02 Popularity



Among respondents, 38.2% considered Korean games to be “widely” popular.

Widespread popularity was observed particularly in Egypt and Saudi Arabia.

When asked how popular Korean games are in their country, 38.2% of consumers described them as “widely popular,” explaining that they are either “widely known among the general public, with related products being sold” or “widely popular among the general public with smooth sales of related products.”

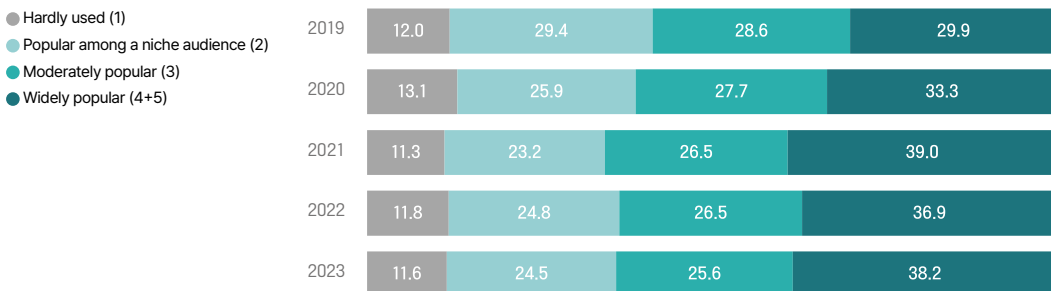
The proportion of those who thought they were “moderately popular” was 25.6%, while 24.5% viewed them as “popular among a niche audi-

ence.” Looking at the trends over the past 5 years, the percentage of those who saw them as “popular among a niche audience” and “moderately popular” have gradually decreased, while the percentage indicating “widely popular” has increased.

Countries where the percentage indicating “widely popular” was higher than the combined proportions of “moderately popular,” “popular among a niche audience,” and “hardly used” included Egypt (54.7%) and Saudi Arabia (53.0%), among 21 countries. On the other hand, countries with the highest proportions indicating “popular among a niche audience” included Australia, Kazakhstan, and Japan, among five countries in total.

Figure 2-190 Comparison of Korean Game Popularity Over the Last 5 Years by Year

BASE: Total, Unit: %



Q. How popular do you think Hallyu is in your country? Please indicate to what extent you agree.

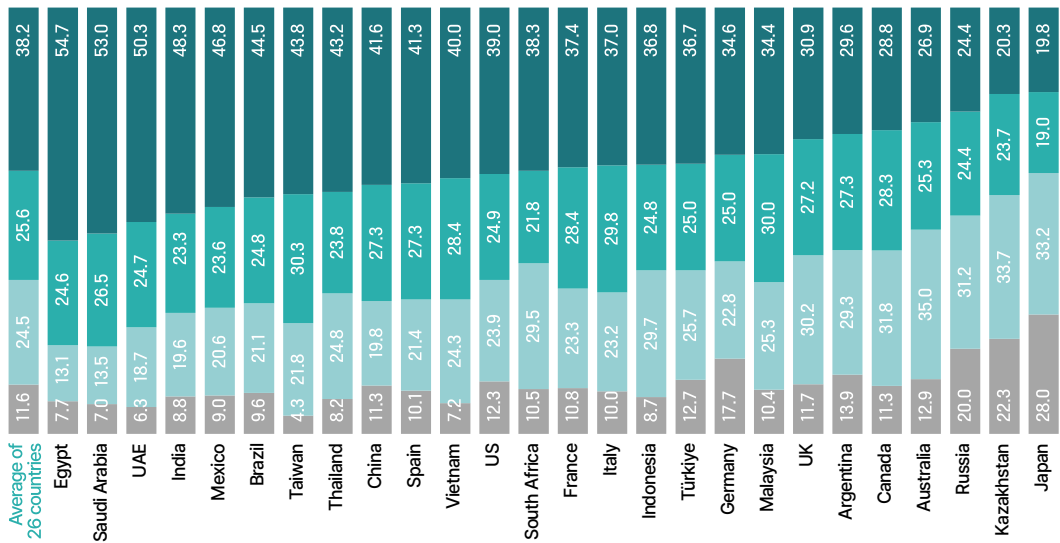
1. Hardly used by anyone / 2. Popular among a niche audience / 3. Known not just by a niche audience but also by the general public / 4. Widely known among the general public, with related products being sold / 5. Widely popular among the general public, with smooth sales of related products



Figure 2-191 Comparison of Korean Game Popularity by Country

BASE: Total, Unit: %

● Hardly used (1) ● Popular among a niche audience (2) ● Moderately popular (3) ● Widely popular (4+5)



Local News

- “Games such as *Battlegrounds*, *League of Legends*, and *Overwatch* have attracted many players in the UAE. Gamers here enjoy playing games from various countries through gaming communities.” (UAE KOTRA Dubai trade officer)
- “In May 2023, the Indian government approved the resumption of *Battlegrounds Mobile India*, which previously had its operations suspended for involving China in development. Following this, Krafton, the game’s developer, hosted an international e-sports event in New Delhi in November that same year, which achieved great success.” (India KOTRA Mumbai trade officer)
- “Mexico is one of the top 10 video game markets in the world, with a strong interest in Korean games. It seems that China’s *League of Legends* is quite popular, and Korea’s *Battlegrounds* and *KartRider* are particularly popular. There is also a large fan base for Korean pro gamers like Faker.” (Mexico KOTRA Mexico City trade officer)
- “Many games are officially distributed with the acquisition of foreign game publishing licenses (authorization necessary for foreign games to be released in China) for seven games, such as *MapleStory M* and *Lost Ark* in December 2022, and in March, five additional games such as *Cookie Run Kingdom* and *Blue Archive* also received permits and are being formally distributed.” (China KOFICE overseas correspondent, China KOTRA Beijing trade officer)

03 Popular Foreign Games



"US" games dominated in popularity.

Korean games competed closely with games from the "US" in the Asia-Pacific region and the Middle East.

Among those in 26 countries with experience playing Korean games, the most popular foreign games in their home countries were identified as made in "the US" (37.2%) and "Korea" (20.8%). The popularity of Korean games was about half of that of American games but 4.1%p higher than that of Japanese games, which ranked third.

By region, Korean games ranked second in popularity after US games in Asia-Pacific, the Middle East, and Africa, showing gaps of 2.6%p, 6.0%p, and 21.2%p, respectively, compared with US

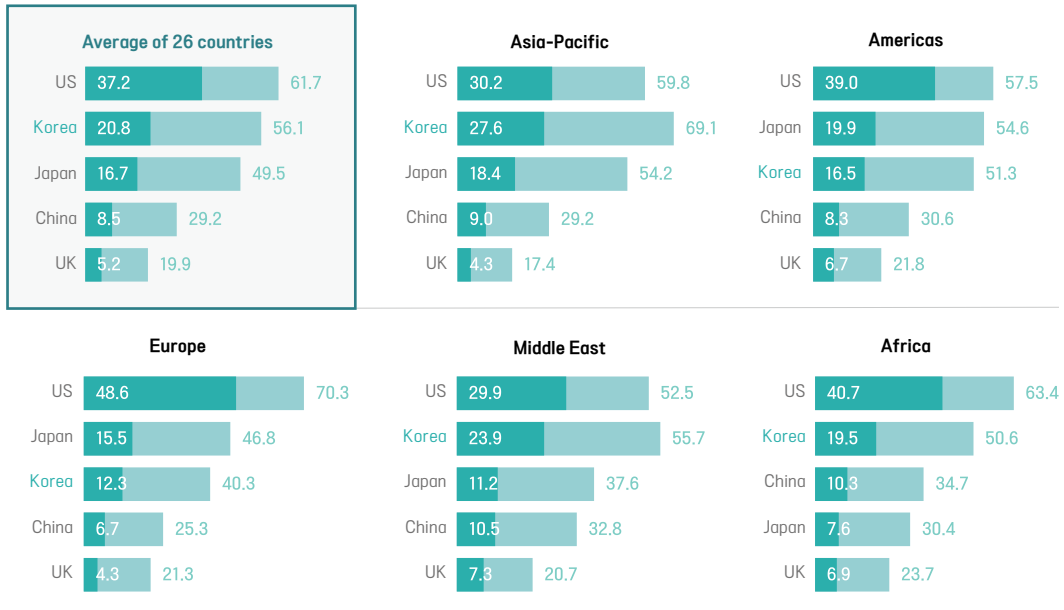
games. This suggests that Korean games enjoy relatively strong popularity in Asia-Pacific and the Middle East.

In the Americas and Europe, the popularity ranking of games was as follows: the US, Japanese, Korean, and Chinese. US games had the highest popularity (39.0% in the Americas and 48.6% in Europe). Korean games were slightly less popular than Japanese games by 3.4%p in the Americas and 3.2%p in Europe. However, they were more popular than Chinese games by 8.2%p and 5.6%p, respectively. In the Americas and Europe, preference for American games was overwhelming, while Japanese and Korean games appeared to be in close competition.

Figure 2-192 Comparison of Popular Foreign Games by Continent

BASE: Consumers who experienced Korean games, Unit: %

● 1st choice ● 1st+2nd+3rd choices (multiple responses)



Q. Which country's games are popular in your country? Please select the top three in order (excluding your own country).

Note Presented are the top five countries with the highest proportion of first-choice responses (in order).

04 Consumption Volume



Korean games were played for an average of 12.5 hours per month across 26 countries.

Thailand, Indonesia, and China led with nearly 20 hours of gameplay.

The average monthly playtime for Korean games per consumer in 26 countries was reported to be 12.5 hours. Countries with the highest playtimes were Thailand (19.8 hours), Indonesia (18.7 hours), and China (17.6 hours). On the other hand, countries like Canada (5.9 hours), Japan (6.9 hours), and Italy (7.0 hours) were among the lowest, with Japan and several European countries occupying the bottom ranks.

When asked about the proportion of Korean games in their overall game consumption, respondents across 26 countries reported a global average of 25.0%. Countries with the highest proportions included Indonesia (33.4%), Vietnam (32.1%), and India (31.1%), while those with the lowest proportions included Italy (15.7%), Canada (16.8%), and Spain (17.0%).

In terms of spending, the Middle East, the US, and Europe, ranked at the top, while China, which ranked third in consumption volume, was fourth in spending with an average of 17.3 USD. Kazakhstan, Russia, and Vietnam were reported to have lower spending levels.

Figure 2-193 Comparison of Time Spent on Korean Games by Country

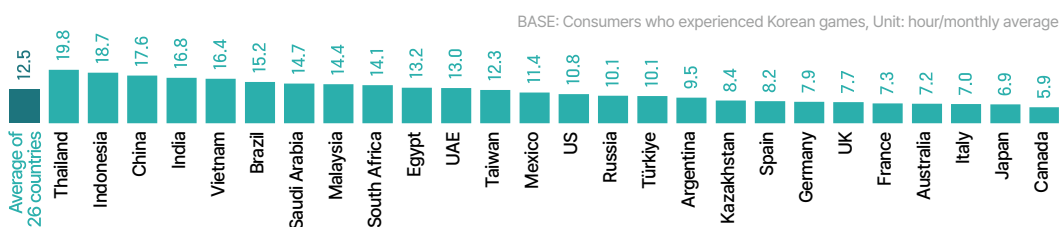


Figure 2-194 Comparison of Proportion of Korean Game Consumption by Country

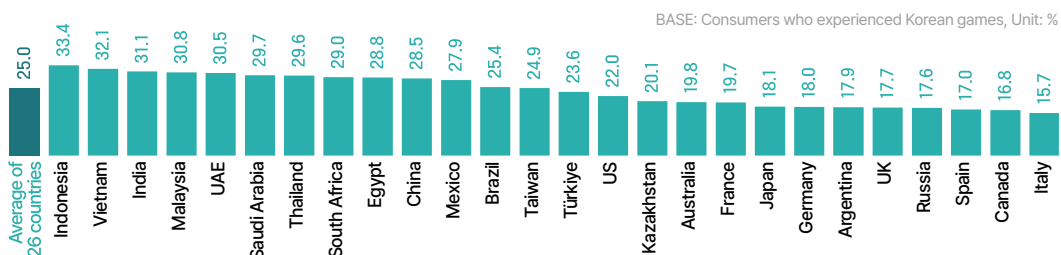
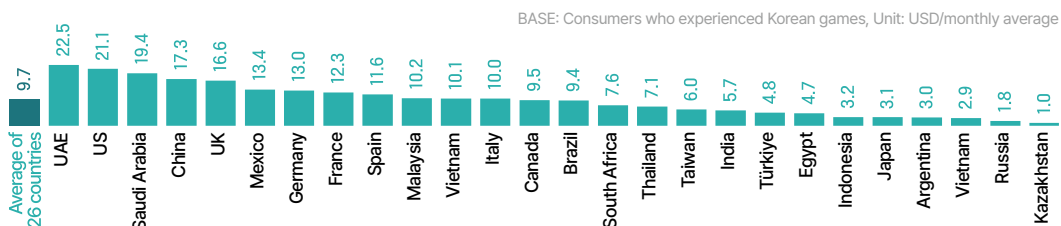


Figure 2-195 Comparison of Expenditure on Korean Games by Country



Q. What is your usual viewing volume, proportion, and average expenditure for Korean games? Please provide monthly average viewing hours and expenditure in the past year.

05 Favorability



In total, 66.3% of respondents enjoyed Korean games.

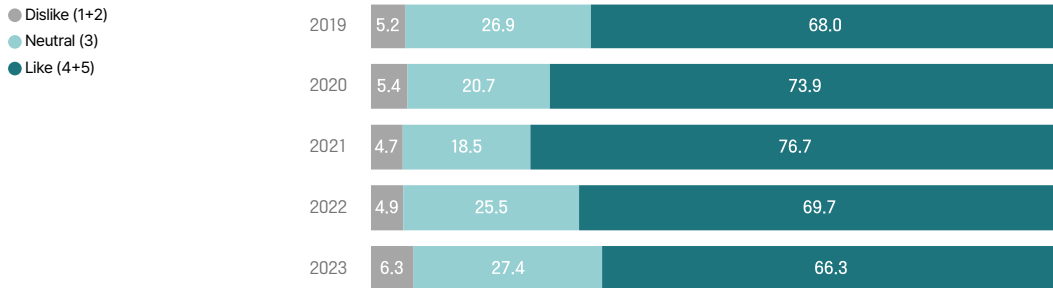
India and Indonesia showed particularly high levels of favorability.

Overall, 66.3% of those who have experienced Korean games responded that they “like[d]” the Korean games that they recently played. Favorability gradually increased from 68.0% in 2019 to 69.7% in 2022 and then dropped slightly to 66.3% in 2023.

Countries with the highest favorability rates were India (80.7%), Indonesia (80.0%), the UAE (77.6%), and Brazil (77.0%), while countries like Kazakhstan (15.2%), Germany (14.7%), and Argentina (13.0%) had over 10% of respondents indicating they “dislike[d]” Korean games.

Figure 2-196 Comparison of Favorability Toward Korean Games Over the Last 5 Years by Year

BASE: Consumers who experienced Korean games, Unit: %

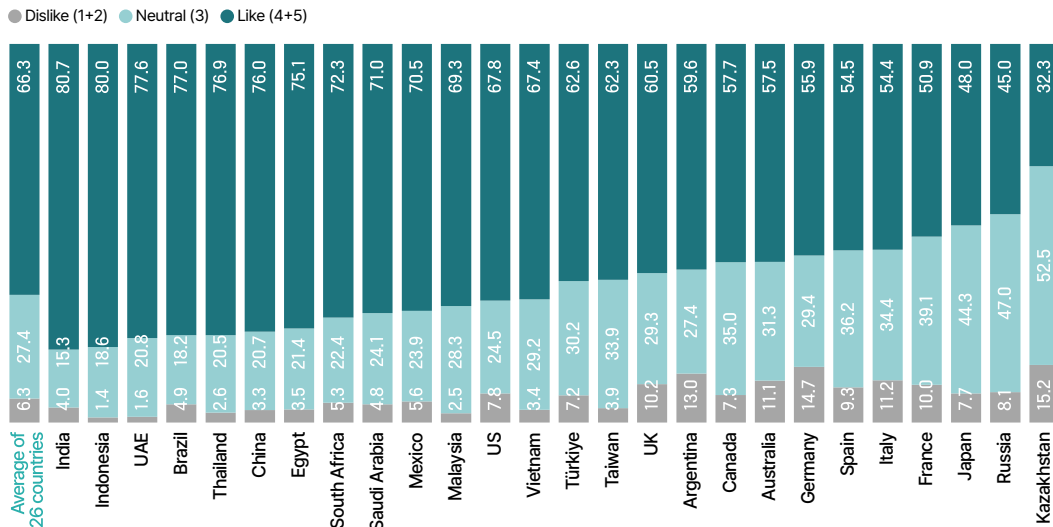


Q. Overall, how much do you like the Korean games you have recently played?

1. Don't like them at all / 2. Don't like them / 3. Neutral / 4. Like them / 5. Like them very much

Figure 2-197 Comparison of Favorability Toward Korean Games by Country

BASE: Consumers who experienced Korean games, Unit: %



06 Factors Promoting and Inhibiting Favorability

Quality factors such as “graphics/visuals” and “composition” drove favorability.

Europe was attracted to “diversity of materials,” while Africa was more drawn to “UI.”

The primary reasons for liking Korean games (with multiple responses allowed) were quality-related factors such as “Graphics/visuals are of high quality” (31.5%) and “Gameplay or composition is well designed” (23.7%), which ranked first and second, respectively, and were also included among the top three across all continents.

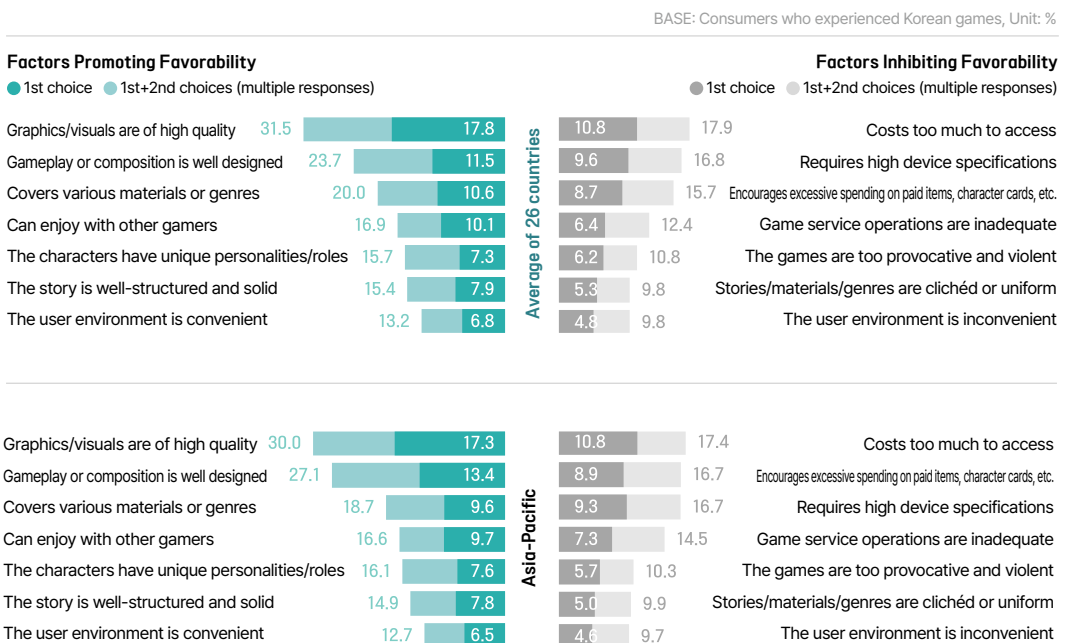
By region, preferences varied: in Asia-Pacific, “Gameplay or composition is well designed” (27.1%) ranked highest; in the Americas, “The story is well structured and solid” (17.2%) stood out; in Europe, “Covers various materials or genres” (23.1%) led the list. In the Middle East, “Like Korean pro gamers” (15.4%) was a key factor, while in Africa, “The user interface is convenient” (16.9%) and “Graphics/visuals are of high quality” (34.6%) received particularly high responses compared to other regions.

“High device specifications,” “costs,” and “encouragement of excessive spending” were pointed out as common factors inhibiting favorability across all regions.

The Middle East expressed discomfort with provocative and violent content.

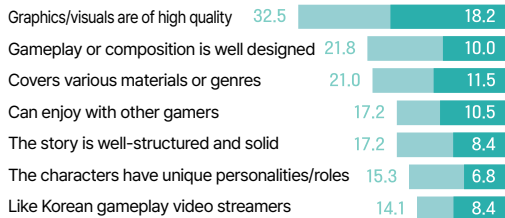
Factors most commonly selected as inhibiting favorability were “Costs too much to use” (17.9%), “Requires high device specifications” (16.8%), and “Encourages excessive spending on paid items, character cards, etc.” (15.7%). The rankings varied by continent, but all of them were included among the top three. In the Middle East, “The game is too provocative and violent” (15.0%) and “Does not fit with my country’s culture” (12.5%) were mentioned more so compared to other regions. In Africa, the top concern was that Korean games “Require high device specifications” (20.9%). These findings suggest that companies planning to expand into the Middle East and Africa should carefully address these regional sensitivities during their market research and strategy development.

Figure 2-198 Comparison of Factors Promoting and Inhibiting Favorability Toward Korean Games by Continent



Factors Promoting Favorability

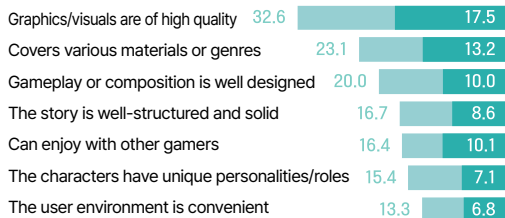
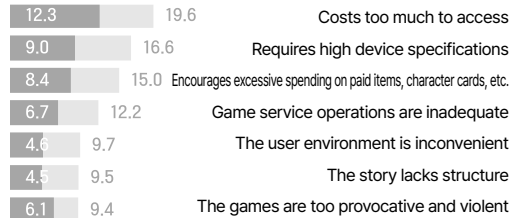
● 1st choice ● 1st+2nd choices (multiple responses)



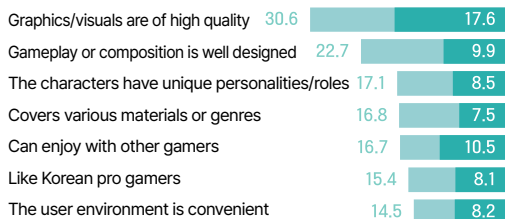
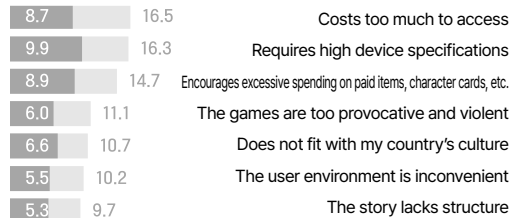
Americas

Factors Inhibiting Favorability

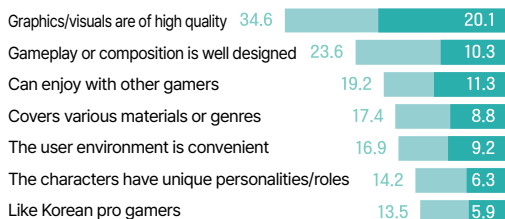
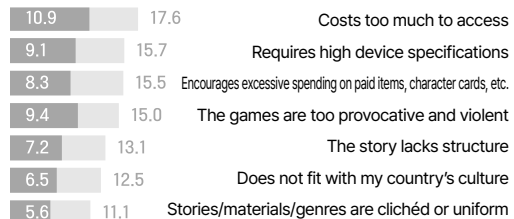
● 1st choice ● 1st+2nd choices (multiple responses)



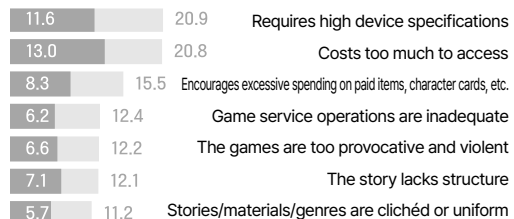
Europe



Middle East



Africa



Q. What do you think are the biggest factors promoting favorability toward Korean games? Please select up to the second choice in order.

Q. What do you think are the factors inhibiting favorability toward Korean games? Please select up to the second choice in order.

07 Preferred Games



Battlegrounds topped the chart for 6 consecutive years.

CrossFire ranked second based on its popularity in the Americas.

When asked about their favorite Korean game, 11.9% of respondents selected “Battlegrounds,” marking its six-year streak at the top since 2019. “Ragnarok” (8.2%), which ranked second from 2018 to 2022, was overtaken by “CrossFire” (9.3%), pushing it down to third place.

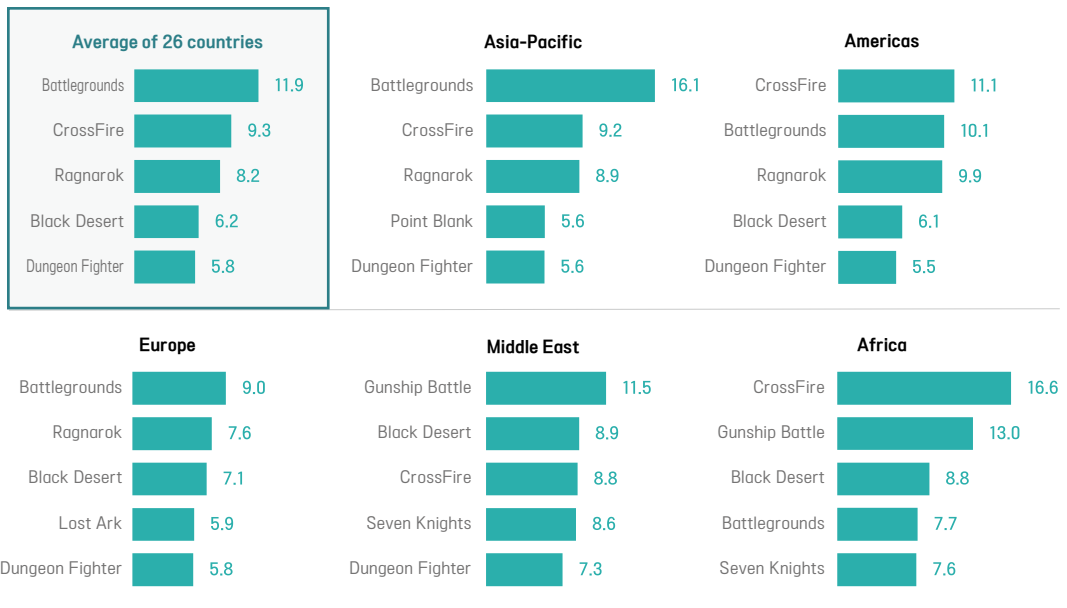
By continent, the most preferred Korean game was “Battlegrounds” in the Asia-Pacific region (16.1%) and Europe (9.0%), “CrossFire” in the Americas

(11.1%) and Africa (16.6%), and “Gunship Battle” (11.5%) in the Middle East. “Battlegrounds” and “CrossFire” significantly outpaced other games in popularity in Asia-Pacific and Africa. Conversely, in the Americas, Europe, and the Middle East, the preference for the top-ranked game was less pronounced, with percentages hovering around 10%, reflecting generally lower enthusiasm for Korean games in these regions compared to Asia-Pacific and Africa.

“Point Blank” (5.6%) was in the ranking in Asia-Pacific, “Lost Ark” (5.9%) in Europe, and “Seven Knights” in the Middle East (8.6%) and Africa (7.6%), which differed from other continents.

Figure 2-199 Comparison of Preferred Korean Games by Continent

BASE: Consumers who experienced Korean games, Unit: %



Q. What is your favorite Korean game among those you played this year? (Open-ended)

08 Willingness to pay



Overall, 40.9% of respondents were willing to pay for Korean games.

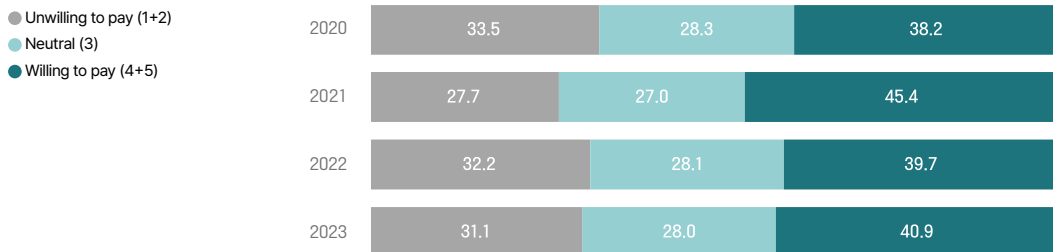
Egypt and Saudi Arabia showed particularly high willingness to pay.

When asked whether they would be willing to pay for Korean games, 40.9% responded positively, while 31.1% said they would not. Over the past 4

years, willingness to pay saw a significant increase in 2021 before returning to previous levels. The countries with the highest willingness to pay were Egypt (62.6%), Saudi Arabia (60.9%), and India (57.5%), and those with the highest proportion of respondents “unwilling to pay” were Kazakhstan (57.1%), Japan (50.9%), and Russia (50.5%).

Figure 2-200 Comparison of the Willingness to pay for Korean Games Over the Last 4 Years by Year

BASE: Total, Unit: %



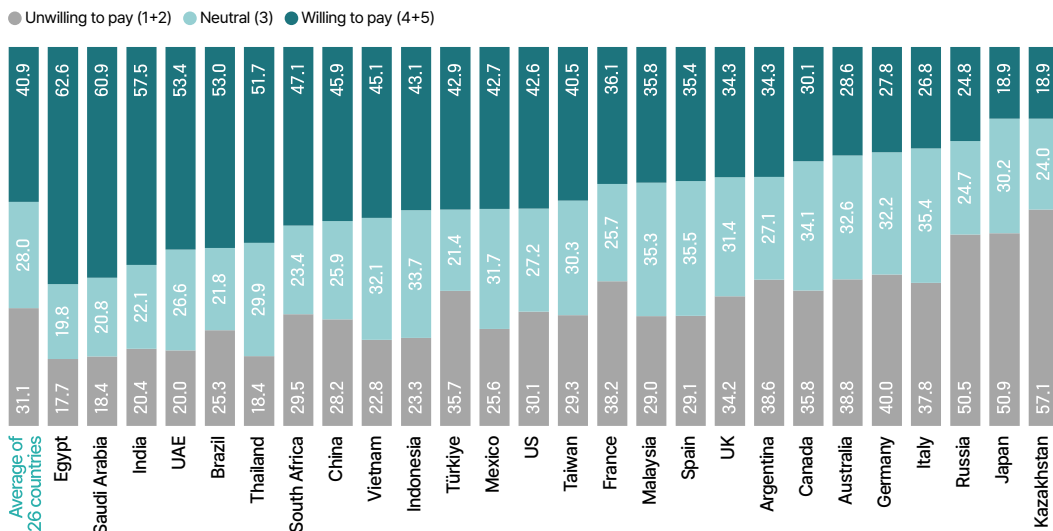
Q. Please indicate your level of willingness to pay for Korean cultural content in the future for each item.

1. Strongly disagree / 2. Disagree / 3. Neutral / 4. Agree / 5. Strongly agree

Note Willingness to pay for Korean games began to be surveyed in 2020.

Figure 2-201 Comparison of the Willingness to pay for Korean Games by Country

BASE: Total, Unit: %



09 Willingness to Recommend



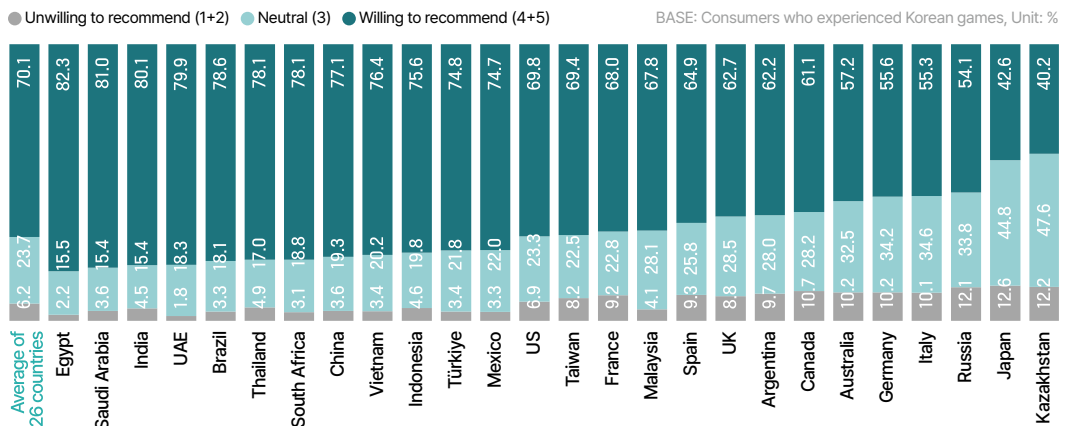
UAE and India, along with respondents in their 20s to 40s, exhibited high enthusiasm for recommending Korean games.

Japan and Kazakhstan displayed a higher willingness not to recommend.

In total, 70.1% of respondents who experienced Korean games expressed a willingness to recommend, while 23.7% were “neutral,” and 6.2% were “unwilling to recommend.” Countries that showed the highest willingness to recommend were the

UAE (82.3%), India (81.0%), and China (80.1%). Japan and Kazakhstan showed higher rates for “neutral” (47.6% and 44.8%, respectively) than for “willing to recommend.” China’s amicable attitude toward Korean games was consistently observed in consumption volume, favorability, willingness to pay, and willingness to recommend. Men (70.9%) were relatively more active about recommending Korean games than women (68.8%), and those in their 20s–40s (71.6–72.1%) were also more active than those in their teens (66.6%) and 50s (65.3%).

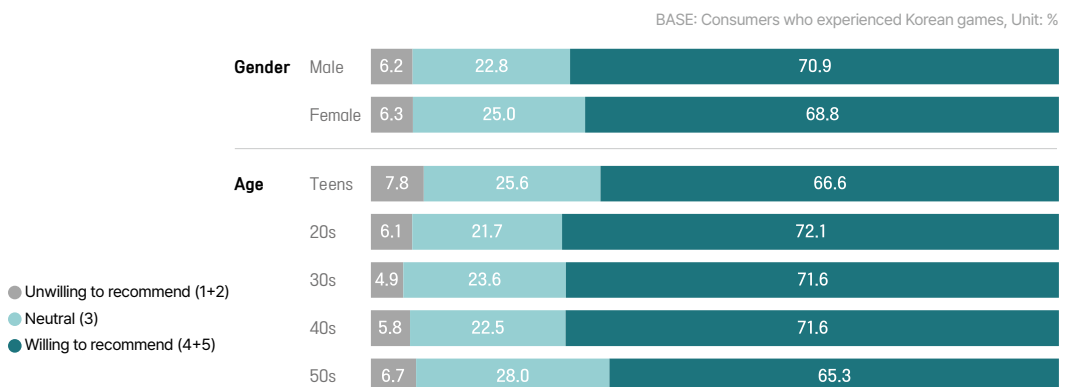
Figure 2-202 Comparison of the Willingness to Recommend Korean Games by Country



Q. Are you willing to recommend Korean games that you have recently experienced to others?

1. Definitely do not recommend / 2. Do not recommend / 3. Neutral / 4. Recommend / 5. Definitely recommend

Figure 2-203 Comparison of the Willingness to Recommend Korean Games by Gender and age



10 Ease of use



Ease of use increased from 51.9% in 2019 to 62.5% in 2023.

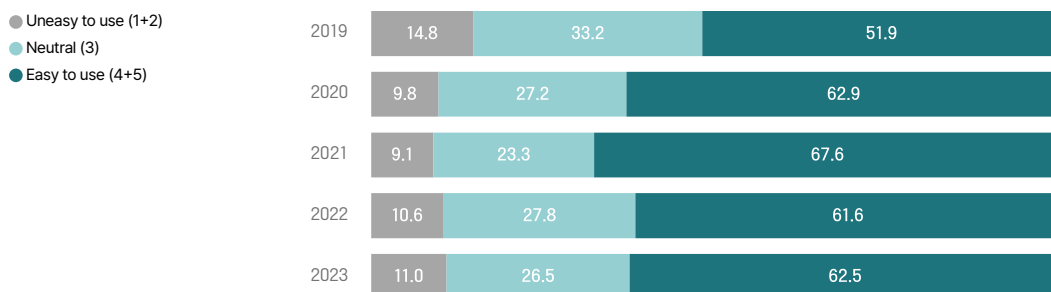
Countries with a high consumption volume, such as Indonesia and China, perceived Korean games as highly user-friendly.

Overall, 62.5% of respondents believed that Korean games were “easy to use,” while 11.0% thought they were “uneasy to use.” The percentage of those who found Korean games “easy to use”

increased from 51.9% in 2019 to 62.5% in 2023. Although there were fluctuations over the years, this percentage has consistently remained in the 60% range since 2020. Countries where respondents most frequently described Korean games as “easy to use” were Indonesia (78.7%), China (77.4%), and the UAE (73.3%), while Kazakhstan (21.1%) and Russia (19.6%) showed a notably higher proportion of respondents who felt that Korean games were not easy to use compared with other countries.

Figure 2-204 Comparison of the Ease of Using Korean Games Over the Last 5 Years by Year

BASE: Consumers who experienced Korean games, Unit: %

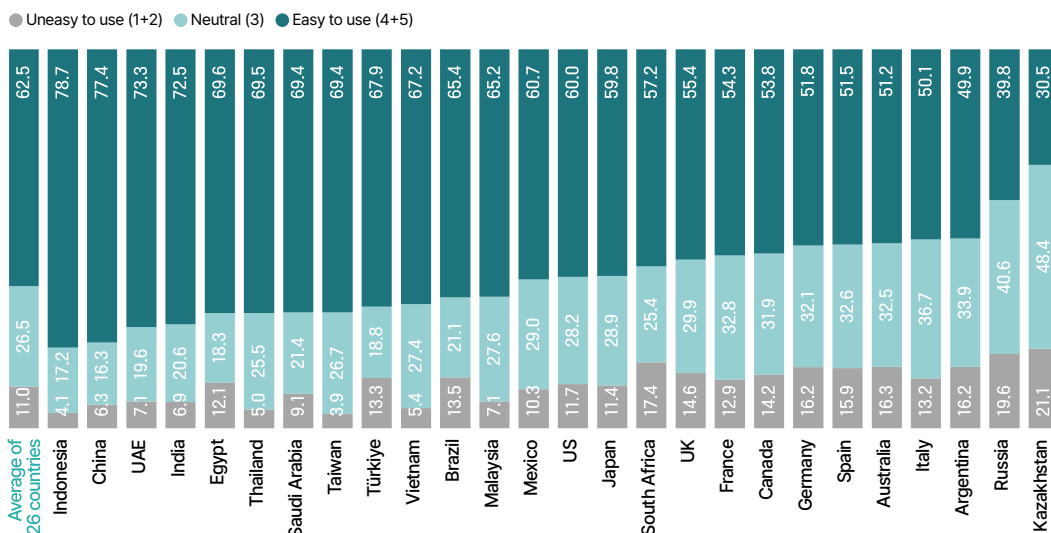


Q. When you are about to play Korean games, is it easy to access the Korean games you want?

1. Strongly disagree / 2. Disagree / 3. Neutral / 4. Agree / 5. Strongly agree

Figure 2-205 Comparison of the Ease of Using Korean Games by Country

BASE: Consumers who experienced Korean games, Unit: %



11 Access Channels



Among the respondents, 58.9% played games online, and 49.0% watched videos.

The Asia-Pacific region and the Middle East exhibited higher access rates compared with Europe and the Americas.

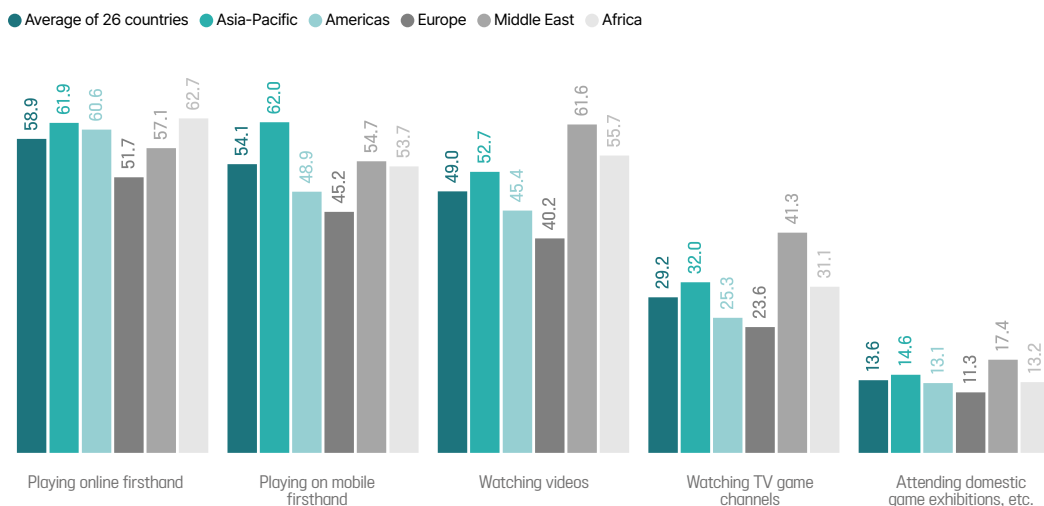
The primary channels for accessing Korean games were mainly “playing online firsthand” (58.9%) and “playing on mobile firsthand” (54.1%), reflecting a high proportion of direct play. Additionally, “watching videos” and “watching TV game channels” accounted for significant shares at 49.0% and 29.2%,

respectively.

By region, Europe exhibited lower access rates across all access channels compared to the average of the 26 countries surveyed, while Asia-Pacific displayed higher-than-average rates across all channels, indicating active usage of Korean games through multiple channels. The Middle East stands out with higher proportions of respondents engaging in “watching videos” and “watching TV game channels” compared to other continents, suggesting a higher preference for watching videos of Korean games.

Figure 2-206 Comparison of Korean Game Access Channels by Continent

BASE: Consumers who experienced Korean games, Unit: % of multiple responses



Q. Please select all of the channels through which you usually access Korean games.



9

Fashion

01 Experience Rate



Six out of 10 respondents have experienced Korean fashion.

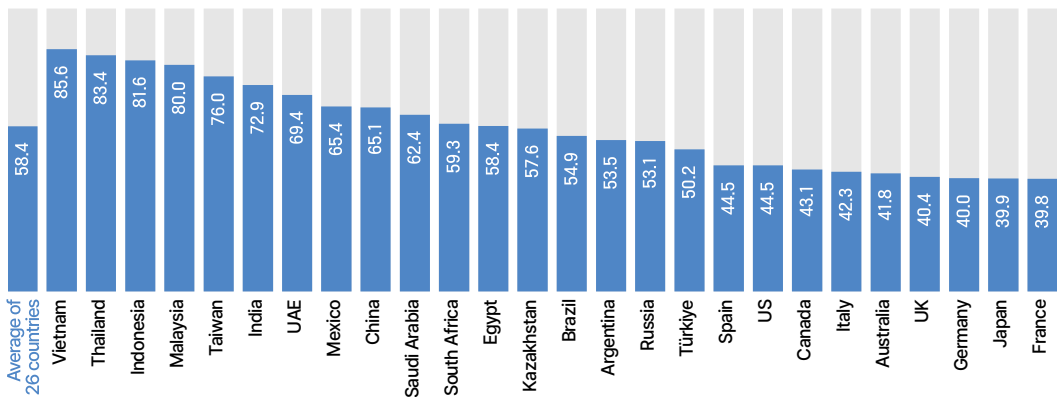
Vietnam was among the higher ranking countries, and the UAE and Mexico were included within the top 10.

The experience rate for Korean fashion among consumers with Hallyu experience was 58.4%, which is roughly 6 out of 10 consumers, ranking fifth among the 11 types of Korean cultural content.

Countries with the highest experience rates were mostly in Southeast Asia, such as Vietnam (85.6%), Thailand (83.4%), and Indonesia (81.6%), while the UAE, Mexico, and Saudi Arabia also ranked within the top 10. Japan (39.9%) and Europe (France 39.8%, Germany 40.0%, etc.) were in the lower ranks. Experience rates were relatively higher among women (66.2%) and those in their 20s (64.8%).

Figure 2-207 Comparison of Korean Fashion Product/style Experience Rates by Country

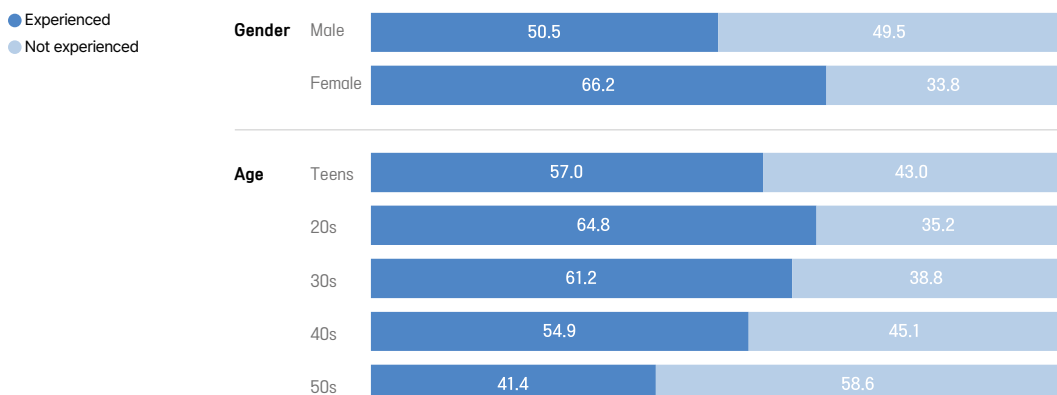
BASE: Total, Unit: %



Q. Please select all types of Korean cultural content that you have experienced.

Figure 2-208 Comparison of Korean Fashion Product/style Experience Rates by Gender and age

BASE: Total, Unit: %



02 Popularity



Among respondents, 47.1% perceived Korean fashion as “widely popular.”

When asked how popular Korean fashion is in their country, 47.1% of respondents with Hallyu experience shared that they were “widely known among the general public, with related products being sold” or “widely popular among the general public, with smooth sales of related products.” This makes it the fourth most recognized Korean cultural content in terms of “widespread popularity,” following food, beauty, and music. The percentage of respondents recognizing Korean fashion as “moderately popular” was 25.9%, while 18.4% considered it “popular among a niche audience.”

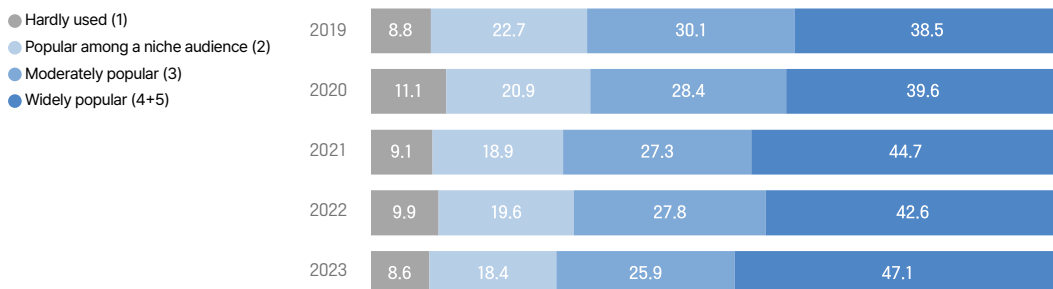
Since 2019, response trends indicate that the rate for “hardly used” has remained at around 10%, while

“popular among a niche audience” and “moderately popular” have gradually declined. In contrast, “widely popular” has increased, with an average annual growth of 5.2%.

Countries with high percentages for “widely popular” were mostly in Southeast Asia, such as Taiwan (66.0%) and Malaysia (64.4%), as well as in the Middle East. In contrast, European countries (e.g., France) and English-speaking countries (e.g., Australia) recorded lower rates. In Japan, the percentage of those considering Korean fashion as “widely popular” stood at 44.3%, noticeably higher compared to other Korean cultural content types such as variety shows, animation, and webtoons (which remained in the 10% range). This aligns Korean fashion with relatively popular categories like beauty (49.4%) and food (65.4%), demonstrating its notable local appeal.

Figure 2-209 Changes in Korean Fashion Product/style Popularity Over the Last 5 Years by Year

BASE: Total, Unit: %



Q. How popular do you think Hallyu is in your country? Please indicate to what extent you agree.

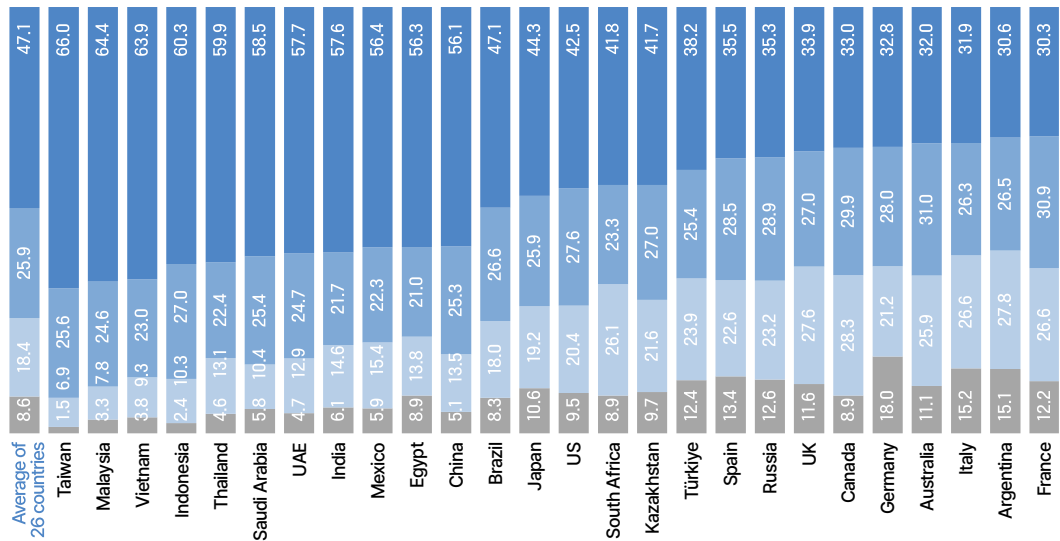
1. Hardly used by anyone / 2. Popular among a niche audience / 3. Known not just by a niche audience but also by the general public / 4. Widely known among the general public, with related products being sold / 5. Widely popular among the general public, with smooth sales of related products



Figure 2-210 Comparison of Korean Fashion Product/style Popularity by Country

BASE: Total, Unit: %

● Hardly used (1) ● Popular among a niche audience (2) ● Moderately popular (3) ● Widely popular (4+5)



Local News

- "In Taiwan, if the clothing was worn or advertised by a famous Korean celebrity, it can easily increase its recognition. Additionally, the current trend in Korea of 'personal experiences' is also feasible here." (Taiwan KOTRA Taipei trade officer)
- "Korean fashion and beauty have been well introduced through Korean dramas, movies, and celebrities. In 2023, there have been even more opportunities to encounter them through the general public or through social media influencers." (Vietnam KOFICE overseas correspondent)
- "Thanks to social media and OTT platforms, people in Vietnam can see what Korean celebrities and influencers are wearing in real time. As a result, the same fashion trends in Korea quickly become popular here. Korean brands like MLB, HAZZYS, and ADLV appear to have successfully gained a foothold in the local market." (Vietnam KOTRA Hanoi trade officer)
- "Local fashion manufacturers or makers in Indonesia are already offering high-quality products at reasonable prices, but Korean brands like MLB have gained popularity by opening flagship stores in several Indonesian cities. Many Indonesians also purchase Korean brand items like Carlyn bags when they visit Korea." (Indonesia KOTRA Jakarta trade officer)
- "With the easing of COVID-19 travel restrictions, Korean designer brands like Mardi Mercredi and Matin Kim have grown in popularity among Japanese people frequently visiting Korea, which led to the opening of their official online websites in Japan." (Japan KOTRA Tokyo trade officer)
- "T-shirts with Hangul prints or Korean fashion style are especially popular, rather than specific brands." (Türkiye KOTRA Istanbul trade officer)

03 Popular Foreign Fashion



"Korea" ranked second after "the US" in fashion. Korean fashion was viewed as comparable to that of the US in the Asia-Pacific region and the Middle East in popularity. Relatively lower popularity was exhibited in the Americas, Europe, and Africa.

Among 26 countries surveyed, respondents who experienced Korean fashion selected "the US" (26.8%) as the country where their most favored foreign fashion is from, followed by "Korea" (24.6%) and "China" (9.9%). The popularity of "Korea" was 2.2%p lower than that of "the US," which ranked first, and 14.7%p higher than that of "China," which

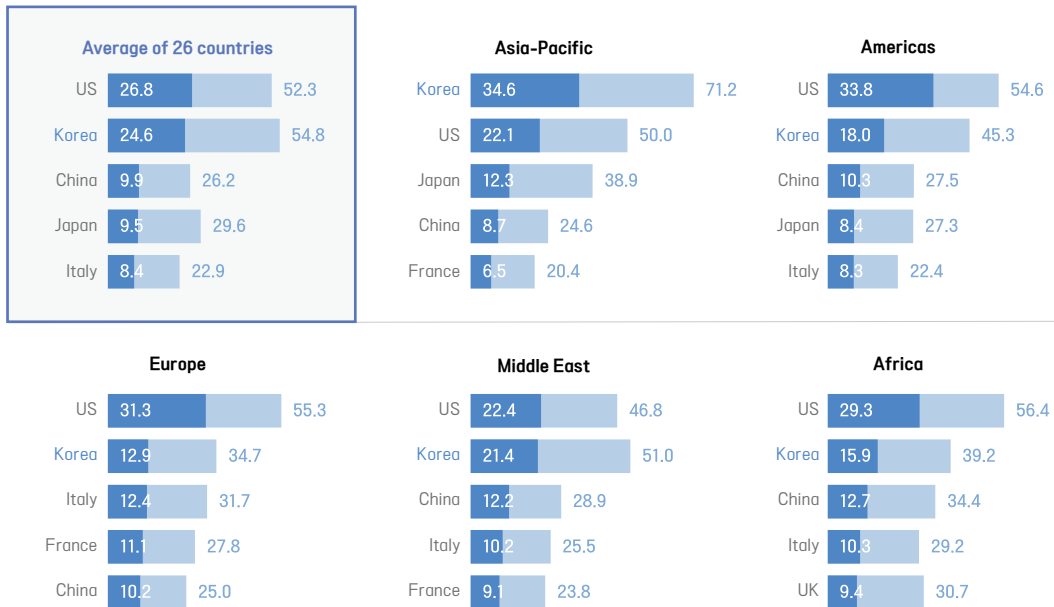
ranked third. Notably, in Asia-Pacific, 34.6% of respondents favored "Korea," a proportion 1.6 times higher than that of "the US" (22.1%).

Korea ranked second after "the US" in the Americas, Europe, the Middle East, and Africa. In the Americas, Europe, and Africa, the gap between "Korea" and "the US" was significant, at about 1.8–2.4 times, whereas in the Middle East, the gap was only 1.0%p. This suggests that in the Asia-Pacific region and the Middle East, Korean fashion enjoys a level of popularity comparable to that of US fashion, while in the Americas, Europe, and Africa, the US takes the lead in popularity, putting Korea in competition with other countries.

Figure 2-211 Comparison of Popular Foreign Fashion by Continent

BASE: Consumers who experienced Korean fashion, Unit: %

● 1st choice ● 1st+2nd+3rd choices (multiple responses)



Q. Which country's fashion is popular in your country? Please select the top three in order (excluding your own country).

Note Presented are the top five countries with the highest proportion of first-choice responses (in order).

04 Consumption Volume



High proportion of Korean fashion consumption was found in Vietnam and Indonesia.

China spent a monthly average of more than 40 USD on Korean fashion.

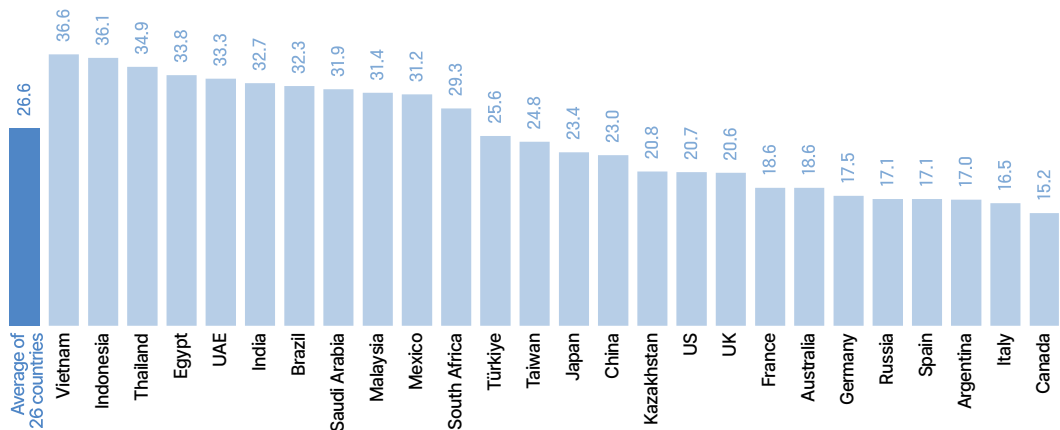
The average monthly Korean fashion consumption per person was 26.6%. The countries with the highest proportion of Korean fashion consumption

were Vietnam (36.6%), Indonesia (36.1%), and Thailand (34.9%), while those with the lowest proportions were Canada (15.2%), Italy (16.5%), and Argentina (17.0%).

The average monthly spending per person was 21.9 USD. China ranked first at 43.0 USD, followed by the UAE (41.7 USD), Saudi Arabia (39.4 USD), and the UK (34.6 USD).

Figure 2-212 Proportion of Korean Fashion Product Consumption

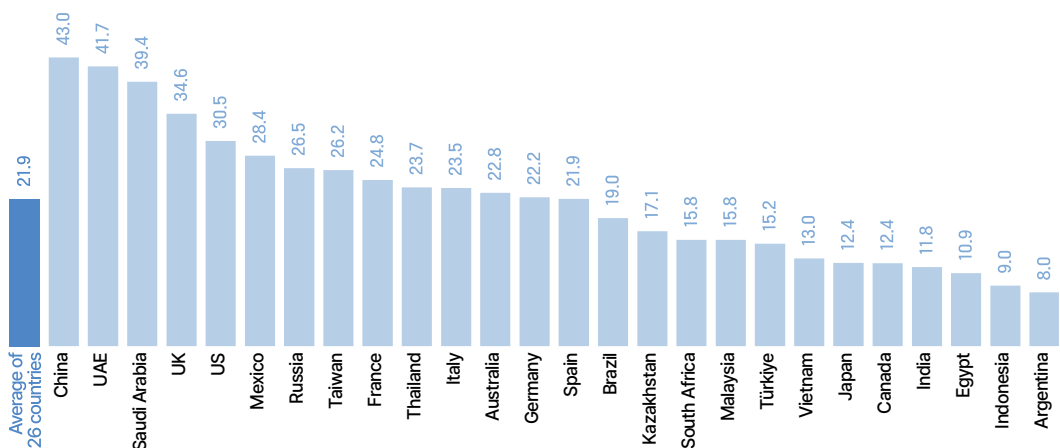
BASE: Consumers who experienced Korean fashion, Unit: %



Q. What is your usual consumption volume (expenditure) and proportion of consumption for Korean fashion products?

Figure 2-213 Expenditure on Korean Fashion Products

BASE: Consumers who experienced Korean fashion, Unit: USD/monthly average



05 Favorability



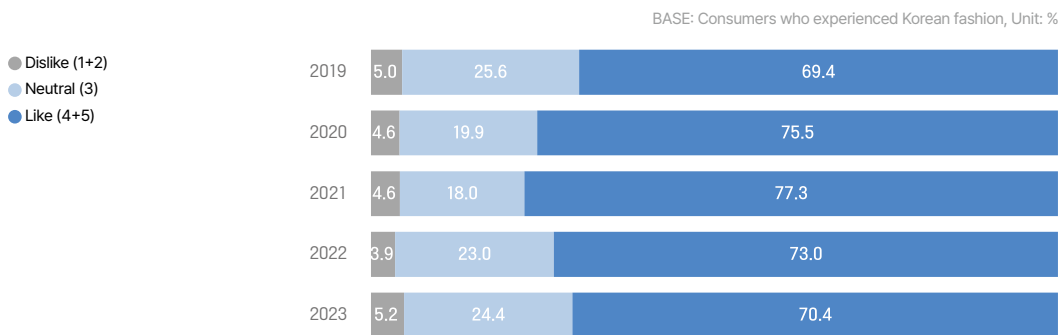
Overall, 70.4% of respondents liked Korean fashion products.

Favorability rates were particularly high in India and Vietnam.

In total, 70.4% of those who experienced Korean fashion stated that they “like[d]” it. The proportion of “neutral” responses decreased, while that of

“like” responses increased from 2019 to 2021. However, since 2022, “neutral” responses have increased again, while “like” responses have decreased. Countries with high favorability toward Korean fashion included India (83.9%), Vietnam (83.0%), and the UAE (82.6%). In contrast, countries with lower favorability were Kazakhstan (50.0%), Germany (53.2%), and France (53.7%).

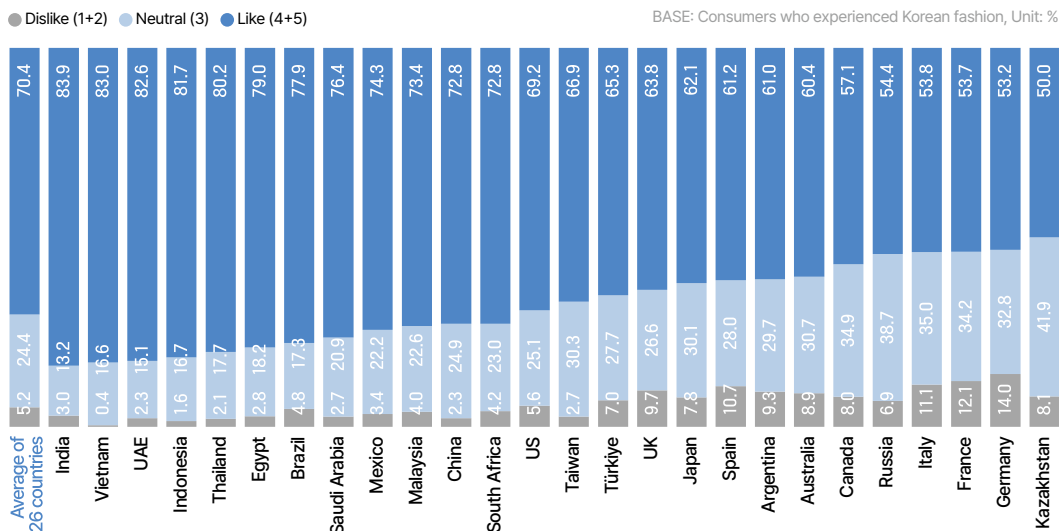
Figure 2-214 Changes in Favorability Toward Korean Fashion Products/styles Over the Last 5 Years by Year



Q. Overall, how much do you like the Korean fashion you have recently used?

1. Don't like it at all / 2. Don't like it / 3. Neutral / 4. Like it / 5. Like it very much

Figure 2-215 Comparison of Favorability Toward Korean Fashion Products/styles by Country



06 Factors Promoting and Inhibiting Favorability

Reasons such as “Designs/styles” and “Variety in types” promoted favorability.

The Asia-Pacific region and the Middle East were more influenced by fashion “Promoted by Hallyu stars.”

Europe, the Middle East, and Africa highly valued “Reasonable prices for the quality offered.” The primary reasons for liking Korean fashion (with multiple responses allowed) were “Good designs/styles” (43.9%), “Variety in product types and styles” (31.9%), “Excellent quality” (27.4%), and “Reasonable prices for the quality offered” (23.4%), ranking first through fourth though rankings varied slightly by region.

In Asia-Pacific, “Good designs/styles” (46.9%) and “Used/promoted by favorite Hallyu stars” (19.3%) were key drivers. In Europe, the Middle East, and Africa, “Reasonable prices for the quality offered” was highly rated (26.9%, 27.0%, and 26.5%, respectively). Additionally, “Good reputation among people around me” (the Middle East 21.0%, Africa 18.7%), and “Used/promoted by favorite Hallyu

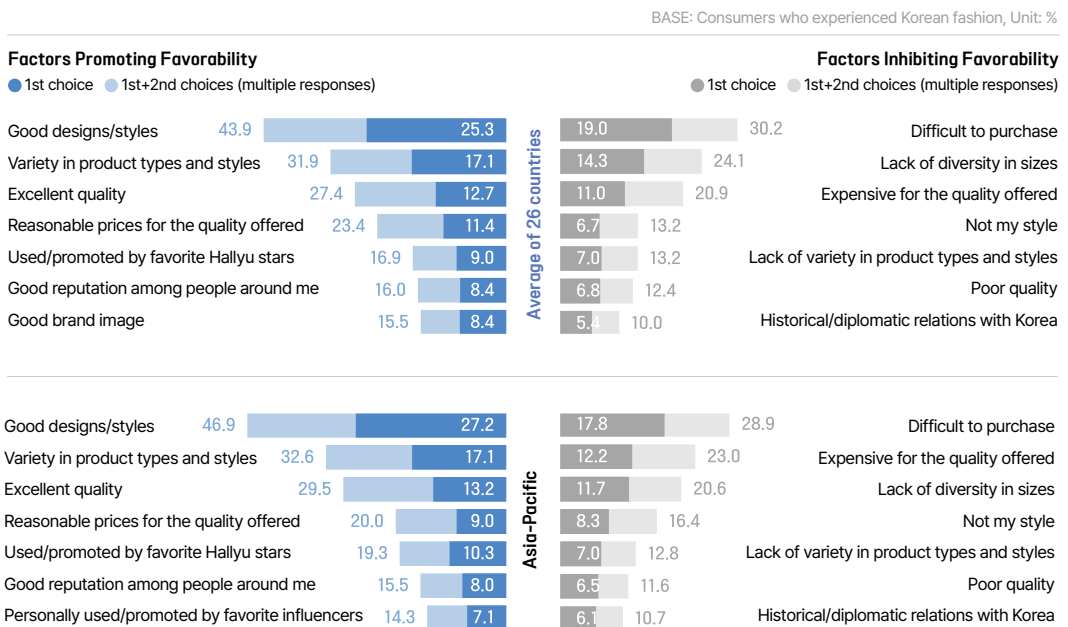
stars” (the Middle East 19.7%) exceeded the 26-country average in these regions.

“Difficult to purchase” was mentioned as the biggest factor inhibiting favorability.

The Middle East primarily cited limited “sizes” and “types/styles” as factors reducing favorability.

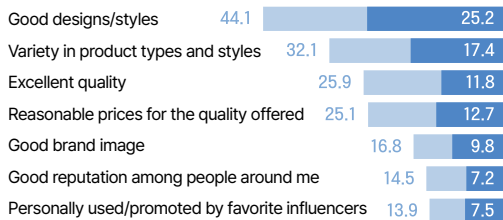
Korean fashion users mostly selected “Difficult to purchase” (30.2%) as the biggest factor inhibiting favorability, followed by “Lack of diversity in sizes” (24.1%) and “Expensive for the quality offered” (20.9%). These top three factors ranked first through third across all continents, although there were slight differences in the rankings. In the Middle East, “Lack of diversity in sizes” (30.1%) and “Lack of variety in product types and styles” (18.5%) were frequently noted. In Africa, “Lack of diversity in sizes” (31.6%) and “Difficult to purchase” (36.1%) were mentioned more frequently than the 26-country average. This suggests that respondents on these continents were more uncomfortable with sizes, styles, and purchase accessibility compared with those in other continents.

Figure 2-216 Comparison of Factors Promoting and Inhibiting Favorability Toward Korean Fashion by Continent

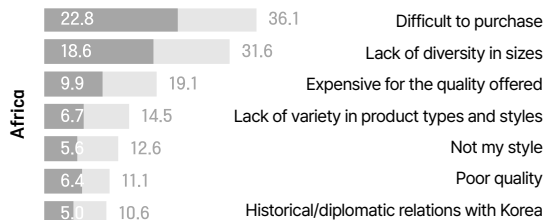
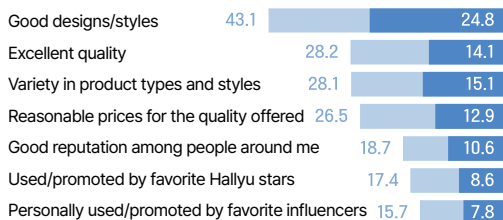
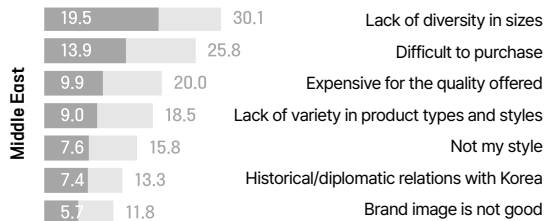
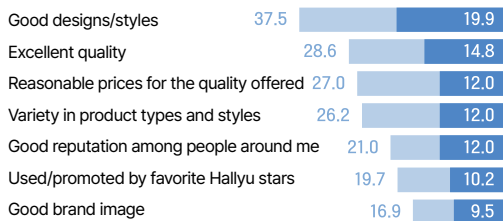
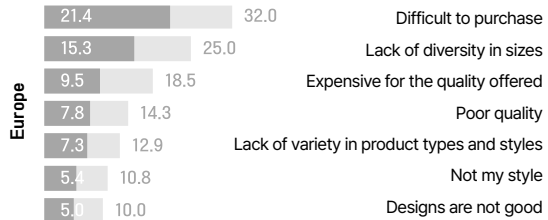
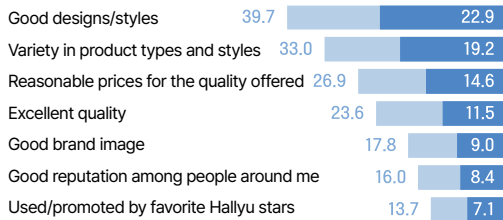
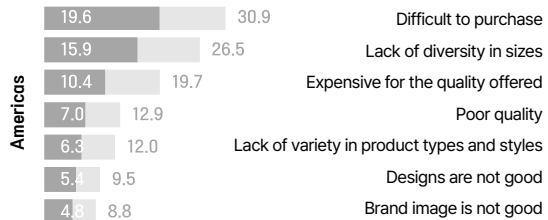


Factors Promoting Favorability

● 1st choice ● 1st+2nd choices (multiple responses)

**Factors Inhibiting Favorability**

● 1st choice ● 1st+2nd choices (multiple responses)



Q. What do you think are the biggest factors promoting favorability toward Korean fashion? Please select up to the second choice in order.

Q. What do you think are the factors inhibiting favorability toward Korean fashion? Please select up to the second choice in order.

07 Willingness to pay



Among consumers, 51.0% were willing to pay for Korean fashion.

Thailand, India, and Vietnam exhibited high willingness to pay.

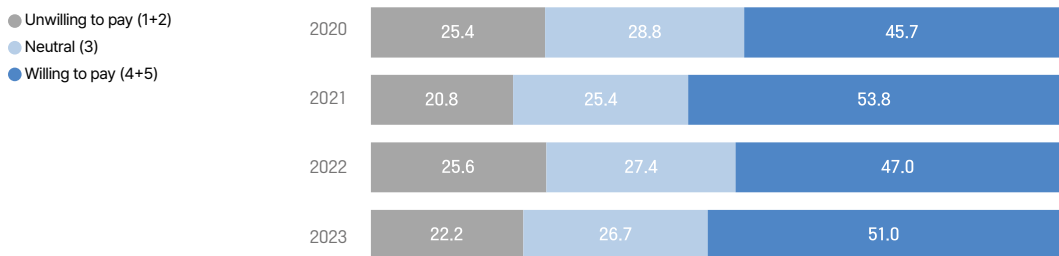
When asked about their willingness to pay for Korean fashion, 51.0% of respondents with Hallyu experience in 26 countries answered "yes," followed by "neutral" at 26.7% and "unwilling to pay" at 22.2%. Over the past 4 years, willingness to pay saw a significant increase in 2021, followed by a decline in

2022, and a subsequent rebound this year.

Countries with the highest willingness to pay included Thailand (71.4%), India (71.3%), and Vietnam (69.9%), with Southeast Asia, South Asia (India), and the Middle East mostly at the top. On the other hand, Germany (37.9%), Italy (37.4%), Japan and France (36.8%, respectively), Canada (31.6%), and Argentina (30.9%) had higher percentages of respondents who were "unwilling to pay," suggesting stronger negative perceptions toward paying for Korean fashion compared to other countries.

Figure 2-217 Comparison of the Willingness to pay for Korean Fashion Products/styles Over the Last 4 Years by Year

BASE: Total, Unit: %



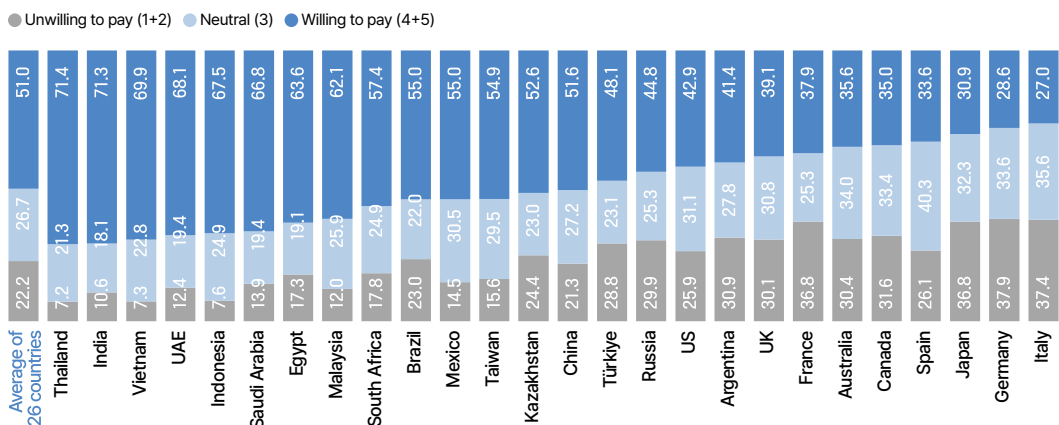
Q. Please indicate your level of willingness to pay for Korean cultural content in the future for each item.

1. Strongly disagree / 2. Disagree / 3. Neutral / 4. Agree / 5. Strongly agree

Note The question about willingness to pay for Korean fashion was added in 2020.

Figure 2-218 Comparison of the Willingness to pay for Korean Fashion Products/styles by Country

BASE: Total, Unit: %



08 Willingness to Recommend



India and Vietnam and those in their 20s–30s were active in recommending Korean fashion.

Japan, Germany, and Canada showed lower enthusiasm.

In total, 66.9% of respondents who experienced Korean fashion responded that they were “willing to recommend” Korean fashion, 27.0% were “neutral,” and 6.1% were “unwilling to recommend.”

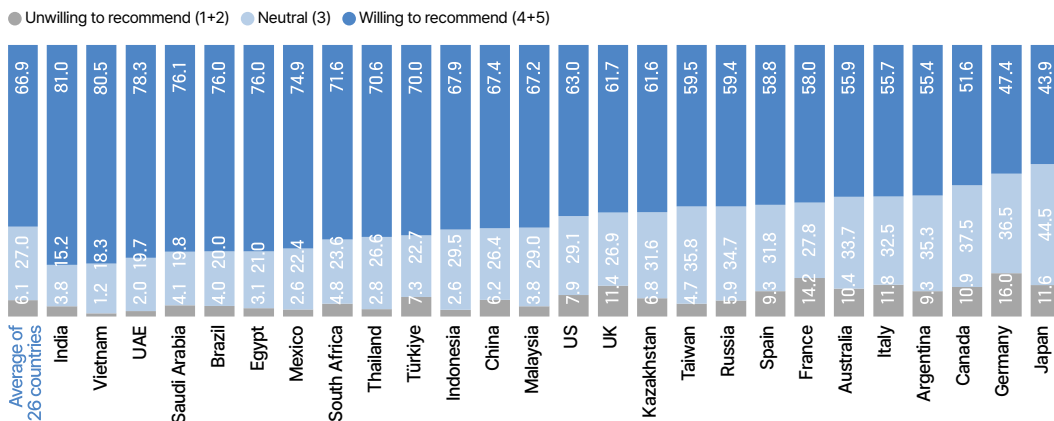
Countries with the highest willingness to recom-

mend Korean fashion were India (81.0%), Vietnam (80.5%), and the UAE (78.3%), while Japan (43.9%), Germany (47.4%), and Canada (51.6%) showed low willingness to recommend. In particular, in seven countries, including Germany (16.0%), France (14.2%), and Italy (11.8%), over 10% of respondents expressed unwillingness to recommend it.

Respondents in their 20s (69.9%) and 30s (70.0%) were relatively more active in recommending Korean fashion compared to other age groups.

Figure 2-219 Comparison of the Willingness to Recommend Korean Fashion Products/styles by Country

BASE: Consumers who experienced Korean fashion, Unit: %

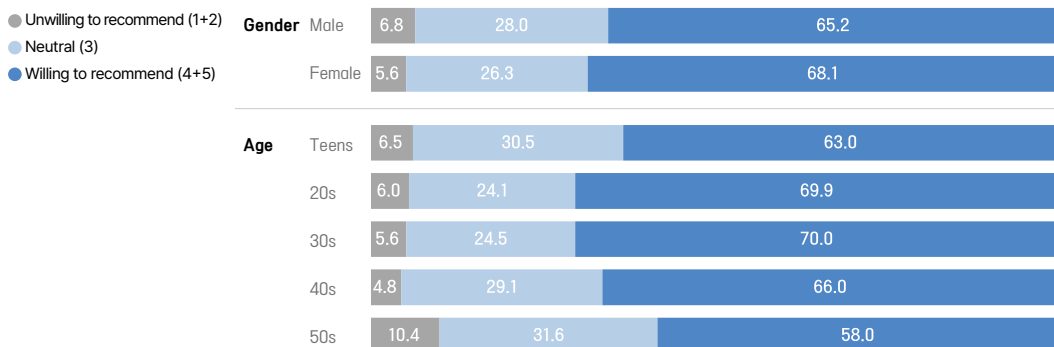


Q. Are you willing to recommend Korean fashion products/styles you have recently experienced to others?

1. Definitely do not recommend / 2. Do not recommend / 3. Neutral / 4. Recommend / 5. Definitely recommend

Figure 2-220 Comparison of the Willingness to Recommend Korean Fashion Products/styles by Gender and age

BASE: Consumers who experienced Korean fashion, Unit: %



09 Ease of use



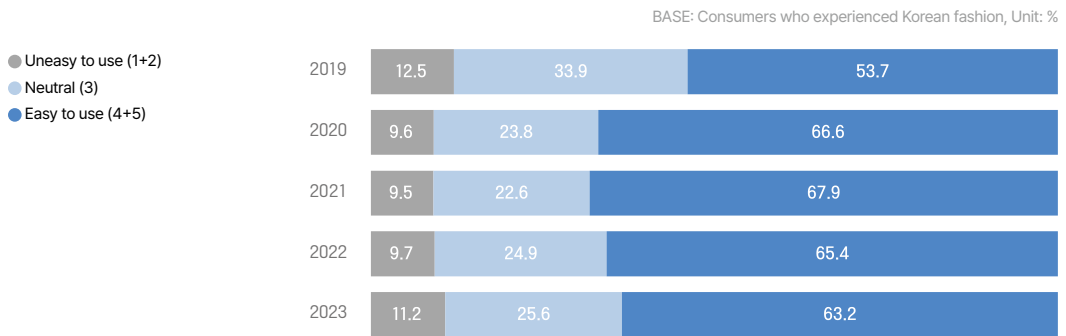
63.2% found Korean fashion “easy to use.”

Indonesia and Vietnam recorded particularly high rates, reaching 78%.

Overall, 63.2% of respondents who experienced Korean fashion stated that Korean fashion was “easy to use,” while 11.2% found it “uneasy to use.” The percentage of those who found it “easy to

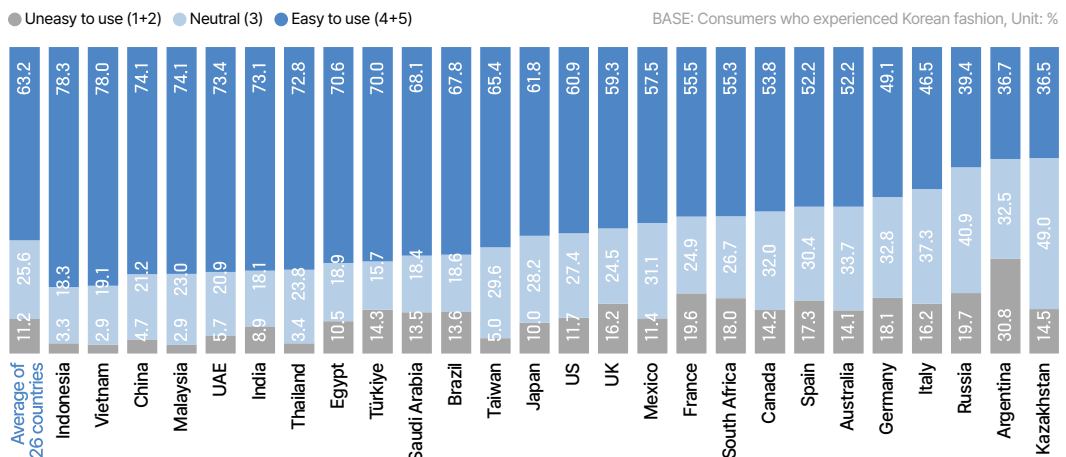
use” increased significantly in 2020 from 53.7% in 2019 and has since remained in the 60% range. The countries with the highest “easy to use” perception included Indonesia (78.3%), Vietnam (78.0%), and China (74.1%), while those with the lowest rates were Kazakhstan (36.5%), Argentina (36.7%), and Russia (39.4%).

Figure 2-221 Changes in the Ease of Using Korean Fashion Products or Videos/Images Over the Last 5 Years by Year



Q. When you are about to use Korean fashion products or videos/images, is it easy to access the Korean fashion products or videos/images you want?
1. Strongly disagree / 2. Disagree / 3. Neutral / 4. Agree / 5. Strongly agree

Figure 2-222 Comparison of the Ease of Using Korean Fashion Products or Videos/Images by Country



10 Access Channels



Asia-Pacific and the Middle East actively used "Korean video content" to access Korean fashion.

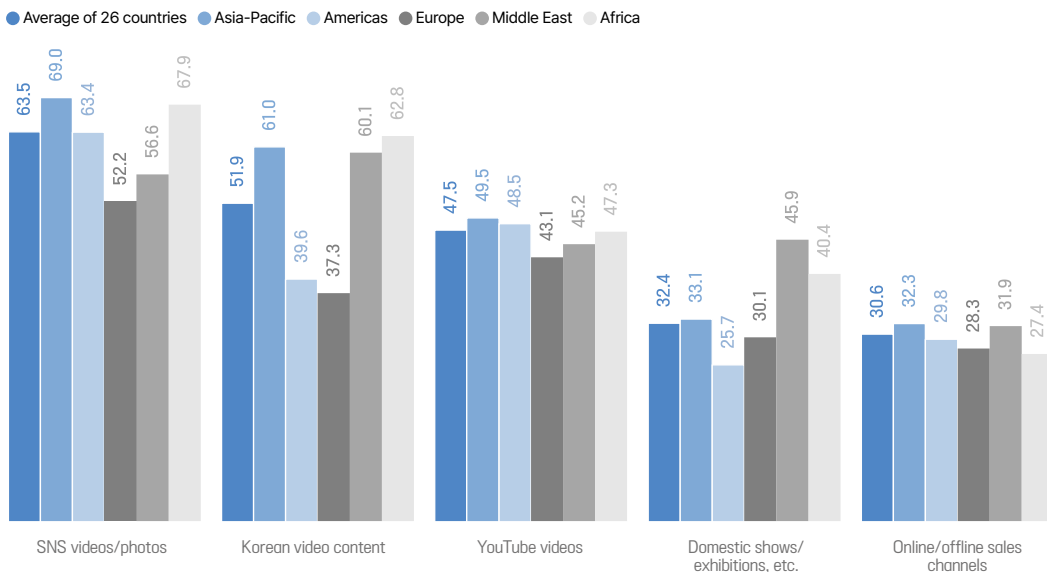
The primary access channels for Korean fashion were "SNS videos/photos" (63.5%) and "Korean video content" (51.9%).

Regional data showed higher-than-average engagement in specific channels. In Asia-Pacific, "SNS videos/photos" (69.0%) and "Korean video content" (61.0%)

content" (61.0%) were dominant. In the Middle East, "Korean video content" (60.1%), "domestic shows/exhibitions, etc." (45.9%), and "online/offline sales channels" (31.9%) were notable. In Africa, key channels included "SNS videos/photos" (67.9%), "Korean video content" (62.8%), and "domestic shows/exhibitions, etc." (40.4%). On the other hand, the Americas and Europe recorded lower access rates across all channels compared to the 26-country average.

Figure 2-223 Comparison of Korean Fashion Product or Video/image Access Channels by Continent

BASE: Consumers who experienced Korean fashion, Unit: % of multiple responses



Q. Please select all of the channels through which you usually access Korean fashion products/styles or related videos/images.



11 Purchase Channels



Most consumers purchased Korean fashion products online.

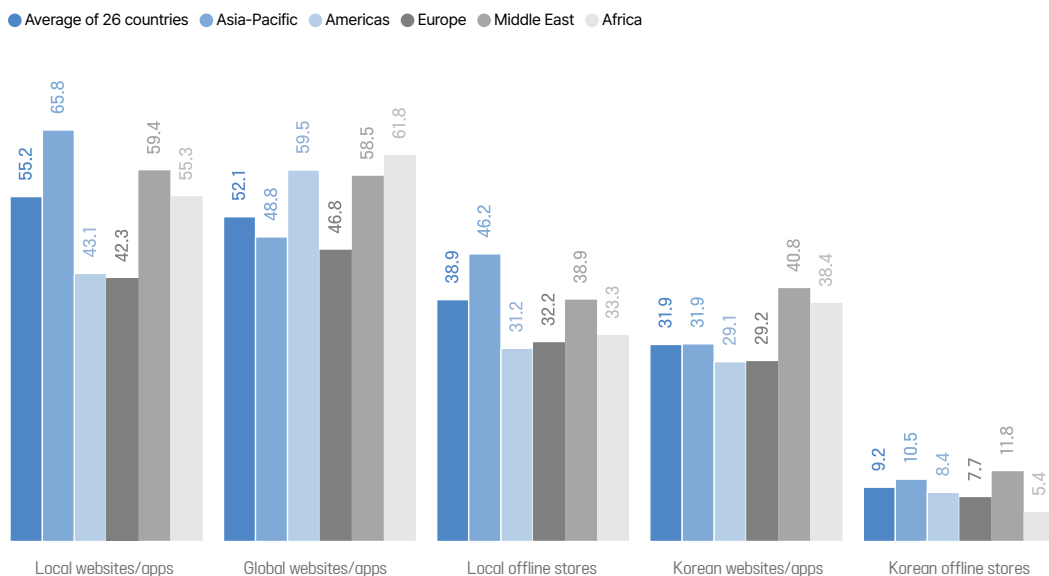
The Middle East and Africa more actively used Korean websites/apps.

The primary purchase channels for Korean fashion products were online channels, such as "local websites/apps" (55.2%) and "global websites/apps" (52.1%). By region, the channels showing higher

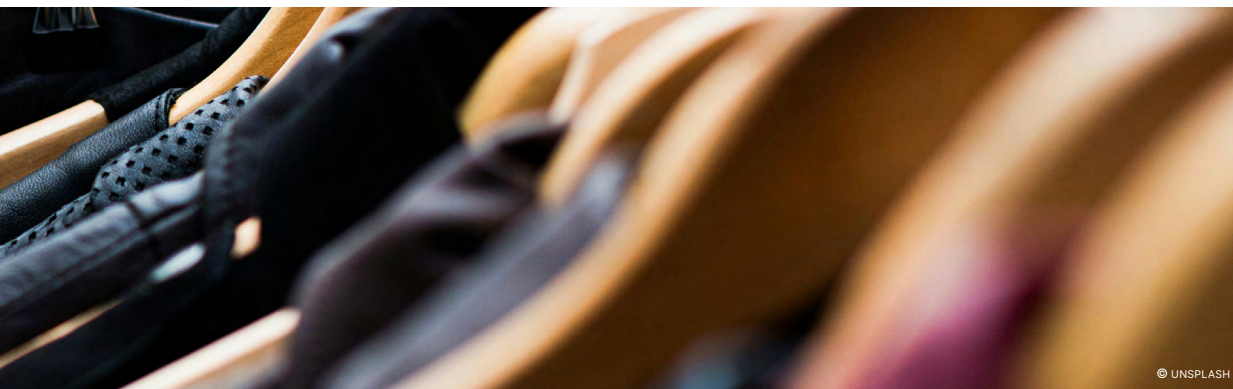
percentages than the average of 26 countries were "local websites/apps" (65.8%) and "local offline stores" (46.2%) in Asia-Pacific, "global websites/apps" (59.5%) in the Americas, "local websites/apps" (59.4%) and "global websites/apps" (58.5%) in the Middle East, and "global websites/apps" (61.8%) in Africa. The continents showing high purchase rates through "Korean websites/apps" included the Middle East (40.8%) and Africa (38.4%).

Figure 2-224 Comparison of Korean Fashion Product Purchase Channels by Continent

BASE: Consumers who experienced Korean fashion, Unit: % of multiple responses



Q. Please select all of the channels through which you usually purchase Korean fashion products.



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10

Beauty

01 Experience Rate



Five to 6 out of 10 respondents have experienced Korean beauty products.

Southeast Asian countries were mainly at the top, with Kazakhstan and Russia ranking fourth and sixth, respectively.

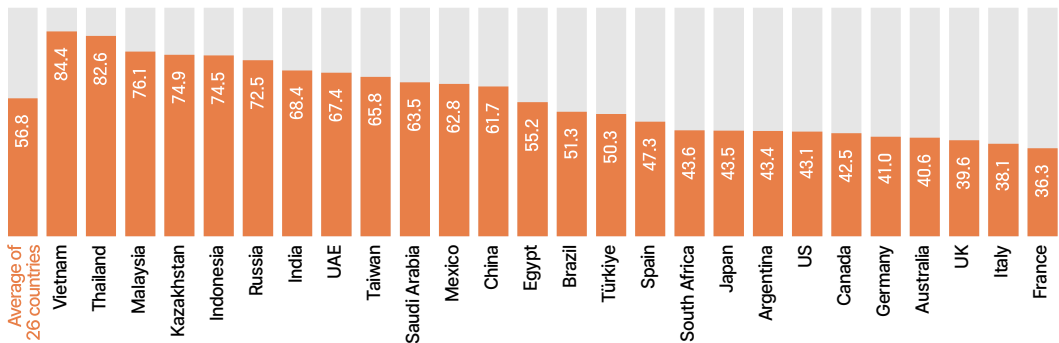
In total, 56.8% of respondents used Korean beauty products, which is equivalent to 5–6 out of 10, making it the sixth highest among the 11 categories of Korean cultural content.

Countries with the highest experience rates were mostly in Southeast Asia, such as Vietnam (84.4%),

Thailand (82.6%), and Malaysia (76.1%). Kazakhstan and Russia, which were in the mid-lower ranks among 26 countries in experience rates for dramas, movies, animation, publications, and webtoons, ranked fourth and sixth, respectively, for beauty products. European countries (e.g., France 36.3%) and English-speaking regions (e.g., the UK 39.6%, Australia 40.6%) recorded lower experience rates. Women (71.4%) and those in their 20s–30s (64.0% and 61.9%, respectively) exhibited relatively high experience rates.

Figure 2-225 Comparison of Korean Beauty Experience Rates by Country

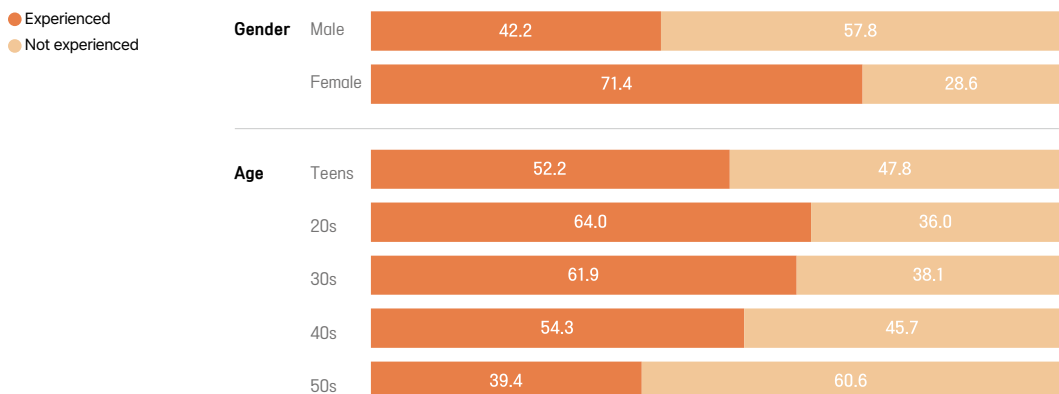
BASE: Total, Unit: %



Q. Please select all types of Korean cultural content that you have experienced.

Figure 2-226 Comparison of Korean Beauty Experience Rates by Gender and age

BASE: Total, Unit: %



02 Popularity



Over half of the respondents recognized Korean beauty products as “widely popular.”

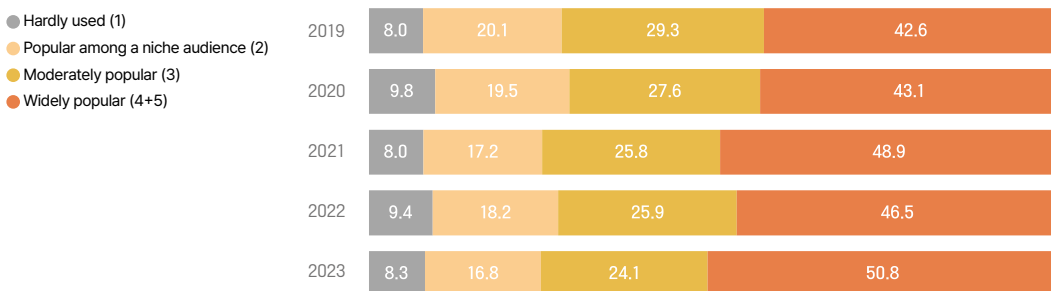
When asked how popular Korean beauty products were in their country, 50.8% of respondents with Hallyu experience responded that they were “widely popular,” such as “widely known among the general public, with related products being sold” or “widely popular among the general public, with smooth sales of related products.”

The “widely popular” rate for beauty was second

highest following food among the 11 types of Korean cultural content, indicating that Korean beauty products were well-known and recognized by the general public. Over the past 5 years, the proportion of respondents who “hardly used” Korean beauty products did not show change much at approximately 8–9%. However, the proportion of those selecting “popular among a niche audience” and “generally popular” have decreased, while the proportion of “widely popular” has shown an upward trend.

Figure 2-227 Comparison of Korean Beauty Popularity Over the Last 5 Years

BASE: Total, Unit: %



Q. How popular do you think Korean beauty products are in your country? Please indicate to what extent you agree.

1. Hardly used by anyone/ 2. Popular among a niche audience/ 3. Known not just by a niche audience but also by the general public/ 4. Widely known among the general public, with related products being sold / 5. Widely popular among the general public, with smooth sales of related products



Vietnam and Taiwan notably showed high rates for “widely popular.”

The rates for “hardly used” were nearly 20% in some countries, including Germany.

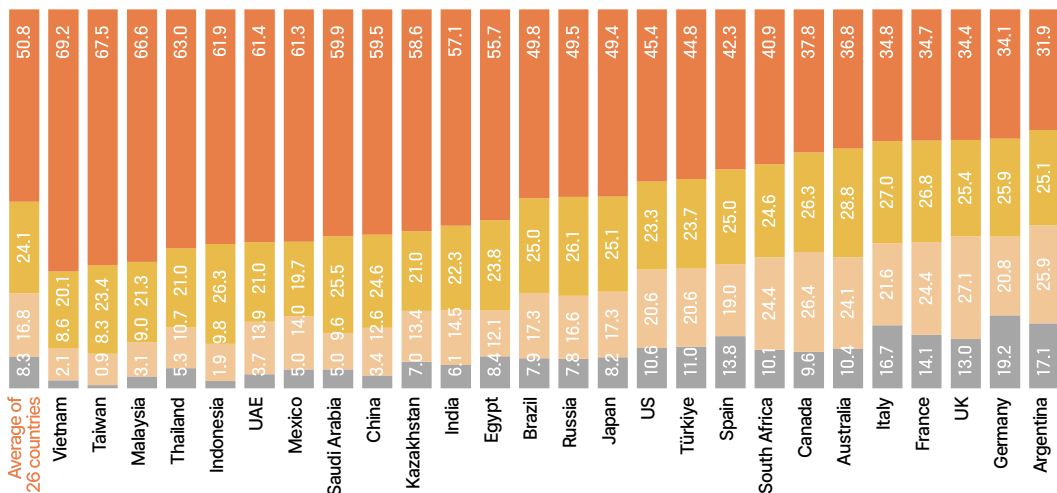
Vietnam (69.2%), Taiwan (67.5%), and Malaysia (66.6%) were among the countries with the highest recognition of Korean beauty products as “widely popular.” In particular, Kazakhstan ranked 10th (58.6%) among 26 countries and had the highest proportion of “widely popular” among the 11 Korean cultural content genres. China also had the highest proportion of respondents selecting “widely popular” among the 11 categories, at

59.5%. Supporting this survey result, local news reports indicated that Korean beauty was widely popular, as proven by the popularity of Korean lip balm in Kazakhstan and beauty experiences included in China’s package tours to Korea since the resumption of overseas travel. On the other hand, Russia, where the Korean beauty experience rate ranked sixth, recorded a moderate rate for “widely popular” at 49.5%. The percentage for “widely popular” were higher than that for “popular among a niche audience” and “moderately popular” in all countries, but the percentage for “hardly used” was higher in Germany (19.2%), Argentina (17.1%), and Italy (16.7%), compared to other countries.

Figure 2-228 Comparison of Korean Beauty Popularity by Country

BASE: Total, Unit: %

● Hardly used (1) ● Popular among a niche audience (2) ● Moderately popular (3) ● Widely popular (4+5)



Local News

- “In 2023, Melting Balm by Korean cosmetic brand Rom&nd was a smash success in Kazakhstan, so this product was easily found in stores selling Korean beauty products. There were also countless reviews of this product on social media. Counterfeit cosmetics began to increase along with the growing popularity of Korean beauty products within Kazakhstan, so the year 2023 was when Olive Young’s global website received great attention for offering free delivery of authentic Korean cosmetics to Kazakhstan for purchases over 60 USD.” (Kazakhstan KOTRA Almaty trade officer)
- “With the resumption of overseas travel in 2023, Korean beauty package tours became popular among Chinese women. I heard that these package programs include personal color analysis*, hair salon experiences, and dermatological procedures in Korea.” (China KOFICE overseas correspondent)

* This offers the experience of identifying one’s personalized color palette.

03 Popular Foreign Beauty Products



Korean beauty ranked first with 32.3% as the most popular brand in respondents' countries.

Korean beauty products were by far the most popular in Asia-Pacific.

When those with experience using Korean beauty products were asked about their favorite foreign beauty brands, "Korea" (32.3%) topped the list, followed by "the US" (19.8%), and "France" (13.2%). The percentage for "Korea" was 1.6 times higher than that for "the US," which indicates a very positive perception of Korean beauty products.

By region, "Korea" (41.8%) had an overwhelmingly

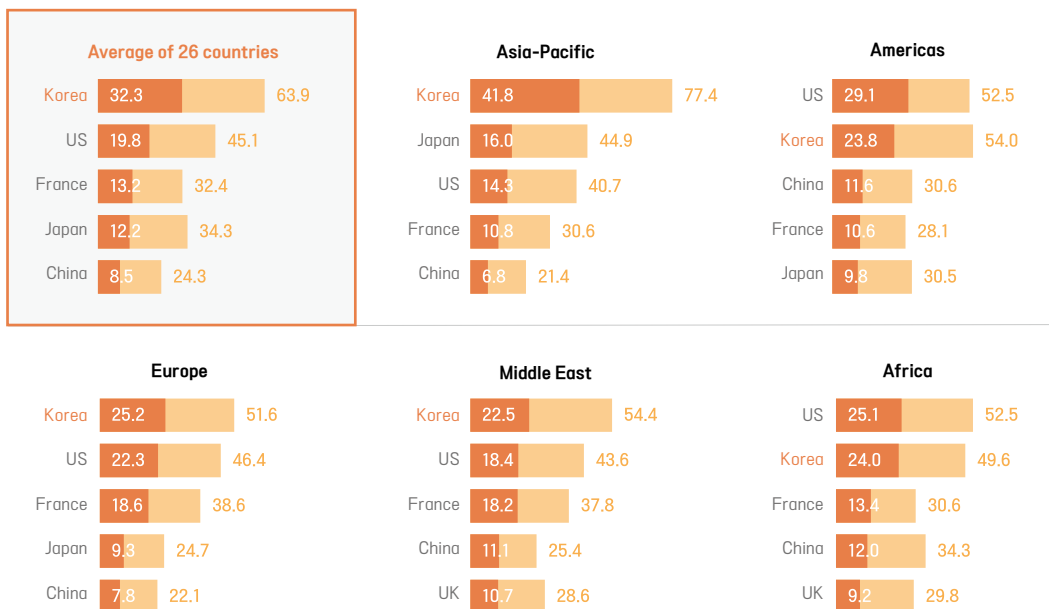
higher proportion in Asia-Pacific compared with other continents, 2.6 times higher than that for "Japan" (16.0%), which ranked second. In contrast, the Middle East and Europe also ranked "Korea" first, but with smaller margins, 4.1%p and 2.9%p over "the US," respectively, indicating that the dominance of Korean beauty was less pronounced compared to Asia-Pacific.

In the Americas, "the US" (29.1%) led, followed by "Korea" (23.8%) and "China" (11.6%). In Africa, "the US" (25.1%), "Korea" (24.0%), and "France" (13.4%) were the most popular.

Figure 2-229 Comparison of Popular Foreign Beauty Products by Continent

BASE: Consumers who experienced Korean beauty, Unit: %

● 1st choice ● 1st+2nd+3rd choices (multiple responses)



Q. Which country's beauty products are popular in your country? Please select the top three in order (excluding your own country).

Note Presented are the top five countries with the highest proportion of first-choice responses (in order).

04 Consumption Volume



The average proportion of Korean beauty product consumption across 26 countries was 28.7%.

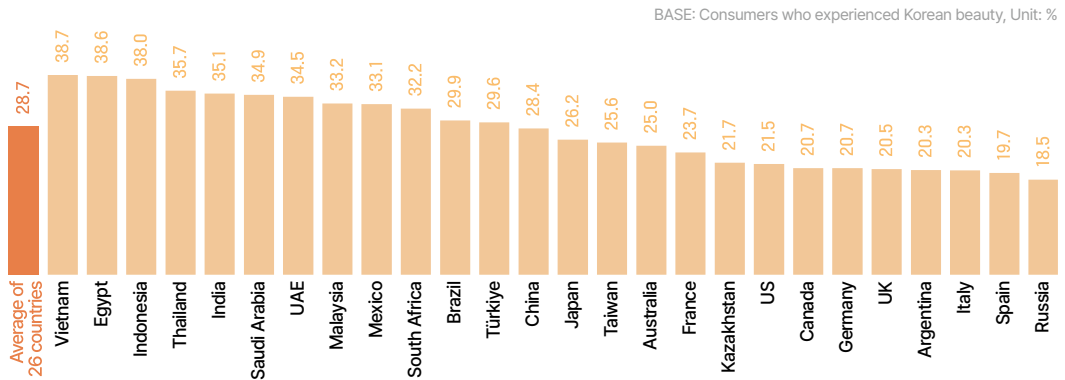
Southeast Asia and Egypt showed notably high consumption, while Europe showed low consumption.

Among individuals with experience using Korean beauty products, an average of 28.7% of their monthly beauty expenditure was allocated to Korean products. The countries with the highest

proportion of Korean beauty consumption were Vietnam (38.7%), Egypt (38.6%), and Indonesia (38.0%). European countries such as Russia (18.5%), Spain (19.7%), and Italy (20.3%) showed lower proportions of consumption.

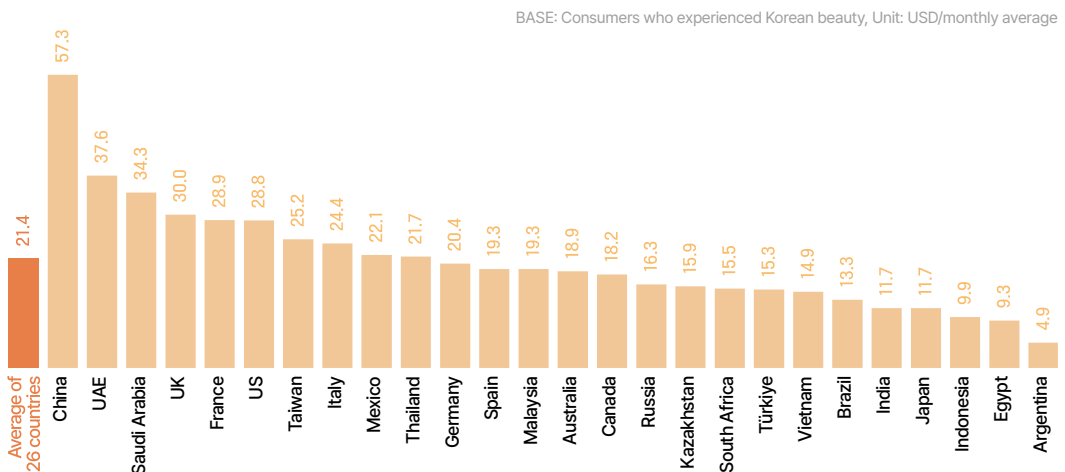
In terms of spending, the average monthly spending per person was by far the highest in China, with 57.3 USD, followed by the UAE (37.6 USD) and Saudi Arabia (34.3 USD), while Argentina (4.9 USD), Egypt (9.3 USD), and Indonesia (9.9 USD) showed lowest spending levels.

Figure 2-230 Comparison of the Proportion of Korean Beauty Product Consumption by Country



Q. What is your usual consumption volume (expenditure) and proportion of consumption of Korean beauty products?

Figure 2-231 Comparison of Expenditure on Korean Beauty Products by Country



05 Favorability



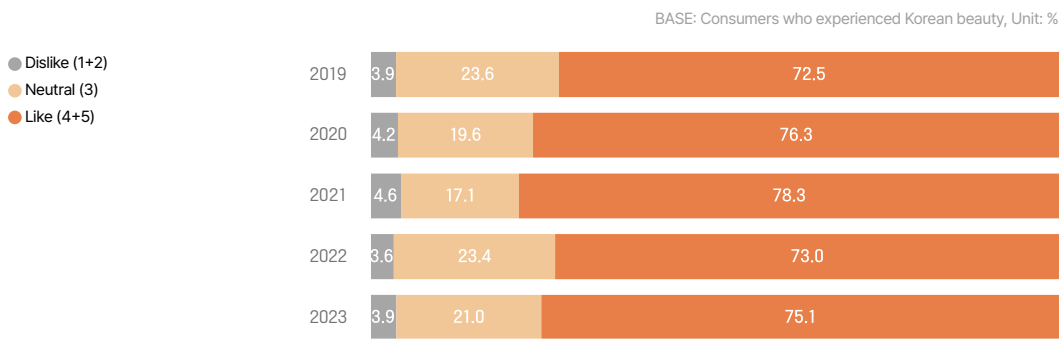
Overall, 75.1% of respondents liked Korean beauty products.

Favorability rates were particularly high in the UAE and India.

In total, 75.1% of those who experienced Korean beauty products stated that they “like[d]” Korean beauty products, reflecting a consistently high fa-

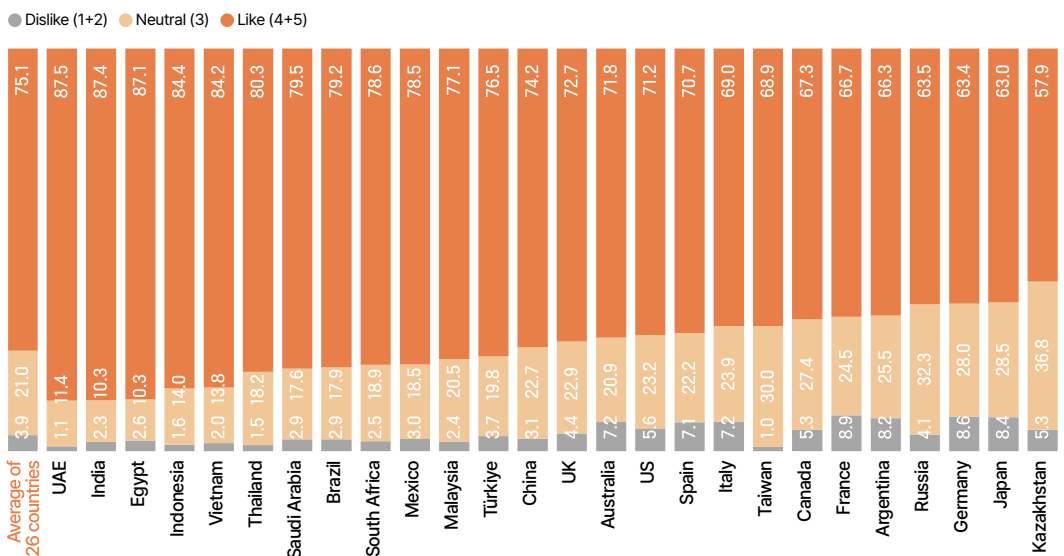
vorability rate of over 70% for the past 5 years. The countries with the highest levels of favorability were the UAE (87.5%), India (87.4%), and Egypt (87.1%), while those with the lowest favorability were Kazakhstan (57.9%), Japan (63.0%), and Germany (63.4%). It is necessary to examine the reasons that favorability was relatively low in Kazakhstan, where the experience and the “widely popular” rates were both high.

Figure 2-232 Changes in Favorability Toward Korean Beauty Over the Last 5 Years by Year



Q. Overall, how much do you like the Korean beauty products you have recently used?
1. Don't like them at all / 2. Don't like them / 3. Neutral / 4. Like them / 5. Like them very much

Figure 2-233 Comparison of Favorability Toward Korean Beauty by Country



06 Factors Promoting and Inhibiting Favorability

Most countries appreciated Korean beauty products for their “effectiveness and excellent quality.” The Middle East and Africa showed high proportions for “good reputation.”

The most frequently cited reasons for liking Korean beauty products and style (with multiple responses allowed) were “Effective and excellent quality” (43.1%), “Variety in product types” (25.6%), and “Reasonable prices for the quality offered” (24.6%). By region, the top-ranking factor promoting favorability was “Effective and excellent quality.” This was followed by “Variety in product types,” which ranked second or third in Asia-Pacific, the Americas, and Europe, and by “Good reputation among people around me,” which ranked second or third in the Middle East and Africa, showing a difference among continents. Reasons for favorability that stood out relative to the 26-country average included “Effective and excellent quality” (47.1%) in Asia-Pacific, “Variety in product types” (30.6%) and “Nice product packaging design” (20.3%) in the Americas, “Good reputation among people around me” (26.9%) and “Use of nature-friendly ingredients and materials” (22.0%) in the Middle East, and “Nice product packaging design” (21.2%) and “Use of nature-friendly ingredients and materials” (22.6%) in Africa.

“Price” was notably a major factor inhibiting favorability in Asia-Pacific.

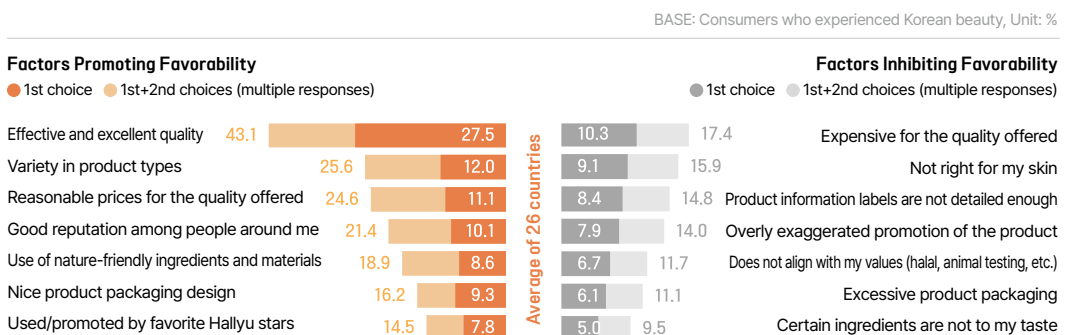
The Middle East was not satisfied with diversity, value, or product information labeling.

The primary factors that inhibited favorability toward Korean beauty products and styles (with multiple responses allowed) were “Expensive for the quality offered” (17.4%), “Not right for my skin” (15.9%), and “Product information labels are not detailed enough” (14.8%).

Regional differences in factors exceeding the 26-country average included “Poor quality” (10.7%) in the Americas, “Lack of variety in product types” (13.5%), “Does not align with my values” (15.6%), and “Product information labels are not detailed enough” (18.3%) in the Middle East, and “Excessive product packaging” (15.1%) and “Lack of variety in product types” (13.1%) in Africa.

With the general perception that Korean beauty products are effective and of excellent quality, the Asia-Pacific region notably had a strong perception of such, while the Americas showed both favorable and unfavorable perceptions of quality. In the Middle East, religious beliefs might have been associated with product types, values not aligning, and insufficient information labeling.

Figure 2-234 Comparison of Factors Promoting and Inhibiting Favorability Toward Korean Beauty by Continent



Factors Promoting Favorability

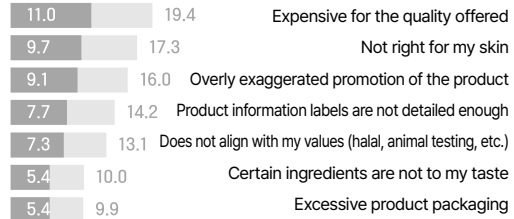
● 1st choice ● 1st+2nd choices (multiple responses)



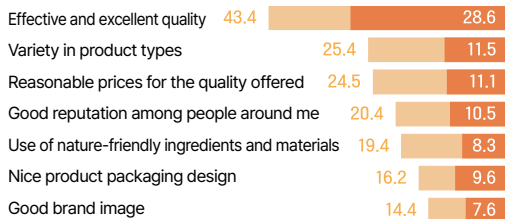
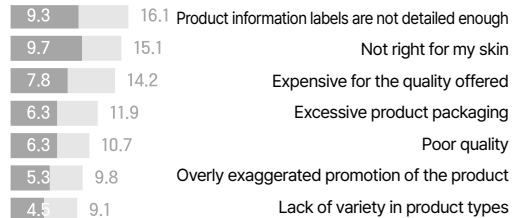
Asia-Pacific

Factors Inhibiting Favorability

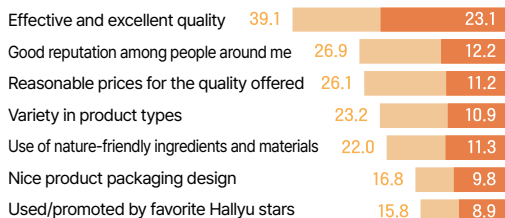
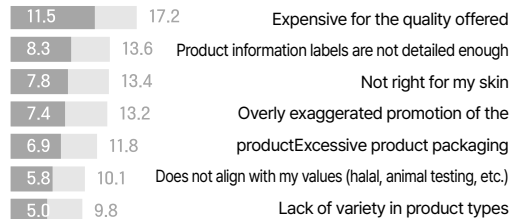
● 1st choice ● 1st+2nd choices (multiple responses)



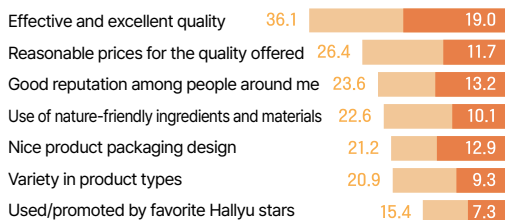
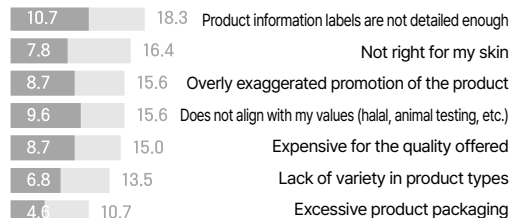
Americas



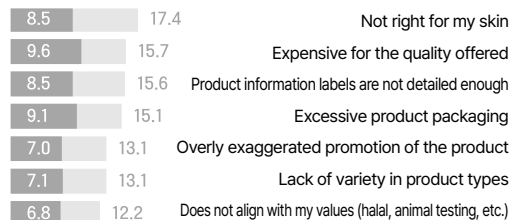
Europe



Middle East



Africa



Q. What do you think are the biggest factors promoting favorability toward Korean beauty products? Please select up to the second choice in order.

Q. What do you think are the factors inhibiting favorability toward Korean beauty products? Please select up to the second choice in order.

07 Willingness to pay



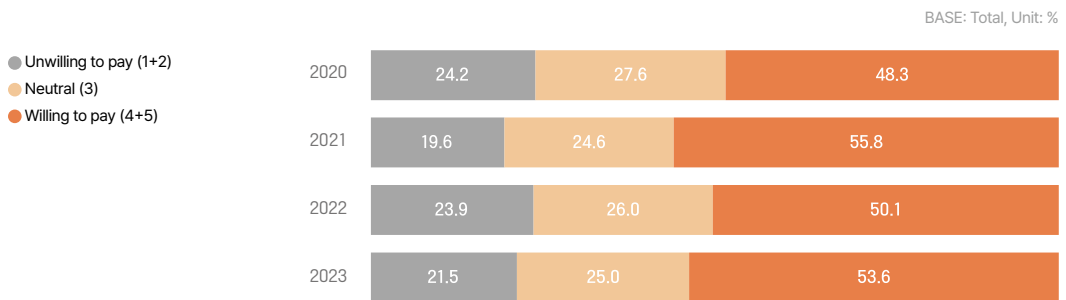
Among respondents, 53.6% were willing to pay for Korean beauty products.

Thailand and Vietnam showed particularly high willingness to pay for Korean beauty products.

When asked about their willingness to pay for Korean beauty products, 53.6% of respondents said they were "willing," while 25.0% were "neutral," and 21.5% were "unwilling to pay." The countries with high

willingness to pay were Thailand (74.2%), Vietnam (71.9%), and the UAE (71.1%), while the countries with low willingness to pay were Italy (28.2%), Germany (32.1%), and Japan (32.7%). Notably, in Italy (38.3%), Germany (38.0%), and Japan (36.9%), the proportion of respondents "unwilling to pay" for Korean beauty products exceeded those "willing to pay," indicating that they have relatively weak willingness to pay in these regions.

Figure 2-235 Comparison of the Willingness to pay for Korean Beauty Products Over the Last 4 Years by Year

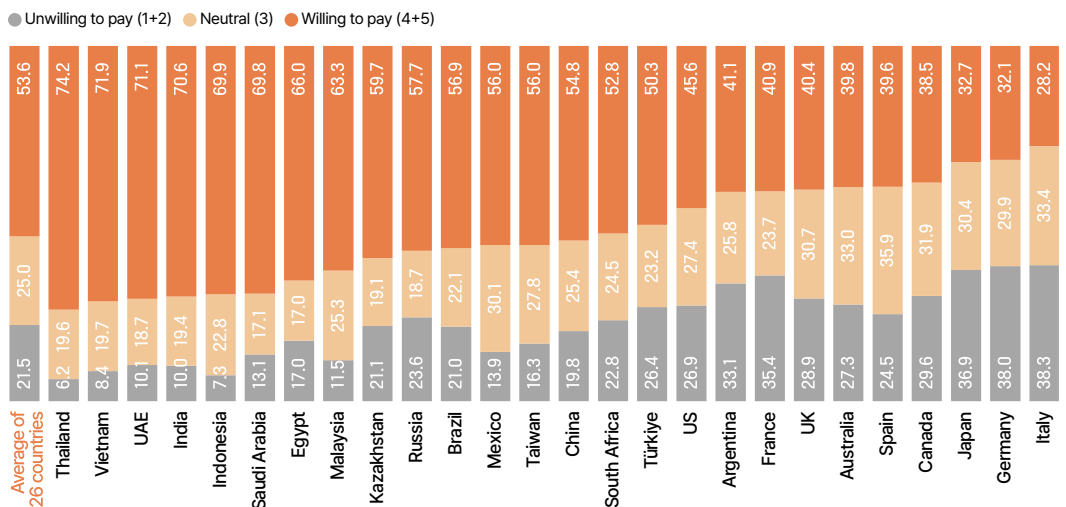


Q. Please indicate your level of willingness to pay for Korean cultural content in the future for each item.

1. Strongly disagree / 2. Disagree / 3. Neutral / 4. Agree / 5. Strongly agree

Note Presented are the top five countries with the highest proportion of first-choice responses (in order).

Figure 2-236 Comparison of the Willingness to pay for Korean Beauty Products by Country



08 Willingness to Recommend



Egypt and the UAE and those in their 20s–30s were active in recommending Korean beauty products.

Japan, Argentina, and Taiwan exhibited lower willingness to recommend.

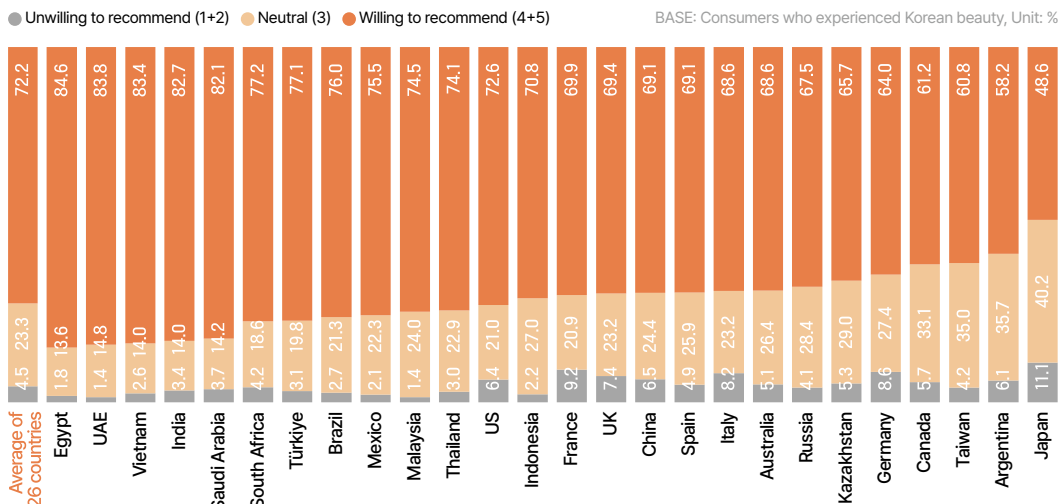
In total, 72.2% of those who experienced Korean beauty products responded that they were “willing to recommend” Korean beauty products, 23.3% were

“neutral,” and 4.5% were “unwilling to recommend.”

The countries with high willingness to recommend were Egypt (84.6%), the UAE (83.8%), and Vietnam (83.4%), while the countries with low willingness were Japan (48.6%), Argentina (58.2%), and Taiwan (60.8%).

Women (73.6%) and respondents in their 20s–30s (74.8% and 74.5%, respectively) were relatively more active in recommending Korean beauty products.

Figure 2-237 Comparison of the Willingness to Recommend Korean Beauty Products by Country

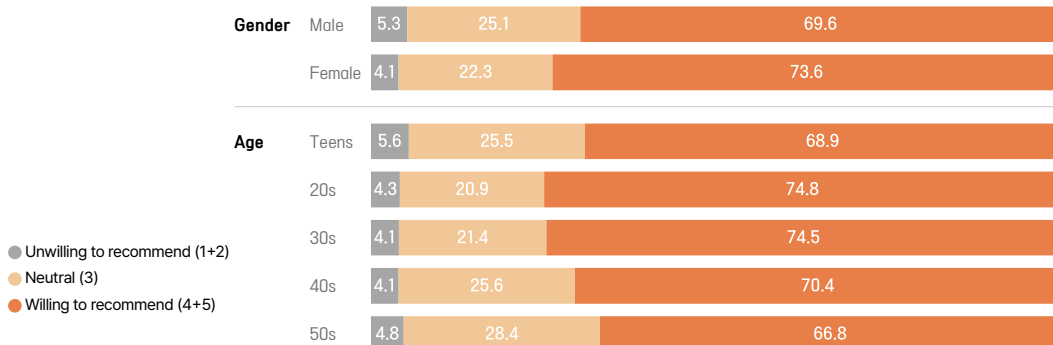


Q. Are you willing to recommend Korean beauty products that you have recently experienced to others?

1. Definitely do not recommend / 2. Do not recommend / 3. Neutral / 4. Recommend / 5. Definitely recommend

Figure 2-238 Comparison of the Willingness to Recommend Korean Beauty Products by Gender and age

BASE: Consumers who experienced Korean beauty, Unit: %



09 Ease of use



Approximately 70% of respondents found Korean beauty products easy to use.

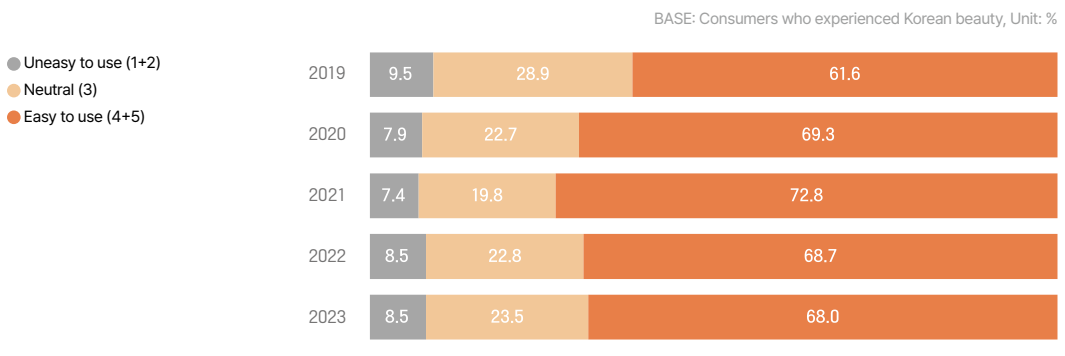
The Middle East and Asia exhibited high ease of use, while Russia and Kazakhstan showed lower ease of use.

Overall, 68.0% of respondents who experienced Korean beauty found Korean beauty products or videos “easy to use,” while 8.5% found them “uneasy to use.” The proportion of “easy to use” responses increased from 61.6% in 2019 to 68.0% in 2023, generally remaining in the upper 60% range despite

fluctuations every year.

Countries with high proportions of “easy to use” responses included the UAE (80.1%), Vietnam and Indonesia (79.8% each), Malaysia (78.1%), and India (76.4%), with the Middle East, Southeast Asia, and Southwest Asia at the top, while Russia (48.3%), Kazakhstan (51.3%), and Argentina (51.4%) showed lower ease-of-use perceptions. In particular, Argentina (19.0%), France (14.9%), South Africa (14.4%), and Türkiye (14.4%) had higher proportion of those who found Korean beauty products “uneasy to use” compared to other countries.

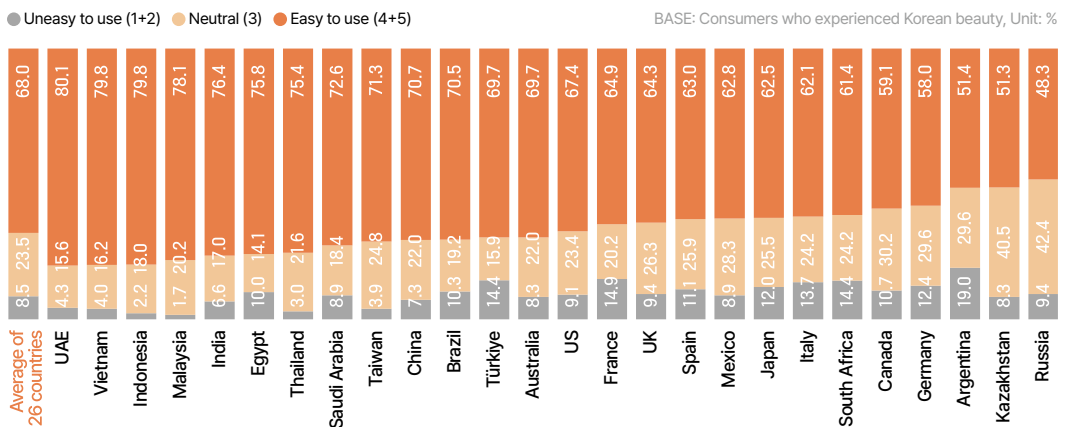
Figure 2-239 Changes in the Ease of Using Korean Beauty Products/videos Over the Last 5 Years



Q. When you are about to use Korean beauty products or videos, is it easy to access them?

1. Strongly disagree / 2. Disagree / 3. Neutral / 4. Agree / 5. Strongly agree

Figure 2-240 Comparison of the Ease of Using Korean Beauty Products/videos by Country



10 Access Channels



Key channels to access Korean beauty products or videos were "SNS" and "YouTube videos."

Over half of the respondents in Asia and the Middle East accessed Korean beauty products or videos through "Korean video content."

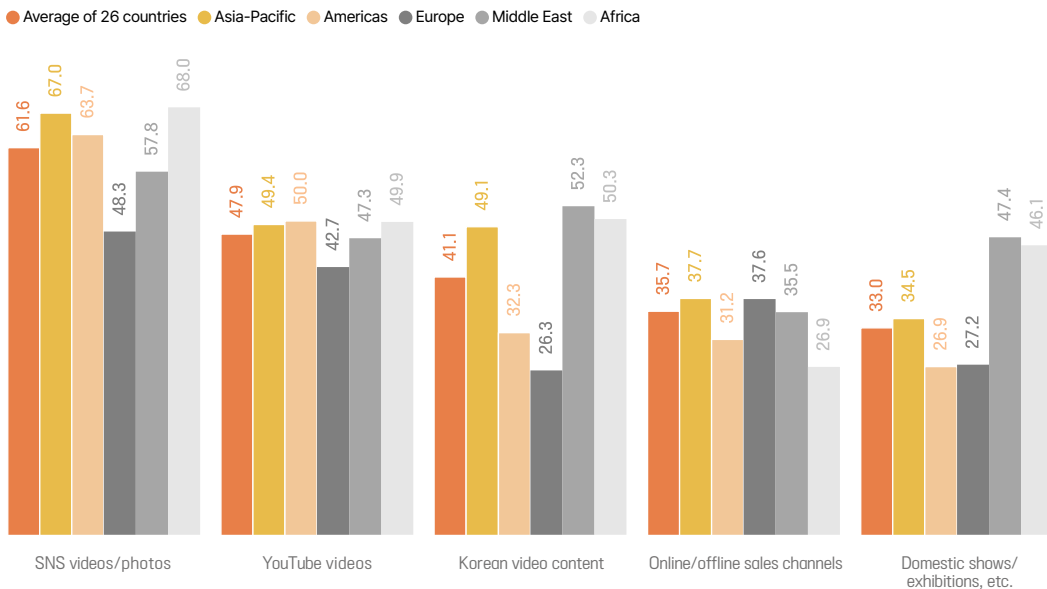
Europe showed low access rates for all channels.

The primary access channels for Korean beauty products/videos (based on multiple responses) were "SNS videos/photos" (61.6%) and "YouTube videos" (47.9%). By continent, the Asia-Pacific region showed higher access rates than the average of 26 countries for all channels, such as "SNS videos/photos" (67.0%) and "Korean video content" (49.1%), showing active contact with Korean beauty.

The Americas exhibited higher access rates through "SNS videos/photos" and "YouTube videos" than the average but lower access rates through "Korean video content," "online/offline sales channels," and "domestic shows/exhibitions, etc.," indicating a tendency for more passive engagement focused on SNS videos or photos. Moreover, the Middle East and Africa showed higher access rates through "Korean video content" and "domestic shows/exhibitions, etc." than the average, suggesting that they were more active than the Americas but more passive than Asia-Pacific. Europe exhibited lower engagement across all channels compare to the average of 26 countries, highlighting relatively limited exposure to Korean beauty through these pathways.

Figure 2-241 Comparison of Korean Beauty Product/video Access Channels by Continent

BASE: Consumers who experienced Korean beauty, Unit: % of multiple responses



Q. Please select all of the channels through which you usually access Korean beauty products or videos.

11 Purchase Channels



Most consumers purchased Korean beauty products online.

The Middle East and Africa more actively used Korean websites/apps.

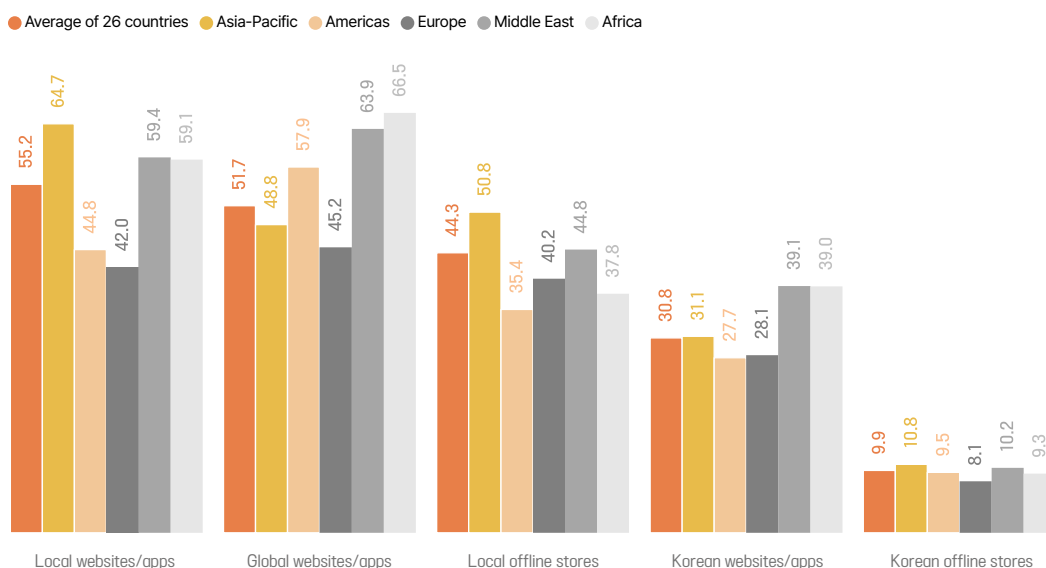
When asked about their purchasing channels for Korean beauty products (with multiple responses allowed), the most common were, online channels, such as "local websites/apps" (55.2%) and "global websites/apps" (51.7%).

By region, the channels showing higher uses than the

average for the 26 countries were "local websites/apps" (64.7%) and "local offline stores" (50.8%) in Asia-Pacific, "global websites/apps" (57.9%) in the Americas, "local websites/apps" (59.4%) and "global websites/apps" (63.9%) in the Middle East, and "global websites/apps" (66.5%) and "local websites/apps" (59.1%) in Africa. The continents showing higher-than-average proportion of purchases through "Korean websites/apps" were the Middle East (39.1%) and Africa (39.0%).

Figure 2-242 Comparison of Korean Beauty Product Purchase Channels by Continent

BASE: Consumers who experienced Korean beauty, Unit: % of multiple responses



Q. Please select all of the channels through which you usually purchase Korean beauty products.





11

Food

01 Experience Rate



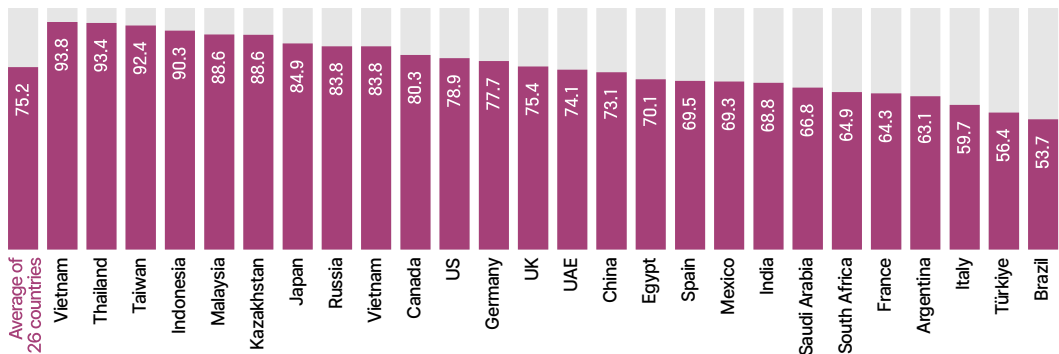
With a 75.2% experience rate, Korean food ranked as the most popular among the 11 types of content. Japan and English-speaking countries were in the top 10 in experience rates among 26 countries.

Overall, 75.2% of survey participants with Hallyu experience have experienced Korean food. This is the highest among the 11 types of Korean cultural content. Countries with the highest experience rates were mostly in Asia, such as Vietnam (93.8%), Thailand (93.4%), and Taiwan (92.4%), while Latin America and Europe, such as Brazil (53.7%), Türkiye

(56.4%), and Italy (59.7%), were in the lower ranks. Japan was in the mid-lower ranks in experience rates for most types of content except music (6th out of 26 countries) but ranked seventh in Korean food, proving the popularity of Korean food in Japan. Australia, Canada, and the US were also in the mid-lower ranks in experience rates for other types of content among 26 countries but ranked 9th, 10th, and 11th, respectively, in food. Respondents in their 20s and older (20s 77.1%, 30s 77.5%, 40s 75.2%, 50s 75.8%) showed higher experience rates than those in their teens (71.0%).

Figure 2-243 Comparison of Korean Food Experience Rates by Country

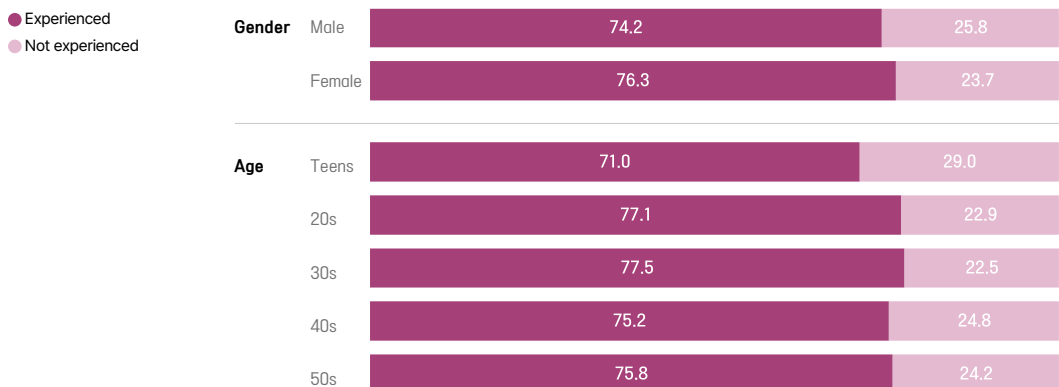
BASE: Total, Unit: %



Q. Please select all types of Korean cultural content that you have experienced.

Figure 2-244 Comparison of Korean Food Experience Rates by Gender and age

BASE: Total, Unit: %



02 Popularity



Korean food was recognized as “widely popular” by 52.3%.

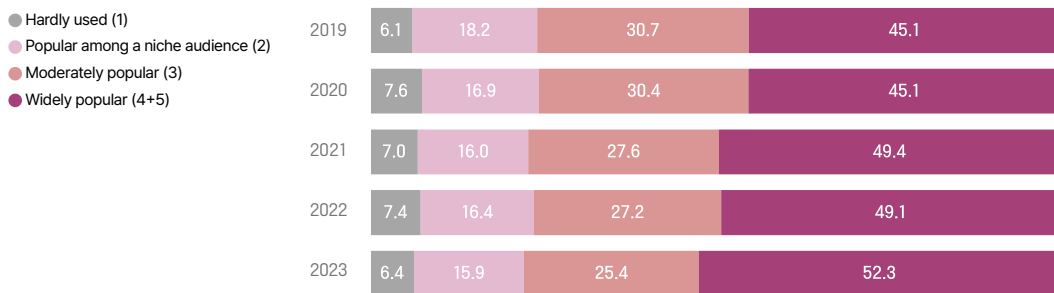
The rate for “widely popular” ranked first for 10 consecutive years among the 11 types of Korean cultural content.

When asked about the popularity of Korean food in their own countries, 52.3% of those with Hallyu experience responded that it was “widely popular,” a 3.2%p increase from 2022. For 10 years (since the survey began asking about popularity in 2014), Kore-

an food has consistently ranked first among Korean content, indicating that it has been widely accepted by the world; 25.4% of respondents considered Korean food to be “moderately popular,” and 15.9% considered it “popular among a niche audience.” Over the past 5 years, the percentage for “hardly used” has remained stable at around 6-7%, but the percentages for “popular among a niche audience” and “moderately popular” have gradually declined, with “widely popular” showing a steady increase.

Figure 2-245 Changes in Korean Food Popularity Over the Last 5 Years by Year

BASE: Total, Unit: %

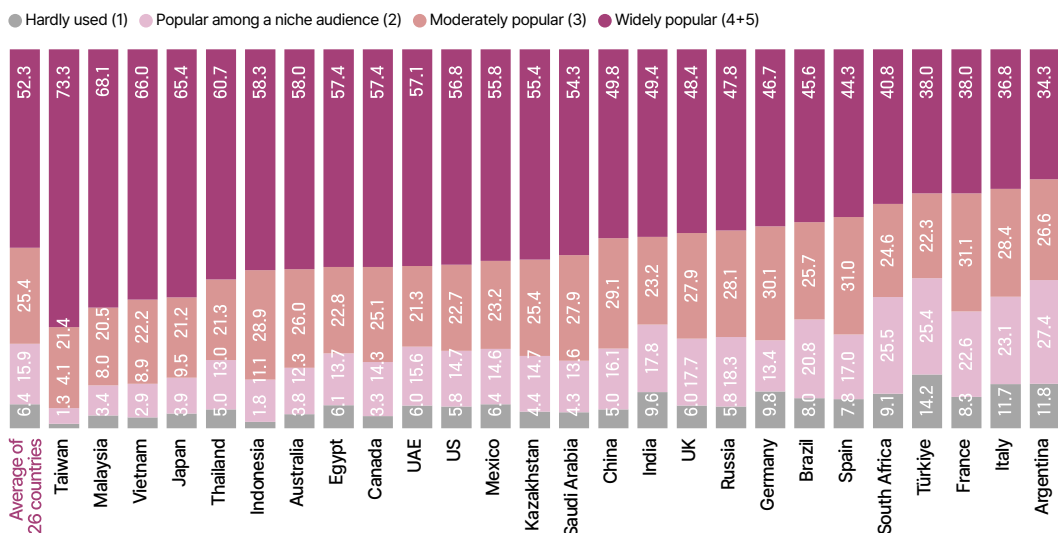


Q. How popular do you think Hallyu is in your country? Please indicate to what extent you agree.

1. Hardly used by anyone/ 2. Popular among a niche audience/ 3. Known not just by a niche audience but also by the general public/ 4. Widely known among the general public, with related products being sold / 5. Widely popular among the general public, with smooth sales of related products

Figure 2-246 Comparison of Korean Food Popularity by Country

BASE: Total, Unit: %



Korean food was highly popular, especially in Southeast Asia, such as Taiwan and Malaysia. Japan, Australia, and Canada ranked higher for food compared to other content types.

The countries with the highest “widely popular” recognition included Taiwan (73.3%), Malaysia (68.1%), and Vietnam (66.0%). On the lower end, Argentina (34.3%), Italy (36.8%), and France (38.0%) showed less recognition. According to local news reports, the widespread presence of Korean restaurant chains and local brands introducing Korean-style fusion

dishes has contributed to the mainstreaming of Korean food in countries like Taiwan, Malaysia, and Vietnam.

In Japan, 65.4% of respondents stated that Korean food was “widely popular,” placing it fourth among the 26 countries, unlike dramas and movies, which were in mid-lower ranks. Australia and Canada also ranked seventh and ninth, respectively, in the rates for “widely popular” among the 26 countries. This is in contrast to other types of Korean cultural content that were mostly in the mid-lower range for “widely popular” rates.

Local News

- “Korean food and brands are being actively introduced in the dining industry in Taiwan. In 2023, there were a series of reports about the launch of ‘Kyochon Chicken,’ which generally received positive responses.” (Taiwan KOTRA Taipei trade officer)
- “Popular Korean dishes here are grilled meat and fried chicken. Local brands such as K-Fry and NakNak, which feature Korean fusion cuisine at lower prices, are especially popular.” (Malaysia KOTRA Kuala Lumpur trade officer)
- “Korean desserts, such as 10-won bread and croffle, are popular with a time lag of at least 6 months to a year. 10-won bread first appeared in major cities such as Hanoi in 2023 and has now become sensational to the point that there are shops everywhere in major tourist spots. Croffles, which were popular in Korea a few years ago, are enjoyed by many people in Vietnam, but tanghulu, which recently gained popularity in Korea, is not yet popular in Vietnam.” (Vietnam KOTRA Hanoi trade officer)
- “Many Korean dishes, such as tteokbokki and gimbap, are widely popular in Vietnam. Recently, there is a growing trend among local Korean companies to give fruits imported from Korea as holiday gifts.” (Vietnam KOFICE overseas correspondent)
- “Hallyu had first begun among middle-aged women through dramas, but it has since expanded to include more lifestyle-related content like food, beauty, and fashion.” (Japan KOTRA Tokyo trade officer)
- “People can easily get Korean ingredients in supermarkets or Korean-style chicken rice, samgak gimbap, and tteokbokki in convenience stores like 7-Eleven. There is also an increasing number of Korean restaurants and Korean-style cafés run by Thai people.” (Thailand KOTRA Bangkok trade officer)
- “With the increasing awareness of and accessibility to Korean ingredients, more Indians are trying to make Korean food at home. Non-Korean brands are releasing Korean-style products, such as Korean-style spicy cup noodles by the Indian processed food company Master Chow and Korean BBQ Veg by Nestlé’s cup noodle brand Maggi.” (India KOTRA New Delhi trade officer)
- “In Argentina, Korean restaurants are located in major commercial areas and are somewhat highly priced, making them less accessible and less popular among the public. People occasionally encounter Korean food through booths linked to K-pop events.” (Argentina KOTRA Buenos Aires trade officer)
- “Italy’s culture is not very open to foreign foods, but interest in Asian food is growing among the younger generation. While many restaurants in Italy are struggling because of rising inflation, Korean restaurants can be found in specific areas like Chinatown in major cities such as Rome, Milan, and Florence.” (Italy KOFICE overseas correspondent, Italy KOTRA Milan trade officer)

03 Popular Foreign Food



Top five preferences for foreign food showed intense competition with differences within a 10% range.

"Korea" ranked first in the Asia-Pacific region, fourth in the Americas, and fifth in Europe.

Those who had experienced Korean food selected "the US" (16.9%) and "Korea" (15.5%) as the countries for their favorite foreign food. Looking at the average of 26 countries, the differences in preference

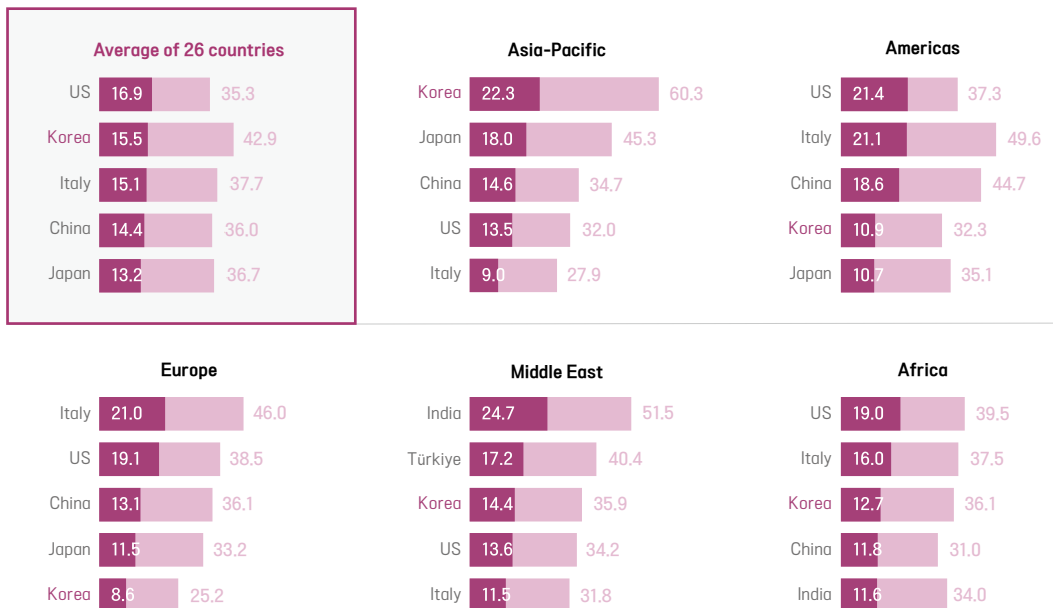
between the ranks (from the first through the fifth choice) were within 1.5%p, suggesting similar levels of favorability.

The popularity of Korean cuisine varied significantly by continent. While "Korea" ranked first (22.3%) in the Asia-Pacific region, it ranked fourth (10.9%) in the Americas following "the US" (21.4%), "Italy" (21.1%), and "China" (18.6%); fifth (8.6%) in Europe behind "Japan" (11.5%); and third (14.4%, 12.7%) in the Middle East and Africa.

Figure 2-247 Comparison of Popular Foreign Food by Continent

BASE: Consumers who experienced Korean food, Unit: %

● 1st choice ● 1st+2nd+3rd choices (multiple responses)



Q. Which country's food is popular in your country? Please select the top three in order (excluding your own country).

Note Presented are the top five countries with the highest proportion of first-choice responses (in order).

04 Consumption Volume



Consumers spent a monthly average of 18.2 USD on Korean food.

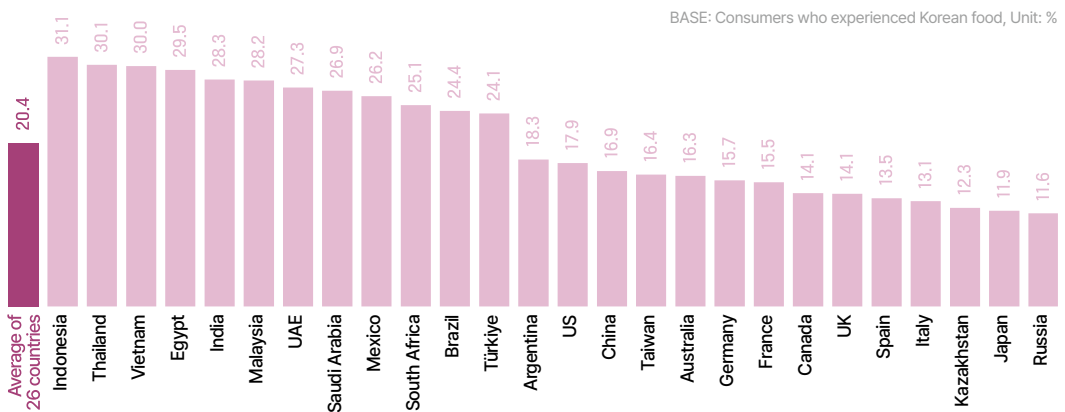
Korean food consumption accounted for 20.4% of overall food consumption.

The proportion of average monthly Korean food consumption per person was 20.4%, and the countries with the highest proportions were Indonesia (31.1%), Thailand (30.1%), and Vietnam (30.0%), while those

with the lowest proportions were Russia (11.6%), Japan (11.9%), and Kazakhstan (12.3%). Japan, which ranked relatively higher in terms of experience rate among 26 countries, was in the lower ranks for proportion of consumption and spending.

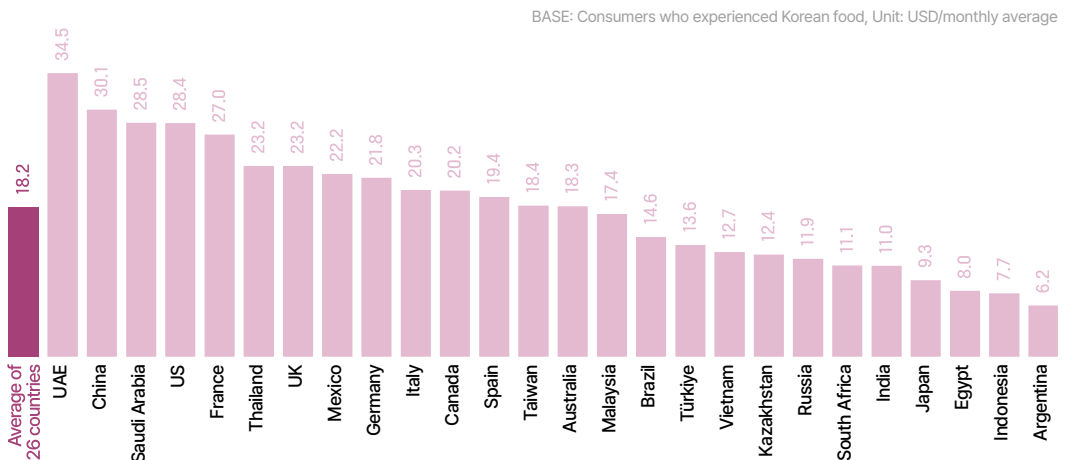
In terms of spending amount, the highest figures were reported in the UAE (34.5 USD), followed by China (30.1 USD) and Saudi Arabia (28.5 USD).

Figure 2-248 Comparison of the Proportion of Korean Food Consumption by Country



Q. What is your usual consumption volume (expenditure) and proportion of consumption for Korean food?

Figure 2-249 Comparison of Expenditure on Korean Food by Country



05 Favorability



Overall, 72.9% responded positively to Korean food.

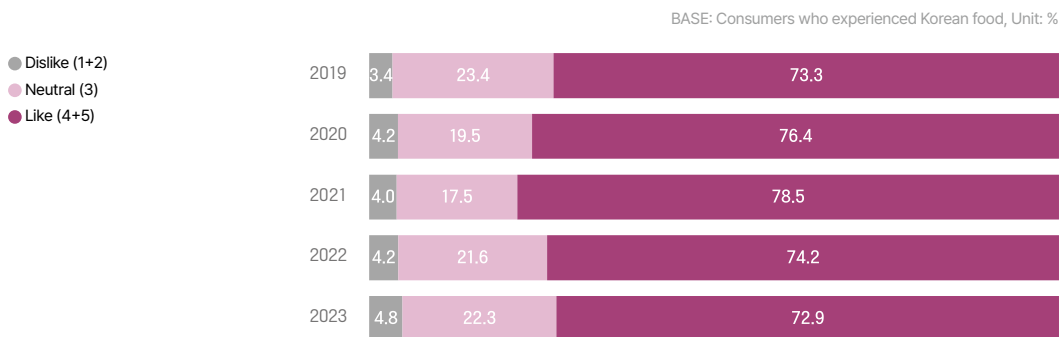
Eight out of 10 consumers in Thailand and Vietnam expressed positive sentiment toward Korean food, showing notably high favorability rates.

In total, 72.9% of respondents who experienced Korean food stated that they “like[d]” it. Over the past 5 years, this rate reached its peak in 2021 before returning to previous levels, stabilizing in the 70% range. Countries with the highest favorability rates were Thailand (82.8%), Vietnam (80.8%), and India (80.6%),

while those with the lowest rates were Kazakhstan (57.8%), Russia (59.7%), and Italy (62.3%).

Countries in the higher ranks for the “like” rate were evenly distributed across various continents such as Asia (e.g., Thailand, Vietnam), Africa (e.g., South Africa), Latin America (e.g., Mexico), Oceania (e.g., Australia), and Europe (e.g., the UK), reaffirming the widespread popularity of Korean food. Japan (66.4%), which had high experience and “widely popular” rates, was in the lower ranks for favorability toward Korean food at 20th place out of 26 countries.

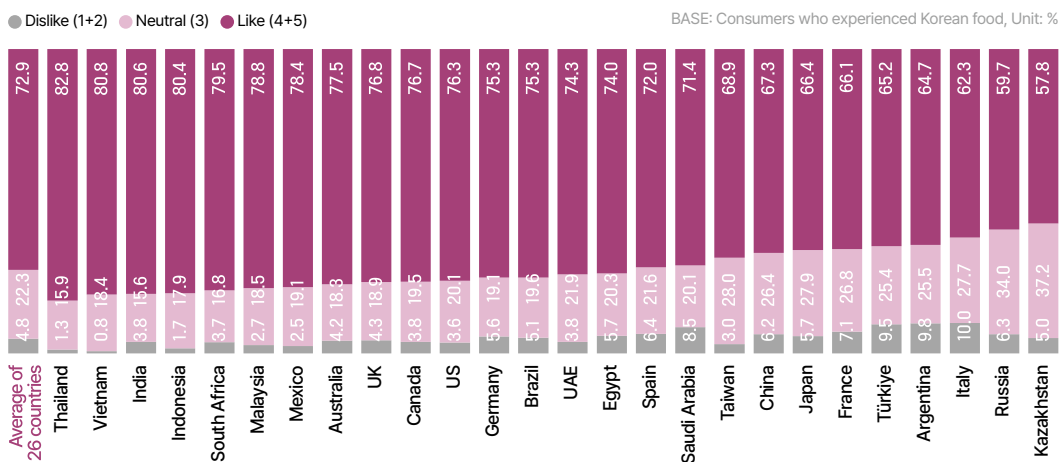
Figure 2-250 Comparison of Favorability Toward Korean Food Over the Last 5 Years by Year



Q. Overall, how much do you like the Korean food you have recently had?

1. Don't like it at all / 2. Don't like it / 3. Neutral / 4. Like it / 5. Like it very much

Figure 2-251 Comparison of Favorability Toward Korean Food by Country



06 Factors Promoting and Inhibiting Favorability

Among respondents, 55.4% liked Korean food for its “taste.”

The Asia-Pacific region was drawn to “Korean food culture in Korean video content” and “Hallyu stars,” the US and Europe to “reasonable prices” and “ingredients/recipes,” and the Middle East and Africa to “hospitable staff.”

Primary reasons for liking Korean food (with multiple responses allowed) were “Good taste” (55.4%), “Can experience the Korean food culture seen in movies, dramas, etc.” (25.3%), and “Reasonable prices” (24.1%). In particular, satisfaction with taste ranked first, with a rate twice as high as the rate for the factor that ranked second. The top factor promoting favorability in each continent was also “Good taste.”

By continent, “Favorite influencer frequently eats/features the food” (12.2%) and “Favorite Hallyu star advertises/promotes the food” (11.2%) were included in the ranks for Asia-Pacific, unlike for other continents, and “Can experience the Korean food culture seen in movies, dramas, etc.” (28.8%) was higher than the average of 26 countries, suggesting that favorability toward Korean food was greatly affected by Korean video content and Hallyu stars. The Americas and Europe showed higher-than-average proportions for cost-effectiveness and health, such as “Reasonable

prices” (26.6% and 26.2%, respectively) and “Healthy ingredients or recipes” (25.9% and 26.5%, respectively). In the Middle East, while “Good taste” (40.8%) was below average, factors such as for “Hospitable staff” (19.1%) and “Nice table setting/restaurant atmosphere” (16.8%) were higher than average. Similarly, in Africa, “Good taste” (48.0%) was relatively lower, but reasons like “Hospitable staff” (15.6%) and “Good hygiene and cleanliness of the restaurant” (17.0%) ranked higher than average.

Asia-Pacific, the Americas, and Europe selected “prices.”

The Middle East and Africa chose “difficult to use eating utensils” as factors inhibiting favorability.

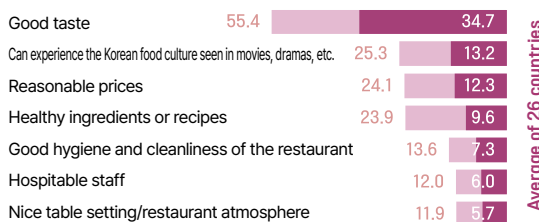
When asked about factors inhibiting favorability, the Asia-Pacific region (28.4%), the Americas (24.4%), and Europe (22.4%) cited “Expensive prices,” and the Middle East (24.6%) and Africa (27.6%) selected “Difficult to use the eating utensils,” highlighting regional differences. The difficulty of using utensils was a particularly significant factor in the Middle East and Africa, with mentions exceeding the average across the 26 countries, indicating that it poses a notable inconvenience for diners in these regions.

Figure 2-252 Comparison of Factors Promoting and Inhibiting Favorability Toward Korean Food by Continent

BASE: Consumers who experienced Korean food, Unit: %

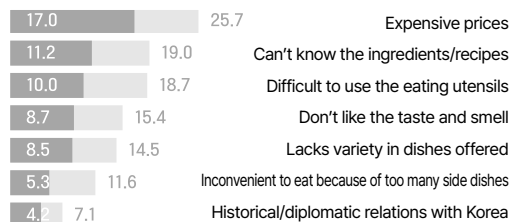
Factors Promoting Favorability

● 1st choice ● 1st+2nd choices (multiple responses)



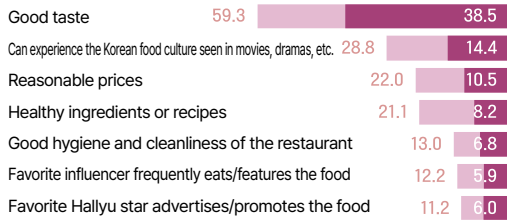
Factors Inhibiting Favorability

● 1st choice ● 1st+2nd choices (multiple responses)



Factors Promoting Favorability

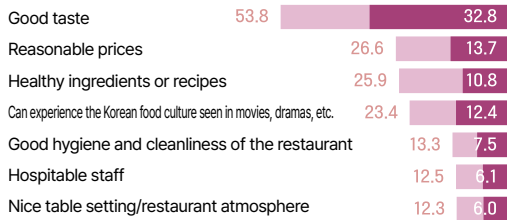
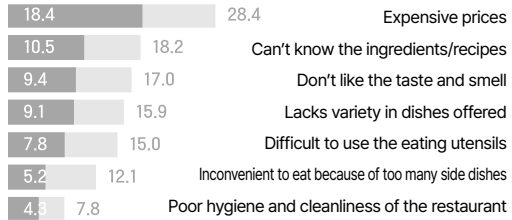
● 1st choice ● 1st+2nd choices (multiple responses)



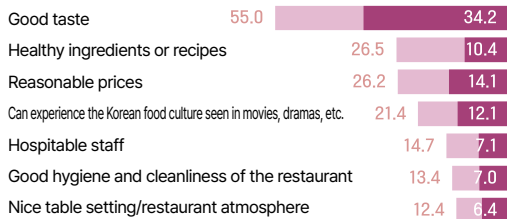
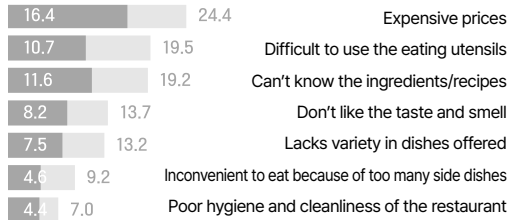
Asia-Pacific

Factors Inhibiting Favorability

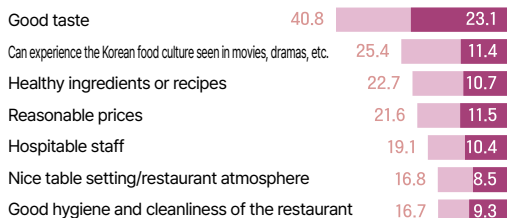
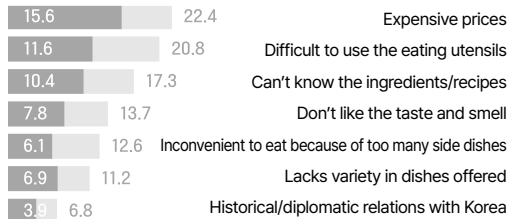
● 1st choice ● 1st+2nd choices (multiple responses)



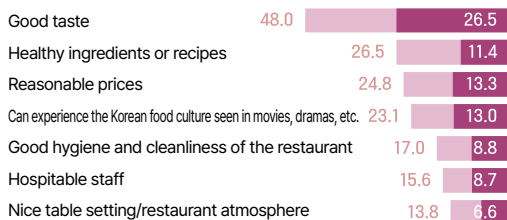
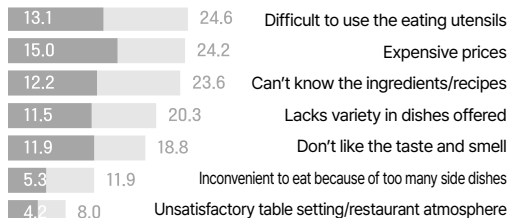
Americas



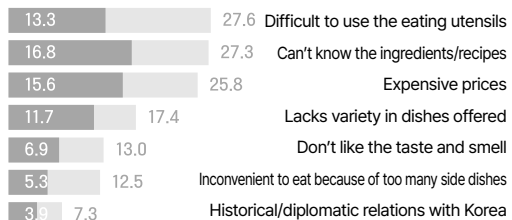
Europe



Middle East



Africa



Q. What do you think are the biggest factors promoting favorability toward Korean food? Please select up to the second choice in order.

Q. What do you think are the factors inhibiting favorability toward Korean food? Please select up to the second choice in order.

07 Willingness to pay

62.7% were willing to pay for Korean food.

Thailand and Indonesia exhibited notably high willingness to pay.

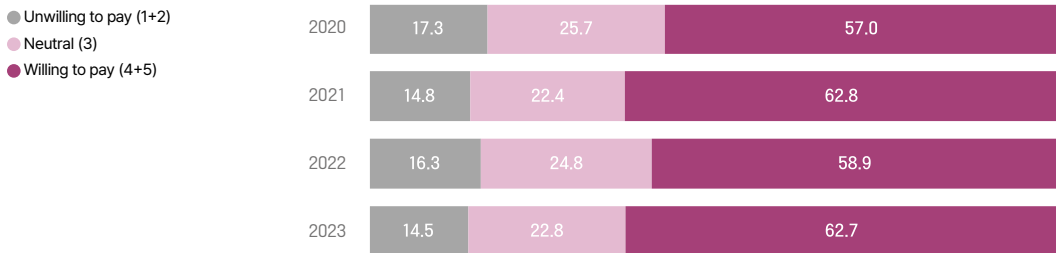
More than 20% of respondents in Italy and Japan were not willing to pay for Korean food.

When asked about their willingness to pay for Korean food, 62.7% of respondents were willing to pay, while 22.8% were neutral and 14.5% were not willing to

pay. The countries with the highest willingness were Thailand (78.3%), Indonesia (76.6%), and Vietnam (75.8%), and those with the lowest willingness were Italy (38.1%), Japan (48.5%), and Germany (51.6%). In contrast, more than 20% of respondents in Italy (28.4%), Türkiye (26.6%), Japan (22.8%), and Argentina and France (21.3%, respectively) expressed unwillingness to pay, showing a noticeable difference compared to other countries.

Figure 2-253 Comparison of the Willingness to pay for Korean Food Over the Last 4 Years by Year

BASE: Total, Unit: %

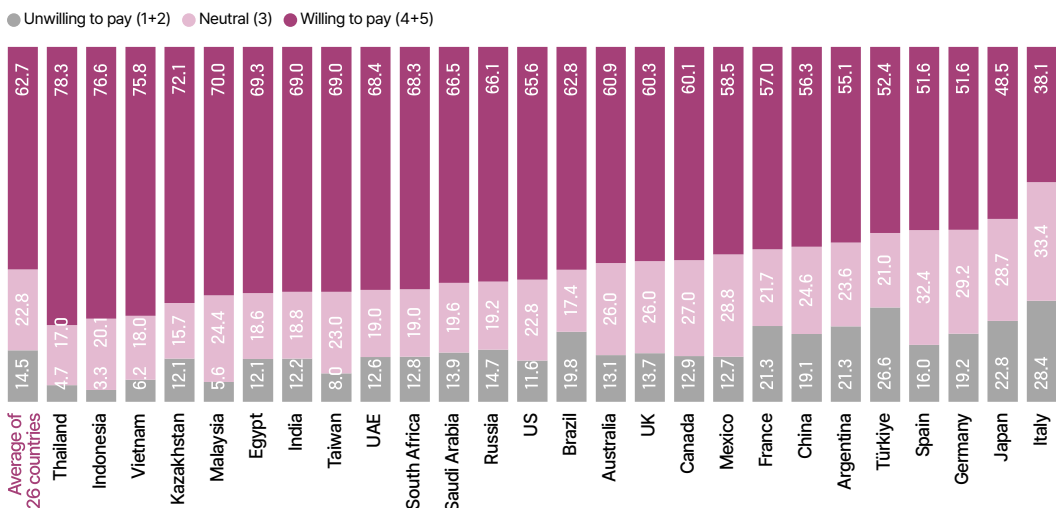


Q. Please indicate your level of willingness to pay for Korean cultural content in the future for each item.

1. Strongly disagree / 2. Disagree / 3. Neutral / 4. Agree / 5. Strongly agree

Figure 2-254 Comparison of the Willingness to pay for Korean Food by Country

BASE: Total, Unit: %



08 Willingness to Recommend



Southeast Asia and the Middle East and those in their 20s–30s were active in recommending Korean food.

Japan, Taiwan, and Argentina showed relatively low willingness.

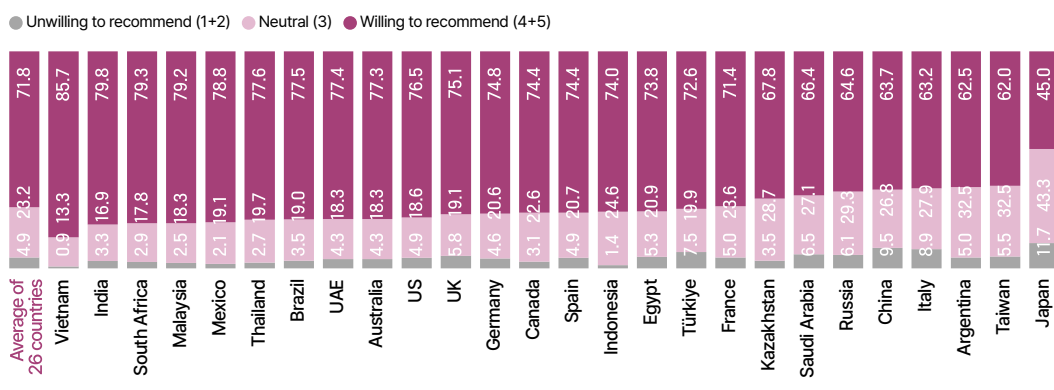
In total, 71.8% of those who had experienced Korean food responded that they were “willing to recommend” Korean food, 23.2% were “neutral,” and 4.9% were “unwilling to recommend.” The countries with the highest willingness were Vietnam (85.7%), India (79.8%), and South Africa (79.3%), and those with the lowest willingness were Japan (45.0%), Taiwan

(62.0%), and Argentina (62.5%).

Japan, in particular, stood out with a relatively higher rate of unwillingness to recommend (11.7%) compared to other countries. The countries with the highest rates for “willing to recommend” were widely distributed across various continents, such as Asia (e.g., Vietnam), Africa (e.g., South Africa), Latin America (e.g., Mexico), the Middle East (e.g., the UAE), and Oceania (e.g., Australia). Women (72.3%) and respondents in their 20s–30s (74.1% and 73.4%, respectively) were relatively more active in recommending.

Figure 2-255 Comparison of the Willingness to Recommend Korean Food by Country

BASE: Consumers who experienced Korean food, Unit: %

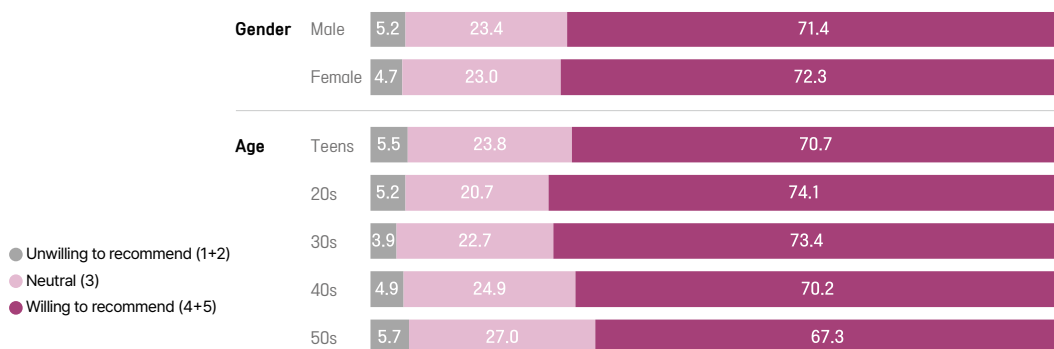


Q. Are you willing to recommend Korean food you have recently experienced to others?

1. Definitely do not recommend / 2. Do not recommend / 3. Neutral / 4. Recommend / 5. Definitely recommend

Figure 2-256 Comparison of the Willingness to Recommend Korean Food by Gender and age

BASE: Consumers who experienced Korean food, Unit: %



09 Ease of use



Among respondents, 64.9% found Korean food or videos easy to use.

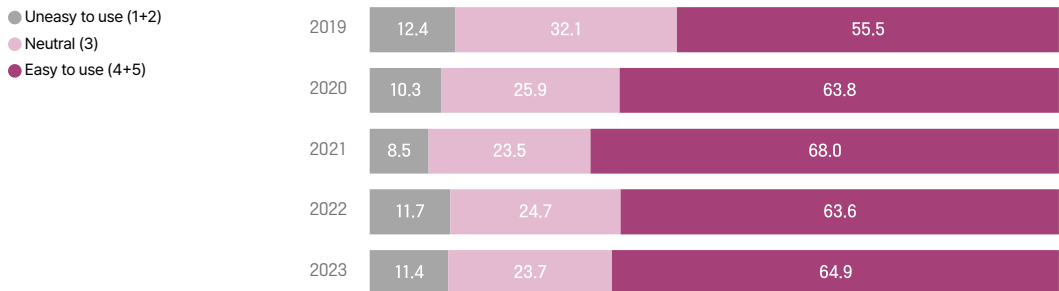
Vietnam and Indonesia showed particularly high rates.

Overall, 64.9% of individuals who experienced Korean food or videos responded that it is "easy to use," while 11.4% found it "uneasy to use." The rate

for "easy to use" was 55.5% in 2019 and peaked at 68.0% in 2021, after which it has remained in the lower-to-mid 60% range. The countries with the highest rates for "easy to use" were Vietnam (80.5%), Indonesia (79.5%), and Malaysia (78.5%), while those with the lowest rates were Russia (40.1%), Argentina (43.7%), and Kazakhstan (47.0%).

Figure 2-257 Changes in the Ease of Using Korean Food/videos Over the Last 5 Years

BASE: Consumers who experienced Korean food, Unit: %

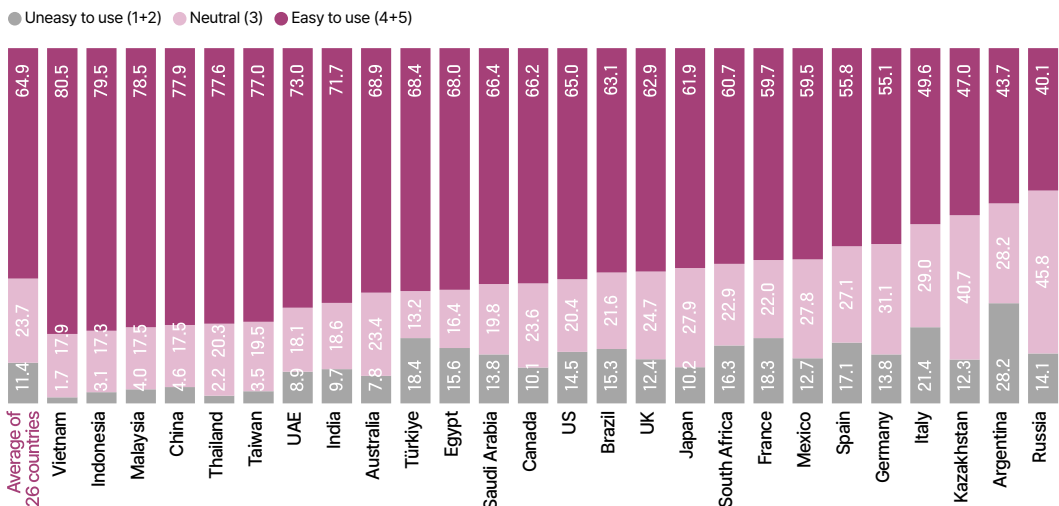


Q. When you are about to eat Korean food or watch related videos, is it easy to access the Korean food or videos you want?

1. Strongly disagree / 2. Disagree / 3. Neutral / 4. Agree / 5. Strongly agree

Figure 2-258 Comparison of the Ease of Using Korean Food/videos by Country

BASE: Consumers who experienced Korean food, Unit: %



10 Access Channels



Respondents actively used “SNS” and “YouTube videos” to access Korean food.

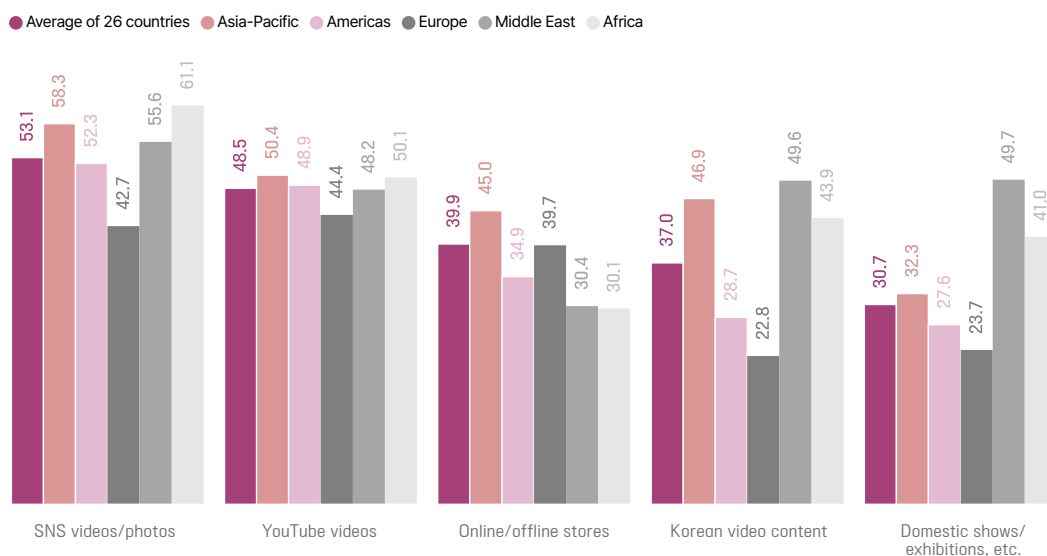
The Asia-Pacific region and Middle East were more heavily influenced by “Korean video content.”

The primary access channels for Korean food and food videos were “SNS videos/photos” (53.1%) and

“YouTube videos” (48.5%). In particular, access rates through “Korean video content” were highest in the Asia-Pacific region (46.9%), the Middle East (49.6%), and Africa (43.9%), while access rates through “domestic shows/exhibitions, etc.” were highest in the Middle East (49.7%) and Africa (41.0%).

Figure 2-259 Comparison of Korean Food Access Channels by Continent

BASE: Consumers who experienced Korean food, Unit: % of multiple responses



Q. Please select all of the channels through which you usually access Korean food or videos.



11 Purchase Channels



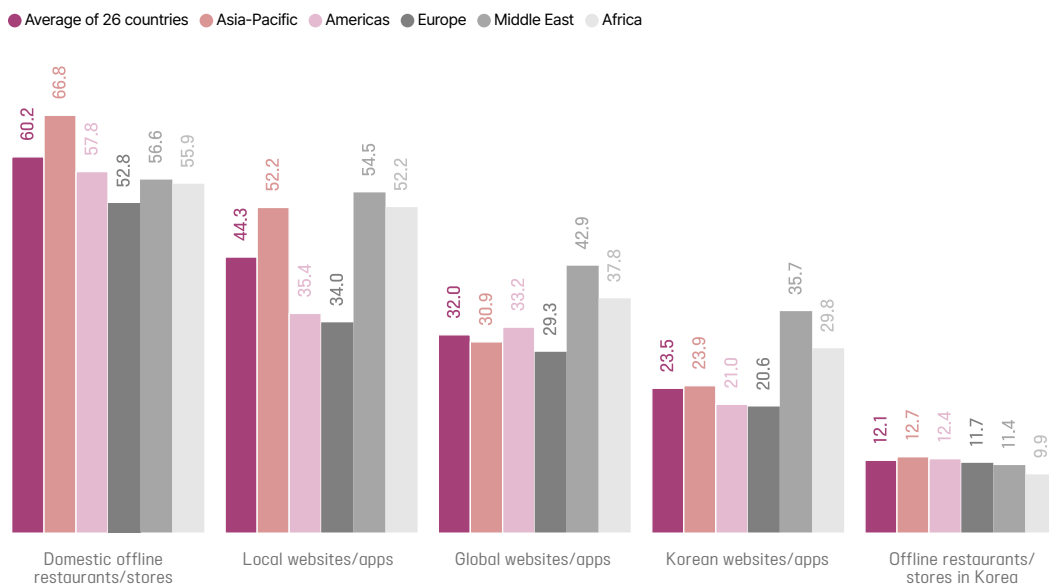
60.2% generally purchased Korean food offline.
The Asia-Pacific region and Middle East showed notably high purchase rates through "local websites/apps."
"Korean websites/apps" were actively used in the Middle East and Africa.

The primary purchase channels for Korean food were "domestic offline restaurants/stores" (60.2%) and "local websites/apps" (44.3%). By continent, the

channels showing higher proportions than the average of 26 countries were "domestic offline restaurants/stores" in Asia-Pacific (66.8%), "local websites/apps" in the Middle East (54.5%) and Africa (52.2%), "global websites/apps" in the Middle East (42.9%) and Africa (37.8%), and "Korean websites/apps" in the Middle East (35.7%) and Africa (29.8%), highlighting regional differences in purchase channels.

Figure 2-260 Comparison of Korean Food Purchase Channels by Continent

BASE: Consumers who experienced Korean food, Unit: % of multiple responses



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

PART 3.

Summary and Implications



01 Overall Summary and Implications

02 Summary and Implications by Continent

1

"K-pop" and "dramas" were the first things that come to mind when individuals thought of Korea; "beauty" was also included in the rankings.

When asked to choose the first image that comes to mind when thinking of Korea, respondents with Hallyu experience in 26 countries said that "K-pop" (17.2%) came first, followed by "Korean food" (13.2%), "dramas" (7.0%), "IT products/brands" (6.3%), and "beauty products (cosmetics)" (5.2%). "K-pop" has consistently ranked first for 7 consecutive years since 2017 with its proportion rising compared to last year (14.3%). "IT products/brands," which historically held positions in the top three, dropped to fourth or fifth starting in 2021, while "Korean War" and "North Korea/nuclear issue," which previously ranked within the top five, have disappeared from the rankings. These spots have been replaced by Hallyu-related keywords. This supports the local insights gathered by KOFICE overseas correspondents and KOTRA trade officers that global expansion of Hallyu allows individuals to easily access K-pop or Korean food and have casual conversations about Hallyu stars or content with those around them.

One thing to note about the results of this survey is that "beauty products (cosmetics)" re-entered the rankings after 2018. This trend was particularly prominent among women and respondents in their 20s–30s, who showed high familiarity and favorability toward Hallyu. This implies that physical consumption has increased worldwide after the post-pandemic phase and that there is a synergy in Hallyu content promoting the use of not only dramas, movies, and music but also consumer goods.

2

***Squid Game*, *Parasite*, and "BTS" remained top favorites, significantly influencing the Hallyu phenomenon, while the Asia-Pacific region favored *The Glory*, and *King the Land* gained popularity in the Americas.**

When asked about the most preferred ▲Korean dramas, "Squid Game" (9.0%) ranked first for 3 consecutive years, followed by "The Glory" (3.4%) and "King the Land" (2.6%) in second and third, respectively. "Squid Game" showed particularly high preference rates in Europe (23.7%) and the Americas (8.3%), "The Glory" in the Asia-Pacific region (5.4%), and "King the Land" in the Americas (5.8%).

For ▲movies, "Parasite" (7.9%) and "Train to Busan" (6.0%) ranked

first and second, respectively, for 5 consecutive years. Movies released in 2023, such as "Unlocked" (2.4%), "Ballerina" (2.0%), and "Phantom" (1.7%) ranked third to fifth. "Parasite" stood out in the Americas (12.6%) and Europe (10.7%), "Train to Busan" in the Asia-Pacific region (8.2%), and "Unlocked" in Africa (4.4%) and the Middle East (3.5%). Dramas within the rankings were either Netflix originals or distributed globally and exclusively via Netflix. Aside from "Parasite" and "Train to Busan," all movies were also distributed via Netflix. This highlights the significant role of global OTT platforms in expanding the reach of Korean content.

The top ▲actor was "Lee Min-ho" (6.4%), and ▲singer/group was "BTS" (29.1%), both securing the top spot for 11 and 6 consecutive years, respectively. "Lee Min-ho" was especially popular in Asia-Pacific (7.7%) and the Middle East (8.2%), while "BTS" was widely popular across the Americas (37.3%), Europe (33.1%), Africa (32.7%), the Middle East (29.9%), and Asia-Pacific (22.2%). The continued dominance of "Squid Game," "Parasite," and "BTS" in rankings, alongside their sustained popularity in the Americas and Europe, suggests that Hallyu has firmly established itself in Asia-Pacific and the Middle East. Meanwhile, interest in and consumption of Korean content have also grown steadily in the Americas and Europe, reflecting a broader global appeal.

3

Dramas, variety shows, and movies recently led the spread of Hallyu, with its base expanding since the COVID-19 pandemic.

Figures have shown that the popularity of Hallyu has expanded rapidly since the COVID-19 pandemic. When individuals with Hallyu experience were asked about the popularity of Korean cultural content in their countries, 52.3% identified food, 50.8% beauty, and 49.8% music as "widely popular among the general public, with smooth sales of related products." Movies (43.0%) and dramas (40.9%) also exceeded 40%. The average popularity of the 11 categories increased by 2.7%p in 2019 compared with 2014 and by 9.2%p in 2023 compared with 2019, indicating that the popularity of Hallyu has increased more rapidly in recent years. The recent rates of increase were highest for dramas (13.7%), music (12.3%), and movies (11.9%), suggesting that these categories have played key roles in expanding Hallyu.

A similar trend was observed in favorability ratings. The favorability toward overall Korean cultural content ("like it" and "like it very much") was 68.8%, which, by category, was the highest for dramas (75.7%), followed by beauty (75.1%), movies (74.6%), and variety shows (74.5%). From 2014 until 2019, food, beauty, and fashion were generally at the top for favorability, but they have been replaced by video content such as dramas, variety shows, and movies since 2020.

The increase in online consumption and the proliferation of OTT

platforms due to the COVID-19 pandemic may have increased the opportunities to access Hallyu content, resulting in the rising popularity of Korean video content. At the same time, interest in and consumption of other types of content such as webtoons, which had been relatively less popular, have also increased, thereby expanding the base of Hallyu.

4

Dramas, variety shows, and beauty products from “Korea” led popularity, with movies also gaining global recognition.

When individuals who have experienced Korean cultural content were asked to name the most popular foreign content (based on first-choice responses) in their countries, “Korea” ranked first for dramas (39.6%), variety shows (35.3%), and beauty (32.3%), surpassing “the US” (29.1%, 29.5%, and 19.8%, respectively). “Korea” ranked second for music (26.5%), fashion (24.6%), movies (22.0%), games (20.8%), publications (19.7%), and food (15.5%) after “the US”; second for webtoons (27.3%) after “Japan”; and third for animation (20.2%) after “Japan” (31.0%) and “the US” (28.0%).

Regional comparisons revealed that Asia-Pacific and the Middle East had higher or more favorable ranking for Korean content compared to the Americas, Europe, and Africa. For dramas, the percentage of respondents choosing “Korea” (51.5%) in Asia-Pacific was 2.3 times higher than that for “the US” (22.1%). This is a larger gap than the 1.6 times in the Americas (“Korea” 40.4%, “the US” 25.6%) and 1.5 times in the Middle East (“Korea” 31.9%, “India” 22.0%). Conversely, in Europe, “the US” (48.2%) was 2.2 times higher than “Korea” (22.3%) and 1.4 times higher in Africa (30.9%). For music, “Korea” ranked second after “the US” on all five continents, but the gap varied among them. In Asia-Pacific, “the US” (41.2%) was 1.1 times higher than “Korea” (36.4%), while in the Middle East (41.3%), it was 1.5 times higher than “Korea” (27.9%). In the Americas, Europe, and Africa, “the US” was 2.4 times, 4.1 times, and 3.3 times higher than “Korea,” respectively. For movies, “Korea” was also lower than “the US,” but the gap was smaller in Asia-Pacific and the Middle East compared with the gap in the Americas, Europe, and Africa.

The proportion of respondents identifying “Korea” as the most popular has been gradually increasing. For movies, “the US” decreased from 63.6% in 2018 to 47.6% in 2023, whereas “Korea” increased from 17.1% to 22.0% during the same period. For dramas, “the US” decreased from 43.9% to 29.1% during the same period, while “Korea” increased from 34.9% to 39.6%. These trends highlight the growing global recognition and influence of Korean dramas and films.

5

Korean content consumption maintained its share amid increasing outdoor activities and resumption of live performances.

The average monthly content consumption volume per person among those with Hallyu experience in 26 countries decreased from 93.3 hours in 2022 to 81.7 hours in 2023. Similarly, the consumption volume of Korean cultural content decreased from 15.2 hours to 11.6 hours during the same period. This decline is attributed to the gradual return to normalcy starting in the latter half of 2022, as workers resumed in-office jobs, students returned to schools, and outdoor activities increased.

Despite the expansion of the OTT market, the increase in competing content, and the resumption of concerts by many artists in 2023, Korean content's share of total content consumption rose slightly, from 25.3% in 2022 to 25.6% in 2023 - a 0.3%p increase. This serves as a positive indicator that interest in Hallyu has not diminished.

When asked about changes in their interest in Korean cultural content compared to a year ago, 45.9% responded that it had "increased," and 43.5% said that it had remained "similar." Regarding their compatriots' interest, 50.9% stated that it had also "increased" compared to a year ago, and 39.7% thought that it was "similar." The response that interest had "decreased" accounted for 10.6% and 9.4%, respectively. Respondents perceived a greater increase in their compatriots' interest than in their own. Although consumption volume has slightly decreased, it appears that interest in Hallyu generally remained steady. These findings are supported by local insights and observations by KOFICE overseas correspondents and KOTRA trade officers, suggesting that, despite the decrease in consumption volume, consumers were showing increased or similar interest as they encountered Hallyu content more easily than before through friends, media, or offline channels.

6

Hallyu has become integrated into everyday life in Asia, while the youth have been driving the Hallyu movement in the Middle East.

The experience rates of various Korean cultural content were generally higher in Asian countries, placing them among the top rankings. The average experience rate for dramas was 65.1%, and countries with the highest experience rates were Indonesia (92.3%), Vietnam (92.1%), Malaysia (91.5%), Taiwan (91.0%), Thailand (85.7%), and China (81.0%). Out of nine Asian countries, seven were included among the top 10, except Japan (62.1%) and Kazakhstan (62.4%). The experience rates for other types of content, such as variety shows, music, and movies, were also generally higher than the average of 26 countries, except for Japan and Kazakhstan. In terms of favorability, most Asian countries showed higher favorability toward Korean content compared to the average of 26 countries, with the exception of countries like China,

Japan, and Taiwan, where historical/diplomatic issues exist, and Kazakhstan, which shows a relatively high popularity rate among a “niche audience.” When asked about how much they generally liked Korean cultural content that they have recently experienced, 68.8% responded that they either “like[d] it” or “like[d] it very much”; the countries with the highest rates for these responses were Indonesia (86.3%), India (84.5%), and Thailand (83.0%), with most Asian countries included in the top rankings. Moreover, favorability in seven countries other than Japan (51.3%) and Kazakhstan (44.6%) was higher than the average of 26 countries. According to local sources (i.e., KO-FICE overseas correspondents, KOTRA trade officers), Korean dramas that were popular in Korea also attracted significant attention in Asia upon airing, sparking active online discussions. Korean music was also commonly heard in department stores, shopping malls, and cafés, and personal color analysis, which is trendy in Korean fashion and beauty, also became popular in these countries. In the food sector, there was a growing interest in Korean fusion cuisine, and more people began cooking Korean dishes at home. Recently, there has been a noticeable shift in interest from traditional Korean dishes (e.g., bulgogi, bibimbap) to street foods (e.g., gimbap, tteokbokki) and desserts (e.g., croffles) often featured in dramas and movies.

Youths in the Middle East, where the population under 35 years of age accounts for 50–70%, showed a particularly enthusiastic embrace of Hallyu. The experience rates in the UAE and Saudi Arabia over the past 2 years were generally higher than or close to the average of 26 countries. The UAE showed the highest experience rates for dramas (76.3%), movies (75.0%), and food (74.1%), with 9 out of 11 content types, except music and webtoons, showing higher-than-average experience rates. Saudi Arabia showed the highest experience rates for movies (72.6%), dramas (72.1%), and food (66.8%), with eight content types, except food, music, and webtoons, showing higher-than-average experience rates. Experience rates, favorability, and popularity were particularly higher among women and respondents in their 30s or younger (teens: games, music, webtoons; 20–30s: dramas, movies, food, etc.). Positive indicators were continuously observed in Latin America (e.g., Mexico, Brazil) as well.

7

Hallyu has rapidly shifted to “online/mobile platforms”; “YouTube” and “Netflix” dominated Asia-Pacific and the Middle East, while “Netflix” took the lead in the Americas and Europe.

When asked about access channels for Korean cultural content (with multiple responses allowed), respondents shared that “online/mobile platforms” were the most widely used for video and music content, such as dramas (86.8%), movies (86.3%), and variety shows (83.6%). In contrast, “TV” usage was lower, with variety shows (47.0%), dramas (44.8%), and movies (42.6%) be-

ing the top categories. Over the past five years, TV-based consumption has decreased, while access through "online/mobile platforms" has increased significantly. The gap in access rates between "TV" and "online/mobile platforms" increased from 4.2%p in 2019 to 42.1%p in 2023 for dramas and from 9.2%p to 43.7%p for movies during the same period, showing a more evident gap. A similar trend was found for variety shows, animation, and music. Most access channels in the Middle East and Africa showed higher rates than the average of 26 countries. These regions tended to use a greater variety of channels than others.

Primary access channels for fashion and beauty were "SNS videos/photos" (63.5% and 61.6%, respectively) and "Korean video content" (51.9% and 41.1%, respectively), while those for food were "SNS videos/photos" (53.1%) and "YouTube videos" (48.5%). "Online/offline sales channels," which was added as an option starting this year, recorded 30.6% for fashion, 35.7% for beauty, and 39.9% for food.

Among online/mobile platforms, "Netflix" and "YouTube" were in fierce competition. The use of "YouTube" was gradually decreasing for dramas, variety shows, movies, and animation, while the use of "Netflix," "Amazon Prime," and "Disney+" was increasing, indicating that OTT media is becoming more diverse and the market is expanding. For dramas and movies, "YouTube" and "Netflix" were generally competing at the top in Asia-Pacific, the Middle East, and Africa, while "Netflix" was taking the lead in the Americas and Europe. The platform with the third highest usage frequency was "iQIYI" in Asia-Pacific, which is notably a local brand. This is contrary to other regions, where "Amazon Prime" ranked third. For music, "YouTube" and "Spotify" were competing in Asia-Pacific, the Americas, Europe, and Africa, while "YouTube" and "YouTube Music" ranked first and second, respectively, in the Middle East, making "YouTube" the overwhelmingly dominant platform in the region.

**The
Asia-Pacific
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Summary

The fandoms in Southeast Asia, including Indonesia and Vietnam, among others, steadily enjoyed Hallyu, while emerging fandoms formed in countries such as India, Kazakhstan, and Australia. Among the regions where Hallyu was stable, Taiwan, Thailand, Malaysia, Indonesia, and Vietnam showed continuous growth in Hallyu. Vietnam, in particular, played a key role in the spread of Hallyu throughout Southeast Asia as the popularity of Hallyu in the region continued to rise. On the other hand, China and Japan, which were the initial hubs of Hallyu, have maintained their fandoms for a long time. However, recent diplomatic issues and civil conflicts have limited Hallyu's growth in these regions. Regions such as India (South Asia), Kazakhstan (Central Asia), and Australia (Pacific region) demonstrated the potential for Hallyu's gradual expansion, signaling opportunities for further growth.

The genres with high favorability in the Asia-Pacific region were dramas, movies, and variety shows, which are video content. The well-structured and solid storytelling in dramas and movies was a key factor in their popularity. However, Korean dramas were often criticized for formulaic and predictable narratives, highlighting the need for innovative storytelling to break away from clichés.

The survey result shows that video content was primarily distributed and consumed via online and mobile platforms. Subscription-based platforms like Netflix and ad-supported platforms like YouTube have become key bases for the spread of Hallyu. Thus, leveraging these platforms effectively in the planning, production, and distribution of content is critical for sustaining Hallyu's growth. However, in China, online/mobile platform engagement has grown a sharp decline, likely influenced by strained diplomatic relations and occasional cultural conflicts among the younger generation. Although the situation has somewhat slowed down, China remains a crucial region for the stable growth and spread of Hallyu and requires careful management of cultural exchange and trade issues.

K-pop was also widely popular in the Asia-Pacific region, especially in Japan and Southeast Asia, where consumers with Hallyu experience reported high levels of popularity and favorability. However, the difficulty of understanding Korean lyrics was pointed out as a major barrier to the enjoy-

ment of K-pop. Similarly, language factors such as translation of subtitles and dubbing quality were pointed out as the biggest obstacles for video content. Language barriers remained an ongoing issue that must be resolved for the continued spread of Hallyu. It is necessary to actively identify alternatives to develop more natural translations for video content and to find effective ways to convey the meaning of K-pop lyrics.

As opposed to platform-based content, categories like food, fashion, and beauty represent Hallyu products consumed on-site. These products, bolstered by the success of video and music content, created a radial structure that amplifies Hallyu's influence. Food, fashion, and beauty interact with dramas, movies, variety shows, and music, creating a virtuous cycle of Hallyu. The popularity of food, fashion, and beauty was particularly high in Japan as well as in Southeast Asian countries such as Thailand, Malaysia, Indonesia, and Vietnam. This calls for more proactive and targeted strategies to capitalize on these markets effectively.

It is important to always be aware that negative feelings toward Hallyu can potentially manifest as anti-Korean or anti-Hallyu sentiments. While positive attitudes toward Hallyu dominated in the Asia-Pacific region, long-term issues such as China's ban on Hallyu or sudden historical and cultural issues in countries such as Japan and Taiwan can be risk factors that foster negative sentiments toward Hallyu. Accordingly, developing structured response manuals and continuously managing both long-term and unexpected issues are critical for mitigating these risks.

The high popularity of and favorability toward Hallyu in these regions do not necessarily mean that local fandoms consumed only Korean cultural content. While the improved quality of Korean cultural content has clearly boosted satisfaction among fandoms, it is also true that these fandoms had a strong preference for content from their own countries (e.g., Chinese content in China), the US (e.g., American content in Japan), or Japan (e.g., Japanese content in Taiwan). It is necessary to be keenly aware that Hallyu is in competition with cultural content from these regions.

Policy/business Implications

The expansion of Hallyu in the Asia-Pacific region was significantly influenced by official diplomatic relations as well as by public diplomacy. Therefore, it is necessary to establish clear diplomatic directions and diversify corresponding public diplomacy programs. Given the presence of considerable cultural conflicts in the private sector, there is a need for policies that promote deeper mutual understanding among cultures. Following Korea's model for promoting cultural content, Taiwan established the "Taiwan Creative Content Agency (TAICCA)" (2019) and has been actively implementing policies to support cultural content. The exchange and trade of cultural content between Korea and Taiwan could serve as a critical bridge for Hallyu's expansion into the

Chinese-speaking world, especially during this period of strained relations with China. Moreover, it is necessary to promote exchanges with Taiwan for Hallyu's penetration into Southeast Asia.

Video content was primarily distributed through global platforms (e.g., Netflix, YouTube). With domestic video content platforms currently operating for domestic use only, efforts must be made to internationalize these platforms through mergers for the stable growth of Hallyu.

There is also a need for publicity and marketing that adequately combine platform-based content like video and music with on-site content like food, fashion, and beauty. Because these two forms of content actively influence each other, it is necessary to seek a synergy by integrating the two rather than keeping them entirely separate.

Given the persistent potential for anti-Korean or anti-Hallyu sentiments to arise at any time or place, structured crisis management strategies are needed to quickly respond to these issues at both policy and industry levels.

The Americas

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Summary

The *2024 Overseas Hallyu Survey* analyzed the Hallyu trends in the US, Canada, Mexico, Brazil, and Argentina in the Americas. This survey showed Hallyu trends that are as diverse and varied as the geography, languages, races, and cultures in this region. The US and Canada in North America are English-speaking and Christian-centered countries, while Mexico and Argentina in Latin America are Spanish-speaking and Catholic-centered countries, and Brazil, also a Catholic-centered country, is a Portuguese-speaking country.

By country, Hallyu in the US has now settled in the mainstream market beyond being merely a niche culture. The Korean cultural content market in Canada began to form gradually around K-pop in the early 2010s. While still modest, but it has been expanding its scope to include dramas, movies, variety shows, music, and food. In Mexico, known as the origin of Hallyu in Latin America, Hallyu began with Korean dramas in the late 1990s. As interest in Korea grew, K-pop spearheaded the growth of Hallyu.

Brazil is expected to be the largest Hallyu market as it is the largest country in Latin America. Hallyu began with K-pop in the early 2000s, and experience rates are now high across all types of Korean cultural content, including movies, dramas, and music as well as fashion, beauty, and food. Argentina had a somewhat later start than other Latin American countries, but interest in and consumption of Hallyu have increased along with the global success of Korean cultural content.

The high usage rates of online/mobile platforms were similarly found in all countries surveyed. There was a notable difference in categories showing the highest experience rates among Korean cultural content between North America and Latin America. The US showed the highest experience rates in food (78.9%), music (65.4%), movies (50.4%), and animation (49.5%) and Canada in food (80.3%), music (66.0%), and movies (49.0%), whereas Mexico showed the highest experience rates in movies (76.9%), food (69.3%), fashion (65.4%), and music (64.9%), Brazil in movies (78.5%), dramas (70.3%), music (69.5%), and animation (62.1%), and Argentina in music (71.1%), movies (64.6%), and food (63.1%). The driving force behind the Hallyu market in the US was K-pop, while Mexico is also one of the major markets for K-pop. Brazil and Argentina have seen a rapid increase in video content consumption, while Canada stood out for the higher popularity of beauty content over movies. Latin America chose language barriers as one of the reasons that it is difficult to enjoy Korean video content. All countries surveyed responded that cultural content consumption helped form a positive image of Korea. As the consumption of Korean cultural content increases, Hallyu is expected to grow in the Americas.

Policy/business Implications

In the Americas, Hallyu flowed smoothly with few significant obstacles, such as anti-Hallyu sentiments, that could hinder its progress. Thus, it is advisable to provide policy support when necessary. Because Latin America tended to have weaker purchasing power compared with North America, appropriate support or product development tailored to local contexts is required. Furthermore, given that there are 33 countries in Latin America, it is also necessary to increase the number of countries surveyed to ensure representativeness in market research on Latin America.

Europe

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Summary

The results of this survey reaffirm that interest in Korean popular culture in Europe is not limited to specific content or artists such as *Squid Game*, BTS, or BLACKPINK. Instead, awareness of Korean popular culture has expanded across various genres such as movies, dramas, webtoons, and food. This signifies that interest in Korean culture is not a fleeting phenomenon but rather an indication of its growing cultural foundation, which is an encouraging development. Specifically, K-pop idol concerts, which had been limited during

the COVID-19 pandemic, are now experiencing a resurgence in Europe. TWICE held concerts in London, Paris, and Berlin in April 2023, and Red Velvet had a world tour in Paris, Berlin, Amsterdam, and London about a month later. Similarly, in September, (G)I-DLE held concerts in these cities, reaffirming the local demand for K-pop. Notably, not only idols from large agencies such as SM and JYP but also those from smaller agencies such as rapper Woodz and the four-member mixed gender group KARD, as well as non-idol Korean artists such as Oceanfromtheblue, have been performing increasingly frequently in Europe. Along with cultural events sponsored by various public institutions including KOFICE, this will contribute to the long-term expansion of the base for Korean music in the European market.

In addition, the survey results reaffirmed the important role played by global OTT platforms in the spread of Korean dramas and movies. The results showed that Netflix original dramas such as *The Glory*, *A Time Called You*, and *Daily Dose of Sunshine* and Netflix original movies such as *Ballerina* and *Jung_E* were listed among the most preferred Korean cultural content by individuals with Hallyu experience in Europe. This underscores the fact that, despite the issues stemming from domestic producers' increased dependence on global OTT platforms, these platforms are key channels through which international viewers access Korean dramas. In fact, considering that the European media industry, like Korea's, is being restructured around OTT platforms and that existing broadcasters and movie companies are creating content in collaboration with Netflix, Disney+, and Amazon Prime Video, the role of these OTT platforms in the dissemination of Korean dramas and movies is expected to remain significant in the future.

Furthermore, survey results from Germany, Italy, Spain, and Russia indicated a growing interest in Korean cuisine, which has become a symbol of Korean popular culture. Notably, the variety of Korean food is expanding beyond traditional dishes like kimchi, bulgogi, and bibimbap to items like chicken, gimbap, and cup rice. In light of this trend, Tesco, a major supermarket chain in the UK, has launched a convenience food product featuring chicken thighs coated with gochujang sauce, while another chain, Sainsbury's, is selling cup rice inspired by yangnyeom (seasoned) chicken in collaboration with a local brand. The increasing interest in Korean ingredients like doenjang (soybean paste) and gochujang (red chili paste) along with the spread of Hallyu indicates growing recognition of Korean culture as a whole and notably shows its potential to harmonize with local daily culture.

Finally, it is evident that people who have encountered Korean popular culture in Europe have also developed a positive image of Korean culture. This outcome underscores the significance of diversifying Hallyu's genres and markets. Therefore, the survey results suggest that not only has interest in Korean popular culture grown quantitatively in Europe, but it has also diversified qualitatively. As Korean popular culture continues to gain traction, it is time to consider long-term strategies to sustain and deepen this interest.

Policy/business Implications

Unlike in Asia, where dramas are driving the awareness of Korean popular culture, movies hold the highest recognition among genres of Korean popular culture in Europe. This highlights the importance of movies in expanding the base of Korean popular culture in Europe. In fact, in many European countries, Korean movies are often perceived as being a part of the art house genre with a strong non-Western auteurist tradition. It would be worth considering screening Korean commercial films in Europe in the long run along with the recovery of the Korean movie industry after the COVID-19 pandemic. Apart from that, it may be a viable option to expand the Korean movie screening programs conducted by Korean Cultural Centers in London, Paris, and Berlin and possibly operate them similar to the film tours conducted by the Japan Foundation in 30 cities across the UK, such as London, Liverpool, and Nottingham.

Similar to North America, interest in Korean variety shows in Europe is relatively low compared to dramas. However, the TV format for *Masked Singer* has been exported to several European countries, with the ninth season airing in Germany, the sixth season in France, and the fifth season in Finland and the UK. This suggests a need for continued interest in the European market as a target for format exports. Moreover, based on the survey results, it will be possible to identify opportunities to expand into European markets for genres such as publications or webtoons, which has received relatively less attention compared to dramas, movies, and music.

Middle East

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Summary

In the Middle East, including the UAE and Saudi Arabia, the experience and popularity of Hallyu have been consistently expanding. Notably, the awareness of Korean cultural content among the younger population in their teens and 20s has been steadily increasing, driven by the activities of K-pop idols and popular celebrities such as BTS and BLACKPINK.

One noteworthy observation was the higher “widely popular” responses for Korean beauty products, fashion, and food, with their popularity significantly surpassing that of dramas and music. This indicated that the range of popular Hallyu content resonating with people in the Middle East was expanding into diverse fields. However, despite their improvements over several years, the popularity of publications and webtoons remained significantly

lower than that of other content types, suggesting the need for a policy approach to resolve this issue. In particular, because of the demographic characteristics of the Middle East, where 50–70% of the population is under 35 years old, there was a significant increase in content access rates through online and mobile platforms primarily for movies and music. The positive change in the perception of Korea after accessing cultural content has increased in the UAE from 69% in 2019 to 85.9% in 2023 and in Saudi Arabia from 72.1% in 2022 to 80.8% in 2023, indicating a highly positive effect of the expansion of Korean cultural content.

Factors promoting and inhibiting favorability toward Korean cultural content showed slight differences between the UAE and Saudi Arabia. For factors promoting favorability, the UAE chose genuine, fun, and well-structured storylines as the most significant factor, whereas Saudi Arabia chose acting skills of the actors. For factors inhibiting favorability, both the UAE and Saudi Arabia claimed that Korean language is difficult and too unfamiliar across all categories, such as dramas, movies, music, and animation, suggesting the need for a more strategic approach regarding Korean language.

In terms of willingness to pay for Korean cultural content, the rates for beauty, food, and fashion were relatively higher compared with those for other content types. This may have reflected the characteristics of the Middle East, where women showed higher willingness than men. On the other hand, the biggest factor for negative perceptions of Hallyu was that Korean content is overly obscene, provocative, and commercial, which suggests the need to promote understanding of the Islamic culture prevalent in the Middle East.

Unlike quality (72%), the top reason for purchasing Korean products, brand (34.1%) and reputation (32.5%) were chosen by relatively fewer participants. Thus, it is necessary to more thoroughly analyze the characteristics of the Middle East, where the face-to-face culture is developed and the role of word-of-mouth is significant, and to establish marketing strategies to improve brand awareness and reputation.

Policy/business Implications

Considering the high proportion of the young population in the Middle East, the expansion of Korean cultural content is highly anticipated in this region. However, such expansion can only be achieved through a thorough understanding and analysis of the unique Islamic culture in the Middle East.

In terms of the popularity of countries by cultural content type, Korea surpassed the US in genres such as dramas, variety shows, fashion, and beauty products but fell behind in music, movies, and games. Notably, regarding food, Korea lagged behind countries with food cultures similar to the Middle East, such as Türkiye and India. Thus, there is a need for a specialized analysis and understanding of Middle Eastern food culture to devise a strategic approach to make Korean food blend in naturally with the food culture in the Middle East.

While Korean cultural content was increasingly popular in the Middle East, there was a lack of strategic understanding of the region and systematic policy development based on that understanding, which suggests the need to actively incorporate these factors into future strategies for expanding Korean cultural content. In particular, 50–70% of the population in the Middle East is under 35 years old, and recently, there has been a strong desire among young people for new cultural experiences, driven by government-led reform and opening up policies in countries like the UAE and Saudi Arabia. Leveraging this sociocultural context is essential for spreading Korean cultural content effectively.

Africa

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Summary

The African continent can be broadly divided into Islamic and Christian cultural regions, with Egypt and South Africa representing these two cultural regions in this survey. Including Western Sahara, there are a total of 55 countries in Africa. While these countries perceive South Korea as a successful model of economic development from extreme poverty, our diplomatic capabilities are insufficient to exert significant influence across Africa, which is why gradual penetration through Hallyu is especially important in this region.

Egypt established consular relations with Korea in 1961 and finally upgraded to ambassadorial diplomatic relations in 1995, after 34 years. The embassy was opened late as Egypt was indebted to North Korea for military support during the 1973 Arab–Israeli War, but the relationship between the two countries has developed significantly with a focus on the economy. Egypt’s state broadcaster, Channel 2, aired *Autumn in My Heart* in August 2004, which was well received by viewers and opened the door for Hallyu in Egypt, followed by *Winter Sonata* in January 2005. In addition to dramas actively promoted by the Korean government, K-pop has continued to build the Hallyu Wave with artists such as EXO, PSY, and BTS, who appealed to the younger generation in Egypt, maintaining a positive atmosphere. However, as highlighted in this report, the difficulty and unfamiliarity of the Korean language remain obstacles to Hallyu’s expansion in Egypt. Just as Arabic is challenging and unfamiliar to Koreans, this issue should be addressed with smoother translation techniques. The quality of translation must be improved so that Arabs can more easily accept the subtitles and dubbing for dramas and movies, as well as song lyrics. This is key to spreading Hallyu in Egypt and throughout the 22 Arab countries in the Middle East and Africa.

Hallyu took its first step into South Africa around the same time as it did into Egypt, spreading stably without much trouble. Similar to Egypt, the Ko-

rean language barrier has been identified as a challenge for accessibility to Hallyu in South Africa, which must also be overcome with high-quality translation.

It is an acultural attempt to make overly artificial efforts to expand the Hallyu consumer base not only across Africa but also worldwide. It is important that Hallyu establishes itself through natural progression. While government-led promotions have driven the global spread of Hallyu, its spontaneous growth beyond national policy frameworks is expected to naturally expand the consumer base, driven by Hallyu's competitiveness. As it may be difficult to access digital Hallyu products such as games depending on the economic levels of consumers as revealed in the survey of Egypt, it is necessary to consider providing an alternative that consumers can access with lower equipment specifications.

Hallyu must retain naturalness based on Korea's traditional culture, which value the natural more than the artificial. The word "jayeon," meaning nature, is a Chinese word that is used in Korea, China, and Japan, but "jayeonseureopge," meaning naturally, is an expression unique to Korea. Efforts must be made to position Korea as a leading cultural producer by incorporating the tradition that places greater value on the "natural" over the "artificial" into Hallyu. Only this will reduce negative feedback that Korean cultural content is overly obscene and provocative to draw attention.

Policy/business Implications

Countries consuming Hallyu all have different circumstances, but those under authoritarian regimes impose censorship and constantly eliminate expressions that they do not like. Hallyu content might be inevitably restricted because of the political situations in these countries. This means that Hallyu consumption may be limited because of the inability to freely express ideas in such political situations if the content fails to pass government censorship. Of course, adjusting or self-censoring the content of cultural products such as dramas or popular music is not acceptable, nor should it even be considered. However, regardless of freedom of expression, content, however minor it may be, that implicitly dismisses or demeans people from other cultures can cause significant damage to both the national image and the overall perception of Hallyu. Content creators must pay close attention to avoid all misunderstandings and ensure that their work does not insult or mock the mainstream culture, language, religion, or people of the Hallyu-consuming countries.

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