2025-01
Annual Survey

2025
OVERSEAS HALLYU SURVEY

KOFICE
Korean Foundation for
International Cultural Exchange

Notes

1 This annual survey aims to understand the usage of and perceptions toward Hallyu content among consumers with Hallyu experience in major overseas countries. Starting with 9 countries in 2012, the survey's number of target countries and sample sizes have steadily increased over time. In 2024, the 14th survey was conducted across 28 countries, with the aim of contributing to policy development that supports the creation of a sustainable Hallyu ecosystem and a favorable environment in overseas market.

2 This survey was conducted **in 28 countries** from November 29 to December 27, 2024, and **involved locals between the ages of 15 and 59 who have experienced Korean cultural content (hereinafter, consumers with Hallyu experience).** The total sample size was 26,400, ranging from a minimum of 700 to a maximum of 2,100 for each country. The margin of error is ±0.60 percentage points for the entire sample (n=26,400) and ±2.14–3.70 percentage points for each country (n=700–2,100) at the 95% confidence level.

3 The survey was conducted in the form of an online questionnaire. As it targeted consumers who have experienced Korean cultural content from online panels, it is likely that the participation rates of consumers with Hallyu experience (e.g., younger demographics, highly educated individuals, etc.) who actively use online platforms are relatively higher. Therefore, it is important to note that this survey reflects the population with Hallyu experience using online platforms, rather than the entire population with Hallyu experience in the surveyed countries. Moreover, because the survey measured the perceptions and thoughts of Hallyu consumers, metrics such as experience rate, popularity, consumption volume, and expenditure may differ from the actual levels of Hallyu diffusion, consumption, usage, and expenditure.

4 Most statistical figures are rounded to the nearest tenth and presented to one decimal place. Consequently, there may be a margin of error within ±0.2 percentage points such that the sum of the percentages presented in the report does not add up to 100%. For multiple response questions (e.g., 1st + 2nd rank, 1st + 2nd + 3rd rank, etc.), percentages are calculated on the basis of 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 and subsequently converted to US dollars (USD) using the average exchange rate for the most recent year (November 1, 2023 to October 31, 2024).

6 For cross-year comparisons of key survey items there are variations in sample sizes, survey items, questions, and content classifications across countries and years.

7 This report is a summary of the results from the *2025 Overseas Hallyu Survey* conducted in 2024. The full report can be downloaded from Korean Foundation for International Cultural Exchange (KOFICE) Hallyu Research Archive. For more detailed survey results, please refer to the reports with country-specific analyses and statistics. Please contact the Cultural Exchange Research Center at KOFICE for inquiries on the included data.

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2025 Overseas Hallyu Survey at a Glance

Participants Consumers with Hallyu experience in 28 countries

Sample Size 26,400

Survey Method Online Panel Survey

Survey Period November–December 2024

Interest in Korean Cultural Content

Q. [My/my compatriots'] current [interest in/intention to spend on] Korean cultural content compared with a year ago.

My interest

Increase **53.2%**

Similar 38.5%

Decrease 8.3%

Top 3 countries with the highest percentage of "Increase" responses

1. India
2. UAE
3. Indonesia

Compatriots' interest

Increase **55.3%**

Similar 34.8%

Decrease 9.9%

Top 3 countries the highest percentage of "Increase" responses

1. Philippines
2. Indonesia
3. India

My intention to spend

Increase **44.5%**

Similar 42.1%

Decrease 13.4%

Top 3 countries the highest percentage of "Increase" responses

1. India
2. Vietnam
3. UAE

Proportion of Korean Cultural Content Consumption

Average of 28 countries **24.9%**

Q. What is your usual viewing volume and proportion for Korean cultural content?

Americas

Mexico	24.9%
Brazil	24.3%
US	21.2%
Argentina	19.5%
Canada	18.8%

Europe

Türkiye	22.0%
UK	18.8%
France	18.5%
Germany	17.2%
Spain	17.0%
Italy	15.9%
Russia	15.6%

Asia-Pacific

Indonesia	34.7%
Philippines	34.0%
Malaysia	33.0%
Vietnam	32.5%
India	31.2%
Thailand	29.5%
Taiwan	26.7%
Hong Kong	25.6%
China	23.3%
Kazakhstan	18.8%
Australia	18.6%
Japan	15.7%

Middle East

UAE	31.2%
Saudi Arabia	30.2%

Africa

South Africa	29.8%
Egypt	27.8%

Popularity of Korean Cultural Content

Q. How popular do you think Hallyu is in your country?

	2019	2024
Food	45.1%	53.7%
Music	37.5%	51.2%
Beauty	42.6%	50.8%
Dramas	27.2%	49.0%
Movies	31.1%	47.2%
Fashion	38.5%	45.3%
Variety shows	27.9%	38.5%
Games	29.9%	38.1%
Animation	26.5%	36.2%
Webtoons	21.5%	31.0%
Publications	23.3%	28.9%

Top 5 Countries

1. Philippines
2. Vietnam
3. Malaysia
4. India
5. Thailand

Preferred Titles and Stars

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

Q. Who is your current favorite Korean [singer or group/actor]?

Dramas

1	Squid Game	9.7%
2	Queen of Tears	6.5%
3	Crash Landing on You	2.2%

No. 1 by Continent

Asia-Pacific	Queen of Tear 8.0%
Americas	Squid Game 9.4%
Europe	Squid Game 23.5%
Middle East	Squid Game 7.6%
Africa	Squid Game 9.4%

Movies

1	Parasite	8.3%
2	Train to Busan	6.5%
3	Exhuma	4.1%

No. 1 by Continent

Asia-Pacific	Train to Busan 8.6%
Americas	Parasite 10.0%
Europe	Parasite 11.4%
Middle East	Parasite 5.7%
Africa	Parasite 5.4%

Animation

1	Pucca	9.2%
2	Larva	8.1%
3	Pororo the Little Penguin	5.7%

No. 1 by Continent

Asia-Pacific	Larva 13.6%
Americas	Pucca 23.4%
Europe	Pucca 9.3%
Middle East	Red Shoes and the Seven Dwarfs 8.4%
Africa	The Haunted House 7.9%

Games

1	Battlegrounds	11.0%
2	Crossfire	8.6%
3	Ragnarok	7.7%

No. 1 by Continent

Asia-Pacific	Battlegrounds 14.3%
Americas	Crossfire 9.5%
Europe	Battlegrounds 9.0%
Middle East	Gunship Battle 11.4%
Africa	Crossfire 12.4%

Actors

1	Lee Min-ho	7.0%
2	Gong Yoo	2.4%
3	Song Hye-gyo	2.4%

No. 1 by Continent

Asia-Pacific	Lee Min-ho 8.4%
Americas	Lee Min-ho 4.9%
Europe	Lee Min-ho 5.0%
Middle East	Lee Min-ho 8.3%
Africa	Lee Min-ho 8.5%

Singers/Groups

1	BTS	24.6%
2	Blackpink	12.3%
3	IU	3.1%

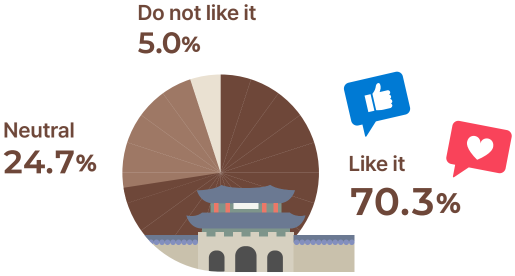
No. 1 by Continent

Asia-Pacific	BTS 19.4%
Americas	BTS 34.2%
Europe	BTS 28.7%
Middle East	BTS 20.5%
Africa	BTS 26.5%

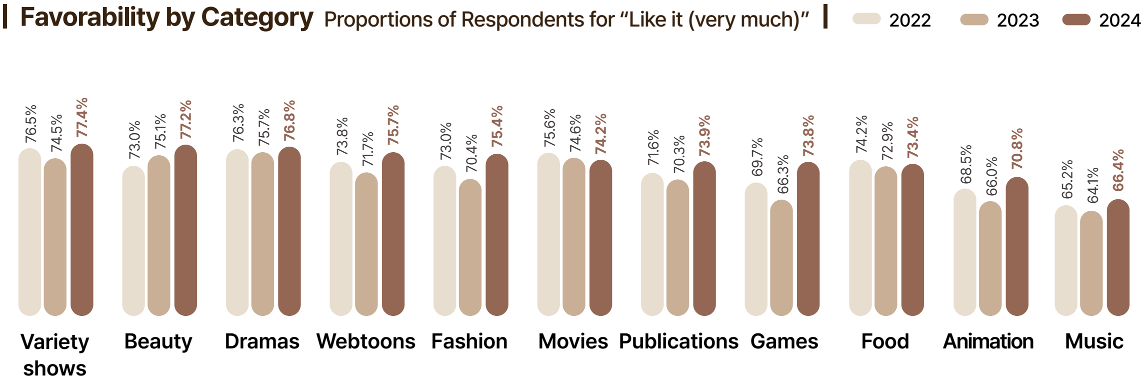
Favorability Toward Korean Cultural Content

Q. Overall, how much do you like [the Korean cultural content that you have recently experienced]?

| Overall Favorability |



| Favorability by Category Proportions of Respondents for "Like it (very much)" |

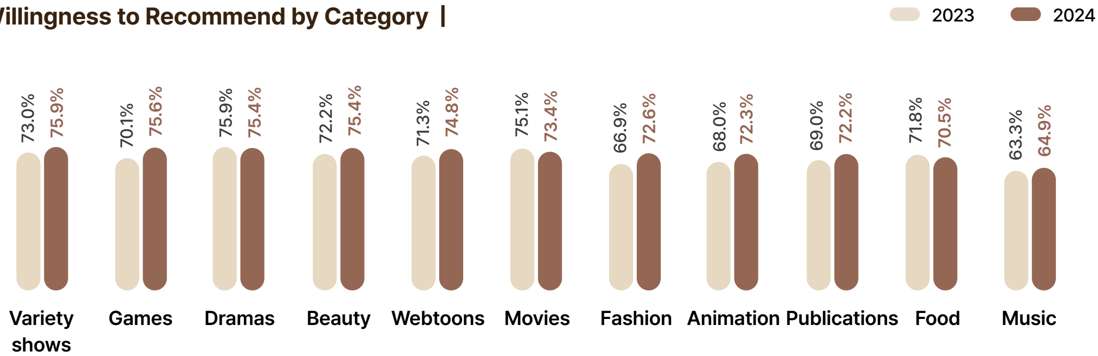


Willingness to Recommend Korean Cultural Content

Q. How willing are you to recommend [the Korean cultural content you have recently experienced] to others?

| Overall Willingness to Recommend |

| Willingness to Recommend by Category |

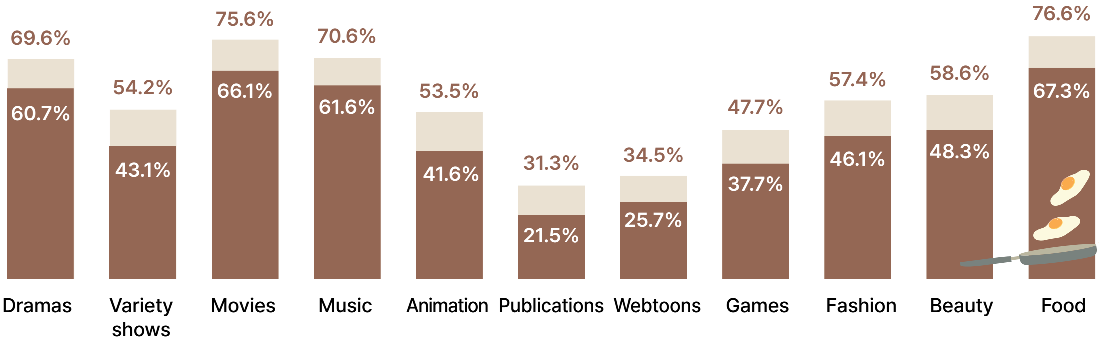


Factors Promoting and Inhibiting Favorability Toward Korean Cultural Content

Category	Factors promoting favorability (1st + 2nd choices)	%	Factors inhibiting favorability (1st + 2nd choices)	%
Dramas	The story is well-structured and solid	26.9%	The Korean language is difficult and unfamiliar	22.1%
	It covers various materials or genres	21.8%	Inconvenient to watch with translated subtitles/dubbing	20.8%
	The love stories are pure	21.5%	Episodes are too long	16.1%
Variety shows	Use of interesting games and materials	31.0%	The Korean language is difficult and unfamiliar	24.5%
	Can indirectly experience Korean lifestyle and culture	29.4%	Inconvenient to watch with translated subtitles/dubbing	22.0%
	Good program concepts and formats	26.7%	Difficult to encounter or access	20.4%
Movies	The story is well-structured and solid	28.1%	The Korean language is difficult and unfamiliar	22.2%
	It covers various materials or genres	21.2%	Inconvenient to watch with translated subtitles/dubbing	20.5%
	The actors' acting abilities are outstanding	20.5%	Difficult to understand due to language/cultural differences	17.6%
Music	The music itself is good/of high-quality	40.3%	Korean lyrics are difficult and unfamiliar	22.5%
	The singer's/group's performance is outstanding	30.1%	Too commercial	16.4%
	The singer/group is attractive in appearance or style	25.9%	The music genres are overly homogeneous	14.1%
Animation	The visuals are beautiful	37.7%	The Korean language is difficult and unfamiliar	22.9%
	The appearance/design of the characters is appealing	30.3%	Inconvenient to watch with translated subtitles/dubbing	20.8%
	The personalities/roles of the characters are appealing	29.9%	Difficult to find or access	19.0%
Publications	The stories are good	33.0%	The translation is inadequate	23.6%
	Hallyu content is often based on original works	26.1%	Difficult to purchase	22.1%
	It covers various materials or genres	24.5%	Difficult to understand due to language/cultural differences	20.6%
Webtoons	The story is well-structured and solid	27.5%	The translation is inadequate	21.9%
	The illustrations are realistic and detailed	26.5%	Difficult to find or access	17.7%
	It covers various materials or genres	25.7%	Difficult to understand because of language/cultural differences	15.8%
Games	The graphics/visuals are of high quality	28.1%	Costs too much to access	17.8%
	The gameplay or composition is well designed	25.9%	Encourages excessive spending	17.6%
	The characters have unique personalities/roles	19.2%	Requires high device specifications	17.0%
Fashion	The design/style is good	42.1%	Difficult to purchase	29.9%
	The quality is excellent	30.8%	Lack of diversity in sizes	25.1%
	Diverse product types and styles	26.0%	Expensive for the quality offered	22.0%
Beauty	It is effective and of excellent quality	41.5%	Expensive for the quality offered	19.1%
	Variety of product types	23.5%	Product information labels are not detailed enough	16.7%
	It has a good reputation among people around me	22.7%	Overly exaggerated promotion of the product	15.8%
Food	It tastes good	57.2%	Expensive prices	26.0%
	Can experience Korean food and dining culture	33.7%	Unfamiliar with the ingredients/recipes	22.6%
	It uses healthy ingredients or recipes	31.3%	Difficult to use the eating utensils	19.6%

Experience with Hallyu Cultural Content

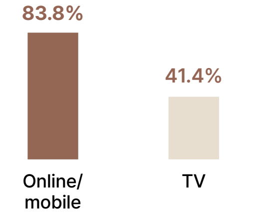
Q. Please select all types of Korean cultural content that you have experienced.



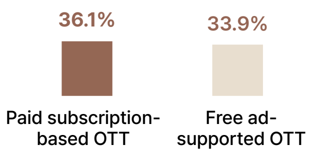
Hallyu Consumption by Category

1. Dramas

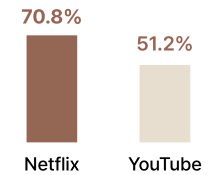
Channel of exposure



Viewing type



Online platform



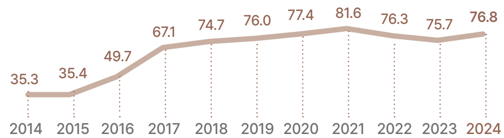
Proportion of consumption

Top 3 countries

1. Indonesia 2. Philippines 3. Malaysia

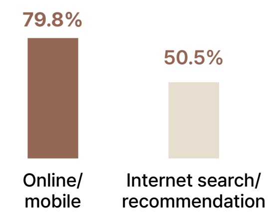
Favorability Proportions of Respondents for "Like it (very much)"

Unit: %

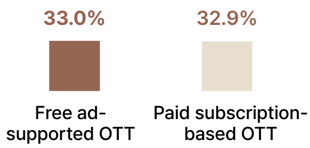


2. Variety shows

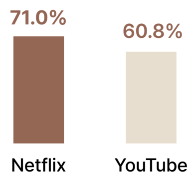
Channel of exposure



Viewing type



Online platform



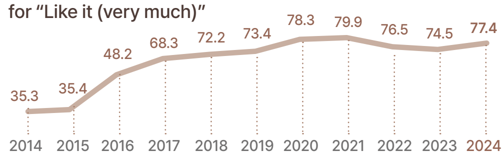
Proportion of consumption

Top 3 countries

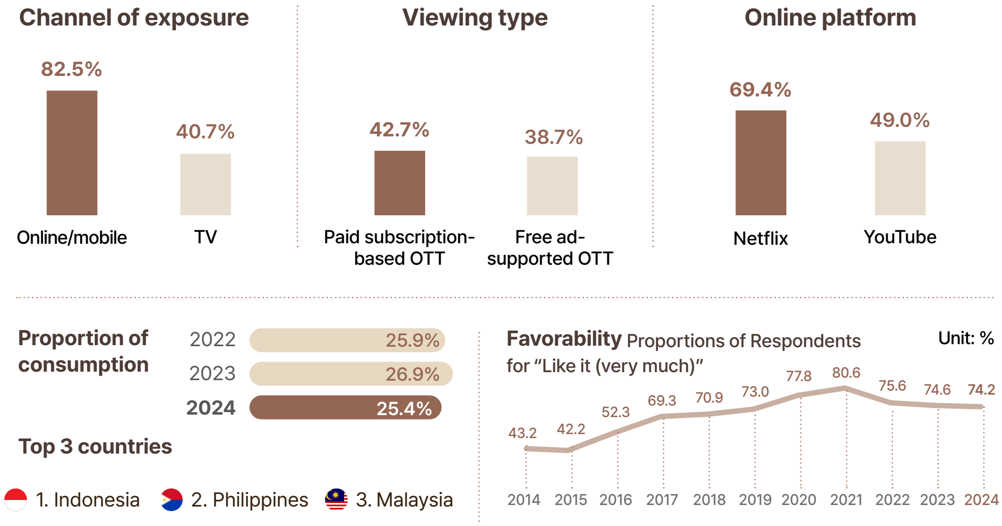
1. Indonesia 2. Philippines 3. Malaysia

Favorability Proportions of Respondents for "Like it (very much)"

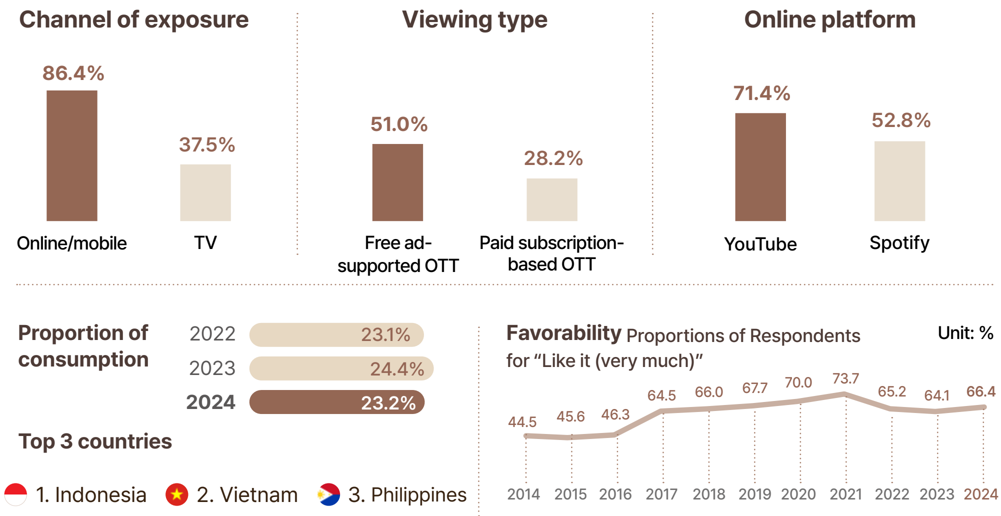
Unit: %



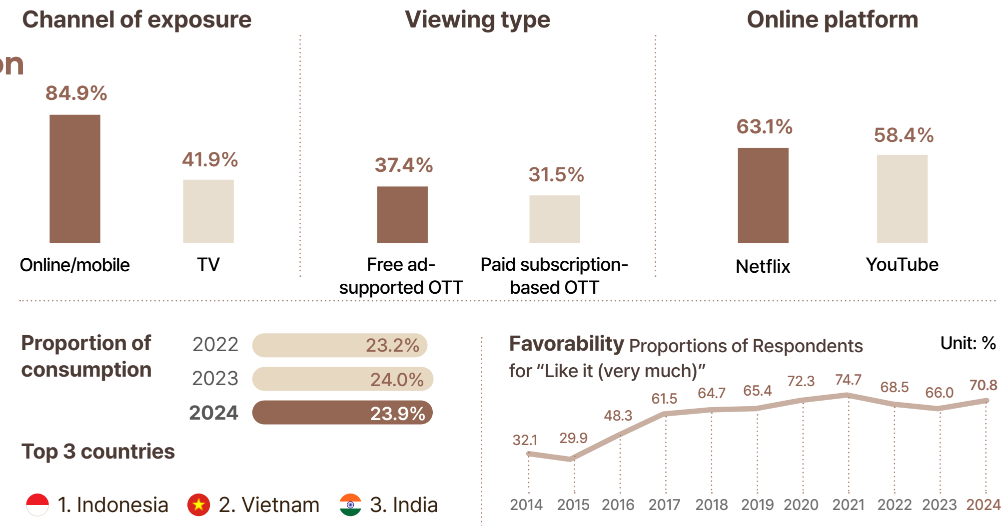
3. Movies



4. Music

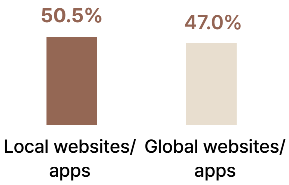


5. Animation

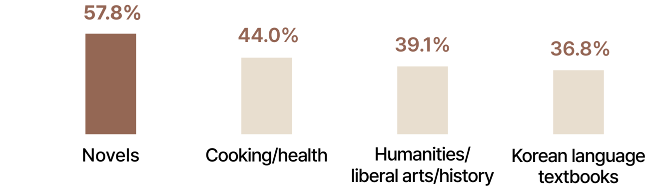


6. Publications

Channel of exposure



Genres



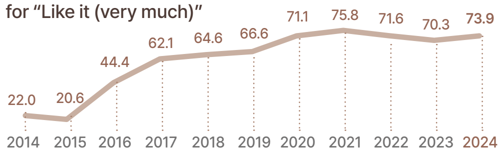
Proportion of consumption

Top 3 countries

1. UAE 2. Malaysia 3. India

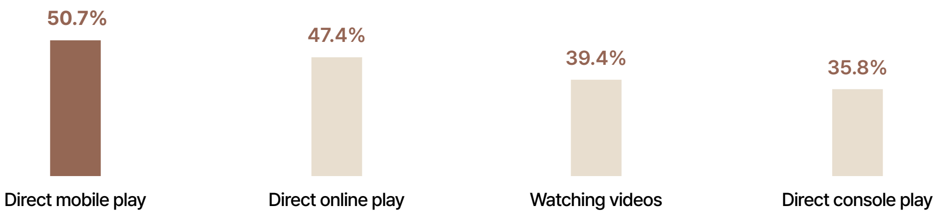
Favorability Proportions of Respondents for "Like it (very much)"

Unit: %



7. Games

Channel of exposure



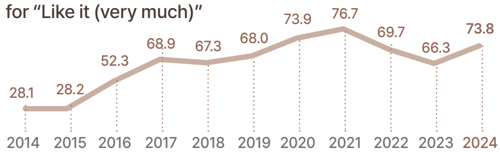
Proportion of consumption

Top 3 countries

1. Indonesia 2. UAE 3. Malaysia

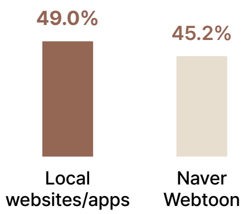
Favorability Proportions of Respondents for "Like it (very much)"

Unit: %

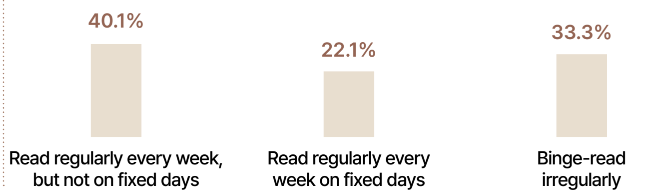


8. Webtoons

Channel of exposure



Usage pattern



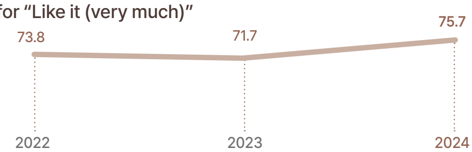
Proportion of consumption

Top 3 countries

1. Indonesia 2. Vietnam 3. Philippines

Favorability Proportions of Respondents for "Like it (very much)"

Unit: %

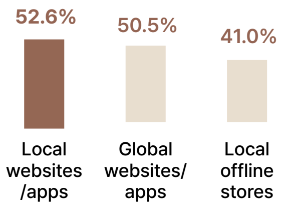


9. Fashion

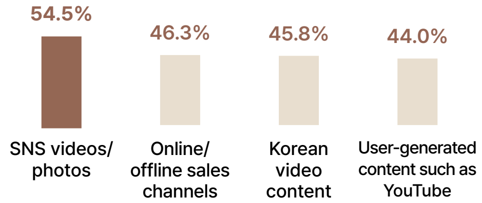
Korean fashion product purchase rate in the year after encountering Hallyu content

66.2%

Purchase channel



Channel of exposure



Proportion of consumption

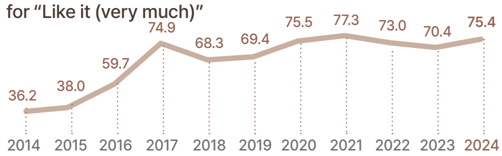
2022	27.5%
2023	26.6%
2024	27.1%

Top 3 countries

1. Saudi Arabia 2. Vietnam 3. Malaysia

Favorability Proportions of Respondents for "Like it (very much)"

Unit: %

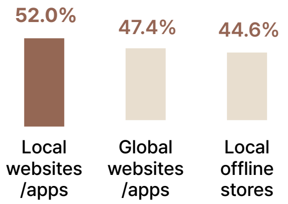


10. Beauty

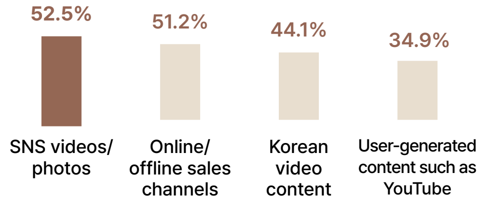
Korean beauty product purchase rate in the year after encountering Hallyu content

68.0%

Purchase channel



Channel of exposure



Proportion of consumption

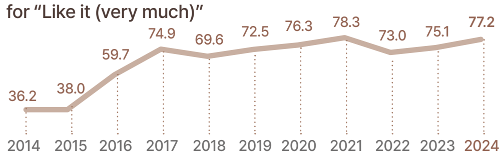
2022	28.7%
2023	28.6%
2024	28.0%

Top 3 countries

1. Vietnam 2. Saudi Arabia 3. Philippines

Favorability Proportions of Respondents for "Like it (very much)"

Unit: %

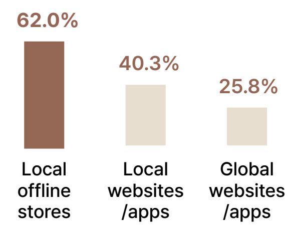


11. Food

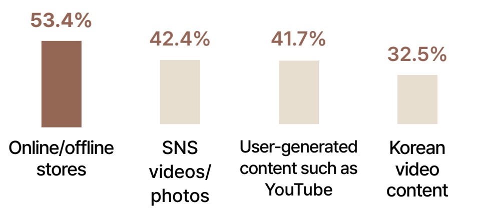
Korean food experience rate in the year after encountering Hallyu content

65.4%

Purchase channel



Channel of exposure



Proportion of consumption

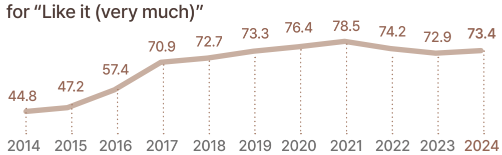
2022	20.1%
2023	20.4%
2024	19.0%

Top 3 countries

1. Philippines 2. Saudi Arabia 3. Vietnam

Favorability Proportions of Respondents for "Like it (very much)"

Unit: %



12. Korean language

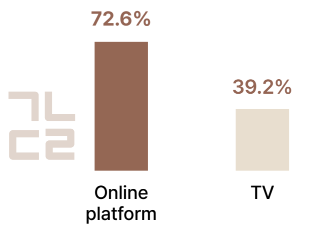
Average learning experience rate across all 28 countries

26.8%

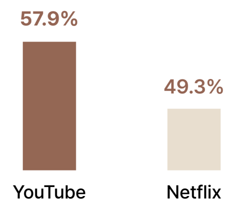
Top 3 countries with high learning experience rates

1. Philippines 45.4%
2. India 43.8%
3. Indonesia 43.8%

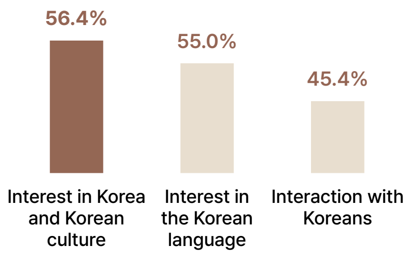
Channel of exposure



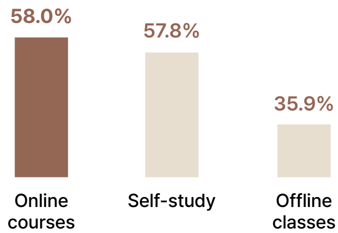
Online platform



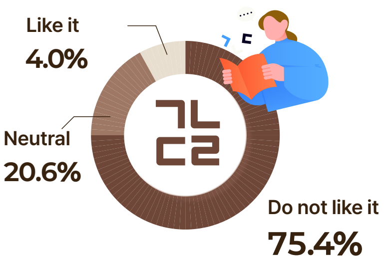
Purpose of learning Korean



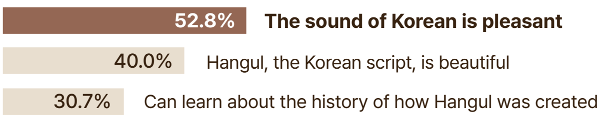
Method of learning Korean



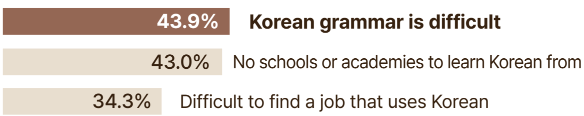
Favorability toward Korean language learning methods



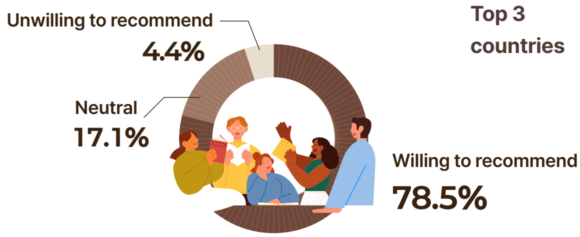
Factors promoting favorability toward the Korean language (1st+2nd choices)



Factors inhibiting favorability toward the Korean language (1st+2nd choices)



Willingness to recommend Korean language learning



Top 3 countries

1. Egypt
2. India
3. Thailand

PART 1

Survey Overview

- This chapter presents the data collected during the survey implementation year "2024."
- Please exercise caution when interpreting time-series indices considering the expansion of target countries, changes in sample designs, and improvements in survey items.
- As noted, since this survey measured the perceptions of Hallyu consumers/users, metrics such as experience rate, popularity, proportion of consumption, consumption volume, and expenditure for each category of Korean cultural content may differ from the actual levels of Hallyu consumption, use, and expenditure.
- To enhance understanding of the survey results, we conducted a survey via email with a total of 24 respondents, including KOFICE overseas correspondents, KOTRA overseas trade officers, and local personnel at KOCCA overseas business centers to gather their subjective opinions on local reactions and issues by category in 2024. This information is presented separately in the "Local News" section at the bottom of the pages containing related items such as "Hallyu popularity." When used as supporting material in the main text, this information is referred to through the expression "According to Local News."

Survey Overview

01

Purpose of the Survey

The purpose of this survey is to offer foundational data with which to 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. The collected data are used to formulate government policies to create a sustainable Hallyu ecosystem and an overseas market environment, and serve as foundational data for related industries to develop business strategies to expand into overseas markets.

History of the Survey

Survey Timeframe	Description
February 2012 (1st)	• Countries Surveyed: 9 countries (China, Japan, Taiwan, Thailand, the United States, Brazil, France, the United Kingdom, and Russia) • Survey Target: Individuals aged 15–59 years who have experienced Korean cultural content • Sample Size: 3,600 samples
December 2012 (2nd)	• Countries Surveyed: 9 countries • Changes in Survey Target: Individuals aged 15–49 years who have experienced Korean cultural content
February 2014 (3rd)	• Countries Surveyed: UAE and South Africa added, totaling 11 countries • Expanded Survey Target: Individuals aged 15–59 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
November 2018 (8th)	• Countries Surveyed: 16 Countries • Addition of Questions: Online/mobile platform channels of exposure • Reduction in Sample Size: 7,800 samples → 7,500 samples

Survey Timeframe	Description
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
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)	• Countries Surveyed: Addition of Kazakhstan, Canada, Mexico, Italy, Spain, Germany, Saudi Arabia, and Egypt, totaling 26 countries • Expanded Sample Size: 25,000 samples (800–1,200 samples per country) • Changed Content Classification: Publications (books/e-books/comics/webtoons) separated into publications (books/e-books) and webtoons
November 2023 (13th)	• Conducted the 2024 Overseas Hallyu Survey • Changed Sample Size by Country: 25,000 samples (700–1,600 samples per country) • Changed Content Classification: Changed “fashion” from “fashion products” to “fashion products/styles”
November 2024 (14th)	• Countries Surveyed: Hong Kong and the Philippines added, totaling 28 countries • Expanded Sample Size: 26,400 samples (700–2,100 samples per country) • Improved Sample Design: Considered population size by country and region, separated the 40s–50s age group • Added a Survey Category: Korean language (Korean language perception, learning, usage pattern, etc.) • Added Survey Items: Uncomfortable or lacking aspects of cultural diversity representation, demographic items (vegetarian/non-vegetarian, gender, etc.) added

Survey Frequency

The survey is conducted annually.

02 Survey Design

Survey Targets

• The targets of this study are male and female locals aged 15–59 years who have experienced at least 1 of the following 11 types of Korean cultural content: Korean dramas, variety shows, movies, music, animation, publications, webtoons, games, fashion, beauty, and food.

• Experience by type of Korean cultural content was identified by the following questions; respondents who selected "1. Yes" for at least 1 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	1	2
10. Korean beauty	1	2
11. Korean food	1	2

* The newly added category, Korean language, can also be encountered through experiences with other cultural content, and its experience rate is expected to be relatively low compared with other types of content. Therefore, it was not included as a criterion for selecting consumers with experience in Korean cultural content.

• In the United Arab Emirates (UAE), only 11.5% of the population are nationals, while the majority (88.5%) constitutes foreign immigrants[1]; therefore, third-country nationals were also included in the survey.

Target Countries

A total of 28 countries were surveyed after 2 countries, Hong Kong and the Philippines, were added to the existing 26 countries.

Global Region	Country (Region)
Asia-Pacific (12 countries)	China, Japan, Taiwan, Thailand, Malaysia, Indonesia, India, Vietnam, Kazakhstan, Australia, Hong Kong, and the Philippines
Americas (5 countries)	The United States (US), Canada, Mexico, Brazil, and Argentina
Europe (7 countries)	The United Kingdom (UK), France, Italy, Spain, Germany, Russia, and Türkiye
Middle East (2 countries)	The UAE and Saudi Arabia
Africa (2 countries)	Egypt and South Africa

1 UNITED ARAB EMIRATES POPULATION STATISTICS 2024

Survey Execution

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

Survey Period

Preliminary survey: November 11–25, 2024
Main survey: November 29–December 27, 2024

Survey Method

A self-administered survey was conducted using a structured questionnaire targeting overseas online panels. Two overseas online panel companies were used to compensate for online panel bias.

Sample Design

Sample size: Total 26,400
Sample allocation

STEP		Sample allocation method
STEP 1	Allocation sampling by country	After basic distribution of 500 samples per country, the remaining samples were allocated proportionally to the square root of each country's population share (the newly added regions of the Philippines and Hong Kong received a basic distribution of 700 samples each)
STEP 2	Allocation sampling by region	Samples were allocated proportionally according to the population share of each region within each country
STEP 3	Allocation sampling by gender/age	For age distribution, equal samples were allocated to the 15–19, 20s, and 30s age groups, with the remaining samples allocated to the 40s–50s age group. The latter age group was divided into 40s and 50s age groups and samples allocated equally.

* The characteristics of Korean cultural content experience differ between those in their 40s and 50s. If these two age groups were combined in the survey, there would be a high likelihood of over-sampling individuals in their 40s, who tend to be more active online, compared to the actual population ratio. Therefore, the 40s and 50s age groups were separated and allocated equal sample proportions.

Weight Calculation

The survey samples collected through the online survey were weighted during analysis to match the target sample allocation by country, region, gender, and age. The weighting formula is as follows:

N : Target sample size

n : Actual sample size

i : Country (28 countries)

j : Region within each country

k : Gender (male, female)

l : Age (15–19, 20s, 30s, 40s, 50s)

$$\text{Weight } (wt_{ijkl}) = \frac{N_{ijkl}}{n_{ijkl}}, \quad i=1,2\text{~}28, \quad j=1,2\text{~}92, \quad k=1,2, \quad l=1,2,3,4,5$$

Sample Allocation

Unit: Sample

Continent	Country	Region	Total	Male					Female				
				15~19	20s	30s	40s	50s	15~19	20s	30s	40s	50s
Total			26,400	3,312	3,310	3,312	1,645	1,621	3,310	3,312	3,310	1,647	1,621
Asia-Pacific	China	Total	2,100	263	263	263	131	130	263	263	263	130	131
		East Coast	856	107	107	107	54	53	107	107	107	53	54
		Northeast	150	19	19	19	9	9	19	19	19	9	9
		Central	568	71	71	71	35	36	71	71	71	36	35
		West Coast	526	66	66	66	33	32	66	66	66	32	33
	Japan	Total	1,000	126	125	126	62	61	125	126	125	62	62
		Northern	104	13	13	13	7	6	13	13	13	6	7
		Kanto	368	46	46	46	23	23	46	46	46	23	23
		Central	342	43	43	43	21	21	43	43	43	21	21
		Southern	186	24	23	24	11	11	23	24	23	12	11
	Taiwan	Total	750	94	94	94	47	46	94	94	94	47	46
		Northern	368	46	46	46	23	23	46	46	46	23	23
		Central-Eastern	172	22	21	22	11	10	21	22	21	11	11
		Southern	210	26	27	26	13	13	27	26	27	13	12
	Thailand	Total	850	106	107	106	54	52	107	106	107	53	52
		Bangkok	172	22	21	22	11	10	21	22	21	11	11
		Central	204	25	26	25	13	13	26	25	26	13	12
		Northeastern	318	40	40	40	20	19	40	40	40	19	20
		Southern	156	19	20	19	10	10	20	19	20	10	9
	Malaysia	Total	730	92	92	92	45	44	92	92	92	45	44
		Central	246	31	31	31	15	15	31	31	31	15	15
		Northeast	210	27	26	27	13	12	26	27	26	13	13
		Other	274	34	35	34	17	17	35	34	35	17	16
	Indonesia	Total	1,200	151	150	151	74	74	150	151	150	75	74
		Sumatra	256	32	32	32	16	16	32	32	32	16	16
		Java	678	85	85	85	42	42	85	85	85	42	42
		Other	266	34	33	34	16	16	33	34	33	17	16
	India	Total	1,850	231	232	231	116	115	232	231	232	115	115
		Central-Northern	1,136	142	142	142	71	71	142	142	142	71	71
		Western	286	36	36	36	18	17	36	36	36	17	18
		Southern	428	53	54	53	27	27	54	53	54	27	26
	Vietnam	Total	900	112	113	112	57	56	113	112	113	57	55
		Northern	316	39	40	39	20	20	40	39	40	20	19
		Central	236	30	29	30	15	14	29	30	29	15	15
		Southern	348	43	44	43	22	22	44	43	44	22	21
	Kazakhstan	Total	700	88	87	88	43	44	87	88	87	45	43
		Northwestern	264	33	33	33	16	17	33	33	33	17	16
		Central	100	13	12	13	6	6	12	13	12	7	6
		Southern	336	42	42	42	21	21	42	42	42	21	21

Unit: Sample

Continent	Country	Region	Total	Male 15~19	Male 20s	Male 30s	Male 40s	Male 50s	Female 15~19	Female 20s	Female 30s	Female 40s	Female 50s
Total			26,400	3,312	3,310	3,312	1,645	1,621	3,310	3,312	3,310	1,647	1,621
Asia-Pacific	Australia	Total	710	89	89	89	44	44	89	89	89	45	43
		Northeast	144	18	18	18	9	9	18	18	18	9	9
		East Central	234	30	29	30	14	14	29	30	29	15	14
		Central-Western	132	16	17	16	9	8	17	16	17	8	8
		Southeastern	200	25	25	25	12	13	25	25	25	13	12
	Hong Kong	Total	700	87	88	87	44	44	88	87	88	44	43
	Philippines	Total	700	88	88	88	43	43	88	88	88	44	42
		Northern	408	51	51	51	25	26	51	51	51	26	25
		Central	130	17	16	17	8	7	16	17	16	8	8
		Southern	162	20	21	20	10	10	21	20	21	10	9
Middle East	UAE	Total	700	88	88	88	44	42	88	88	88	43	43
		Abu Dhabi	130	16	17	16	8	8	17	16	17	8	7
		Dubai	254	32	32	32	16	15	32	32	32	15	16
		Others	316	40	39	40	20	19	39	40	39	20	20
	Saudi Arabia	Total	730	92	91	92	45	45	91	92	91	46	45
		Riyadh	202	26	25	26	12	12	25	26	25	13	12
		Mecca	184	23	23	23	11	12	23	23	23	12	11
		Others	344	43	43	43	22	21	43	43	43	21	22
The Americas	US	Total	1,300	163	162	163	81	81	162	163	162	82	81
		Northeastern	224	28	28	28	14	14	28	28	28	14	14
		Central-Western	264	33	33	33	16	17	33	33	33	17	16
		Western	312	39	39	39	20	19	39	39	39	19	20
		Southern	500	63	62	63	31	31	62	63	62	32	31
	Canada	Total	800	100	101	100	51	48	101	100	101	49	49
		Northwestern	260	32	33	32	17	16	33	32	33	16	16
		Atlantic Ocean	226	29	28	29	14	13	28	29	28	14	14
		Ontario	314	39	40	39	20	19	40	39	40	19	19
	Mexico	Total	960	121	120	121	59	59	120	121	120	60	59
		Northern	330	42	41	42	20	20	41	42	41	21	20
		Southern	374	47	47	47	23	23	47	47	47	23	23
		Other	256	32	32	32	16	16	32	32	32	16	16
	Brazil	Total	1,100	137	138	137	70	68	138	137	138	69	68
		Northeastern	372	46	47	46	24	23	47	46	47	23	23
		Southeastern	460	58	57	58	29	28	57	58	57	29	29
		Southwestern	268	33	34	33	17	17	34	33	34	17	16
	Argentina	Total	800	101	100	101	50	48	100	101	100	50	49
		Buenos Aires	354	45	44	45	22	21	44	45	44	22	22
		Northern	170	21	22	21	11	10	22	21	22	10	10
		Central Southwestern	276	35	34	35	17	17	34	35	34	18	17

Unit: Sample

Continent	Country	Region	Total	Male					Female				
				15~19	20s	30s	40s	50s	15~19	20s	30s	40s	50s
Total			26,400	3,312	3,310	3,312	1,645	1,621	3,310	3,312	3,310	1,647	1,621
Europe	UK	Total	850	107	106	107	53	52	106	107	106	54	52
		Northeastern	324	41	40	41	20	20	40	41	40	21	20
		Southwestern	240	30	30	30	15	15	30	30	30	15	15
		London	140	17	18	17	9	9	18	17	18	9	8
		Other(excluding England)	146	19	18	19	9	8	18	19	18	9	9
	France	Total	850	107	107	107	52	52	107	107	107	53	51
		Northern	354	44	45	44	22	22	45	44	45	22	21
		Paris	174	22	22	22	10	11	22	22	22	11	10
		Southern	322	41	40	41	20	19	40	41	40	20	20
	Italy	Total	840	106	105	106	51	52	105	106	105	53	51
		Northern	398	50	50	50	24	25	50	50	50	25	24
		Central	180	23	22	23	11	11	22	23	22	12	11
		Southern	262	33	33	33	16	16	33	33	33	16	16
	Spain	Total	800	100	101	100	50	49	101	100	101	49	49
		Northern	292	36	37	36	19	18	37	36	37	18	18
		Central	302	38	38	38	19	18	38	38	38	18	19
		Southern	206	26	26	26	12	13	26	26	26	13	12
	Germany	Total	900	114	113	114	55	54	113	114	113	55	55
		Northern	162	21	20	21	10	9	20	21	20	10	10
		Eastern	150	19	19	19	9	9	19	19	19	9	9
		Southern	270	34	34	34	16	17	34	34	34	17	16
		Western	318	40	40	40	20	19	40	40	40	19	20
	Russia	Total	1,000	125	126	125	62	62	126	125	126	63	60
		Northwest/Ural	200	25	25	25	12	13	25	25	25	13	12
		Eastern	164	21	20	21	10	10	20	21	20	11	10
		Central	274	34	35	34	17	17	35	34	35	17	16
		Western	362	45	46	45	23	22	46	45	46	22	22
	Türkiye	Total	880	110	111	110	55	54	111	110	111	54	54
		Northeastern	230	29	29	29	14	14	29	29	29	14	14
		Central	254	32	32	32	16	15	32	32	32	15	16
		Western	396	49	50	49	25	25	50	49	50	25	24
Africa	South Africa	Total	800	101	100	101	50	48	100	101	100	50	49
		Northeastern	302	38	38	38	18	19	38	38	38	19	18
		Central	172	22	21	22	11	10	21	22	21	11	11
		Western	116	14	15	14	8	7	15	14	15	7	7
		Hauteng	210	27	26	27	13	12	26	27	26	13	13
	Egypt	Total	900	113	113	113	57	54	113	113	113	55	56
		Northern	314	39	40	39	20	19	40	39	40	19	19
		Eastern	190	24	24	24	12	11	24	24	24	11	12
		Central-Western	240	30	30	30	15	15	30	30	30	15	15
		Southern	156	20	19	20	10	9	19	20	19	10	10

Survey Details

03

Major Changes in 2024

The survey was expanded by adding the Korean language category to existing survey items such as “perception of Korea,” “consumption status by Hallyu content type,” “perception of Hallyu,” “influence of Hallyu,” and “respondent characteristics.” To improve the survey items, face-to-face meetings were held with personnel involved in Hallyu content in academia, industry, and relevant government departments to gather diverse opinions. Four major changes were made to the 2024 survey.

First, for the item “online/mobile platforms for Korean cultural content,” popular local platforms were added for each country. In addition to global platforms such as YouTube and Netflix, local or newly launched platforms were added for each country to better elucidate the usage status of country-specific platforms.

Second, a new item was added to identify “inappropriate or inadequate aspects of cultural diversity representation” by type of Korean cultural content. Whether cultural diversity is considered in content has recently become an important factor in post-consumption evaluations. It has been noted that a lack of such consideration may serve as an element of cultural conflict with consumers in each country. Accordingly, to support the continued growth of Hallyu, it was deemed necessary to include items related to cultural diversity. Therefore, for respondents who selected “lack of consideration for cultural diversity” as a factor inhibiting favorability toward Korean cultural content, follow-up items were added to identify the inappropriate or inadequate aspects of cultural diversity representation. Additional demographic items such as “vegetarian or non-vegetarian and stage” and “gender identity,” were also considered to better capture the diversity of respondent characteristics.

Third, the item “Korean product purchase experience and frequency” was added for the Korean fashion, beauty, and food categories. For these categories, it was deemed necessary to examine not only content consumption status such as watching videos or viewing images but also related product purchase status in connection with content consumption. Accordingly, the item “experience and frequency of purchasing related products in the year after viewing Korean fashion/beauty/food videos or images” was added.

Fourth, a new category on the Korean language was created. Unlike other Hallyu content such as dramas, variety shows, or music, which are primarily consumed through viewing or listening, the Korean language is engaged with via learning. Therefore, new items entirely distinct from the existing Hallyu content items were developed to explore aspects such as “Korean language learning and usage patterns,” “reasons for not having learned the Korean language,” “perceptions toward the Korean language,” and “connection with the Korean language.”

Survey Changes

Item		Changed or not	Detailed changes
Perception of Korea	Perception of Korea		
	Overall perception of Korea		
	Images associated with Kore		
Consumption of Hallyu (Dramas–Food)	Ease of using Korean cultural content		
	Channels of exposure to Korean cultural content	Changed	Added "Korean language textbooks" as a response option under Publications Added "Tapas" as a response option under Webtoons
	Online/mobile viewing types for Korean cultural content	New	
	Online/mobile platforms for Korean cultural content	Changed	Changed response options for online/mobile platforms by country
	Korean cultural content usage/expenditure		
	Favorability toward Korean cultural content	Changed	Changed the standard from "typically experienced content" to "recently experienced content"
	Factors promoting favorability toward Korean cultural content	Changed	Changed/added/deleted response options overall by content type
	Factors inhibiting favorability toward Korean cultural content	Changed	
	Countries of popular foreign content in the country		
	Willingness to recommend Korean cultural content to others	Changed	Changed the standard from "typically experienced content" to "recently experienced content"
	Degree of relevance to Hallyu in Korean cultural content		
	Inappropriate or inadequate aspects of cultural diversity representation in Korean cultural content	New	
	Most preferred Korean drama (open-ended)		
	Most preferred Korean actor (open-ended)		
	Most preferred Korean movie (open-ended)		
	Most preferred Korean singer/group (open-ended)		
	Most preferred animation	Changed	Added "Catch! Teenieping" "Animal Rescue" and "Metal Cardbot Series" as response options
	Most preferred Korean games	Changed	Added "Stellar Blade" and "Lies of P" as response options
	Online/offline product purchase experience and frequency after watching videos related to consumer goods (fashion/beauty/food)	New	
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		
	Overall willingness to recommend Korean cultural content to others		
	Changes in overall perception of Korea after engaging with Korean cultural content		
	Degree of agreement with negative perceptions toward Hallyu		
	Reasons for negative perceptions toward Hallyu		

Item			Changed or not	Detailed changes
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			
	Influence of consuming Korean cultural content on purchasing and using Korean products/services			
Korean Language	Korean Language learning experience and learning methods		New	
	Reasons for not learning Korean and future intentions		New	
	Perceptions toward the Korean language: Favorability, unfavorability, etc.		New	
	Connection with the Korean language: Recognition among other languages, accessibility of learning institutions, perceived need for learning, etc.		New	
Respondent Characte-ristics	Gender	Occupation		
	Age	Education level		
	Area of residence		Changed	Specified from global region by country to detailed regions (states/cities)
	Marital status	Average annual household income		
	Religion	Vegetarian or non-vegetarian and stage	New	
	Gender identity	Nationality	New	

* Because of religious reasons, questions related to alcohol are not permitted in Arab Region countries (i.e., Saudi Arabia, Egypt, Türkiye, UAE—Local Nationals). 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 12 categories, with the addition of "Korean language" to the existing 11 categories. In 2023, the "fashion" and "beauty" categories were relabeled "fashion products/styles" and "beauty products" However, as the 2024 survey was expanded to include items related to consumer goods, such as purchase experience and frequency, the category names were revised to "fashion" and "beauty."

Year	Description
2016 (6th)	Dramas, variety shows, movies, music, animation/comics, books (publications), webtoons, nline/mobile games, fashion/beauty products, and food
2017 (7th)	Dramas, variety shows, movies, music, **animation, comics, books (publications), character goods**, online/mobile games, fashion/beauty products, and food
2018 (8th)	Dramas, variety shows, movies, music, animation, **books (including webtoons, comics)**, online/mobile games, fashion products, beauty products, and food
2019 (9th)	Dramas, variety shows, movies, music, animation, **publications (books, e-books, comics, webtoons, web novels, etc.)**, games, fashion products, beauty products, and food
2020 (10th)	Dramas, variety shows, movies, music, animation, **publications (books, e-books, comics, webtoons, etc.)**, games, fashion products, beauty products, and food
2021 (11th)	Dramas, variety shows, movies, music, animation, publications (books, e-books, comics, webtoons, etc.), games, fashion products, beauty products, and food
2022 (12th)	Dramas, variety shows, movies, music, animation, **publications (books, e-books, etc.), webtoons**, games, fashion products, beauty products, and food
2023 (13th)	Dramas, variety shows, movies, music, animation, publications (books, e-books, etc.), webtoons, games, **fashion products/styles**, beauty products, and food
2024 (14th)	Dramas, variety shows, movies, music, animation, publications (books, e-books, etc.), webtoons, games, **fashion, beauty**, food, and the **Korean language**

* 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 with the previous year.

Response Method

For the 11 cultural content categories excluding the Korean language category, respondents who had experienced at least one category were asked about their Hallyu consumption status in that category. As some respondents may have experienced multiple genres because of the spread of Hallyu, the number of reported experience categories was capped at six to prevent deterioration of data quality. Moreover, as the Korean language category was added in 2024 and is expected to have a relatively lower experience rate compared with other content types, it was excluded from the initial selection question. Instead, all consumers with Hallyu experience were asked about their Korean language learning experience in a separate question. Following the learning experience, respondents were asked about their Hallyu consumption status as they were for other categories.

Respondent Characteristics

04

Respondent Characteristics

Unit: %

Category		Total no. of cases (person)	Asia-Pacific												Middle East	
			China	Japan	Taiwan	Thailand	Malaysia	Indonesia	India	Vietnam	Kazakhstan	Australia	Hong Kon	Philippines	UAE	Saudi Arabia
Total		26,400	8.0	3.8	2.8	3.2	2.8	4.5	7.0	3.4	2.7	2.7	2.7	2.7	2.7	2.8
Gender	Male	13,200	8.0	3.8	2.8	3.2	2.8	4.5	7.0	3.4	2.7	2.7	2.7	2.7	2.7	2.8
	Female	13,200	8.0	3.8	2.8	3.2	2.8	4.5	7.0	3.4	2.7	2.7	2.7	2.7	2.7	2.8
Age	15–19	6,622	7.9	3.8	2.8	3.2	2.8	4.5	7.0	3.4	2.6	2.7	2.6	2.7	2.7	2.8
	20–29	6,622	7.9	3.8	2.8	3.2	2.8	4.5	7.0	3.4	2.6	2.7	2.6	2.7	2.7	2.8
	30–39	6,622	7.9	3.8	2.8	3.2	2.8	4.5	7.0	3.4	2.6	2.7	2.6	2.7	2.7	2.8
	40–49	3,292	7.9	3.8	2.9	3.3	2.7	4.5	7.0	3.5	2.7	2.7	2.7	2.6	2.6	2.8
	50–59	3,242	8.1	3.8	2.8	3.2	2.7	4.6	7.1	3.4	2.7	2.7	2.7	2.6	2.6	2.8
Highest Education Level	High school graduate or below	6,076	4.6	5.6	2.4	3.5	3.5	6.2	4.0	2.8	2.0	3.6	2.7	1.5	1.6	2.6
	College graduate	14,207	11.1	3.9	3.5	3.8	2.6	5.2	6.1	3.1	2.1	2.5	2.9	3.4	2.5	3.3
	Graduate school	5,487	4.2	1.6	1.9	1.2	2.5	1.0	12.6	4.9	3.5	2.4	2.2	2.2	4.3	1.8
	Other	630	2.1	2.1	0.4	4.3	1.5	4.4	7.9	2.9	13.1	1.4	0.0	1.1	1.1	0.8
Occupation	Middle/high school student	2,115	6.0	5.2	3.7	3.4	2.8	4.1	6.4	3.8	1.9	4.1	3.1	2.3	1.7	2.2
	College(graduate) student	3,535	11.3	2.7	2.7	2.1	2.4	4.6	8.0	3.8	3.5	1.5	2.3	3.6	3.2	2.8
	Clerical/technical worker	4,358	11.8	5.7	4.3	5.4	1.9	5.2	6.8	5.8	2.7	2.3	6.2	2.2	1.4	0.5
	Sales/production worker	1,875	12.0	6.4	6.9	3.9	1.9	2.0	5.2	3.6	2.7	2.0	2.5	1.9	3.8	2.0
	Professional	4,720	6.0	1.5	2.0	1.4	3.4	2.5	8.7	2.8	1.2	3.2	2.0	3.0	3.7	4.0
	Part-time	3,689	3.2	3.5	0.9	2.2	4.0	5.6	7.4	2.1	2.3	3.1	1.3	2.0	2.4	3.8
	Self-employed	2,370	10.5	2.4	1.6	5.3	2.5	9.5	7.7	3.6	2.4	1.5	1.1	2.5	3.0	3.1
	Full-time homemaker	1,081	5.0	5.1	3.1	1.6	3.6	6.2	6.8	1.6	5.2	2.6	2.3	2.7	4.3	5.0
	Unemployed/ retired	1,349	5.0	6.2	2.3	1.9	2.2	2.6	2.1	1.3	4.0	4.9	1.3	2.6	1.0	2.7
	Other	1,309	4.5	2.1	2.4	5.9	2.5	2.8	5.0	2.7	4.4	2.7	1.7	4.1	1.7	2.3
Marital Status	Married	11,411	9.8	2.5	2.3	2.7	2.9	5.5	8.6	4.1	2.4	2.5	3.0	2.3	3.7	3.7
	Single	14,349	6.7	4.9	3.3	3.6	2.7	3.8	6.0	3.0	2.9	2.9	2.5	2.9	1.8	2.1
	Other	639	2.3	0.5	1.5	2.3	0.6	3.1	2.0	1.9	2.5	2.5	0.3	3.0	1.7	0.8
Nationality	Korean descendant local	225	1.3	1.3	1.2	1.3	1.3	0.4	10.7	3.1	1.2	5.3	2.7	0.0	7.7	2.2
	Local	25,819	8.1	3.9	2.9	3.3	2.8	4.6	7.1	3.5	2.7	2.7	2.7	2.7	1.3	2.8
	Third-country national	356	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	100.0	0.0
Awareness of Korea	High	7,064	9.0	3.5	3.3	5.6	3.1	7.8	10.5	4.8	1.3	2.2	3.7	3.6	3.7	4.0
	Medium	15,027	8.8	4.2	3.0	2.5	2.8	3.7	6.1	3.3	3.3	2.7	2.7	2.6	2.4	2.4
	Low	4,309	3.4	2.8	1.6	1.8	2.2	2.2	4.6	1.4	2.7	3.5	0.8	1.4	1.7	2.2

Unit: %

Category		Americas					Europe							Africa	
		US	Canada	Mexico	Brazil	Argen-tina	UK	France	Italy	Spain	Germany	Russia	Türkiye	South Africa	Egypt
Total		4.9	3.0	3.6	4.2	3.0	3.2	3.2	3.2	3.0	3.4	3.8	3.3	3.0	3.4
Gender	Male	4.9	3.0	3.6	4.2	3.0	3.2	3.2	3.2	3.0	3.4	3.8	3.3	3.0	3.4
	Female	4.9	3.0	3.6	4.2	3.0	3.2	3.2	3.2	3.0	3.4	3.8	3.3	3.0	3.4
Age	15–19	4.9	3.0	3.6	4.2	3.0	3.2	3.2	3.2	3.0	3.4	3.8	3.3	3.0	3.4
	20–29	4.9	3.0	3.6	4.2	3.0	3.2	3.2	3.2	3.0	3.4	3.8	3.3	3.0	3.4
	30–39	4.9	3.0	3.6	4.2	3.0	3.2	3.2	3.2	3.0	3.4	3.8	3.3	3.0	3.4
	40–49	5.0	3.0	3.6	4.2	3.0	3.3	3.2	3.2	3.0	3.3	3.8	3.3	3.0	3.4
	50–59	5.0	3.0	3.6	4.2	3.0	3.2	3.2	3.2	3.0	3.4	3.8	3.3	3.0	3.4
Highest Education Level	High school graduate or below	7.0	3.2	2.0	4.3	4.2	3.6	3.8	5.8	2.3	5.3	2.4	4.2	3.5	1.6
	College graduate	4.0	3.1	3.3	3.6	2.6	3.1	2.3	2.1	3.1	2.3	3.1	3.7	3.1	4.6
	Graduate school	5.3	2.8	6.3	4.7	2.9	3.0	5.3	2.9	3.7	3.4	6.2	2.0	2.6	2.5
	Other	2.1	1.3	2.7	11.5	1.4	4.2	0.9	4.0	3.2	11.8	11.7	0.2	1.0	1.3
Occupation	Middle/high school student	6.2	3.3	1.8	4.8	4.4	3.0	2.9	3.3	2.2	4.0	2.7	3.8	4.2	2.7
	College(graduate) student	3.1	2.7	3.8	2.9	3.1	2.6	3.5	3.9	3.1	2.7	4.4	3.0	2.7	4.1
	Clerical/technical worker	2.6	2.1	1.9	3.0	1.7	2.6	2.3	2.4	3.5	4.4	6.4	2.6	1.6	0.5
	Sales/production worker	3.4	2.9	3.4	4.7	2.8	2.3	1.9	1.7	2.6	5.0	4.9	3.0	2.7	2.2
	Professional	4.8	3.4	4.2	3.5	3.1	4.3	5.7	3.8	4.3	2.5	2.4	2.9	4.2	5.3
	Part-time	6.1	3.7	5.5	5.2	4.1	4.1	2.7	3.8	3.0	4.2	3.1	2.3	2.8	5.6
	Self-employed	3.4	2.1	4.4	5.3	3.9	2.3	2.2	2.0	1.7	1.7	3.1	2.9	3.2	4.9
	Full-time homemaker	6.5	2.3	5.5	2.9	2.1	3.7	1.1	2.3	1.4	1.8	3.1	7.7	1.6	3.1
	Unemployed/ retired	11.9	5.3	2.4	4.4	1.9	4.4	4.4	4.6	3.6	3.7	3.2	5.2	4.5	0.6
	Other	9.3	3.5	3.7	7.7	2.6	2.6	3.1	3.1	2.1	3.9	3.3	5.9	3.0	1.3
Marital Status	Married	3.7	2.2	3.6	4.1	2.1	3.0	2.8	2.4	2.5	2.5	4.2	3.9	2.3	4.6
	Single	5.8	3.5	3.6	4.2	3.6	3.3	3.4	3.4	3.3	4.0	3.6	3.0	3.5	2.6
	Other	6.9	6.3	5.6	4.4	7.4	6.1	7.1	12.5	5.3	4.8	1.9	0.7	4.7	1.3
Nationality	Korean descendant local	11.1	8.0	4.4	7.4	2.7	3.7	3.3	2.2	7.1	5.7	0.9	1.4	1.8	0.4
	Local	4.9	3.0	3.7	4.2	3.1	3.3	3.3	3.2	3.0	3.4	3.9	3.4	3.1	3.5
	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	0.0	0.0
Awareness of Korea	High	4.1	2.2	2.6	2.5	1.4	2.2	1.7	1.2	1.4	2.7	1.4	2.1	2.1	6.3
	Medium	4.7	3.2	3.7	4.3	3.2	3.2	2.9	3.2	3.3	3.5	5.1	3.8	3.0	2.2
	Low	6.8	3.8	5.1	6.4	5.0	4.9	6.7	6.2	4.6	4.2	3.0	3.6	4.6	2.7

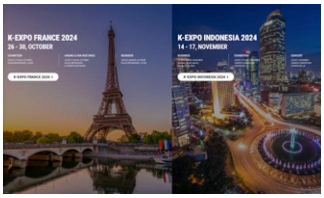
Number of Respondents by Type of Korean Cultural Content

Since the "Hallyu consumption status" section targets respondents who have consumed each type of cultural content the number of cases for each category (type of Korean cultural content) varies, as provided in the table below. The sample size for "Base: Total" can be found in Part 1, Section 4.1: Respondent Characteristics, while the sample sizes for each Korean cultural content category such as "Base: Consumers who have experienced Korean dramas" and "Base: Consumers who have experienced Korean variety shows" can be found in the following table.

Category			Dramas	Variety shows	Movies	Music	Animation	Publi-cations	Webtoons	Games	Fashion	Beauty	Food	Korean language
Total			12,698	11,633	12,867	12,624	12,122	8,251	8,760	11,820	11,931	12,155	13,007	7,084
By Continent		Asia-Pacific	6,573	6,161	6,346	6,195	5,363	3,836	4,661	5,241	6,260	5,786	6,199	3,961
		Americas	2,071	2,067	2,147	2,290	2,424	1,670	1,656	2,279	2,006	2,242	2,235	1,015
		Europe	2,485	1,891	2,783	2,770	2,731	1,666	1,506	2,802	2,169	2,628	3,085	1,010
		Middle East	723	702	717	706	717	545	475	688	702	707	715	554
		Africa	846	812	874	662	888	534	463	809	795	792	773	544
By Country	Asia-Pacific	China	1,214	1,121	1,059	900	816	561	840	800	1,080	707	853	592
		Japan	552	209	397	588	155	133	113	216	303	336	768	165
		Taiwan	393	407	406	404	313	310	402	395	406	293	398	213
		Thailand	483	441	472	470	417	332	465	442	461	453	442	263
		Malaysia	435	567	391	401	322	200	344	261	464	367	371	296
		Indonesia	738	554	671	671	643	544	589	632	569	613	670	525
		India	927	980	1,008	867	1,079	665	783	954	1,010	974	743	810
		Vietnam	436	593	457	446	409	396	281	470	546	523	466	322
		Kazakhstan	379	200	385	387	325	178	106	236	340	384	405	95
		Australia	251	252	303	366	263	125	159	254	252	277	428	122
		Hong Kong	338	398	377	345	255	207	215	332	381	397	347	240
		Philippines	428	439	420	350	366	185	364	249	450	463	307	318
	Americas	US	374	446	433	546	630	348	367	574	464	543	669	260
		Canada	256	291	293	411	346	142	178	316	276	352	461	143
		Mexico	479	468	479	482	478	436	467	469	461	479	447	234
		Brazil	595	545	558	461	598	466	285	554	457	523	324	257
		Argentina	367	317	384	390	372	278	359	366	348	345	334	121
	Europe	UK	296	318	378	418	398	189	191	376	276	377	434	188
		France	344	230	354	365	354	222	240	348	296	343	396	152
		Italy	426	217	386	323	384	225	145	410	249	287	399	98
		Spain	243	232	359	371	317	244	258	412	266	346	380	135
		Germany	265	257	315	443	365	204	191	389	323	344	524	190
		Russia	452	284	524	470	491	293	104	425	408	569	600	90
		Türkiye	459	353	467	380	422	289	377	443	351	363	352	157
	Middle East	UAE	332	335	335	334	337	256	243	330	330	331	333	276
		Saudi Arabia	391	367	382	372	380	289	232	358	372	376	382	278
	Africa	South Africa	375	380	416	330	450	196	211	382	363	369	333	189
		Egypt	471	432	458	332	438	338	252	427	432	423	440	355
Gender		Male	6,116	5,688	6,734	6,210	6,225	4,134	4,303	6,921	5,321	4,789	6,463	3,272
		Female	6,582	5,945	6,133	6,414	5,898	4,118	4,457	4,899	6,611	7,365	6,544	3,812
Age		Teens	3,048	2,930	3,048	3,393	3,308	2,202	2,493	3,098	3,059	2,892	3,067	1,875
		20s	3,277	3,129	3,108	3,230	3,179	2,349	2,593	3,159	3,105	3,155	3,132	2,193
		30s	3,233	3,065	3,257	3,090	3,075	2,189	2,248	3,199	3,121	3,172	3,225	1,935
		40s	1,619	1,313	1,743	1,492	1,367	856	815	1,342	1,410	1,512	1,788	619
		50s	1,522	1,196	1,711	1,419	1,194	655	611	1,022	1,236	1,424	1,794	462

Major Hallyu Issues of the Year

05



Jan. 2024

- The drama *Marry My Husband* ranked no. 1 in Amazon Prime Video's global daily TV program rankings across 67 countries
- The movie *12.12: The Day* remained on the Australia box office chart for 7 consecutive weeks
- 1.7. The animation *Solo Leveling*, created based on the original webtoon, premiered in France
- 1.10. The comic book series *FAME*, featuring BTS, was released
- 1.28. The movie *Sleep* won the Grand Prize at the Gérardmer International Fantastic Film Festival in France

Feb. 2024

- The Netflix original Korean drama *A Killer Paradox* ranked first on Netflix's Top 10 Non-English Shows chart
- 2.23. Black Swan became the first K-pop group to perform in Mumbai, India
- 2.24. The movie *It's Okay!* won the Crystal Bear at the 71st Berlinale
- 2.26. Korean animation *Duda & Dada: The Secret of Hoohoo Island* was exported to over 40 countries

Mar. 2024

- 3.8. TWICE topped the US Billboard 200 main album chart
- 3.13. The movie *My Name is Loh Kiwan*, starring Song Joong-ki, ranked first globally on Netflix's Top 10 Non-English Movies
- 3.18. The movie *Exhuma* surpassed 1 million viewers in Indonesia within 2 weeks of release

Apr. 2024

- 4.1. Movies *Exhuma, A Travelers' Needs, It's Okay!, Picnic*, and *Work to Do* were invited to the 14th Beijing International Film Festival
- 4.3. *Queen of Tears* ranked first in Netflix's Non-English TV Shows category
- 4.4. Webtoon *A Man's Man* achieved monthly transactions of JPY 115 million (approximately 1.02 billion KRW) in Japan
- 4.7. BTS's J-Hope entered the Billboard 200 album chart in fifth place with his special album
- 4.14. TXT's *minisode 3: TOMORROW* entered the Billboard 200 chart in third place

May 2024

- Netflix original Korean drama *The 8 Show* ranked first on Netflix's Top 10 Non-English TV Shows chart
- The movie *It's Okay!* was invited to the 71st Sydney Film Festival
- 5.11. RM of BTS topped the iTunes chart in 82 countries with *Come Back to Me*
- The movie *I, the Executioner* was invited to the Midnight Screening section of the 77th Cannes Film Festival

Jun. 2024	• 6.8. BTS Jung Kook's *Never Let Go* reached no. 1 on the iTunes Top Songs chart in 96 countries • 6.9. ATEEZ's *Golden Hour*: *Part 1* entered the US Billboard 200 album chart at no. 2 • 6.19. The Netflix original Korean drama *Hierarchy* ranked no. 1 on Netflix's Top 10 Non-English TV Shows chart • The musical version of the drama *Crash Landing on You* debuted at the New National Theatre, Tokyo (NNTT) • Movie *The Roundup: Punishment 4* remained on the Australian box office chart for 7 consecutive weeks
Jul. 2024	• 7.1. Nexon's *Dungeon & Fighter* Mobile topped global game revenue charts, boosted by its popularity in China • 7.17. Pinkfong's *Baby Shark* became the most-streamed music video on the UK Official Charts • 7.21. Jimin of BTS became the first Korean solo artist to rank at no. 1 on the UK's Official Big Top 40 chart
Aug. 2024	• Netflix original Korean drama *The Frog* ranked fourth on Netflix's Top 10 Non-English TV Shows chart • The movies *Escape and Pilot* remained on the Australian box office chart for 4 consecutive weeks • SKIN1004 became the first Korean beauty brand to be stocked by Ulta Beauty, the largest cosmetics retailer in the US • Stray Kids achieved their 5th consecutive no. 1 on the US Billboard 200 chart, with Jimin of BTS at no. 2 • 8.5. Samyang Foods' Buldak Ramen products entered Kazakhstan's online market, Ozon • 8.16. *Dynamite* by BTS became the first foreign song to reach 800 million streams on Japan's Oricon Chart
Sept. 2024	• The first Korean food festival, Korea Fest, was held in New York city in the US • 9.9. Movies *Harbin, Love in the Big City, I, the Executioner*, and *By the Stream* were invited to the 2024 Toronto International Film Festival • 9.11. SEVENTEEN won Best Group and LISA won Best K-pop at the MTV VMA in the US • 9.16. Mexican Canal 5 aired the drama *True Beauty* • 9.25. The movie *Officer Black Belt* and variety show *Culinary Class Wars* ranked no. 1 on Netflix's global Top 10 Non-English Movies and TV Show charts
Oct. 2024	• The Ministry of Culture, Sports and Tourism and KOCCA held the K-Expo France in Paris, France • 10.10. Author Han Kang won Korea's first Nobel Prize in Literature • 10.11. The Ministry of Trade, Industry and Energy and KOTRA held the 2024 Tokyo Hallyu Expo in Tokyo, Japan • 10.12. BLACKPINK member JENNIE's new single *Mantra* ranked first on the iTunes charts in 47 countries • 10.14. German public broadcaster RBB launched the first radio show dedicated to K-pop, "Best Music K-pop"
Nov. 2024	• *Light Shop* set the highest viewership among Disney+ original Korean content released in 2024 • 11.2. G-Dragon topped the iTunes charts in 15 countries with his first new single in 7 years, *Power* • 11.12. Pinkfong's *Little Dino School* ranked first on Netflix Kids charts in 9 countries, including the US • 11.21. NewJeans won Best New Artist, TXT received a Special Award, and LE SSERAFIM won the Special International Music Award at the 66th Japan Record Awards
Dec. 2024	• Netflix original Korean drama *Squid Game 2* was nominated for Best Drama TV Series at the Golden Globe Awards in the US • BLACKPINK member ROSÉ's single *APT*. ranked no. 15 on the US Billboard Singles Chart and remained on the chart for 5 consecutive weeks • 12.10. BTS Jin's solo album *Happy* and TXT's *The Star Chapter: Sanctuary* earned Platinum certifications from the Japan Gold Disc Awards

PART 2

Survey Results

Status of Hallyu

Prologue Before presenting the main content, this section introduces the key findings, improvements made to the survey, and the structure of the report.

This survey measured the usage of and perceptions toward Hallyu content in major countries around the world and examined the degree of its diffusion.

One thing to note is that the forms of Hallyu content consumption are gradually diversifying. In addition to traditionally strong categories such as dramas and food, consumption is expanding into other areas such as beauty, webtoons, and games. Notably, average gameplay time increased by 2.9 hours compared with the previous year which reached 15.4 hours. While webtoon consumption time increased by 2.1 hours for an average of 14.5 hours. In addition, beauty ranked among the top 3 most popular categories and placed fourth in responses regarding “images associated with Korea,” demonstrating the increasingly diverse influence of Hallyu.

Channels through which people access Hallyu are also evolving. For video content such as dramas, variety shows, movies, and music, around 80% of users accessed such content via online and mobile platforms, while access through TV is on the decline. For lifestyle content such as fashion, beauty, food, short videos and images on social media are popular channels of exposure, and presence through both online and offline retail channels is also on the rise. Amid ongoing changes in the online and mobile environment—such as OTT subscription policies, short-form content, and global e-commerce—channels of exposure to Hallyu content will continue to evolve.

While video content such as dramas and movies remains central to the diffusion of Hallyu, its scope is expanding beyond mere media consumption to influence broader aspects of life. However, as it continues to spread, negative perceptions toward Hallyu are also increasing, highlighting the need for ongoing monitoring.

The *2025 Overseas Hallyu Survey* introduced three major improvements over previous surveys. First, the sample design was refined to ensure representativeness and accuracy. Unlike the previous method of random allocation by country, gender, and age, this year's sample was allocated based on national and regional population sizes. In addition, respondents in their 40s and 50s were surveyed separately to improve survey accuracy.

Second, the scope of target countries was expanded. With the Philippines and Hong Kong added as new survey countries (or regions), the total number of countries surveyed increased from 26 to 28, expanding the scope of the survey and enhancing its overall comprehensiveness.

Finally, survey items were improved or added. Feedback was collected from various stakeholders of Hallyu content in academia, industry, and government to enhance the questionnaire. Efforts were also made to more accurately capture the current status by including local platforms in each country under the "online/mobile platforms" response options. Furthermore, items on "cultural diversity," a key element of cultural acceptance, as well as "purchase experience" in the fashion, beauty, and food categories were added. The survey also added new items on the "Korean language," which has become an essential element of experiencing Hallyu content, thereby broadening the genre scope.

This report is a summary report of the *2025 Overseas Hallyu Survey* and is organized into three main parts. Part 1 (Survey Overview) outlines the purpose and background of the survey, survey design, changes in the questionnaire, and key Hallyu-related issues over the past year. Part 2 (Survey Results) is divided into two sections. The first section presents the findings on perceptions, consumption and usage status, and overall influence of Hallyu. The second section provides a detailed analysis of consumption and perceptions across 12 major categories of Hallyu content. Finally, Part 3 (Summary and Implications) offers an integrated perspective on the survey results and presents the implications of the findings.

For further detail, please refer to the "*Analytical Report (Country-specific Report)*" *and* "*Statistical Report*" available on the KOFICE Archive. The *Analytical Report* presents annual Hallyu-related issues by country, time-series comparisons of key indicators, graphs illustrating the survey results, and cross-tabulated (frequency) data by gender and age for all 28 countries. The *Statistical Report* contains tables presenting cross-tabulated frequency data by gender, age, and region for each of the 28 countries.

2025 KOREA

Perception of Hallyu

SUMMARY

Across the 28 countries surveyed, 7 of 10 (70.3%) consumers who have experienced Hallyu responded that they "like" Korean cultural content (indicating favorability). Its popularity is continuing to grow, especially in Asian regions, including the Philippines. *Squid Game* maintained its strong presence, ranking as the most popular drama for the 4th consecutive year, while romance dramas such as *Queen of Tears* have begun gaining traction. *Parasite* and *Train to Busan* were selected as the most preferred movies for the 6th consecutive year, and *Exhuma* demonstrated the potential for genre diversification. Actor Lee Min-ho and music group BTS were named the most preferred stars for the 12th and 7th consecutive year.

Responses indicating an increased interest in Hallyu were higher for "my compatriots' interest" (55.3%) than for "my interest" (53.2%), with a particularly notable rise in Western regions. Food, music, and beauty were identified as the most popular content categories, reflecting the accelerated spread of Hallyu centered around video content. Willingness to recommend Korean cultural content stood at 68.2%, with especially high levels observed in the Philippines, India, and Vietnam. However, agreement with negative perceptions toward Hallyu also increased, growing from 20.1% in 2020 to 37.5% in 2024. The main reasons for such perceptions included "too commercial" (15.0%), "North–South division/international threat of North Korea" (13.2%), and "need to protect the domestic content industry" (11.8%).

1 Favorability Toward Korean Cultural Content

The percentage of respondents who said they liked Korean cultural content (favorability rate) was 70.3%. In particular, the Philippines has emerged as a rising stronghold of Hallyu, and the popularity of Korean cultural content continued to grow in Asian regions such as Indonesia, India, and Thailand. Favorability rose by 0.5–7.5 percentage points across all content categories except movies, indicating increased interest in Hallyu content overall.

70.3% of respondents expressed favorability toward Korean cultural content.

Across 28 countries, 7 out of 10 (70.3%) consumers with Hallyu experience showed generally positive responses to Korean cultural content. Notably, the Philippines—newly included in the survey in 2024—recorded the highest favorability rate at 88.9%, followed by Indonesia (86.5%), India (84.5%), and Thailand (82.7%), indicating strong favorability in Southeast Asian countries. On the other hand, Kazakhstan (45.9%), Japan (46.3%), and Russia (47.4%) showed low favorability ratings of less than 50%. Germany (12.5%) and Japan (11.6%) had particularly high proportions of respondents selecting "do not like it," highlighting clear regional differences in the preference for Hallyu.

Compared with 2023, favorability toward 10 categories of Korean cultural content, including dramas, variety shows, and beauty, but excluding movies (▼0.4 percentage points), increased by 0.5–7.5 percentage points, indicating a general rise in interest. In particular, Korean variety shows recorded the highest favorability rate (77.4%), ranking first, followed by beauty (77.2%) and dramas (76.8%) in second and third place, maintaining their top rankings from 2023. Webtoons (75.7%) achieved their highest favorability since the survey began, likely due to their active expansion into video content through collaborations with various OTT platforms like Netflix.

Analysis of changes in the popularity of Hallyu content over the past 11 years reveals that food, beauty, fashion, and music generally ranked at the top until 2017. However, since 2018, there has been a marked rise in video content such as dramas, variety shows, and movies, shifting the core of popular Hallyu content. In contrast, animation, games, and publications have remained in the lower tier for 11 consecutive years, recording relatively low favorability. This can be attributed to the fact that categories such as beauty and fashion are often consumed indirectly through visual media such as dramas and variety shows, while animation, games, and publications tend to be less accessible and are primarily consumed by niche audiences. In particular, the shift in content consumption patterns focused on OTT platforms and social media appears to have exacerbated this gap, and video content will likely continue to play a key role in the spread of Hallyu.

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

Q. Overall, how much do you like the Korean cultural content you have experienced?

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

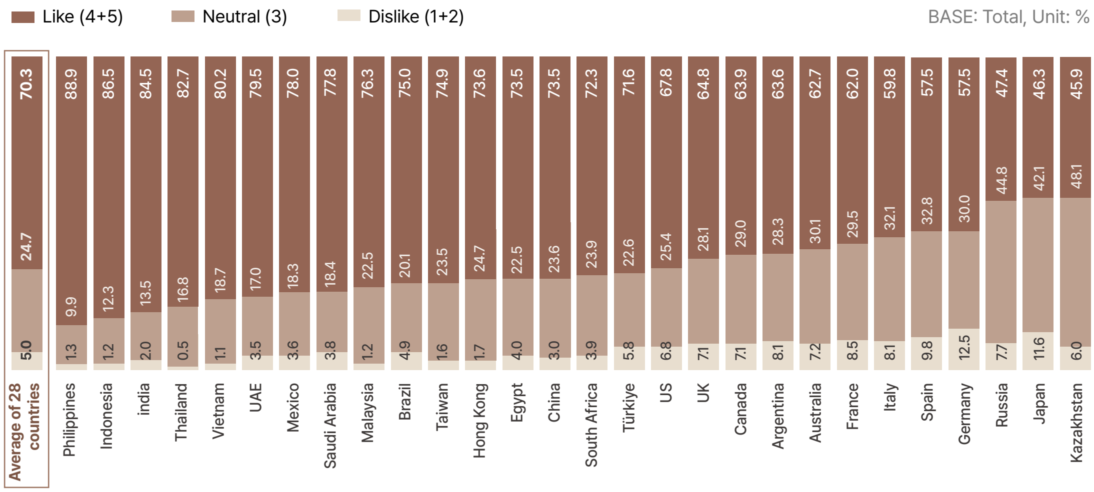


Figure 2-2 Changes in Favorability Over the Last 11 Years by Type of Korean Cultural Content

BASE: Total (overall), consumers who have experienced Korean cultural content by type (by content type), Unit: Like (4+5)%, 2023–2024 percentage points

Note 1. The question on the "overall favorability toward Korean cultural content" was added to the 2023 survey. Therefore, to compare findings with those of the previous year, the proportions of "like it very much" and "like it" for 12 types of cultural content were added and compared with the arithmetic mean.

Note 2. Webtoons were included in publications until 2021 and have been a separate category since 2022.

Note 3. "Korean language" is a new category added to the 2024 survey.

	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Average	35.8	36.1	51.8	68.2	69.1	70.5	74.9	77.7	72.5	68.8	70.3 ▲1.5
Variety shows	35.3	35.4	48.2	68.3	72.2	73.4	78.3	79.9	76.5	74.5	77.4 ▲2.9
Beauty	36.2	38.0	59.7	74.9	69.6	72.5	76.3	78.3	73.0	75.1	77.2 ▲2.1
Dramas	35.3	35.4	49.7	67.1	74.7	76.0	77.4	81.6	76.3	75.7	76.8 ▲1.1
Webtoons	-	-	-	-	-	-	-	-	73.8	71.7	75.7 ▲4.0
Fashion	36.2	38.0	59.7	74.9	68.3	69.4	75.5	77.3	73.0	70.4	75.4 ▲5.0
Korean language	-	-	-	-	-	-	-	-	-	-	75.4
Movies	43.2	42.2	52.3	69.3	70.9	73.0	77.8	80.6	75.6	74.6	74.2 ▼0.4
Publications	22.0	20.6	44.4	62.1	64.6	66.6	71.1	75.8	71.6	70.3	73.9 ▲3.6
Games	28.1	28.2	52.3	68.9	67.3	68.0	73.9	76.7	69.7	66.3	73.8 ▲7.5
Food	44.8	47.2	57.4	70.9	72.7	73.3	76.4	78.5	74.2	72.9	73.4 ▲0.5
Animation	32.1	29.9	48.3	61.5	64.7	65.4	72.3	74.7	68.5	66.0	70.8 ▲4.8
Music	44.5	45.6	46.3	64.5	66.0	67.7	70.0	73.7	65.2	64.1	66.4 ▲2.3

2 Preferred Hallyu Content (dramas and movies)

The most preferred Korean drama was still *Squid Game*, which maintained its position at no. 1, but romance dramas such as *Queen of Tears* performed well, indicating a new trend. The most preferred Korean movies were *Parasite* and *Train to Busan*, which remained in the top two for the fifth consecutive year, demonstrating strong global recognition. Responses to the new occult film *Exhuma* varied by region, suggesting the potential for genre expansion in Korean movies.

Squid Game has topped the list for four consecutive years. Romance drama *Queen of Tears* gained momentum.

Squid Game (9.7%) was the most preferred Korean drama in 2024, maintaining its global no. 1 position for the fourth consecutive year. This demonstrates its status as more than just a trend but a true cultural phenomenon. Released in 2024, *Queen of Tears* (6.5%) took second place, while *Crash Landing on You* (2.2%) remained in the top ranks for the fifth consecutive year. In addition, the webtoon-based drama *True Beauty* (2.1%) and the new 2024 release *Lovely Runner* (1.8%) ranked fourth and fifth, respectively. Excluding *Squid Game*, consumption in 2024 was largely centered on romance dramas.

In the Asia-Pacific region, *Queen of Tears* (8.0%) claimed the top spot, surpassing the previous year's no. 1, *The Glory*.
Queen of Tears also ranked second in the Americas, Europe, the Middle East, and Africa, proving its widespread global popularity. *True Beauty* ranked third in the Americas (6.5%) and Europe (1.8%). Riding on the drama's popularity, the second season of the anime adaptation is set to be released in the US. In terms of performance on OTT platforms, *Queen of Tears* ranked third in the 2024 Top TV Shows list compiled by FlixPatrol, a global OTT content ranking site, while *True Beauty* came in 14th, reflecting their global impact. Season 2 of *Squid Game*, which premiered in December, immediately ranked no. 1 on Netflix Canada. With Season 3 now confirmed, its popularity is expected to continue.

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

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

BASE: Consumers who experienced Korean dramas, Unit: %

	2020	2021	2022	2023	2024
1st	Crash Landing on You 9.5	Squid Game 21.2	Squid Game 11.3	Squid Game 9.0	Squid Game 9.7
2nd	It's Okay to Not Be Okay 4.1	Crash Landing on You 2.2	Extraordinary Attorney Woo 2.8	The Glory 3.4	Queen of Tears 6.5
3rd	The World of the Married 2.8	Vincenzo 1.9	All of Us Are Dead 2.6	King the Land 2.6	Crash Landing on You 2.2
4th	Itaewon Class 2.8	The Penthouse: War in Life 1.6	Business Proposal 1.9	Crash Landing on You 2.2	True Beauty 2.1
5th	Kingdom 2.5	Hometown Cha-Cha-Cha 1.4	Crash Landing on You 1.9	Black Knight 1.6	Lovely Runner 1.8

Table 2-2 Comparison of top 5 Most Preferred Korean Dramas by Continent

BASE: Consumers who experienced Korean dramas, Unit: %

	Asia-Pacific	Americas	Europe	Middle East	Africa
1st	Queen of Tears 8.0	Squid Game 9.4	Squid Game 23.5	Squid Game 7.6	Squid Game 9.4
2nd	Squid Game 4.8	Queen of Tears 7.0	Queen of Tears 2.4	Queen of Tears 6.0	Queen of Tears 6.0
3rd	Lovely Runner 2.9	True Beauty 6.5	True Beauty 1.8	Boys Over Flowers 2.6	Love Next Door 2.0
4th	The Judge from Hell 2.8	Crash Landing on You 4.2	The Glory 1.3	Mr. Plankton 2.1	Marry My Husband 1.9
5th	Crash Landing on You 2.1	Marry My Husband 2.5	Crash Landing on You 1.3	When the Phone Rings 1.8	True Beauty 1.7

Table 2-3 FlixPatrol's top 15 TV Shows in 2024 (Based on Viewing Time)

1	Bridgerton 3	73,380	9	Berlin	31,840
2	Fool Me Once	68,950	10	One Piece	31,690
3	**Queen of Tears**	68,260	11	Bridgerton 1	31,450
4	Avatar the Last Airbender	51,530	12	My Demon	31,120
5	The Gentlemen	50,730	13	Love Is Blind	29,930
6	3 Body Problem	38,810	14	**True Beauty**	29,350
7	Griselda	38,300	15	Bridgerton 2	29,090
8	Baby Reindeer	34,760			

Parasite and *Train to Busan* have remained no. 1 and no. 2 for five consecutive years. *Exhuma* gained popularity in the Asia-Pacific.

Among consumers who experienced Korean movies, *Parasite* (8.3%) and *Train to Busan* (6.5%) were ranked no. 1 and no. 2, for the fifth consecutive year, demonstrating their enduring popularity. *Exhuma* (4.1%), which topped the Korean box office in 2024 (based on December revenue), ranked third, marking a successful debut. Other movies of diverse genres, such as *Escape* and *Wonderland*, also ranked high.

Analysis of movie preferences by continent shows that *Parasite* ranked no. 1 in all continents except in Asia-Pacific, affirming its strong global recognition. In Europe (11.4%), *Train to Busan* (4.2%) led by 7.2 percentage points, and recorded the highest preference in the Americas (10.0%). *Train to Busan* was particularly popular in the Asia-Pacific (8.6%), with high favorability in Malaysia (17.6%) and Kazakhstan (13.2%). Released in 2024, *Exhuma* ranked third in Asia-Pacific (5.9%) and Europe (2.2%), and fourth in the Americas (2.8%) and the Middle East (2.3%), showing varied responses across regions. The movie was particularly popular in Taiwan (12.1%), Hong Kong (10.3%), and Indonesia (9.7%)-likely due to the shamanistic elements of the occult genre being more familiar and culturally accepted in Asian regions. In contrast, in the Middle East and Africa, where "religion" ranked as the most inappropriate or uncomfortable aspect in terms of cultural diversity, this genre drew relatively lower interest.

While romance dominated the drama category, a variety of genres reflecting Korean cultural elements were popular in the movie category, such as *Exhuma* (occult), *Escape* (set in North and South Korea), and *Wonderland* (sci-fi fantasy). This suggests that Korean movies are maintaining their competitiveness in the global market through a wide range of themes and genre diversity.

Table 2-4 Comparison of top 5 Most Preferred Korean Movies Over the Last 5 Years by Year

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

BASE: Consumers who experienced Korean movies, Unit: %

	2020	2021	2022	2023	2024
1st	Parasite 18.4	Parasite 10.3	Parasite 9.1	Parasite 7.9	**Parasite 8.3**
2nd	Train to Busan 10.2	Train to Busan 6.8	Train to Busan 6.9	Train to Busan 6.0	**Train to Busan 6.5**
3rd	Peninsula 3.5	Seo Bok 1.5	Carter 2.5	Unlocked 2.4	**Exhuma 4.1**
4th	#Alive 2.1	Midnight 1.3	Hunt 2.0	Ballerina 2.0	**Escape 1.5**
5th	Time to Hunt 1.6	Space Sweepers 1.3	20th Century Girl 1.8	Phantom 1.7	**Wonderland 1.5**

Table 2-5 Comparison of top 5 Most Preferred Korean Movies by Continent

BASE: Consumers who experienced Korean movies, Unit: %

	Asia-Pacific	Americas	Europe	Middle East	Africa
1st	**Train to Busan 8.6**	**Parasite 10.0**	**Parasite 11.4**	**Parasite 5.7**	**Parasite 5.4**
2nd	Parasite 7.1	Train to Busan 5.3	Train to Busan 4.2	Train to Busan 5.1	Escape 3.9
3rd	Exhuma 5.9	Wonderland 3.9	Exhuma 2.2	Oldboy 2.6	Oldboy 2.7
4th	Escape 2.0	Exhuma 2.8	Oldboy 2.1	Exhuma 2.3	Train to Busan 2.6
5th	The Roundup: Punishment 4 1.6	Badland Hunters 1.6	Wonderland 1.9	Uprising 1.5	Forgotten 2.3

3 Preferred Hallyu stars (Actors and Singers)

Actor Lee Min-ho and group BTS were selected as the most preferred stars for the 12th and 7th consecutive year, respectively, further solidifying their status as global Hallyu stars. Apart from certain actors and singers, the preference rates for other stars remained in the 2% range, indicating a continued concentration of recognition around a few select Hallyu stars.

Lee Min-ho has ranked first for 12 consecutive years.

The most preferred Korean actor overseas was Lee Min-ho (7.0%), who ranked first for the 12th consecutive year since 2014. His role in *Boys Over Flowers*, which ranked third in the Middle East's most preferred dramas this year, helped him win widespread recognition across Asia. Furthermore, his performance in the 2022 Apple TV+ drama *Pachinko* contributed to his expanding popularity in the Americas and Europe. Gong Yoo (2.4%), who ranked fourth in 2023, rose to second place in 2024, reflecting the continued impact of the movie *Train to Busan* and the actor's growing global recognition. Song Hye-kyo (2.4%) secured third place thanks to the continued popularity of the drama *The Glory*. Kim Soo-hyun (2.3%) ranked fourth, bolstered by the success of *Queen of Tears* in 2024. Lee Jong-suk maintained his fifth position for a third consecutive year despite no major activities since the 2022 drama *Big Mouth*.

By continent, Lee Min-ho ranked first across all five continents, demonstrating overwhelming popularity. Gong Yoo ranked second in the Americas (2.3%) and Europe (2.6%), while Kim Soo-hyun rose one spot from the previous year to claim second place in the Middle East (3.4%). Song Hye-kyo and Hyun Bin remained steady, ranking second in Asia-Pacific (4.4%) and Africa (4.6%). Lee Min-ho has maintained the no. 1 spot for 12 consecutive years, solidifying his status as a global Hallyu star. He remains popular across all continents through his wide-ranging works. Actors with extensive movie experience (Gong Yoo and Hyun Bin) and actors who starred in global OTT dramas (Song Hye-kyo and Kim Soo-hyun) enjoyed relatively high popularity, suggesting that the influence of OTT and theatrical releases is reflected in actor preferences. Despite the growing global influence of Korean dramas and movies, the fact that the preference rates for actors other than Lee Min-ho remain in the 2% range indicates a continued concentration of recognition around specific actors in overseas markets.

Table 2-6 Comparison of top 5 Most Preferred Korean Actors Over the Last 5 Years by Year

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

BASE: Total, Unit: %

	2020	2021	2022	2023	2024
1st	Lee Min-ho 9.6	Lee Min-ho 9.3	Lee Min-ho 9.1	Lee Min-ho 6.4	Lee Min-ho 7.0
2nd	Hyun Bin 3.5	Hyun Bin 3.1	Gong Yoo 2.7	Hyun Bin 3.4	Gong Yoo 2.4
3rd	Gong Yoo 2.3	Gong Yoo 2.8	Hyun Bin 2.4	Song Hye-kyo 2.7	Song Hye-kyo 2.4
4th	Song Hye-kyo 2.1	Song Hye-kyo 2.2	Song Hye-kyo 2.0	Gong Yoo 2.2	Kim Soo-hyun 2.3
5th	Lee Jong-suk 2.0	Song Joong-ki 2.1	Lee Jong-suk 1.5	Lee Jong-suk 2.0	Lee Jong-suk 2.0

Table 2-7 Comparison of top 5 Most Preferred Korean Actors by Continent

BASE: Total, Unit: %

	Asia-Pacific	Americas	Europe	Middle East	Africa
1st	Lee Min-ho 8.4	Lee Min-ho 4.9	Lee Min-ho 5.0	Lee Min-ho 8.3	Lee Min-ho 8.5
2nd	Song Hye-kyo 4.4	Gong Yoo 2.3	Gong Yoo 2.6	Kim Soo-hyun 3.4	Hyun Bin 4.6
3rd	Kim Soo-hyun 3.4	Cha Eun-woo 2.2	Hyun Bin 1.7	Hyun Bin 3.1	Kim Soo-hyun 3.7
4th	Gong Yoo 2.6	Jun Ji-hyun 1.9	Ji Chang-wook 1.3	Lee Jong-suk 2.7	Lee Jong-suk 2.8
5th	Don Lee (Ma Dong-seok) 2.5	Lee Jong-suk 1.7	Lee Jong-suk 1.2	Don Lee (Ma Dong-seok) 2.1	Jun Ji-hyun 1.4

BTS continued to enjoy steady popularity in the Americas and Europe. BLACKPINK ranked high in Asia, with growing recognition for individual members.

The most preferred Korean singer was BTS (24.6%), who have maintained the no. 1 spot for seven consecutive years, followed by BLACKPINK (12.3%), who have ranked second for six years in a row. IU (3.1%) and PSY (2.2%) ranked third and fourth, respectively, maintaining their positions at the top. TWICE (1.8%) also made the list, expanding their global presence.

BTS recorded the highest preference in the Americas (34.2%) and surpassed 20% in all other continents, demonstrating their global popularity. BLACKPINK showed the highest preference in the Asia-Pacific region (16.2%), and the individual popularity of each group member was also noteworthy. In particular, BLACKPINK member LISA (2.6%) ranked fifth in the Asia-Pacific region, while ROSÉ (1.0%) entered the Middle East rankings for the first time thanks to the popularity of "*APT*." In the Middle East, BTS members Jung Kook (3.2%) and Jimin (1.3%) ranked third and fourth, indicating the high individual recognition of BTS and BLACKPINK members.

TWICE (5th), a girl group formed 10 years ago, topped the Billboard 200 album chart for the first time since their debut, expanding their global presence. Stray Kids also continued to gain popularity in the Americas, Europe, and Africa (ranking 4th in each), strengthening their influence in overseas markets.

Meanwhile, similar to actor preferences, most artists aside from BTS and BLACKPINK recorded low preference rates below 2%. This suggests the need for more active overseas promotion by various groups and solo artists in addition to major artists, along with strategic approaches that consider the musical preferences of each region.

Table 2-8 Comparison of top 5 Most Preferred Korean Singers/Groups Over the Last 5 Years by Year

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

BASE: Consumers who experienced Korean music, Unit: 1st choice %

	2020	2021	2022	2023	2024
1st	BTS 22.0	BTS 26.7	BTS 31.3	BTS 29.1	BTS 24.6
2nd	BLACKPINK 13.5	BLACKPINK 10.4	BLACKPINK 10.8	BLACKPINK 13.1	BLACKPINK 12.3
3rd	PSY 2.9	IU 2.8	PSY 2.6	PSY 2.9	IU 3.1
4th	TWICE 2.4	LISA 2.4	TWICE 1.8	Jung Kook 2.7	PSY 2.2
5th	EXO 2.1	PSY 2.2	IU 1.7	IU 2.1	TWICE 1.8

Table 2-9 Comparison of top 5 Most Preferred Korean Singers/Groups by Continent

BASE: Consumers who experienced Korean music, Unit: 1st choice %

	Asia-Pacific	Americas	Europe	Middle East	Africa
1st	BTS 19.4	BTS 34.2	BTS 28.7	BTS 20.5	BTS 26.5
2nd	BLACKPINK 16.2	BLACKPINK 9.6	BLACKPINK 9.1	BLACKPINK 6.2	BLACKPINK 4.7
3rd	IU 5.2	PSY 2.9	PSY 3.0	Jung Kook 3.2	Jung Kook 4.1
4th	TWICE 2.7	Stray Kids 1.7	Stray Kids 1.9	Jimin 1.3	Stray Kids 1.7
5th	LISA 2.6	TWICE 1.6	Jung Kook 1.6	ROSÉ 1.0	PSY 1.7

4 Change in Interest in Korean Cultural Content

Consumers with Hallyu experience perceived that their interest in Hallyu had increased compared with that of a year ago, reporting a higher increase among compatriots (55.3%) than in their own (53.2%). Notably, in Western regions, only the increase among compatriots was particularly prominent, while respondents in Asia and the Middle East showed higher expectations of increased Hallyu consumption in a year.

53.2% of respondents claimed that their own interest had increased compared with that of a year ago. The outlook for an increase in compatriots' interest was higher.

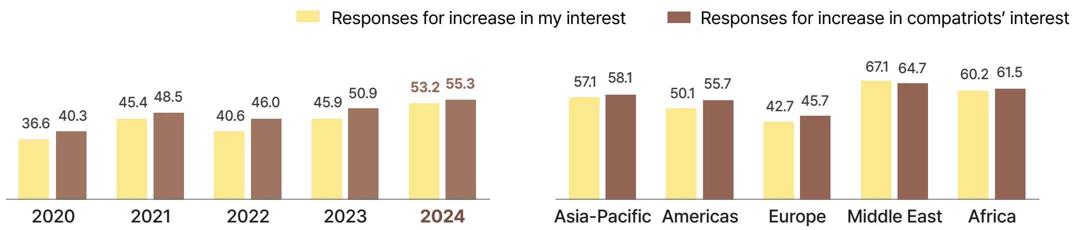
When asked about changes in interest in Korean cultural content compared with one year ago, 53.2% of respondents said that their interest had "increased," while 38.5% said that it was "similar." This indicated that 91.7% of all respondents either maintained or increased their interest. In contrast, 8.3% said that their interest had "decreased." Consumers with Hallyu experience tended to perceive a greater increase in the interest of their "compatriots" than in their own, a trend that has continued over the past five years.
By continent, all regions except the Middle East recorded a higher share of respondents reporting increased interest their respondents' compatriots than in themselves with a particularly pronounced gap observed in the Americas (5.6 percentage points) and Europe (3.0 percentage points).
With Han Kang being awarded the 2024 Nobel Prize in Literature, BTS member Jimin being named the best-selling K-pop solo artist in the US for the second consecutive year based on pure sales, and aespa's sold-out concert in Berlin during their 2024 European tour reflect the growing influence of Hallyu content in Western regions and Europe.
When asked about expected changes in interest in Korean cultural content one year from now, 48.4% of respondents expected their own interest to "increase," while 54.9% expected their compatriots' interest to "increase.," This indicated a stronger outlook for increase in compatriot interest. In addition, while the share of respondents reporting an "increase" in interest after one year has declined compared with that of the previous year, the proportion indicating that their interest will remain "similar" has risen. This indicated that overall changes in interest are relatively stable.

Figure 2-3 Changes in Interest in Korean Cultural Content

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 2-4(L) Changes in the Increased Interest in Korean Cultural Content Over the Last 5 Years by Year
Figure 2-5(R) Comparison of the Increased Interest in Korean Cultural Content Compared With That of a Year Ago by Continent

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



Positive outlook for Hallyu interest and consumption in Asia and the Middle East.

Countries with the highest rates of increased interest in Korean cultural content compared with a year ago were India (75.6%), the UAE (69.2%), Indonesia (67.8%), and Egypt (66.9%). In contrast, Japan (28.7%), Russia (32.0%), and Canada (34.9%) reported lower rates of increased interest. Projected interest in the upcoming year was also highest in India (70.3%), Egypt (66.0%), and Indonesia (63.9%), while lower projections were observed in Japan (22.8%), France (28.9%), and Canada (31.6%).

In addition, the countries with the highest projected increase in spending on Korean cultural content in the upcoming year were India (64.5%), Vietnam (56.1%), Egypt (55.6%), and the UAE (54.6%). Countries with lower projections included Japan (20.3%), Italy (29.5%), and Germany (30.2%).
The survey results indicate a strong outlook for increased interest in and consumption of Korean cultural content in the upcoming year in Asia (including India, Indonesia, and the Philippines) and the Middle East (including the UAE, Egypt, and Saudi Arabia). These regions are emerging markets with rapidly growing economies, suggesting that demand for Hallyu consumption is likely to expand further.

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

BASE: Total, Unit: %

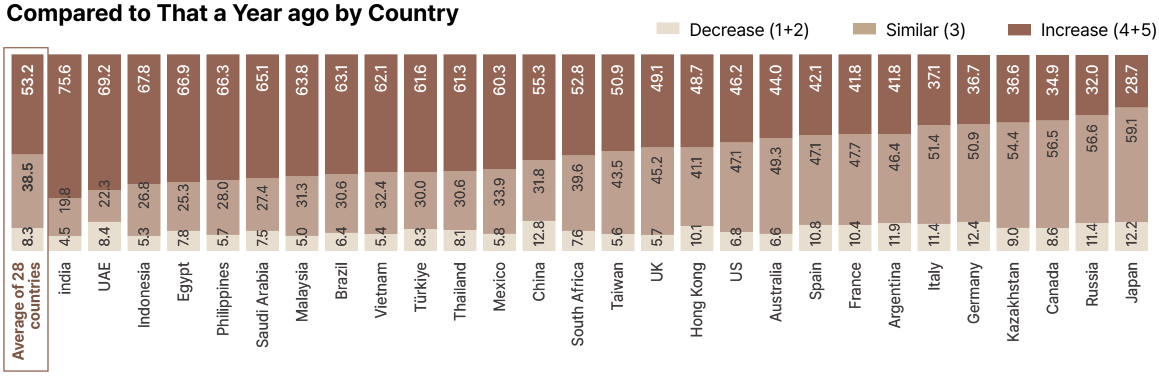


Figure 2-7 Comparison of Expected Changes in Interest in Korean

BASE: Total, Unit: %

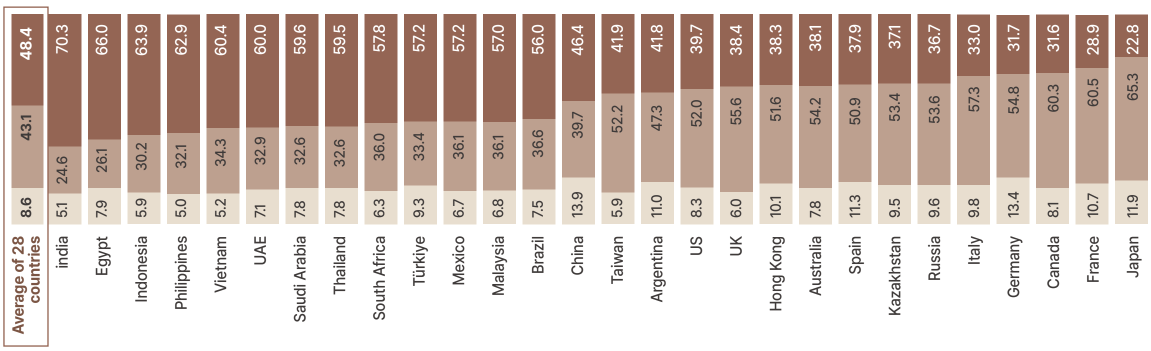
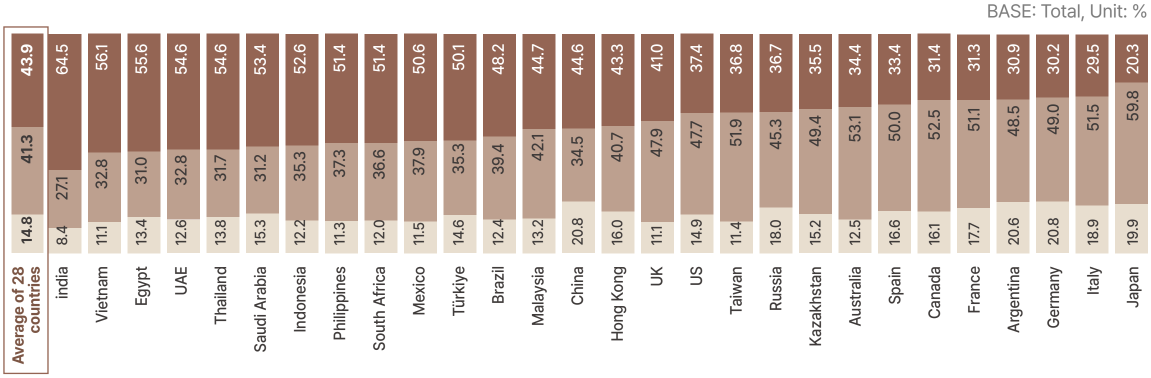


Figure 2-8 Comparison of Intent to Spend on Korean Cultural Content in the Upcoming Year by Country

BASE: Total, Unit: %



5 Popularity of Korean Cultural Content

Korean content perceived as popular among the general public includes food, music, and beauty, while the demand for dramas, movies, and variety shows is also growing. Since 2020, the center of Hallyu content has shifted toward video content, accelerating the overall spread of Hallyu.

Korean food, music, and beauty are "widely popular."

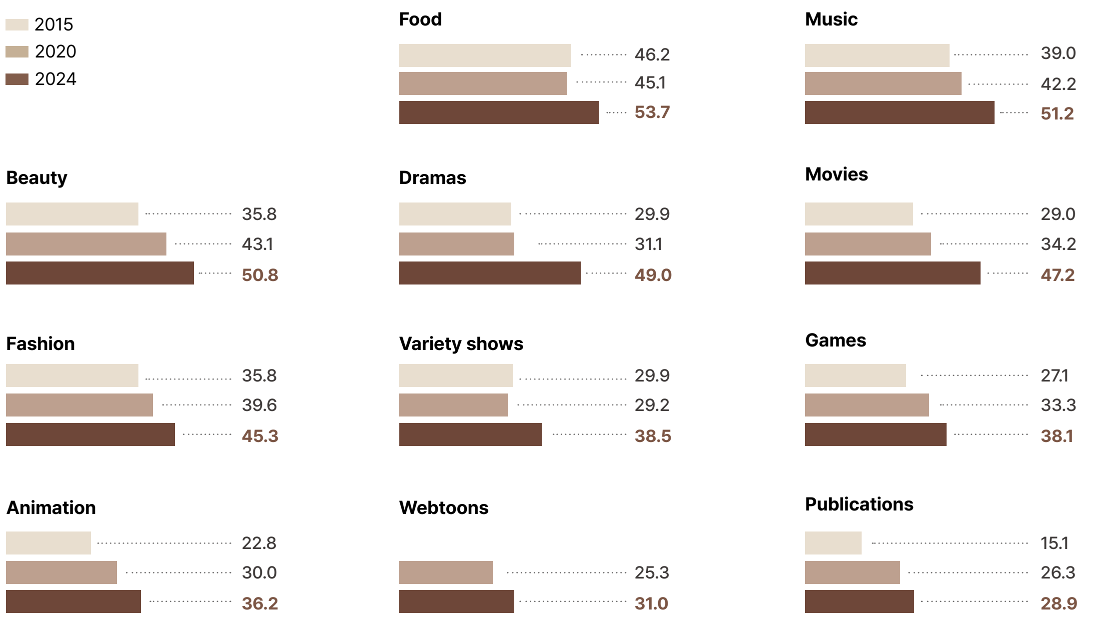
When respondents with Hallyu experience were asked about the popularity of different genres of Korean cultural content in their own countries, the highest proportions selecting "widely popular" were for food (53.7%), music (51.2%), beauty (50.8%), and dramas (49.0%). A comparison of response at 5-year intervals shows a continuous upward trend in the mainstream popularity of Korean cultural content. According to the 2024 local news and survey analysis conducted by KOFICE overseas correspondents and KOTRA trade officers, exposure to Korean culture through social media and OTT platforms has been on the rise. Based on this trend, offline access to Korean food, music, and beauty is also increasing through Korean restaurants, drugstores, and pop-up events. In particular, Korean food culture is spreading through cooking programs such as Netflix's *Culinary Class Wars*, and some countries are seeing a surge in the opening of Korean restaurants. Indeed, Korean food is being increasingly perceived as trendy. Moreover, Korean music is frequently used as background music in short-form content on platforms like TikTok, and offline activities such as concerts, fan meetings, and pop-up events are also actively taking place. Korean beauty products are also being actively promoted through social media and are receiving growing recognition from being stocked by global online platforms such as Amazon and local drugstores. Notably, beauty brands featuring drama heroines or girl group members as models are gaining significant popularity. Korean beauty ranked first among the most popular foreign beauty brands in local markets and second in favorability among all Korean cultural content in this survey, demonstrating its widespread popularity.

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

Total, Unit: %, Widely popular (4+5) proportion

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



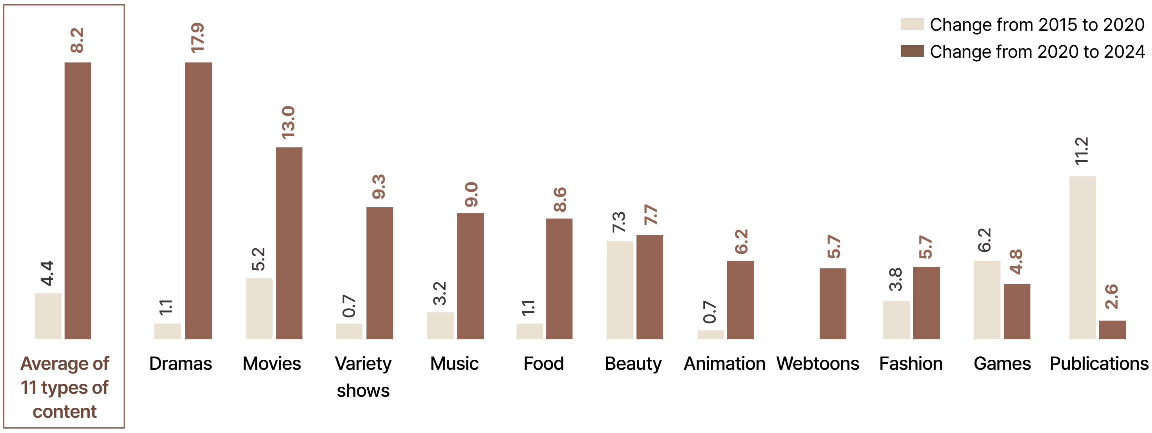
The popularity of video content such as Korean dramas, film, and variety shows continues to accelerate.

An analysis of the pace of Hallyu diffusion shows a steady expansion in the perception of content as "widely popular." The average perception rate of "widely popular" for 11 content types rose by 4.4 percentage points in 2020 compared with 2015, and by 8.2 percentage points in 2024 compared with 2020, showing a greater increase. This suggests that the perception of Korean cultural content as "widely popular" among consumers with Hallyu experience has been growing steadily, with the pace of its dissemination accelerating further.

By content type, from 2015 to 2020, the perceived popularity was most significant for non-video content such as publications (11.2 percentage points), beauty (7.3 percentage points), and games (6.2 percentage points). In contrast, from 2020 to 2024, video content such as dramas (17.9 percentage points), movies (13.0 percentage points), and variety shows (9.3 percentage points) saw a sharp increase in popularity, driving the spread of Hallyu. This shift appears to have been influenced by the expansion of global OTT platforms and the increasing consumption of online content.

Figure 2-10 Gap in "Widely Popular" Proportions of Respondents Within the Country at 5-year Intervals by Type of Korean Cultural Content

BASE: Total, Unit: %p



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6 Willingness to Recommend Korean Cultural Content

A total of 68.2% of consumers with Hallyu experience said that they were willing to recommend Korean cultural content. Respondents' willingness to recommend was particularly high in the Philippines, India, and Vietnam, but relatively low in Japan, Germany, and France. In 2024, Korean language and games newly entered the upper ranks, while willingness to recommend increased for fashion, games, and animation.

Respondents' willingness to recommend was high in the Philippines, India, and Vietnam.

A survey of consumers with Hallyu experience across 28 countries found that 68.2% responded that they were "willing to recommend" Korean cultural content they had recently encountered. Countries with the highest willingness to recommend included the Philippines (88.1%), India (83.0%), and Vietnam (80.8%), while Japan (31.8%), Kazakhstan (50.5%), and Germany (52.3%) showed relatively lower levels. In particular, over 10% of respondents in Japan (17.1%), Germany (14.7%), France (11.8%), the UK (10.3%), and Italy (10.1%) reported that they were "unwilling to recommend," revealing clear differences by country.

Additionally, women (70.1%) and respondents in their 20s (70.3%) and 30s (70.5%) showed a relatively favorable attitude toward recommending Korean cultural content. This is likely because women and younger generations tend to be more active in consuming content on digital platforms and SNS and are more inclined to share positive experiences of Korean cultural content.

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

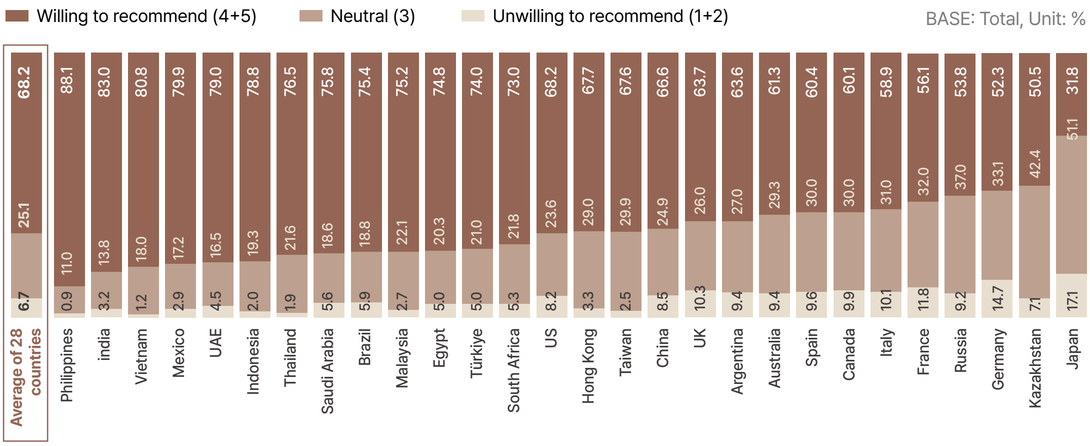
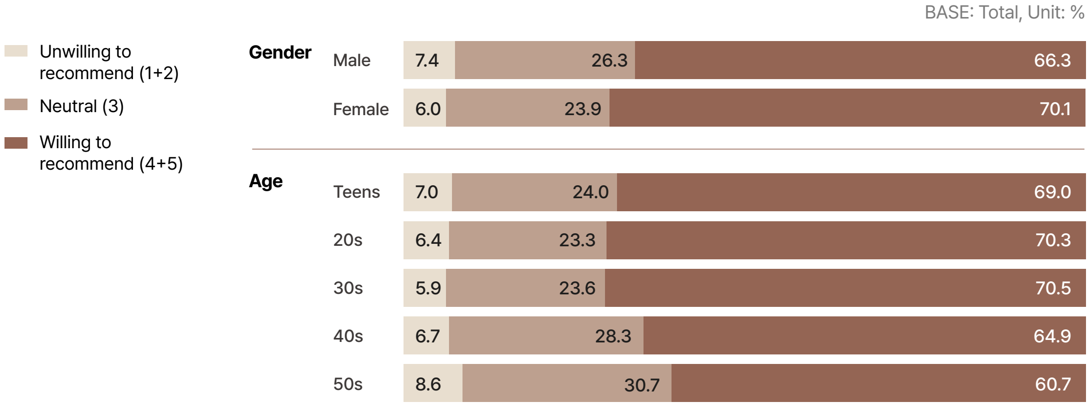


Figure 2-12 Comparison of Overall Willingness to Recommend Korean Cultural Content by Gender



Willingness to recommend was high for Korean language, variety shows, and games.

Analysis of willingness to recommend by Korean cultural content in 2024 revealed that respondents were most willing to recommend the Korean language (78.5%), variety shows (75.9%), games (75.6%), dramas (75.4%), and beauty (75.4%). Notably, the newly included Korean language in the 2024 survey and games ranked among the top categories. However, music (64.9 %) had the lowest recommendation rate among the 12 content types, and was the only category where the share of respondents "unwilling to recommend" exceeded 10.0%. In 2023, dramas, movies, variety shows, beauty, and food were identified as the content types with the highest willingness to recommend. However, in 2024, Korean language and games ranked first and third, showing a strong willingness to recommend these content types. In terms of year-on-year increase by content type, fashion saw the largest rise (5.7 percentage points), followed by games (5.5 percentage points) and animation (4.3 percentage points). Overall, willingness to recommend Korean cultural content is on the rise, and the spread of content consumption is expected to accelerate.

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

BASE: Total, Unit: %

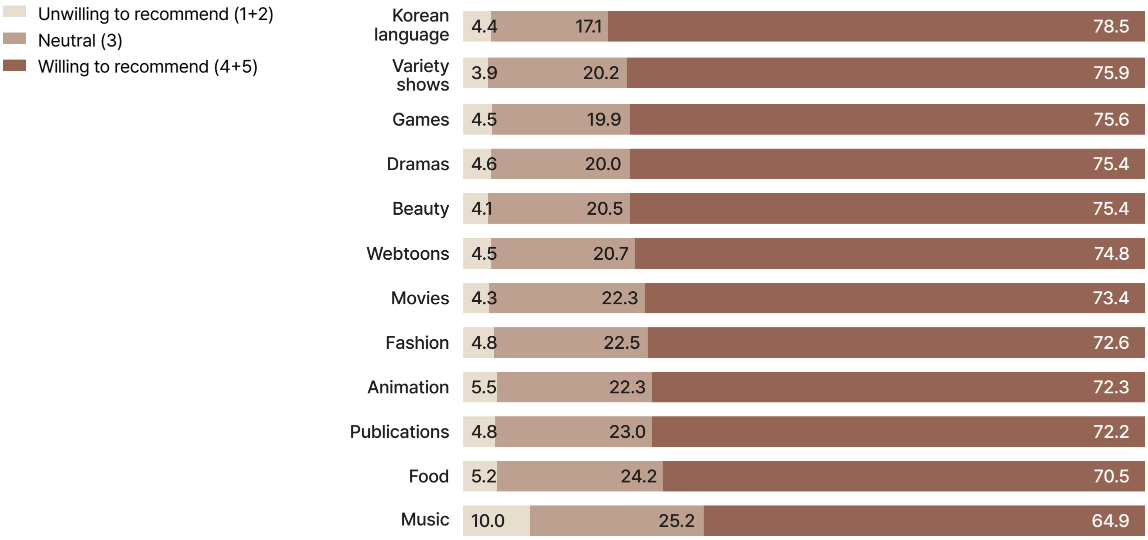
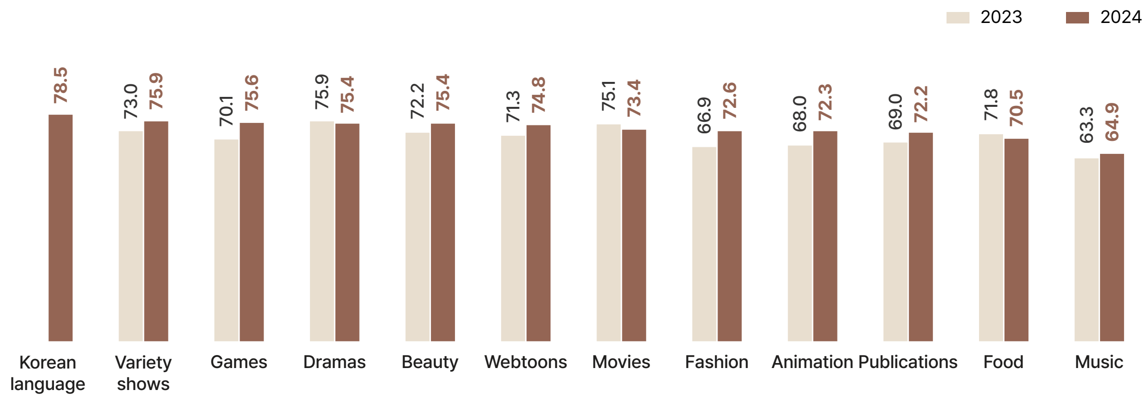


Figure 2-14 Willingness to Recommend Korean Cultural Content by Type: Comparison Between 2023 and 2024

BASE: Total, Unit: %



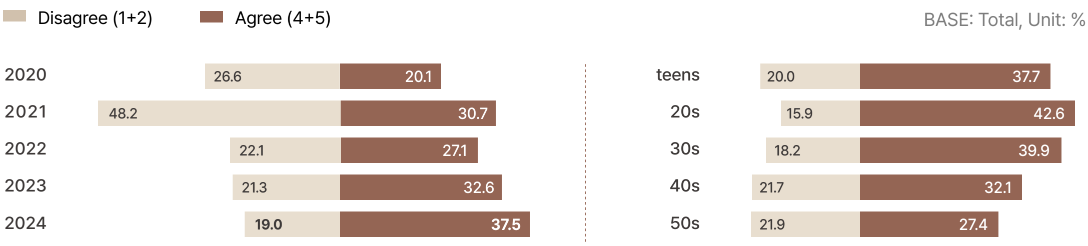
7 Agreement With and Reasons for Negative Perceptions Toward Hallyu

The proportion of respondents agreeing with negative perceptions toward Hallyu increased from 20.1% in 2020 to 37.5% in 2024, with relatively higher percentages observed among those in their 20s and 30s and in countries where Hallyu consumption is more active. The main reasons cited for negative perceptions toward Hallyu included “too commercial” (15.0%), the “North–South division/international threat posed by North Korea” (13.2%), and the “need to protect the domestic content industry” (11.8%).

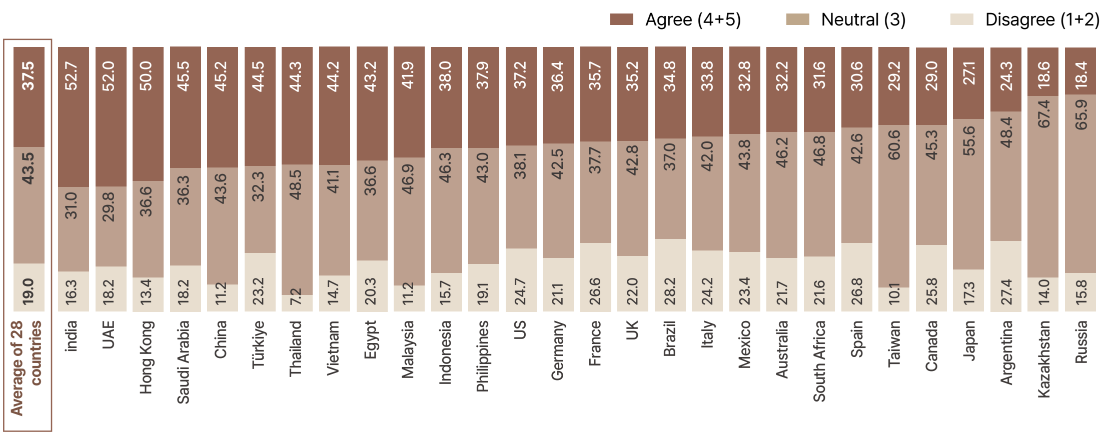
37.5% of respondents agreed with negative perceptions toward Hallyu.

A total of 37.5% of respondents said that they “agree” with negative perceptions toward Hallyu. This marks an increase of 17.4 percentage points from 20.1% in 2020, showing an overall upward trend despite some fluctuations over the years. In contrast, the proportion of respondents selecting “disagree” declined from 26.6% to 19.0% during the same period, with a consistent downward trend over the years, with the exception of 2021. Notably, in 2024, the rate for “agree” reached the highest level in the past five years, while the rate for “disagree” hit its lowest, indicating an increase in negative perceptions toward Hallyu.
By age group, the rate of agreement with negative perceptions was relatively high among those in their 20s (42.6%) and 30s (39.9%), groups that also showed high experience rates, favorability, and willingness to recommend Korean cultural content. In contrast, those in their 40s (21.7%) and 50s (21.9%) showed relatively high proportions selecting “disagree,” indicating a generational difference. By country, the rate of agreement with negative perceptions was high in India (52.7%), the UAE (52.0%), and Hong Kong (50.0%), while Kazakhstan (67.4%), Russia (65.9%), and Taiwan (60.6%) were largely neutral. In contrast, Argentina (27.4%), Spain (26.8%), and France (26.6%) showed higher proportions of respondents selecting “disagree.” Results indicate that countries with higher interest in and more active consumption of Hallyu tend to have higher agreement with negative perceptions, suggesting the need for efforts to improve negative perceptions toward Hallyu to achieve sustainable growth.

2-15(L) Comparison of Agreement With Negative Perceptions Toward Hallyu Over the Last 5 Years by Year
2-16(R) Comparison of Agreement With Negative Perceptions Toward Hallyu by age



2-17 Comparison of Agreement With Negative Perceptions Toward Hallyu by Country BASE: Total, Unit: %



External factors have a greater influence on negative perceptions toward Hallyu than content quality.

The main reasons for negative perceptions toward Hallyu were “too commercial” (15.0%), the “North–South division/international threat posed by North Korea” (13.2%), and the “need to protect the domestic content industry” (11.8%), showing a balance between concerns about content quality and external factors. The proportion of respondents selecting “too commercial” has decreased gradually from 28.9% in 2019 to 21.1% in 2023 and 15.0% in 2024, while the share indicating “excessively obscene/provocative” dropped sharply from 24.9% in 2023 to 9.7% in 2024. Opinions that Hallyu content is “uniform and unoriginal” have also declined, indicating an overall easing of direct complaints about the content itself. Meanwhile, external factors such as the “North–South division/international threat posed by North Korea,” “need to protect the domestic content industry," and “Hallyu star’s inappropriate/unethical words and behavior” have increasingly contributed to negative perceptions toward Hallyu. Therefore, to mitigate negative perceptions toward Hallyu, we need to develop a strategic approach that goes beyond simply improving content quality. We should also take into account broader external factors such as political and economic elements, as well as ethical issues regarding Hallyu stars.

Figure 2-18 Reasons for Agreement With Negative Perceptions Toward Hallyu: Comparison Over the Last 5 Years by Year

BASE: Total, Unit: 1st choice %

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.

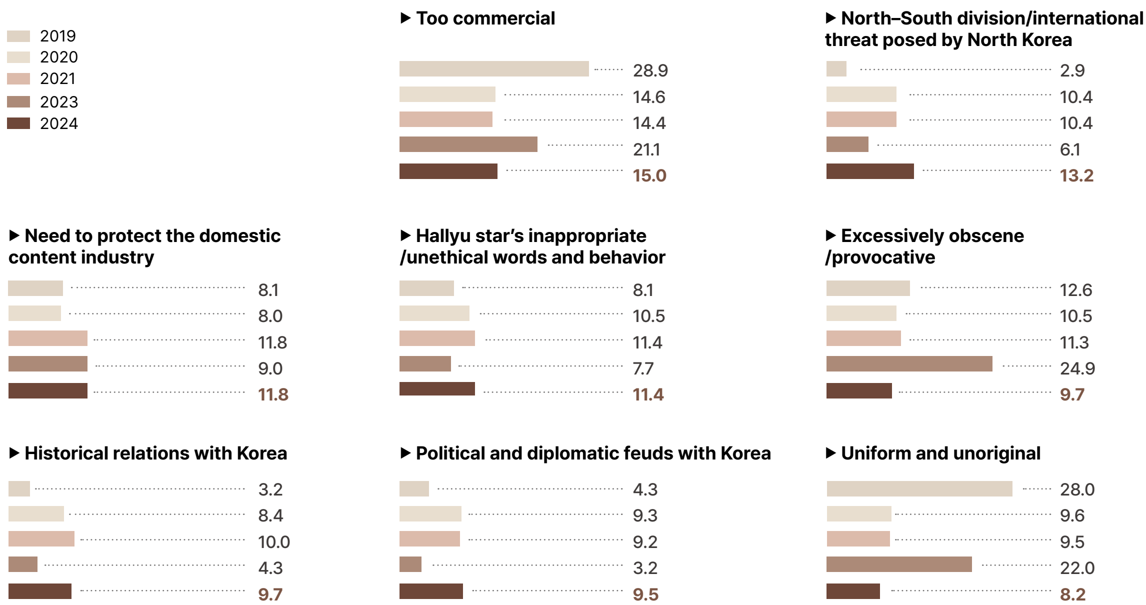
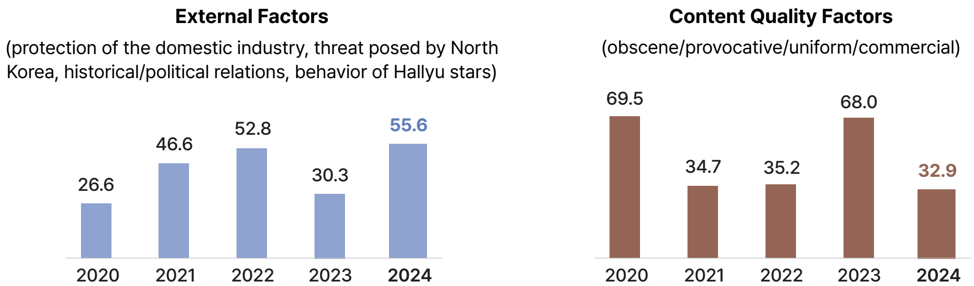


Figure 2-19 Reasons for Agreement With Negative Perceptions Toward Hallyu: Comparison Over the Last 5 Years by Year: External Factors vs. Content Quality Factors

BASE: Total, Unit: 1st choice %



8 Images Associated With Korea

The image most commonly associated with Korea was “K-pop,” which ranked first for the eighth consecutive year, followed by “Korean food,” “dramas,” “beauty products,” and “movies.” By continent, images related to plastic surgery and Hallyu stars were more prominent in Asia, while associations with North Korea were common in the Americas and Europe. Women were more likely to associate Korea with “beauty” and “K-pop,” while men tended to associate it with “IT” and “games.” In terms of age, younger generations were more likely to think of “K-pop,” while older age groups tended to associate Korea with “Korean food.”

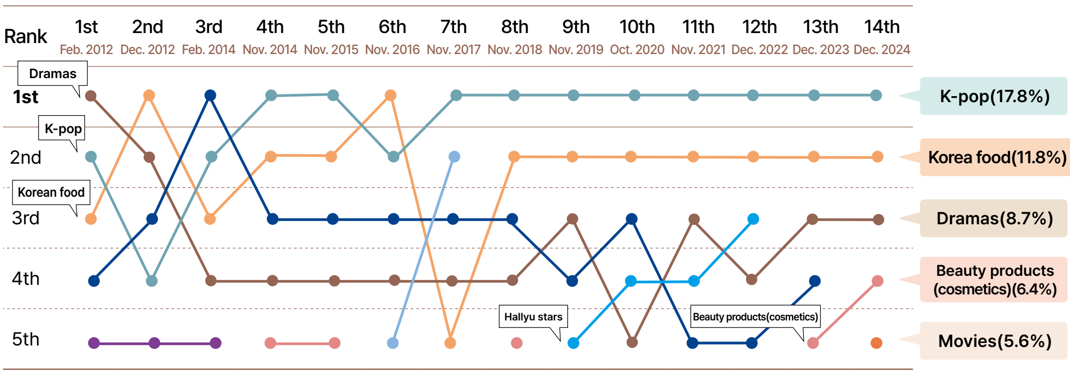
Images associated With Korea include K-pop, Korean food, and dramas.

Once again, respondents primarily associated Korea with “K-pop,” which ranked first at 17.8%. “K-pop” has maintained the top spot for eight consecutive years since 2017, solidifying its status as the most prominent global image of Korea. It was followed by “Korean food” (11.8%), “dramas” (8.7%), “beauty products” (6.4%), and “movies” (5.6%). “dramas” have consistently ranked within the top five every year, and maintained its 2023 rank of third place in 2024, while “beauty products (cosmetics)” rose one spot to fourth. “movies” entered the top five for the first time since the survey began, while “IT products/brands,” which had previously remained in the top five, dropped to sixth place. Overall, images related to Hallyu content such as music, dramas, and movies dominated the top ranks, while those related to history and tradition-such as economic growth, the Korean War, Hanbok, and Hangeul-remained in the middle or lower tiers. Images associated with Korea’s technological capabilities, including IT, automobiles, and plastic surgery, largely ranked in the middle tier.

Figure 2-20 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?



Responses ranking 6th or lower in the 14th survey

6th IT products/brands (5.1%)	**7th** Hallyu stars(4.1%)	**8th** Nuclear threats/war risks/ North Korea (3.9%)	**9th** Beauty Services (plastic surgery) (3.4%)	**10th** Games/e-sports/ pro gamers (3.4%)
11th Automobiles (3.2%)	**12th** Fashion (2.9%)	**13th** Economic growth (2.8%)	**14th** Taekwondo (2.7%)	**15th** Korean War (2.6%)
16th Animation (2.4%)	**17th** Hanbok/hanok/ palaces (2.0%)	**18th** Host of 1988 Seoul Olympics/ 2002 FIFA World Cup (2.0%)	**19th** Variety shows (1.8%)	**20th** Hangeul (Korean language) (1.7%)
21th Korean YouTuber videos (1.6%)	**22th** Sports/sports stars (1.2%)	**23th** Webtoons (1.1%)	**24th** Character goods/ emoticons (0.8%)	**25th** Books/literature (0.5%)

Images of Korea reflecting interests by continent, gender, and age group.

By continent, notable results include the Asia-Pacific region, where associations with "Hallyu stars" (6.2%) and "beauty services (plastic surgery)" (4.9%) were significantly higher than in other continents.
In the Americas and Europe, along with associations with "K-pop," images related to "Nuclear threat/North Korea" also ranked within the top five. This reflects the impact of the unique North–South situation on perceptions of Korea's national image. In the Middle East, immediately associated images scored below 10%, indicating that associations with Korea are relatively diverse rather than concentrated on specific images. In Africa, "dramas," "IT products/brands," and "games" showed higher association rates compared with the average of the 28 countries surveyed. On the other hand, associations with "beauty products (cosmetics)," "beauty services (plastic surgery)," and "Hallyu stars" were relatively low.

Figure 2-21 Comparison of Images Associated With Korea by Continent BASE: Total, Unit: %, 1st choice responses

	K-pop	Korean food	Dramas	Beauty products	Movies	IT products/ brands	Hallyu stars	Nuclear threat/ North Korea	Beauty services	Games/ gamers
Average of 28 countries	17.8	11.8	8.7	6.4	5.6	5.1	4.1	3.9	3.4	3.4
Asia-Pacific	19.2	13.5	10.3	6.3	5.0	4.3	6.2	2.3	4.9	2.3
Americas	22.4	10.7	7.8	5.8	5.3	4.2	2.2	5.8	1.8	3.7
Europe	15.7	10.6	5.6	7.7	5.5	6.1	1.7	5.6	2.4	4.2
Middle East	7.8	9.8	9.3	7.5	8.6	7.0	5.5	3.4	3.2	5.6
Africa	9.1	9.4	11.2	3.9	7.9	8.2	2.3	4.8	2.0	5.6

Women showed higher proportions of respondents than men for fashion- and entertainment-related images such as "beauty products (cosmetics)," "K-pop," "dramas," and "beauty services (plastic surgery)." In contrast, men showed higher proportions of respondents than women for "automobiles," "IT products/brands," "games/e-sports/pro gamers," and "movies." This result can be attributed to the differences in cultural content consumption and areas of interest by gender. Notably, both women and men reported strong associations between Korea and "K-pop" and "Korean food."

By age group, "K-pop" showed higher association among younger respondents, while associations with "Korean food" increased with respondent age. "IT products/brands" had the highest association among respondents in their 50s, while "Hallyu stars" recorded the highest rate among those in theSir 20s. The popularity of "dramas" was generally consistent across age groups.

Figure 2-22 Comparison of Images Associated With Korea by Gender

BASE: Total,
Unit : %, 1st choice responses

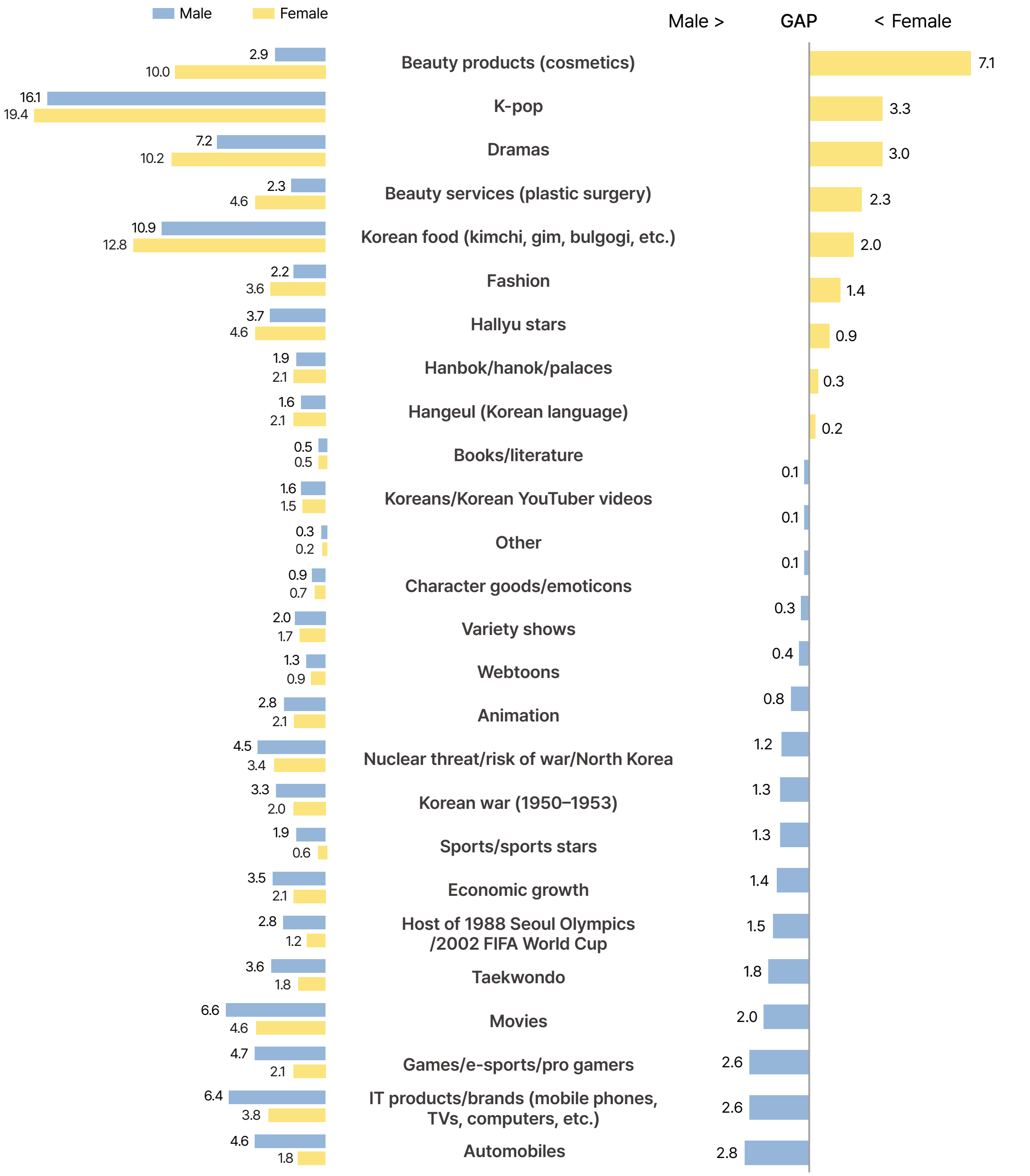
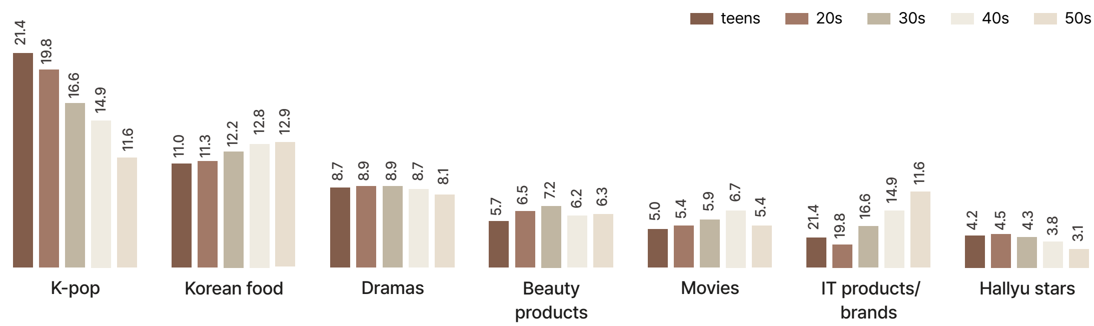


Figure 2-23 Comparison of Images Associated With Korea by age

BASE: Total, Unit : %, 1st choice



The "positive" perception of Korea stood at 72.8%, continuing its upward trend, while the "negative" perception declined. Positive evaluations were high in the Middle East and Southeast Asia, but remained below 50% in Japan and China. Among specific items, agreement was highest for "economically advanced country" at 76.6%, while "cultural powerhouse" received relatively lower agreement at 53.5%.

72.8% of consumers with Hallyu.

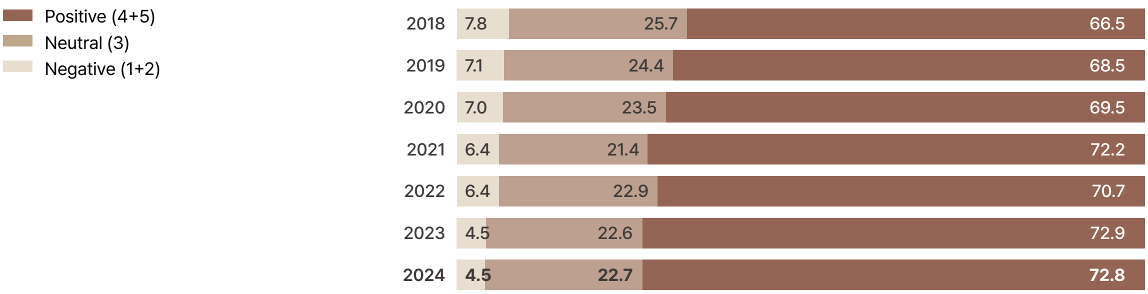
In terms of overall perceptions of Korea, 72.8% of respondents selected "positive." The "positive" perception increased from 66.5% in 2018 to 72.2% in 2021, and has since remained above 70% through 2024. The proportion of "neutral" responses declined from the mid-20% range to the low-20% range, while "negative" perceptions decreased by 3.3 percentage points from 7.8% in 2018 to 4.5% in 2024.

Figure 2-24 Comparison of Overall Perceptions Toward Korea Over the Last 7 Years by Year

Q. What is your overall perception of Korea?

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

BASE: Total, Unit: %



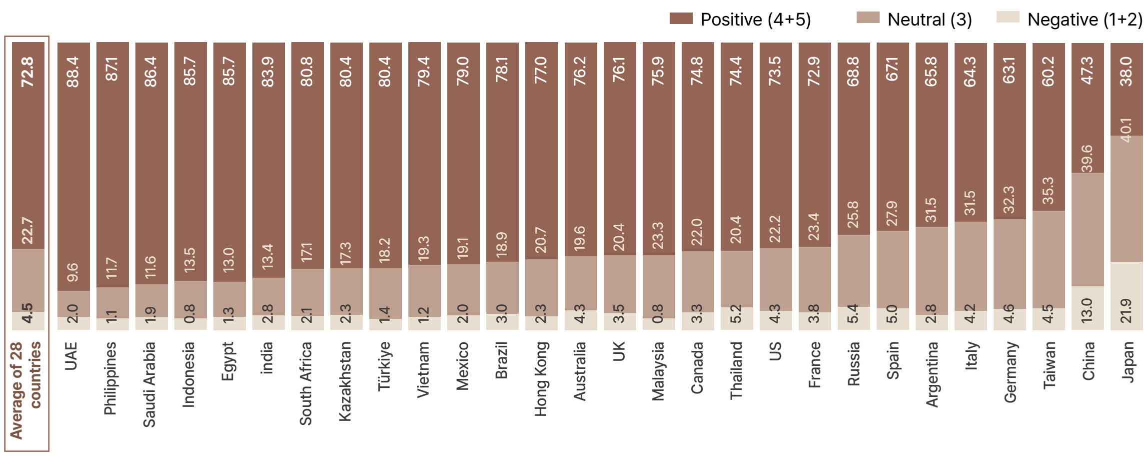
The Middle East reported significantly positive perceptions. Positive perceptions in China and Japan were below 50%.

A notably high proportion of respondents in the UAE (88.4%), the Philippines (87.1%), Saudi Arabia (86.4%), Indonesia (85.7%), and Egypt (85.7%) reported a "positive" perception of Korea.

It is worth noting that both Middle Eastern countries, namely the UAE and Saudi Arabia, recorded strong "positive" perceptions. On the other hand, Japan (38.0%), China (47.3%), and Taiwan (60.2%) showed relatively lower levels of "positive" perception. Japan and China, which have geographical proximity to Korea, recorded significantly lower positive perception rates compared with other countries, with Japan ranking the lowest at 38.0%.

Figure 2-25 Comparison of Overall Perceptions Toward Korea by Country

BASE: Total, Unit: %



76.6% of respondents agreed that Korea is an "economically advanced country." Southeast Asia and the Middle East showed high agreement across various items.

Analysis of perceptions of Korea by evaluation item showed that "economically advanced country" achieved the highest agreement rate at 76.6%. This was followed by "likeable country" (68.6%), "friendly toward us" (63.2%), and "participates in international social contribution activities" (62.5%), all recording agreement rates in the 60% range. The statement "more of a partner than a competitor" had an agreement rate of 59.3%, while "cultural powerhouse" received the lowest agreement at 53.5%.

By country, Southeast Asia (i.e., Indonesia, the Philippines, and Vietnam) and the Middle East (i.e., the UAE and Saudi Arabia) were predominant among those with high agreement rates for each evaluation item. In contrast, respondents in Japan and China—who reported lower overall "positive" perceptions of Korea—also tended to show lower agreement rates by item. Countries with a high agreement rate for the item "cultural powerhouse" (i.e., the Philippines, UAE, and Saudi Arabia) also ranked high in terms of favorability to Korean cultural content and overall positive perception toward Korea. While no clear causal relationship between items can be determined, these findings suggest that positive perceptions may be interrelated.

Figure 2-26 Comparison of Perceptions Toward Korea by Evaluation Item

BASE: Total, Unit: %

Q. What do you generally think of Korea?

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

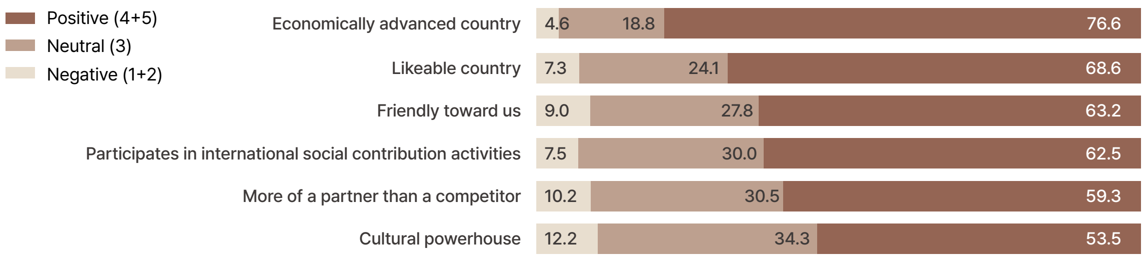


Figure 2-27 Countries With the Highest and Lowest Positive Proportions of Respondents Regarding Perceptions Toward Korea by Item

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

Countries with the highest proportions of respondents				Countries with the lowest proportions of respondents		
1. Indonesia 91.3%	2. Philippines 90.3%	3. Vietnam 88.0%	**Economically advanced country**	3. Germany 64.0%	2. Italy 61.8%	1. Japan 38.7%
1. Philippines 86.3%	2. Egypt 83.1%	3. Saudi Arabia 82.5%	**Likeable country**	3. Taiwan 48.3%	2. China 45.6%	1. Japan 39.6%
1. Indonesia 85.1%	2. Philippines 90.3%	3. Egypt 80.6%	**Friendly toward us**	3. Taiwan 40.8%	2. Russia 38.5%	1. Japan 27.6%
1. Philippines 84.3%	2. UAE 76.4%	3. Indonesia 76.2%	**Participates in international social contribution activities**	3. Italy 49.2%	2. Russia 47.6%	1. Japan 28.0%
1. Indonesia 78.3 %	2. Philippines 76.3%	3. Vietnam 75.9%	**More of a partner than a competitor**	3. China 45.2%	2. Taiwan 37.5%	1. Japan 30.4%
1. Philippines 67.7%	2. UAE 66.9%	3. Saudi Arabia 65.8%	**Cultural powerhouse**	3. Russia 38.6%	2. Italy 36.8%	1. China 31.0%

Perception of the Korean Language 10

A total of 51.4% of respondents said that they could distinguish Korean from other languages, while 49.9% said that learning the Korean language was necessary to better understand Korean cultural content. However, respondents reported difficulty meeting other people learning Korean or finding institutions where Korean is taught. Meanwhile, 46.2% of respondents reported having no resistance to the Korean language, with women and those in their 30s or younger showing relatively lower levels of resistance.

A total of 51.4% of respondents said that they could identify the Korean language. 49.9% said that learning Korean was necessary.

Based on the degree of Korean language identification, the learning environment, and the need for learning, 51.4% of respondents said that they could clearly distinguish Korean from other languages. In addition, 49.9% said that they believed learning Korean was necessary to enjoy and understand Korean cultural content.

On the other hand, only 33.5% said that they could easily find people learning Korean or Korean language institutions in their surroundings, while 41.4% said otherwise. This suggests that an adequate learning environment for the Korean language has yet to be established.

Figure 2-28 Connection With the Korean language

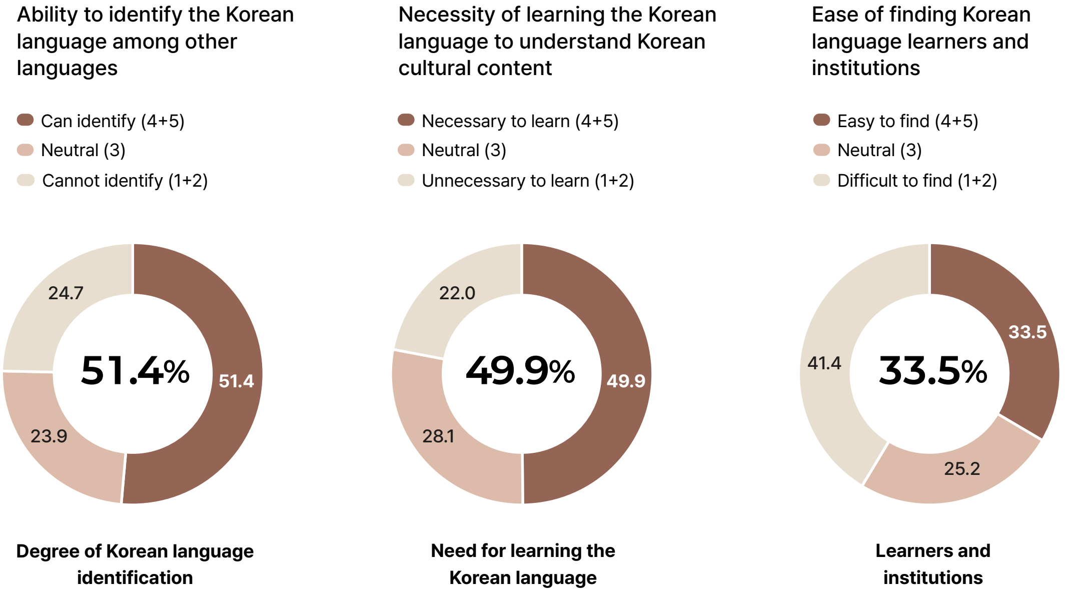
BASE: Total, Unit: %

Q. Can you easily distinguish Korean language from other languages?

Q. Do you think that learning Korean proficiency is required to encounter and understand Korean cultural content?

Q. Do you normally see people learning Korean proficiency or attending Korean language educational institutions around you?

1. Not at all / 2. Not really / 3. Moderate / 4. Usually / 5. Certainly



By country, agreement with “can identify” the Korean language was higher in Asian countries such as China (75.5%), Vietnam (75.0%), and Indonesia (74.8%), while identification rates were lower or similar in Europe (e.g., Russia, Italy, Germany, etc.) and the Americas (Canada, Brazil, the US, etc.).
Regarding the perceived need to learn the Korean language, high rates of agreement were observed in Indonesia (68.2%), the UAE (67.6%), and Malaysia (67.1%), while disagreement was higher in countries such as Russia (40.1%), France (39.3%), Germany (36.7%), Italy (36.5%), and Japan (34.8%).
As for Korean language learners and learning institutions, 12 countries, including Vietnam (58.4%) and the UAE (53.1%), showed high agreement rates with the statement “easy to find,” while 16 countries including Argentina (61.8%), Canada (61.1%), and South Africa (60.8%) reported high disagreement rates.

Figure 2-29 Comparison of the Extent to Which Korean language can be Identified Among Other Languages by Country

BASE: Total, Unit: %

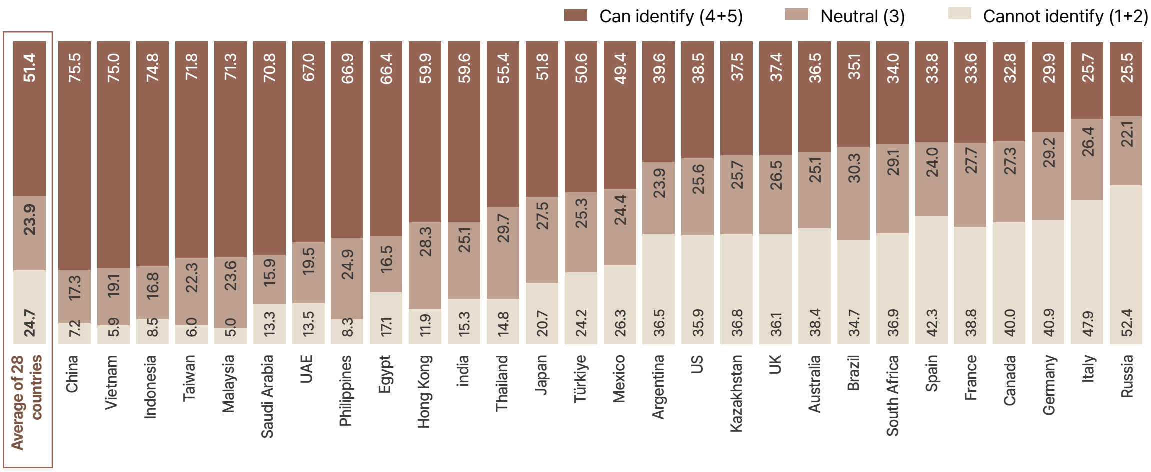


Figure 2-30 Comparison of the Perceived Need to Learn the Korean language to Understand Korean Cultural Content by Country

BASE: Total, Unit: %

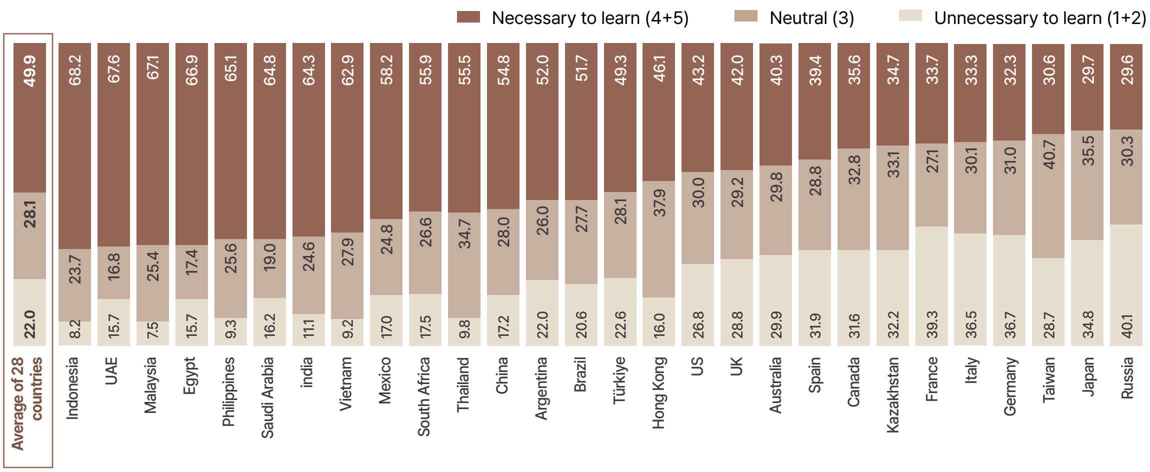
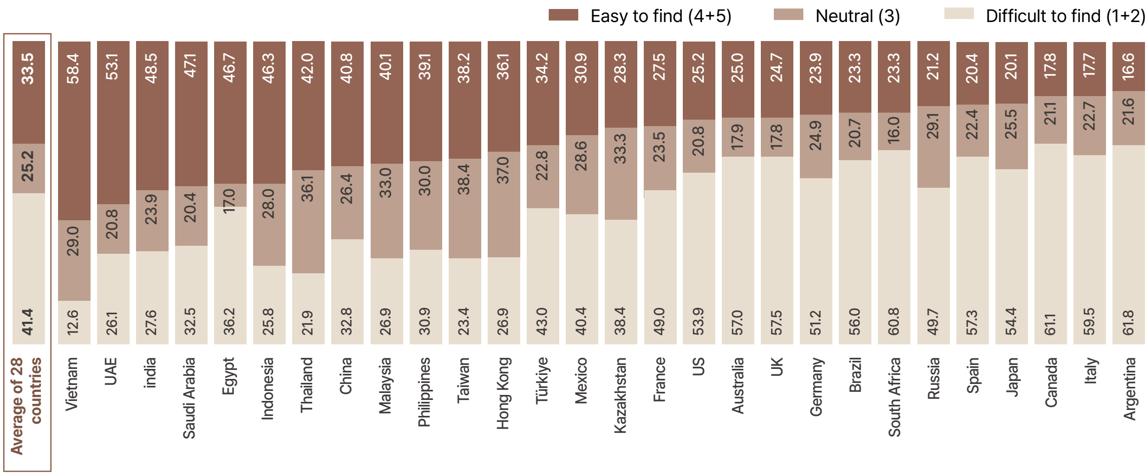


Figure 2-31 Comparison of Korean language Learners and Institutions by Country

BASE: Total, Unit: %



46.2% of respondents reported having "no resistance" to the Korean language. Resistance was low among women and respondents in their 30s or younger.

A total of 46.2% of respondents reported having "no resistance" to the Korean language when encountering it in Korean cultural content, while 13.7% reported feeling resistant.
Women (47.4%) were slightly more likely than men (45.0%) to report no resistance, while those in or below their 30s (i.e., teens: 47.7%; 20s: 49.5%; and 30s: 48.2%) were more likely to feel no resistance compared with those in their 40s or older (i.e., 40s: 41.6%; 50s: 37.0%).
By country, India (64.1%), Saudi Arabia (63.4%), and China (63.1%) recorded high rates of "no resistance." The majority of respondents selected "neutral" in Russia (56.2%) and Kazakhstan (57.9%). Meanwhile, a relatively higher proportion of respondents reported resistance in Brazil (29.6%), Spain (28.9%), and Japan (25.2%).

Figure 2-32 Comparison of Responses to the Korean language When Engaging With Korean Cultural Content by Gender and age

BASE: Total, Unit: %

Q. When you encounter Korean cultural content, what is your impression when Korean words appear in the content?
1. Very unfavorable / 2. Unfavorable / 3. Average / 4. Favorable / 5. Very favorable

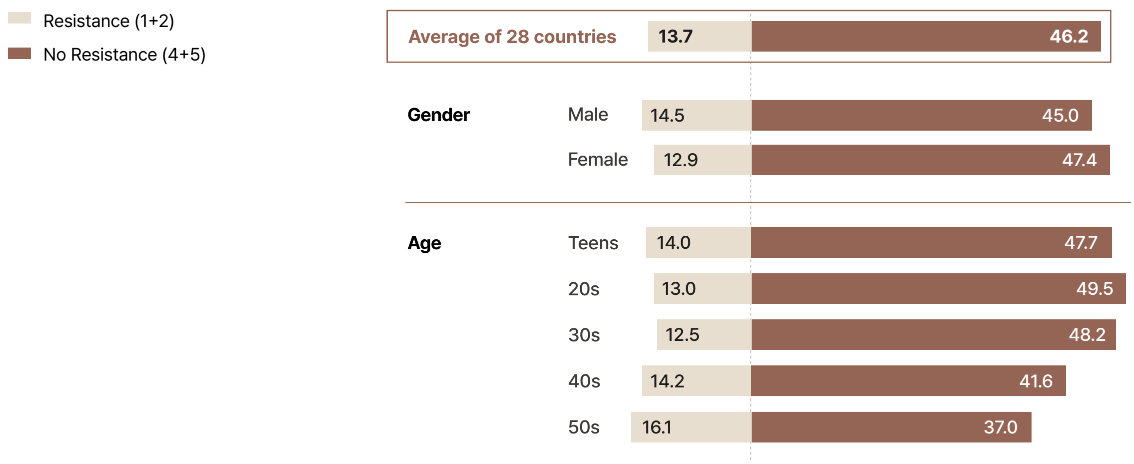
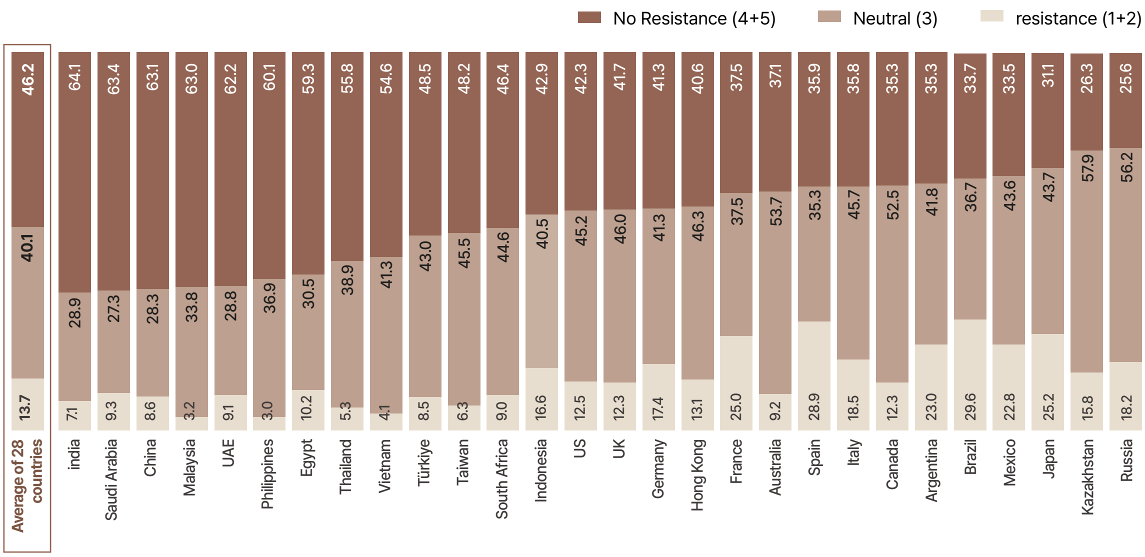


Figure 2-33 Comparison of Responses to the Korean language When Engaging With Korean Cultural Content by Country

BASE: Total, Unit: %



Consumption of Hallyu

2

SUMMARY

Consumers with Hallyu experience spent an average of 14.0 hours per month consuming Korean content, a 2.4-hour increase from the previous year. Specifically, consumption was high for dramas (17.5 hours) and variety shows (17.0 hours); time spent on Korean language learning (26.2 hours), games (15.4 hours), and webtoons (14.5 hours) also increased. The average monthly expenditure was 15.4 USD, increasing by 4.9 USD from the previous year, with the highest expenditure on Korean language learning (31.7 USD), fashion (31.2 USD), and beauty (27.9 USD). Korean content accounted for 24.9% of total content consumption. Time spent and proportion of consumption were particularly high in Asian countries such as the Philippines, Thailand, and Indonesia, while the UAE recorded an average monthly expenditure of 37.0 USD, more than twice the average of the 28 countries surveyed.

For dramas, variety shows, movies, and music, 79.8–86.4% of consumers with Hallyu experience accessed such content primarily through “online/mobile platforms.” Meanwhile, access rates through TV showed a declining trend. For lifestyle content such as fashion, beauty, and food, “SNS videos/photos” were the main channels of exposure, and access through “online/offline sales channels” increased.

Some 67.1% of respondents said that their perception of Korea became more positive after engaging with Korean content, an increase of 8.3 percentage points compared with 2020 (58.8%). Positive changes were particularly notable in the Philippines (85.1%), India (83.8%), and the UAE (82.0%), while the figures were relatively lower in Europe and Japan. Overall, the consumption of Korean content has continued to rise, with growing interest across various types of content.

1 Consumption Volume of Korean Cultural Content

On average, consumers with Hallyu experience spent 14.0 hours a month consuming Korean content. Although this marked an increase from the previous year, the proportion of consumption of Korean content decreased. Overall, consumption of dramas declined, while consumption of content such as animation, webtoons, and games increased, reflecting a tendency for diversification in content consumption. Asian countries ranked high in consumption, with the UAE showing particularly high levels in time spent, proportion, and expenditure.

Consumers spent a long time on dramas and variety shows, and increased the amount of time spent on games and webtoons.

The average monthly time spent consuming Korean content by consumers with Hallyu experience in 28 countries was 14.0 hours, a 2.4-hour increase compared with 2023. Excluding the newly added category of the Korean language, the monthly average increased to 13.2 hours, a growth of 1.6 hours compared with the previous year. By content type, dramas recorded the longest time spent at 17.5 hours, followed closely by variety shows at 17.0 hours. Consumers had watched an average of 7.3 films over the past three months. Compared with 2023, time spent on games (15.4 hours) and webtoons (14.5 hours) increased by approximately 2.9 hours and 2.1 hours, respectively. In addition, Korean language learners spent an average of 26.2 hours per month studying the language.

Figure 2-34 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

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)

Q. How much time and money do you usually spend learning Korean language? [OPEN]

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

Note 2. Movies were surveyed according to 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 1.85 hours per movie.

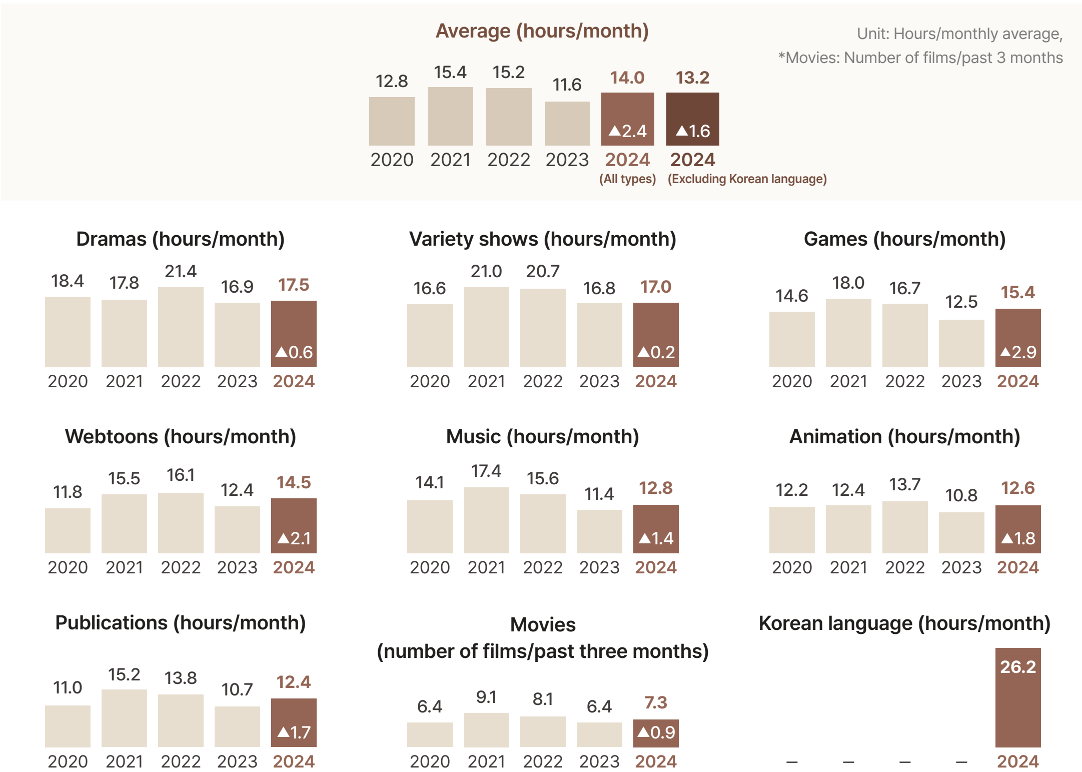
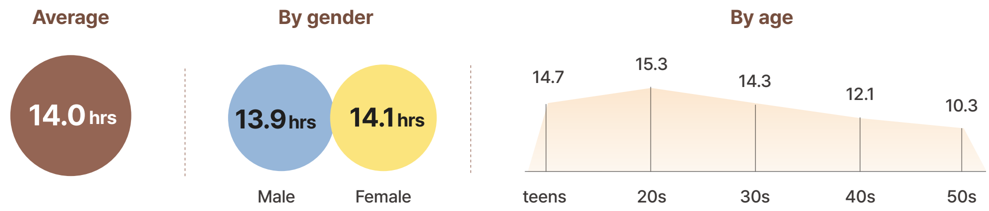


Figure 2-35 Comparison of Average Time Spent on Overall Korean Cultural Content by Gender and age

BASE: Total, Unit: hour/monthly average



Analysis of the total volume of content consumption based on the average time spent and proportion of consumption showed that while time spent on Korean content increased, time spent on content from other countries decreased.

Consequently, overall time spent on cultural content (from all countries) declined by an average of 2.7 hours per month. Among cultural content types, dramas accounted for the highest consumption volume, with consumers who experienced Korean dramas watching an average of 105.4 hours of drama per month. This marked a decrease of 3.7 hours compared with 2023. Consumption volume increased across all content types except for dramas, with notable increases in animation (89.6 hours) and webtoons (86.4 hours), both of which grew by 6.0 hours, while gameplay time increased by 4.5 hours. This shift reflects a trend of decreasing consumption of dramas, which require longer viewing times, and increasing consumption of content that can be enjoyed in relatively shorter time. It can also be interpreted as an indication that consumption of Korean cultural content is expanding to more diverse content categories, rather than being concentrated in specific categories.

Table 2-10 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

Note 1. This is the result of 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.

Note 2. 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 1.85 hours and analyzing the consumption time.

Note 3. As there were no questions regarding the proportion for the Korean language, this category was not included in the conversion of average consumption volume by type of cultural content.

By content type	2022	2023	2024	Gap (2024–2023)
Overall average (hours/month)	93.3	81.7	79.1	▼ 2.7
Dramas (hours/month)	122.9	109.1	105.4	▼ 3.7
Variety shows (hours/month)	107.1	96.8	101.1	▲ 4.3
Movies (number of films/past three months)	62.0	53.2	53.7	▲ 0.5
Music (hours/month)	97.0	81.1	81.7	▲ 0.6
Animation (hours/month)	99.4	83.6	89.6	▲ 6.0
Publications (hours/month)	94.9	82.0	85.4	▲ 3.4
Webtoons(hours/month)	87.9	80.4	86.4	▲ 6.0
Playing games (hours/month)	105.3	91.5	96.0	▲ 4.5
Watching gameplay videos (hours/month)	96.9	86.6	89.9	▲ 3.3

Expenditure increased by 4.9 USD compared with the last year. Notable expenditure on fashion and beauty.

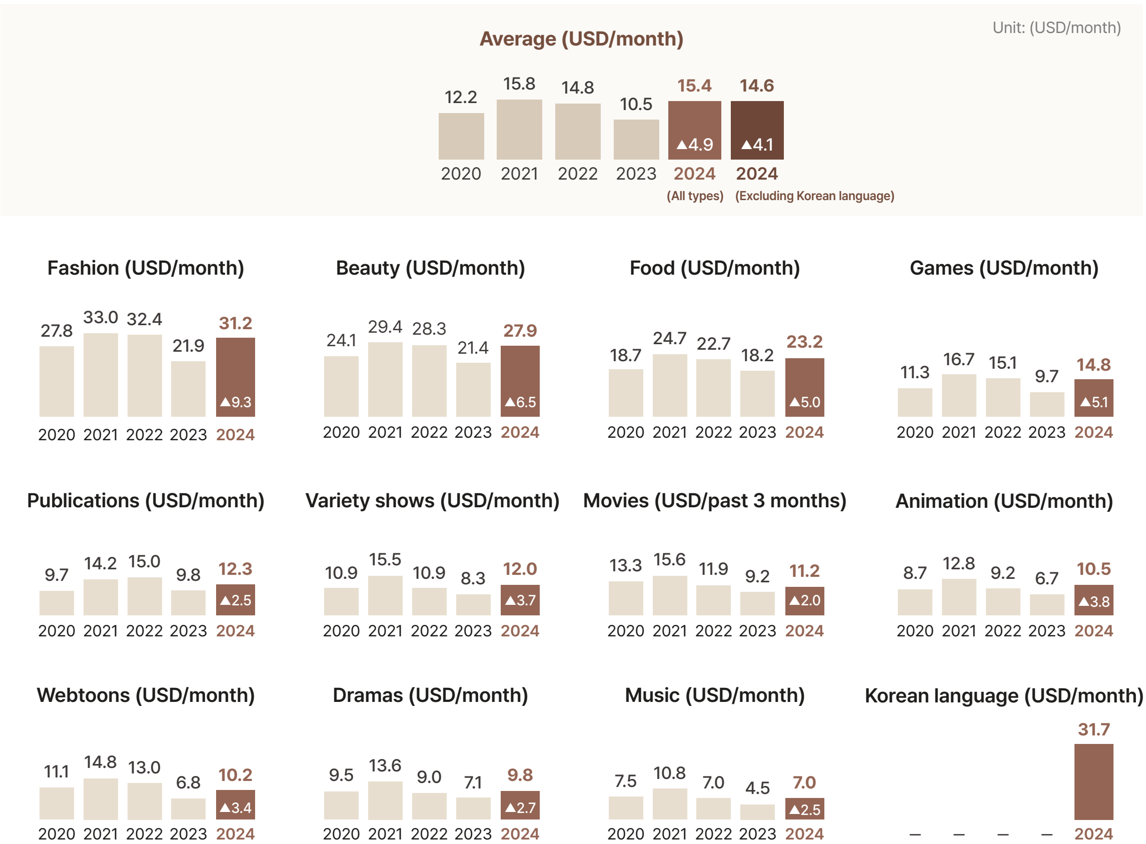
Consumers with Hallyu experience spent an average of 15.4 USD per month on Korean cultural content, marking a 4.9 USD increase from 10.5 USD in the previous year. Expenditure was highest on Fashion (31.2 USD), beauty (27.9 USD), and food (23.2 USD), while music (7.0 USD), dramas (9.8 USD), and webtoons (10.2 USD) showed lower expenditure. The Korean language, which scored the longest time spent, also recorded the highest expenditure at 31.7 USD. Even when excluding the newly added category of the Korean language, the overall average monthly expenditure increased by 4.1 USD from the previous year. Average monthly expenditure rose across all content types compared with 2023, with particularly large increases in high-expenditure categories such as fashion and beauty, which increased by 9.3 USD and 6.5 USD, respectively.

The overall increase in expenditure on Korean cultural content in 2024 appears to be related to the growing use of product placement (PPL) in video content and increased collaborations with Hallyu stars (fashion, beauty, etc.). In addition, the expanded presence of Korean products on global e-commerce platforms such as Amazon, Shopee, and Lazada has improved accessibility for overseas consumers, which seems to have contributed to the increase in overall expenditure. Moreover, Korean content is perceived as trendy and high-quality, which has led to particularly high expenditure in various categories such as fashion, beauty, and food. The growing production of secondary content, such as dramas and movies based on Korean webtoons and novels, also appears to have driven the increase in consumption of Korean content overall.

Figure 2-36 Comparison of Average Expenditure per Person on Each Type of Korean Cultural Content Over the Last 5 Years by Year

BASE: Consumers who have experienced Korean cultural content by type

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)



Korean content accounted for 24.9% of total content consumption.

The proportion of Korean content in total consumption across all cultural content types (all countries) was 24.9%, a 0.7 percentage point decrease from 2023. The proportion of consumption was highest in beauty (28.0%) and lowest in food (19.0%). With the exception of fashion and games, the proportion of consumption declined by up to 2 percentage points compared with the previous year.

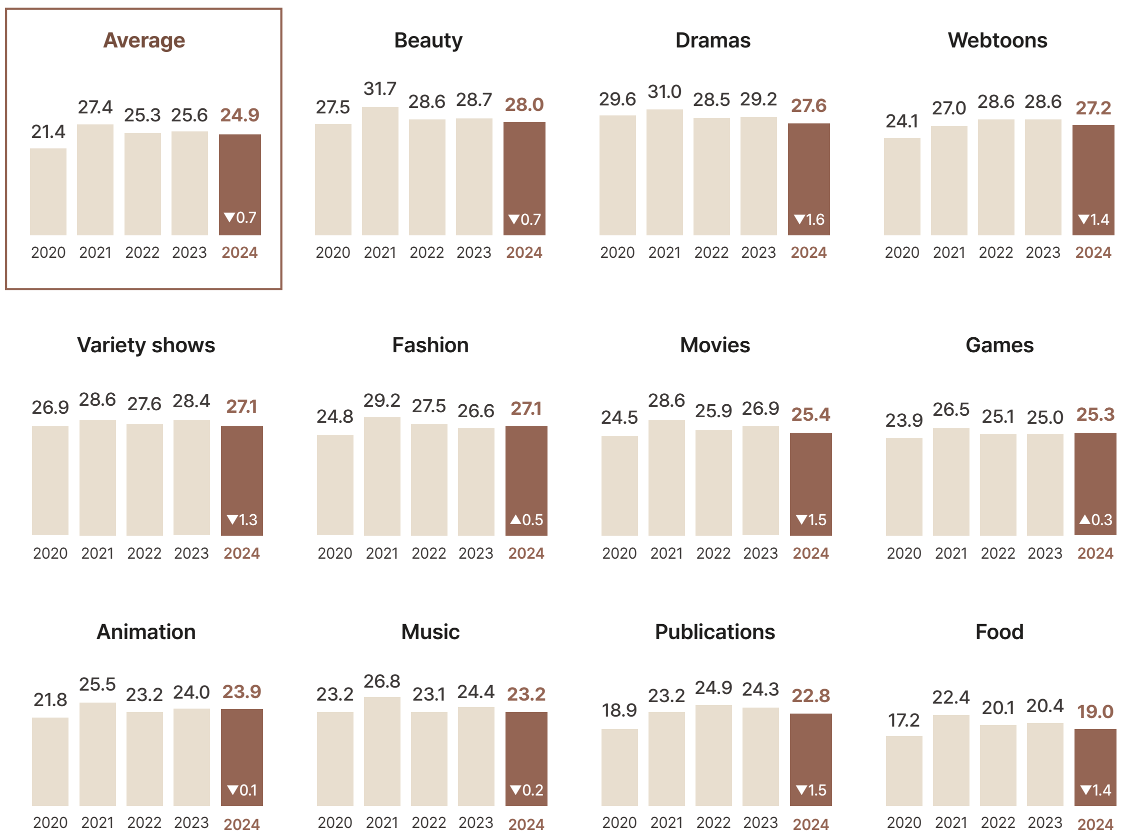
The content type with the largest decrease in proportion of consumption was dramas. According to Netflix's "What we Watched the First Half of 2024," announced in September 2024, the top four most-watched dramas (series) in the first half of 2024 were all UK productions. Among Korean content, *Queen of Tears* ranked 14th. As the second season of the globally recognized *Squid Game* was released at the end of December 2024, the show was not reflected in the results of this survey, which was conducted in November.

The decline in the proportion of consumption despite the increase in time spent and expenditure on Korean cultural content indicates that the relative share of Korean content in overall cultural consumption has decreased. This can be interpreted as a consequence of consumers having more choices as content from various countries strengthens its competitiveness in the global market. Intensified competition driven by the increase of local content production, as well as the strengthening of regionally tailored content by global OTT services and platforms, also appears to have contributed to this decline.

Figure 2-37 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)

BASE: Consumers who have experienced Korean cultural content by type, Unit: %, %p



Asian countries ranked high in terms of time spent on Korean cultural content and proportion. The UAE showed high consumption, while Japan had relatively low consumption.

Analysis of the average consumption volume of Korean cultural content by country showed that, in the Philippines, consumers spent approximately one full day (24.0 hours) per month engaging with Korean content. This was followed by Thailand (20.1 hours), the UAE (19.2 hours), India (18.9 hours), and Indonesia (18.8 hours), in the order of longest time spent.

In terms of proportion of consumption, Indonesia (34.7%), the Philippines (34.0%), and Malaysia (33.0%) recorded the highest proportions of Korean content consumption. Expenditure was highest in the Middle East (i.e., UAE at 37.0 USD and Saudi Arabia at 28.8 USD), the US (28.7 USD), and the UK (24.4 USD), where subscription fees for major OTT platforms (e.g., Netflix, YouTube Premium) tend to be higher than in other countries.[1]

Asian countries (e.g., the Philippines, Thailand, India, Indonesia, Vietnam, etc.) ranked high in both time spent and proportion of consumption. However, despite being an Asian country, Japan recorded lower figures in average time spent (5.4 hours), proportion of consumption (15.7%), and expenditure (8.1 USD). The UAE ranked among the top countries in all items indicating consumption volume, including time spent, proportion of consumption, and expenditure. In particular, the UAE's expenditure reached 37.0 USD, which is more than twice the average of the 28 countries surveyed.

Figure 2-38 Comparison of Average Time Spent on Overall Korean Cultural Content by Country

BASE: Total, Unit: hours/month

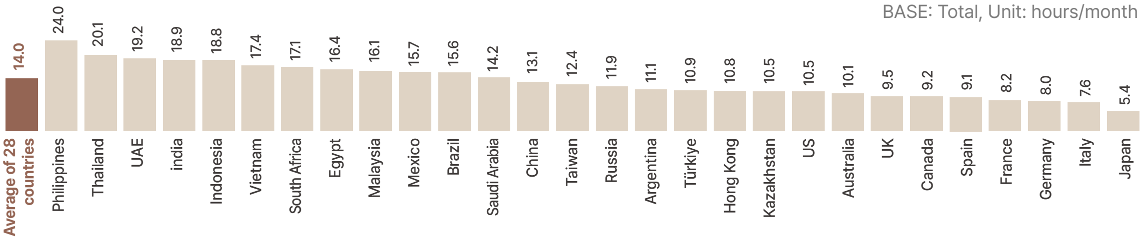


Figure 2-39 Comparison of Average Proportion of Consumption on Overall Korean Cultural Content by Country

BASE: Total, Unit: %

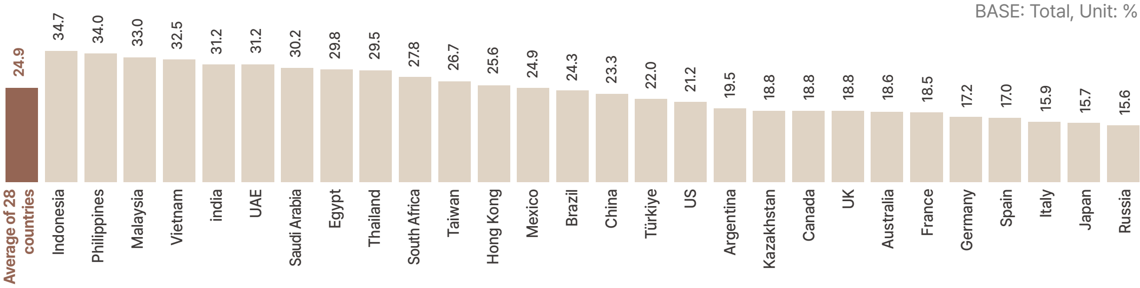
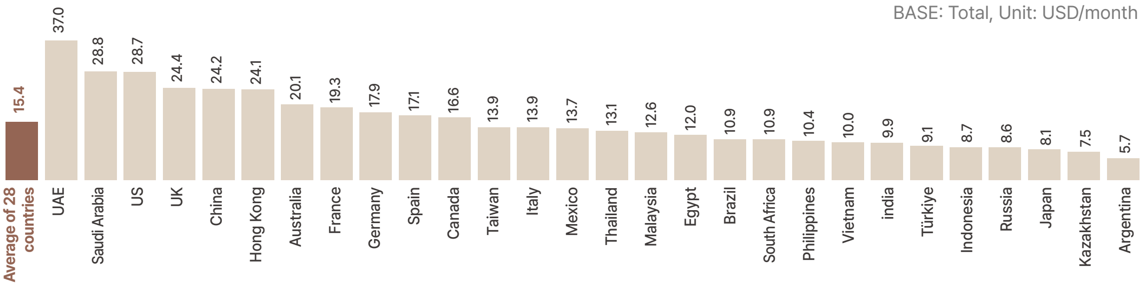


Figure 2-40 Comparison of Expenditure on Overall Korean Cultural Content by Country

BASE: Total, Unit: USD/month



1 According to media reports, Netflix adopted a policy requiring additional payment for password sharing in 2023. Additionally, in the US, major OTT platforms such as HBO Max, Disney+, and Hulu raised their subscription fees. As a result, the average monthly OTT subscription fee per household in the US was reported to be 29.99 USD. In the UK, as of the second quarter of 2024, households spent a monthly average of 55.59 GBP (69.31 USD) on pay TV and approximately 25–50 GBP on streaming services.

Source: *Korea Economic Daily*. "Soaring OTT Subscription Fees: The Era of 'Streamflation' Begins" (Aug. 16, 2023). https://www.hankyunq.com/article/202308163144i
Reliant. "How Much Do We Spend on TV Streaming Services in the UK?" https:"www'reliant'co.uk/bloq/how-much-do-^

Access Channels by Type of Korean Cultural Content

Approximately 80% of respondents accessed audiovisual Hallyu content through "online/mobile platforms," while the influence of "TV" showed a steadily declining trend. For lifestyle content such as fashion, beauty, and food, "SNS videos/photos" were identified as the primary channels of exposure, with a noticeable increase in access rates via "online/offline sales channels."

8 out of 10 consumers accessed content online, while TV access rates continued to decline.

Approximately 8 out of 10 consumers (79.8–86.4%) accessed audiovisual content such as dramas, variety shows, movies, and music through "online/mobile platforms." Meanwhile, only about 37.5% to 44.5% of consumers accessed such content via "TV."

Over the past five years, "online/mobile platforms" showed the greatest growth as channels of exposure and access for variety shows, although access rates increased for all five content types compared with 2020. Meanwhile, "TV" showed a notable decline, decreasing from 50.4–68.0% in 2020 to 37.5–44.4% in 2024.

While the increase in the use of "online/mobile platforms" to consume Korean video content is slowing, it is worth noting that access via "TV" has continued to decline. As emphasized in PwC's *Global Entertainment & Media Outlook*, given that the main consumer base of Hallyu content is in their 30s or younger, the diminishing influence of "TV" is expected to intensify even further.

Figure 2-41 Comparison of Audiovisual Content Access Channels 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)

BASE: Consumers who have experienced Korean cultural content by type, Unit: % of multiple responses

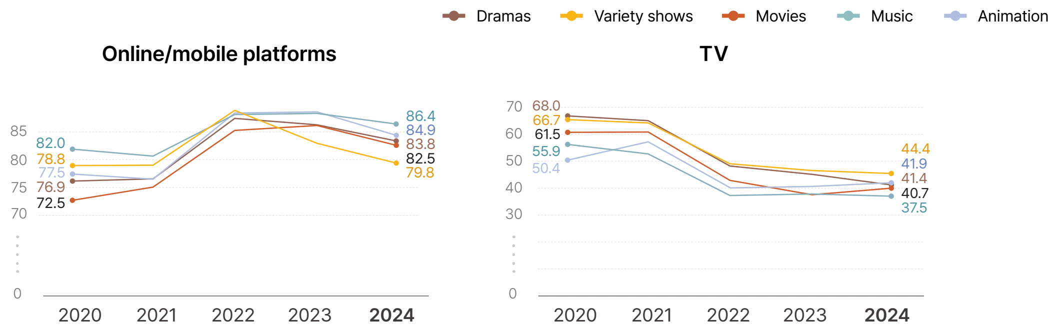
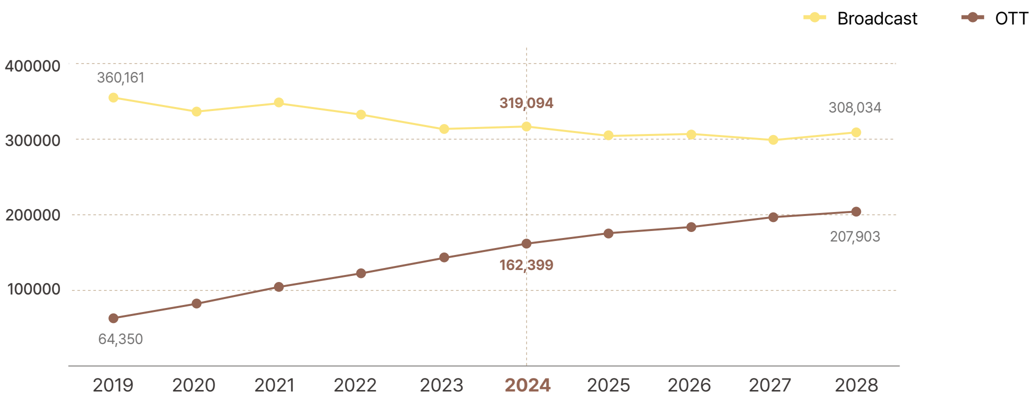


Figure 2-42 PwC Global Standard OTT/broadcast Market Size

Unit: million USD



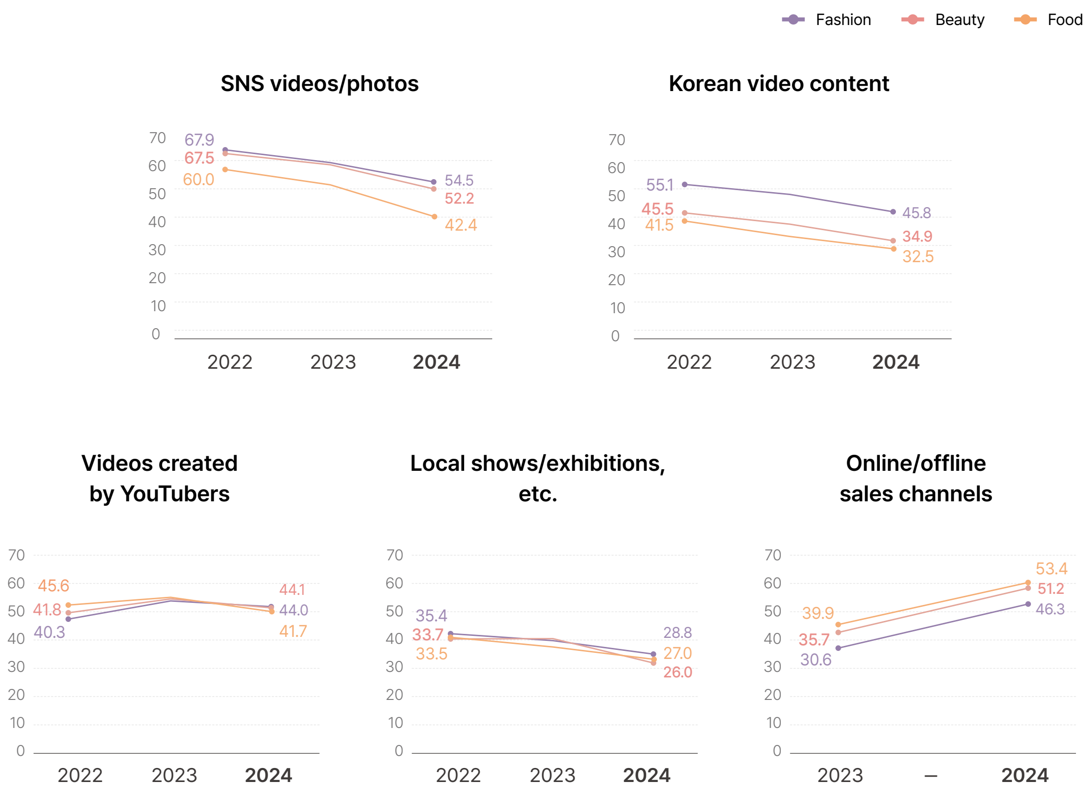
"SNS videos/photos" are the main access channel for fashion, beauty, and food. Notable increase in access rates via "online/offline sales channels."

"SNS videos/photos" (42.4–54.5%) were found to be the primary channels of exposure for lifestyle content such as fashion, beauty, and food, with a notable increase in access via "online/offline sales channels" compared with the previous year. Online channels of exposure and access such as "SNS videos/photos," "Korean video content," and "videos created by YouTubers" continued to fall in the 40–50% range, while "local shows/exhibitions, etc." recorded an access rate of 26.0–28.8%. The access rate via "online/offline sales channels" for fashion, beauty, and food was in the 30% range in 2023, but in 2024, it increased to 46.3–53.4%. Korean beauty and fashion brands are actively entering Shopee, the largest e-commerce platform in Southeast Asia. According to Shopee Korea, in 2024, orders for and sales of Korean products increased by 63% and 44%, respectively, compared with 2023. In particular, products such as VT Cosmetics' "Reedle Shot Essence," COSRX's "Acne Pimple Master Patch," and INGA's "Water Glow Lip Tint" became popular products in the Southeast Asian market, with orders in the beauty category increasing by 77% compared with 2023.
Samsung Fashion Institute identified "more active overseas expansion" as one of the top 10 issues in the fashion industry for 2025, and there have been continuous reports of domestic fashion brands expanding not only into China and Southeast Asia but also into Europe and the Middle East. Korean food is also becoming more accessible, with news of a Korean diner opening in New York City and the rising popularity of convenient foods such as gimbap and ramen. These proactive market expansion strategies in the fashion, beauty, and food industries appear to have influenced the survey results.

Figure 2-43 Comparison of Lifestyle and Cultural Content Access Channels Over the Last 3 Years by Year

Q. Please select all the channels through which you usually access Korean fashion products/styles or images/videos. (The same question asked for beauty and food products/videos.)

BASE: Consumers who have experienced Korean cultural content by type, Unit: % of multiple responses



Changes in Perceptions Toward Korea After Encountering Korean Cultural Content 3

After encountering Korean cultural content, 67.1% of respondents reported a more positive perception of Korea,with notably high proportions in the Philippines, India, and the UAE. In European and American countries, the level of positive change was relatively lower, while in Japan the most common response was "no change."

Approximately 67.1% of respondents reported a more positive perception of Korea after encountering Hallyu.

When asked how their perception of Korea changed after encountering Korean cultural content, 67.1% responded that it became "more positive," 28.5% said "no change," and 4.4% reported that it became "more negative." Looking at trends over the past five years, the proportion of those with a "more positive" perception increased from 58.8% in 2020 to 67.1% in 2024.

By country, over 80% of respondents in the Philippines (85.1%), India (83.8%), and the UAE (82.0%) reported a "more positive" perception of Korea after encountering Korean cultural content. Strong positive changes were also observed in Saudi Arabia (79.6%), Egypt (79.3%), and Vietnam (78.9%). In contrast, European and American countries such as Italy (51.9%), France (54.5%), and Canada (56.8%) showed relatively lower proportions of "more positive" responses. Meanwhile, in Japan, proportion indicating "no change" (60.2%) surpassed that for "more positive" (31.0%), and China had the highest "more negative" responses at 11.4%.

Figure 2-44 Comparison of Changes in Perceptions Toward Korea After Encountering Korean Cultural Content Over the Last 5 Years by Year

Q. How has your overall perception of Korea changed since you experienced Korean cultural contents?

1. Has become very negative / 2. Has become somewhat negative / 3. Has not changed / 4. Has become somewhat positive / 5. Has become very positive

BASE: Total, Unit: %

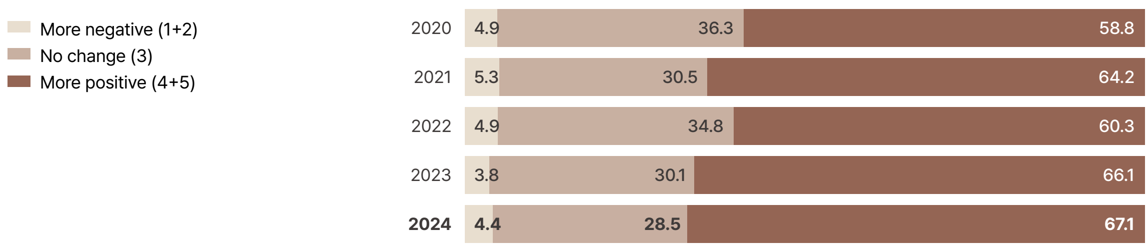
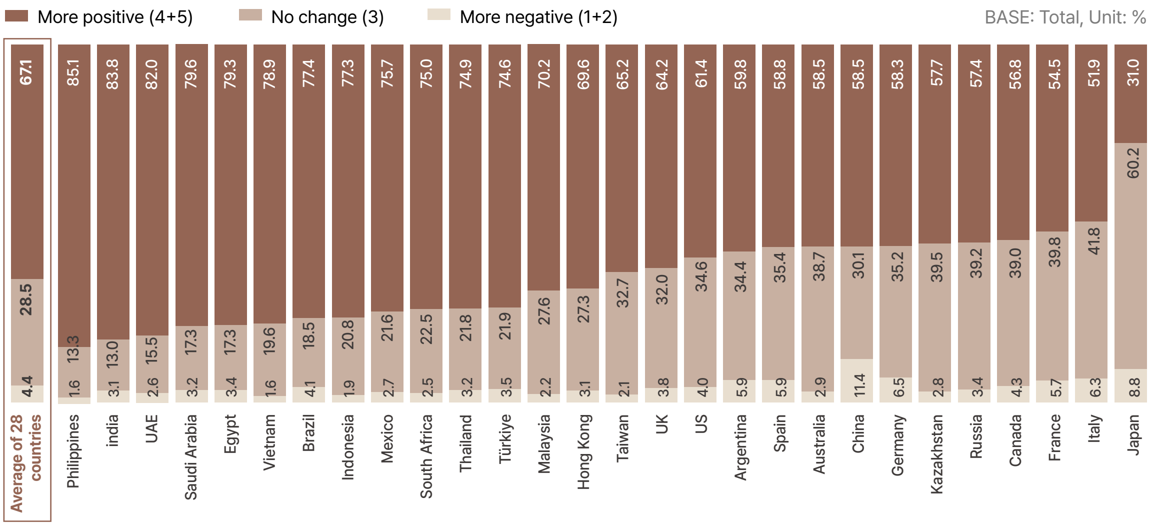


Figure 2-45 Comparison of Changes in Perceptions Toward Korea After Encountering Korean Cultural Content by Country

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Influence of Hallyu

3

SUMMARY

Among consumers with Hallyu experience, the purchase experience rate for Korean products and services was 95.4% for low-involvement items (e.g., food and cosmetics) and 81.6% for high-involvement items (e.g., home appliances and automobiles). Purchase rates were particularly high in Hong Kong, the UAE, and Saudi Arabia, while Japan showed relatively low rates. Food and cosmetics were the most commonly purchased categories, and alcohol consumption also showed an increasing trend.

Approximately 58.9% of respondents reported that they intended to purchase Korean products, with particularly high rates in the Middle East and Asia, including Saudi Arabia, Egypt, India, and the UAE. In contrast, the intent to purchase was relatively low in Japan and some European countries. The most important factors influencing purchase decisions were "quality" (61.5%) and "price" (43.4%), followed by "appearance in movies and TV shows" (22.1%).

Some 63.8% of consumers with Hallyu experience said that Hallyu influenced their use of Korean products and services, with especially high agreement in Indonesia, the Philippines, and India. Countries that cited "appearance in movies and TV shows" as a reason for purchasing Korean products and services also showed high recognition rates of the influence of Hallyu.

1 Korean Product/service Purchase Experience

Among consumers with Hallyu experience, 95.4% had purchased Korean low-involvement products or services within the past year, and 81.6% had purchased high-involvement products or services within the past four years. Purchase experience rates were high in Hong Kong and the Middle East, while Japan showed relatively low rates.

95.4% of respondents had purchased low-involvement products in the past year.

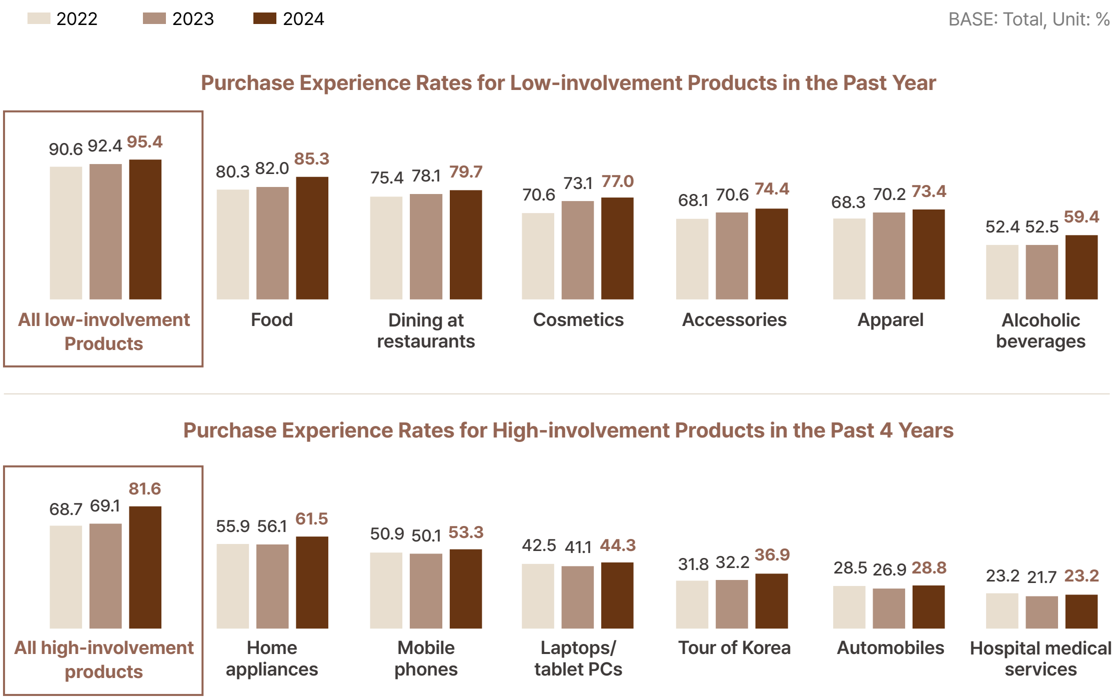
Among consumers with Hallyu experience, 95.4% reported having purchased low-involvement products in the past year. This figure represents an increase of approximately 3.0 percentage points from the previous year, with the purchase experience rate for low-involvement items showing a steady upward trend since 2022. The most commonly purchased item was "food" (85.3%), followed by "dining at restaurants" (79.7%) and "cosmetics" (77.0%).

Interestingly, despite regulations on alcohol in each country, the purchase experience rate for "alcoholic beverages" rose to 59.4%, a 6.9 percentage point increase from the previous year. According to the Korea Customs Service's trade statistics, soju exports reached 104.51 million USD (approximately 150 billion KRW) in 2024, up 3.1% (4.4 billion KRW) from the previous year. While local brands dominate the overseas market for beer, soju distinguishes itself as a uniquely Korean alcoholic beverage. The frequent appearance of soju in recent Korean cultural content is believed to have contributed to the rise in purchase experience.

Approximately 81.6% of respondents purchased high-involvement products within the past 4 years.

Among consumers with Hallyu experience, 81.6% had purchased high-involvement Korean products or services such as home appliances, automobiles, or tourism within the past four years. Purchase experience rates were highest for "home appliances" (61.5%) and "mobile phones" (53.3%), both of which exceeded 50%. In contrast, "hospital medical services" (23.2%), which have more specific target users, recorded the lowest rate. "Automobiles" (28.8%), which have a longer purchase cycle, also showed a relatively low experience rate.

Figure 2-46 Comparison of Korean Product/service Purchase Experience Over the Last 3 Years by Year



High purchase rates of Korean products in Hong Kong, UAE, and Saudi Arabia.

By country, the purchase experience rate for Korean low-involvement products (e.g., food and cosmetics) within the past year was highest in Hong Kong (99.4%), the UAE (99.1%), Vietnam (98.9%), Saudi Arabia (98.9%), and Malaysia (98.8%), while Japan (87.0%) and Italy (87.6%) showed relatively lower rates.
As for high-involvement Korean products/services (e.g., home appliances, automobiles, and tourism) purchased within the past four years, the highest rates were observed in Egypt (95.5%), the UAE (95.4%), and Saudi Arabia (95.1%), while relatively lower rates were recorded in Japan (44.8%), Canada (66.8%), and Australia (68.8%). In general, the Middle East showed higher purchase experience rates for high-involvement products/services, while Japan and Anglosphere countries showed lower rates. Hong Kong, the UAE, and Saudi Arabia showed higher purchase experience rates for both low- and high-involvement Korean products compared with other countries, while Japan recorded the lowest purchase experience rate among all 28 countries.

Figure 2-47 Comparison of Low-involvement Korean Product/service Purchase Experience Within the Past 1 Year by Country

BASE: Total, Unit: %

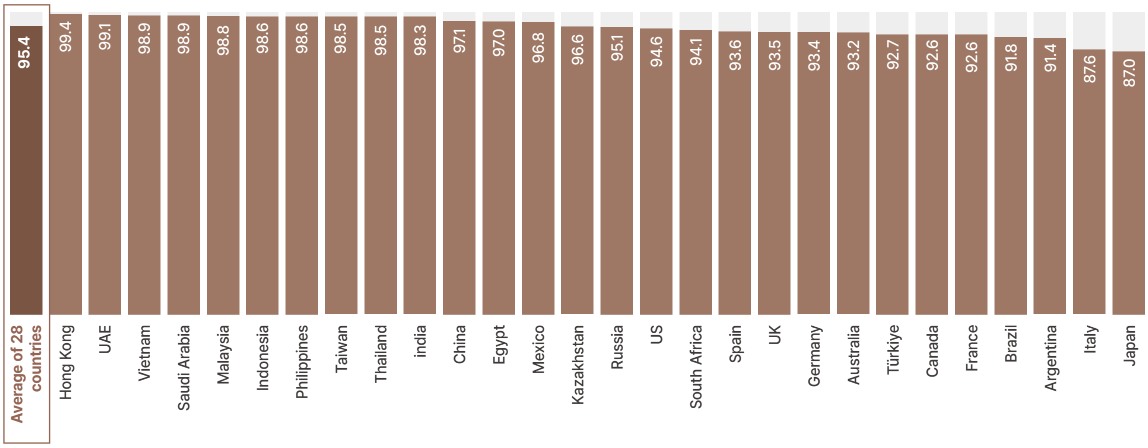
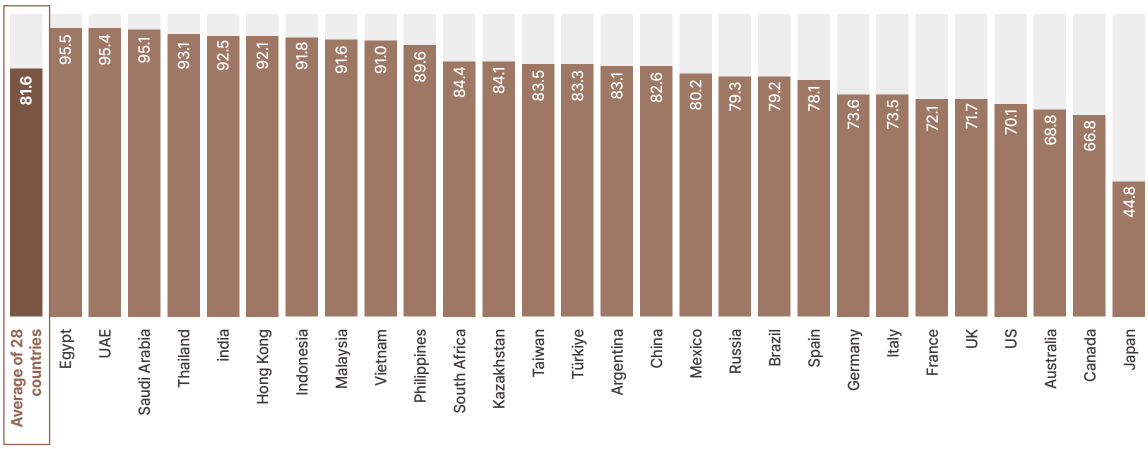


Figure 2-48 Comparison of High-involvement Korean Product/service Purchase Experience Within 4 Years by Country

BASE: Total, Unit: %



2 Intent to Purchase Korean Products/services

Approximately 58.9% of consumers with Hallyu experience expressed an intent to purchase Korean products. In general, intent to purchase was higher in the Middle East and Asia and relatively lower in Japan and Europe. While food (66.2%) was the most popular category, respondents also reported high intention to visit Korea (64.1%) and dine at Korean restaurants (64.0%).

58.9% of participants expressed their intention to purchase Korean products.

When asked whether they intend to purchase Korean products/services, 58.9% of consumers with Hallyu experience responded that they "have intent to purchase." Meanwhile, 31.5% answered "neutral," and 9.7% responded that they "have no intent to purchase." Over the past five years, the share of those who "have intent to purchase" grew by 14.8 percentage points, increasing from 44.1% in 2020 to 58.9% in 2024. Although there have been short-term fluctuations, data indicate a steady upward trend in the intent to purchase Korean products/services.

By gender, 59.5% of men and 58.2% of women said that they "have intent to purchase," with a slightly higher proportion of men giving this response. By age, those in their 30s recorded the highest rate at 61.7%, followed by those in their 20s (59.7%) and teens (58.1%), showing relatively high intent to purchase among consumers in their 30s and younger.

Figure 2-49 Comparison of Changes in Overall Purchase Intentions Regarding Korean Products/services Over the Last 5 Years by Year

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

BASE: Total, Unit: %

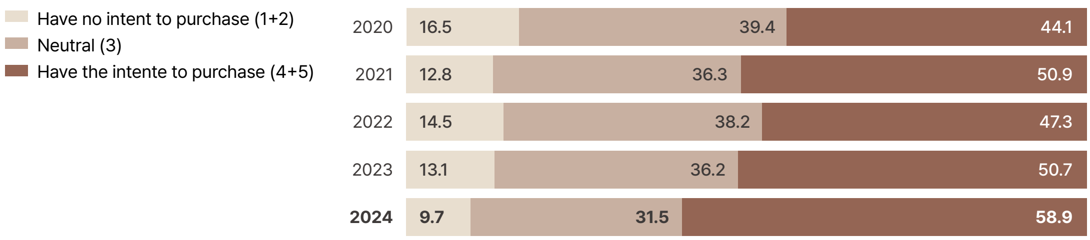
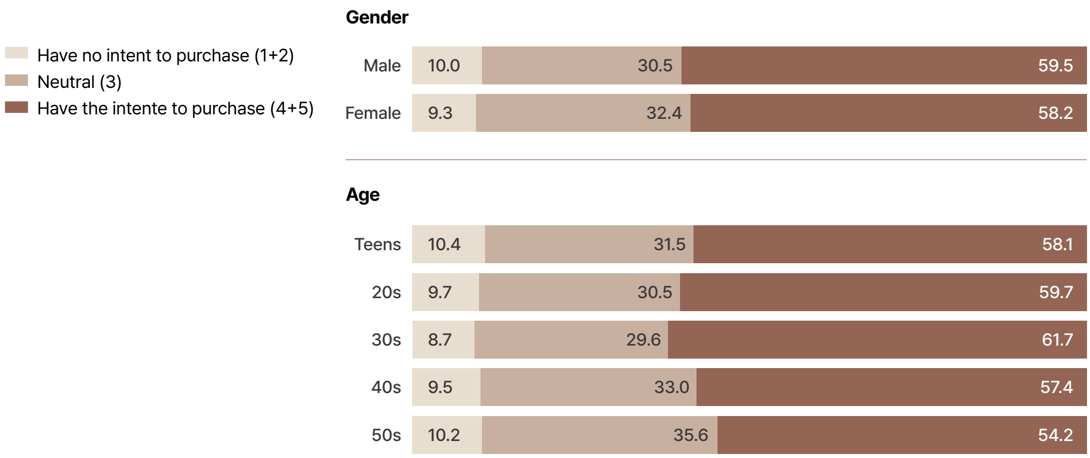


Figure 2-50 Comparison of Overall Purchase Intentions for Korean Products/services by Gender and age

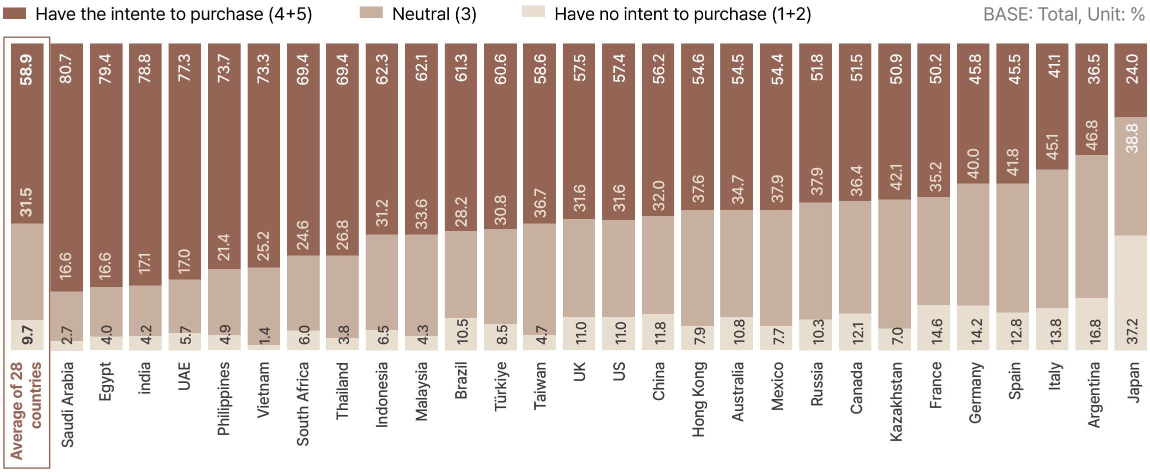
BASE: Total, Unit: %



The intent to purchase Korean products is particularly high in the Middle East and Africa.

Countries with the highest overall rates of “have intent to purchase” Korean products were Saudi Arabia (80.7%), Egypt (79.4%), India (78.8%), and the UAE (77.3%), while Japan (24.0%), Argentina (36.5%), Italy (41.1%), and Spain (45.5%) reported low purchase intentions. Notably, Japan recorded a 37.2% rate of “have no intent to purchase,” nearly four times higher than the average of all 28 countries (9.7%). In Argentina (46.8%) and Italy (45.1%), the proportion of “neutral” responses exceeded that of “have intent to purchase.” Overall, intent to purchase Korean products was high in the Middle East and Asia, and generally lower in Japan and Europe.

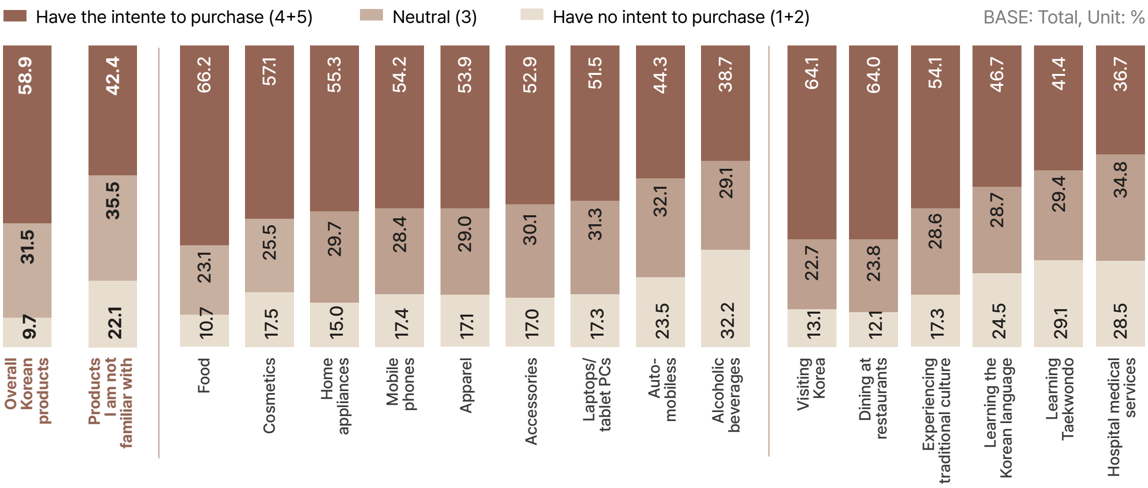
Figure 2-51 Comparison of Overall Purchase Intentions for Korean Products/services by Country



High intent to purchase food and visit Korea.

By product category, “food,” which also had a high purchase experience rate, showed the highest intent to purchase at 66.2%, followed by “cosmetics” (57.1%) and “home appliances” (55.3%). In the service sector, “visiting Korea” (64.1%) and “dining at restaurants” (64.0%) showed high intent to purchase. Approximately 42.4% of respondents reported having an intent to purchase Korean products regardless of their familiarity with anything outside certain products or services.

Figure 2-52 Purchase Intentions by Korean Products/services



3 Reasons for Purchasing Korean Products/services

The most commonly cited reason for purchasing Korean products/services was "quality" (61.5%). "Appearance in movies and TV shows" was selected by 22.1% of respondents, an increase from 2023. Countries reporting relatively high proportions for "appearance in movies and TV shows" included Thailand, India, the UAE, China, and Vietnam.

22.1% purchased Korean products because of their "appearance in movies and TV shows." Influence of "movies and TV shows" was relatively high in Thailand, India, and the UAE.

When respondents who had purchased Korean products or services were asked for reasons for their purchase (multiple responses allowed), "quality" (61.5%) was the most frequently cited response. This was followed by "price" (43.4%) and "convenience in use" (32.6%), while "appearance in movies and TV shows" was selected by 22.1%.

Compared with 2023, the proportions of respondents identifying factors with a direct impact on purchasing experience and decisions such as "price," "convenience in use," and "convenience in purchase" have increased, as has the proportion of respondents identifying "appearance in movies and TV shows."

By country, the proportion of respondents who cited "appearance in movies and TV shows" as a reason for purchase was highest in Thailand (33.1%), India (31.0%), the UAE (27.5%), China (26.9%), and Vietnam (26.9%). In contrast, Russia (10.0%), Kazakhstan (10.5%), and Japan (10.8%) recorded figures significantly below the average of 28 countries (22.1%).

Figure 2-53 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.

BASE: Consumers with Korean product/service purchase experience, Unit: %, multiple responses

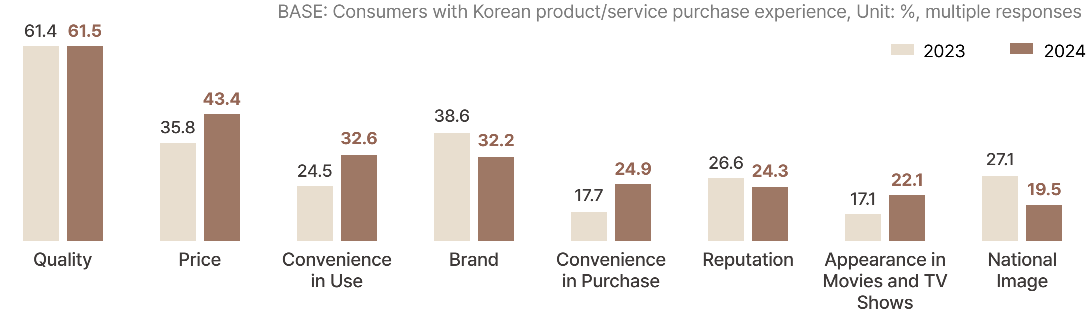
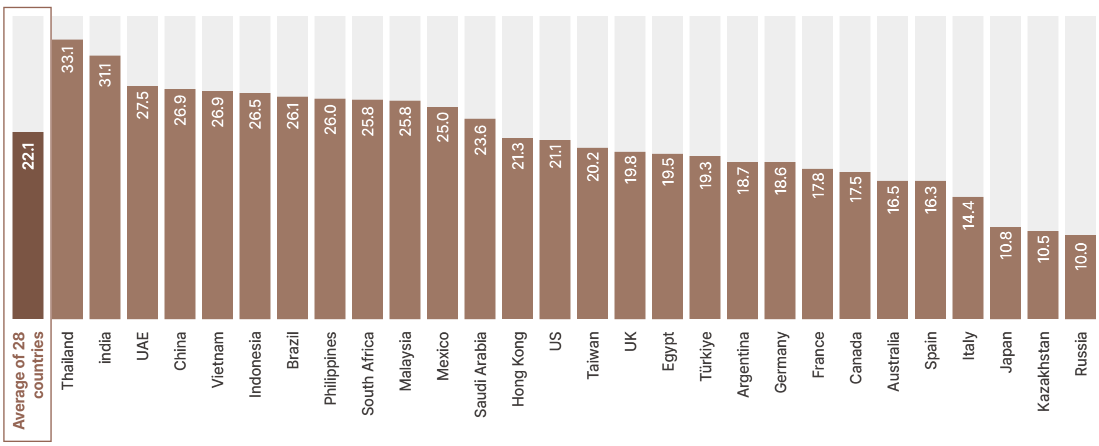


Figure 2-54 Comparison of Proportions of Respondents for "Appearances in Movies or TV Programs" as a Reason for Purchasing Korean Products/services by Country

BASE: Consumers with Korean product/service purchase experience, Unit: % of multiple responses



Influence of Hallyu on the Use of Korean Products/services

Some 63.8% of consumers with Hallyu experience responded that Hallyu influences their use of Korean products/services. The perceived influence of Hallyu was particularly high in Indonesia, the Philippines, India, Vietnam, and Saudi Arabia.

Approximately 63.8% of respondents said that Hallyu influences their purchase and use.

When asked how much Hallyu influences their purchase and use of Korean products/services, 63.8% of respondents said that it "has an influence," while 28.7% said "neutral" and 7.5% answered that it "has no influence."

By country, about 8 out of 10 respondents in Indonesia (82.7%) and the Philippines (81.6%) said that they were influenced by Hallyu. High proportions of respondents selecting "has an influence" were also recorded in India (79.5%), Vietnam (76.3%), and the UAE (75.3%). Meanwhile, Russia (45.5%), Kazakhstan (45.5%), Italy (47.5%), and France (48.8%) reported relatively low perceived influence of Hallyu. In Japan, the "neutral" responses (42.7%) exceeded that of "has an influence" (35.9%), showing a different pattern compared to other countries. Countries where "appearance in movies or TV shows" was frequently cited as a reason for purchasing Korean products/services also showed a higher perceived influence of Hallyu than others. By gender, the proportion of respondents selecting "has an influence" was relatively higher among women (65.1%). By age group, the "has an influence" responses was highest among those in their 20s (68.2%).

Figure 2-55 Comparison of Perceived Influence of Hallyu on the Use of Korean Products/services by Country

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

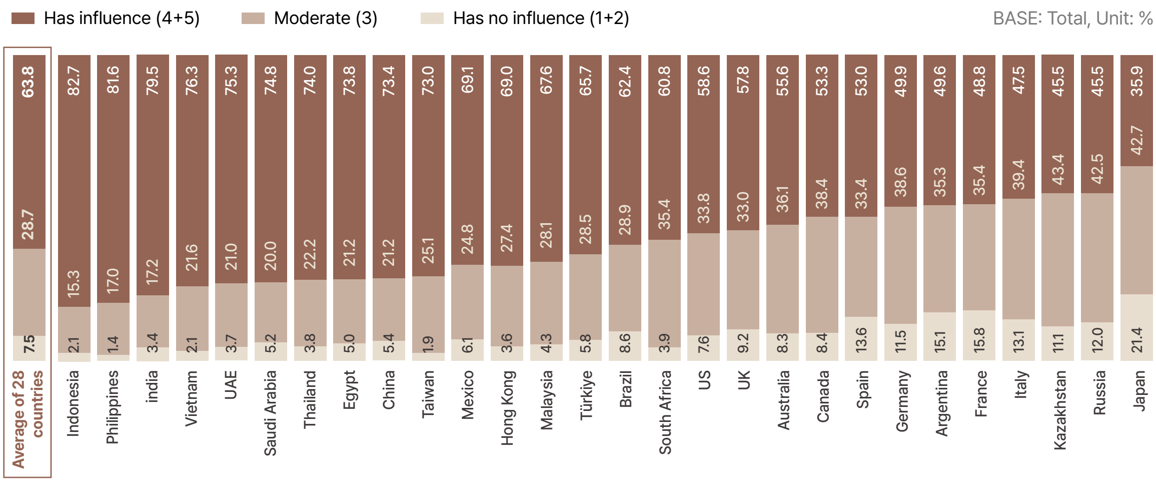
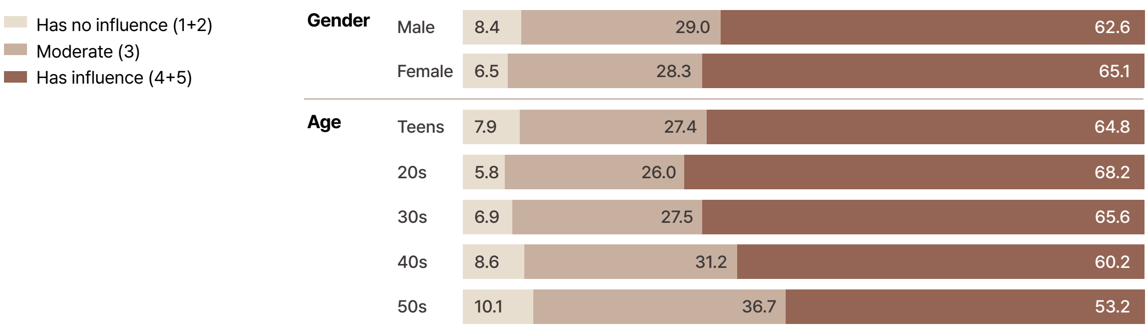


Figure 2-56 Comparison of Perceived Influence of Hallyu on the Use of Korean Products/services by Gender and age



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

12 Korean language

Shows >
K-Dramas
THE TRAUMA CODE
HEROES ON CALL
TOP 10
Signal
SQUID GAME
QUEEN of TEARS
When the Camellia Blooms
The Glory
STRANGER
Misaeng Incomplete life
ENCOUNTER
When the Phone Rings
CRASH LANDING ON YOU
Little Women
The Whirlwind
THE TRUNK
DESIGNATED SURVIVOR 60 DAYS
RECORD OF YOUTH
©NETFLIX

Dramas

DRAMA

SUMMARY

Korean dramas have maintained steady growth in the global market , showing particular strength in Asia, the Middle East, and Latin America. However, factors such as platform accessibility, localization quality, and cultural differences are expected to play a key role in sustaining global expansion.

In this survey, 69.6% of consumers with Hallyu experience reported having watched Korean dramas. Korean dramas ranked fourth among Hallyu cultural content, following food, movies, and music, and their global recognition has also grown. The proportion of respondents selecting “widely popular” was high in countries such as the Philippines (81.0%), Malaysia (71.1%), and Taiwan (66.9%), while that for “popular among a niche audience” was relatively higher in Russia (30.0%), Australia (29.4%), and Canada (28.8%).

The key factors promoting favorability toward Korean dramas were “solid stories” (26.9%) and “unique themes” (21.8%), with notable regional differences. There were high proportions of respondents selecting actors' visuals and storylines in the Asia-Pacific, for cultural experience elements in the Americas and Europe, and for the actors’ acting ability and narrative structure in the Middle East and Africa. In contrast, factors inhibiting favorability were “language barriers” and “issues with translation/ dubbing quality” (20.8%). In the Middle East, “lack of cultural diversity” and “long running time” were also mentioned as drawbacks.

Regarding the most preferred dramas, *Squid Game* (9.7%) ranked first for the fourth consecutive year, while *Queen of Tears* (6.5%) and *Lovely Runner* (1.8%) garnered significant attention among new releases in 2024. In 2024, romance dramas emphasizing emotional narratives emerged as a leading trend.

01 Experience Rate

Among respondents, 7 out of 10 have watched Korean dramas. Higher experience rates were reported among women and those in their 20s and 30s, and there was a notable increase among those in their 50s.

Among consumers with Hallyu experience, 69.6% reported having watched Korean dramas, an increase of 4.5 percentage points from 2023 (65.1%). Korean dramas ranked fourth in experience rate among all Hallyu cultural content categories, following food, movies, and music.

By country, experience rates of Korean dramas were high in Southeast Asian countries such as the Philippines (96.4%), Indonesia (94.1%), and Malaysia (93.6%). In contrast, experience rates were relatively low in Europe and the Anglosphere countries, including Germany (38.9%), Spain (42.6%), and Canada (43.0%).

By gender and age, women (72.7%) and consumers in their 20s (73.3%) and 30s (72.3%) showed higher experience rates. Experience rates increased across all gender and age groups compared with the previous year, with those in their 50s showing the greatest growth, increasing by 12.0 percentage points to 60.8%. This indicates growing interest in Korean dramas across a wider range of age groups.

Figure 2-57 Comparison of Korean Drama Experience Rates by Country

BASE: Total, Unit: %

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

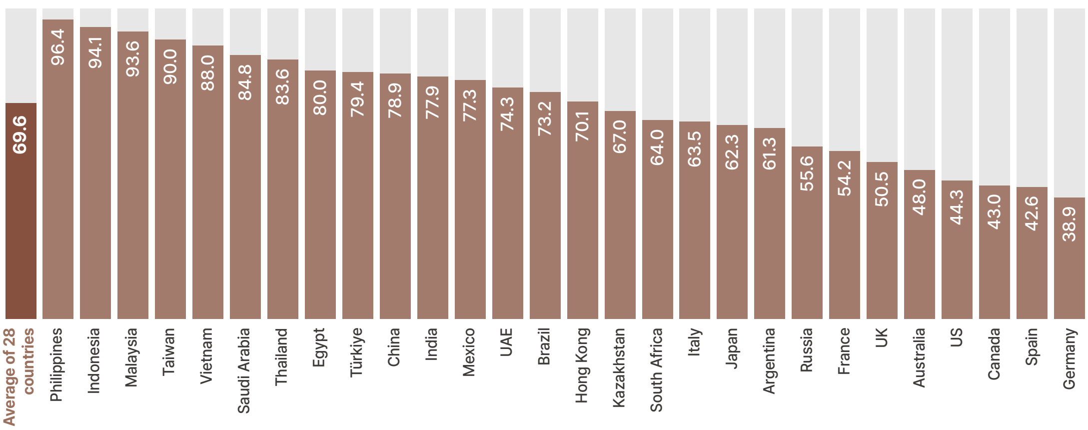
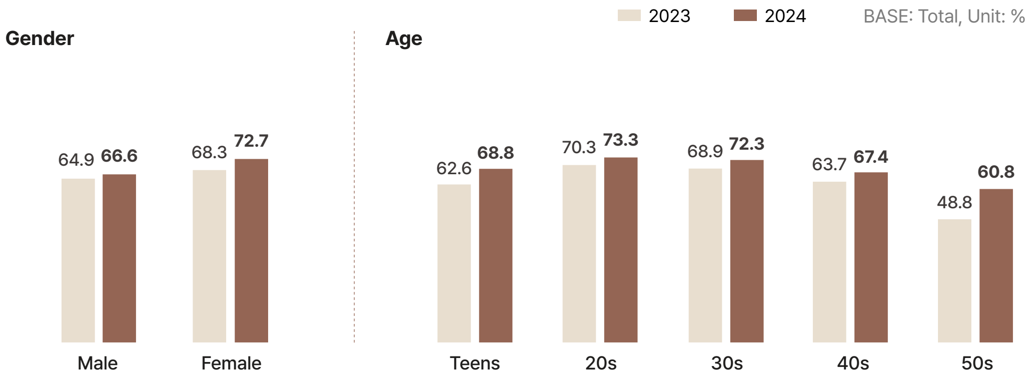


Figure 2-58 Comparison of Korean Drama Experience Rates Over the Last 2 Years by Gender and age

BASE: Total, Unit: %



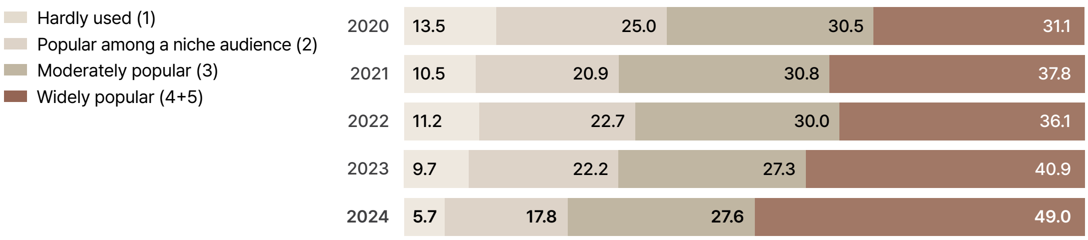
02 Popularity

An overall 49.0% of respondents perceived Korean dramas as "widely popular." The "widely popular" rate has increased steadily over 5 years.

Among consumers with Hallyu experience, 49.0% rated Korean dramas as "widely popular." This represents an increase of 8.1 percentage points compared with 2023 (40.9%). Among responses, "moderately popular" accounted for 27.6%, "popular among a niche audience" for 17.8%, and "hardly used" for 5.7%. Compared with the previous year, the proportions of respondents selecting "widely popular" and "moderately popular" increased, while those for "popular among a niche audience" and "hardly used" decreased.
Looking at changes in annual proportions of respondents selecting over the past five years, the "widely popular" rate rose by 17.9 percentage points from 31.1% in 2020, while "hardly used" and "popular among a niche audience" rates declined significantly.
Analysis of the compound annual growth rate (CAGR)1 of the "widely popular" rate from 2020 to 2024 showed that Korean dramas increased by an average of 9.5% per year, recording the highest growth rate. This indicates that Korean dramas are gradually gaining widespread global recognition and suggests strong potential for continued expansion.

Figure 2-59 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



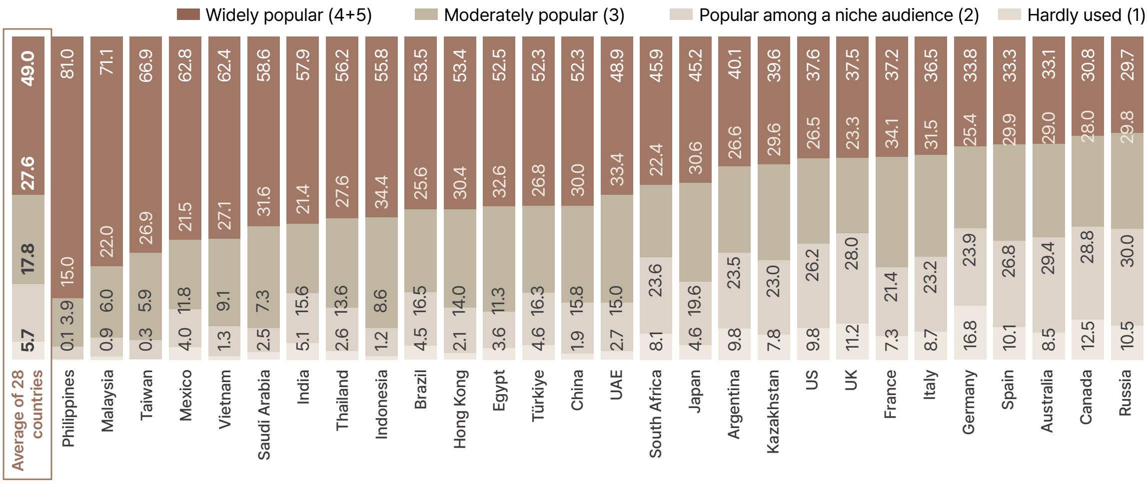
Proportions of respondents selecting "widely popular" were high in Asia such as the Philippines and Malaysia. Consumption was centered on niche audiences in Europe and the Anglosphere.

Countries with high proportions of respondents selecting "widely popular" included the Philippines (81.0%), Malaysia (71.1%), and Taiwan (66.9%). Notably, the Philippines, newly included in this year's survey, recorded the highest proportion of respondents selecting "widely popular." Malaysia also showed a significant increase, rising 15.9 percentage points from 55.8% in 2023.
Meanwhile, six countries, including Russia (30.0%), Australia (29.4%), and Canada (28.8%), showed higher proportions of respondents selecting "popular among a niche audience" compared with other countries. Therefore, in some European and Anglosphere countries, Korean dramas are still perceived primarily as content centered on a niche audience. However, rapid rises in popularity, as in the case of Malaysia, suggest strong potential for expansion to "widely popular" status in these countries in the future.

1 Compound annual growth rate (CAGR) is the mean annual growth rate over a period longer than one year and is calculated as follows: [[Ending value / { Beginning value (1/(End year - Start year))}] - 1] × 100 %

Figure 2-60 Comparison of Korean Drama Popularity by Country

BASE: Total, Unit: %



Local News

"The most popular drama in Indonesia this year was *Queen of Tears*. The lead actors also visited Indonesia this year and held fan meetings. At the 2024 AACA (Asian Academy Creative Awards), it won the best direction award, and at the 28th ATA (Asia Television Awards) it also won the best drama award, sweeping the two major Asian content awards."

Indonesia KOFICE Jakarta Overseas Correspondent

"In June 2024, the Korean drama *Crash Landing on You* became hugely popular in Japan and was adapted into a musical. In December, five episodes of KBS Drama Special 2023 (including *Behind the Shadows* and *Polar Night*) were confirmed for their first broadcast in Japan, proving that various genres of Korean dramas are receiving love and attention in Japan. As more works featuring Korean and Japanese actors in lead roles, such as *Eye Love You*, emerge, awareness of Korean actors is also increasing."

Japan KOFICE Osaka Overseas Correspondent

"In Thailand, the Korean drama *Lovely Runner* ranked first as the most streamed drama on Viu in the last week of May 2024 and proved its popularity by holding a pop-up store event in Bangkok. *Marry My Husband* ranked within the top 10 on Amazon Prime Thailand and topped the 2024 Google Thailand trending search for overseas dramas."

Thailand KOFICE Bangkok Overseas Correspondent

"In China, no Korean dramas have aired since March 2023. Since early 2024, even the airing of Chinese remakes of Korean dramas has been implicitly restricted."

KOCCA China Beijing Business Center Director

"A wide variety of Korean dramas are drawing interest from local viewers through platforms such as Netflix and Disney+. In particular, the recently released *Squid Game 2* ranked no. 1 on Netflix Canada. According to Canada's Parrot Analytics, from 2024 to early 2025, demand for Korean thrillers such as the *Squid Game* series was 163.7 times higher than that of the average TV series—a level not seen since the final season of HBO's *Game of Thrones* in 2019."

Canada KOTRA Toronto Trade Officer

"According to Prestige HK, the most popular Korean romance dramas in Hong Kong in 2024 were *Lovely Runner* and *Queen of Tears*, ranking 1st and 2nd, respectively. Both shows received overwhelming love from Hong Kong fans during the first half of the year. I believe 2024 was truly a golden era for Korean dramas in Hong Kong."

Hong Kong KOFICE Overseas Correspondent

03 Popular Foreign Dramas

Korean dramas ranked first among preferred foreign dramas despite intensifying competition.

The gap is narrowing in Asia and the Americas, and there is growth in the Middle East and Africa.

Among the 28 surveyed countries, "Korean dramas" (37.0%) were selected as the most preferred foreign dramas, but the preference rate declined by 2.6 percentage points compared with the previous year's (39.6%), narrowing the gap with those from "the US" (30.4%). In contrast, preference for drams from "Japan" (8.6%) and "China" (7.6%) increased by 2.3 and 1.9 percentage points, respectively, indicating intensified competition among Asian content.

In the Asia-Pacific (46.0%), although preference for "Korea" decreased by 5.5 percentage points from the previous year (51.5%), it still maintained the top position. In the Americas, the gap between "Korea" (32.9%) and "the US" (31.3%) narrowed sharply from 14.8 percentage points last year to just 1.6 percentage points this year. Meanwhile, in the Middle East, preference for Korean dramas increased by 5.2 percentage points, that is, from 31.9% to 37.1%, taking the top spot.

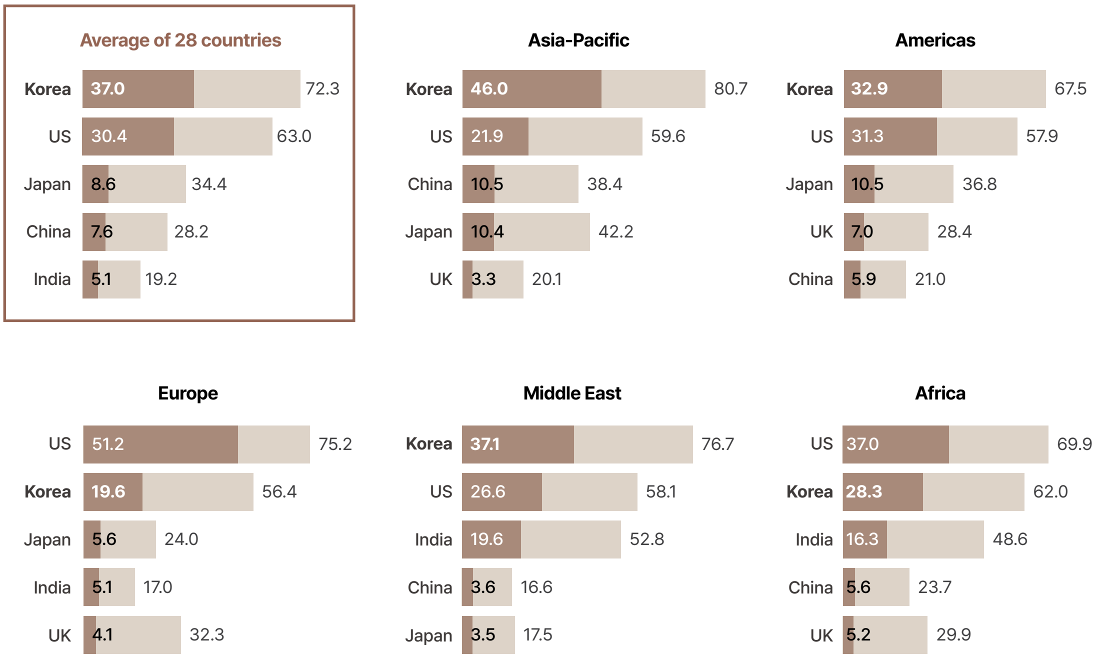
In Europe, "the US" (51.2%) was 2.6 times higher than "Korea" (19.6%), but "Korea" showed the highest preference among Asian content, with a rate 3.5 times higher than that of "Japan" (5.6%). In Africa, "the US" (37.0%) still led "Korea" (28.3%) by 1.3 times, but preference for Korean dramas rose 5.8 percentage points from the previous year (22.5%), showing steady growth.

Figure 2-61 Comparison of Popular Foreign Dramas by Continent

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).

1st choice   1st+2nd+3rd choices (multiple responses)   BASE: Consumers who experienced Korean dramas, Unit: %



04 Consumption Volume

Viewing time for Korean dramas increased.
The Philippines led in viewing time but fell below average in expenditure.

Consumers who had experienced Korean dramas reported an average monthly viewing time of 17.5 hours per person, up 0.6 hours from 2023 (16.9 hours). The Philippines (31.1 hours), Thailand (28.0 hours), and Indonesia (25.5 hours) recorded the longest viewing times, with the Philippines logging nearly twice the average of the 28 surveyed countries. In contrast, viewing times in Japan (5.7 hours), Italy (8.4 hours), France (8.5 hours), and Germany (9.2 hours) remained below 10 hours, placing them at the lower end.
Korean dramas accounted for 27.6% of all drama content consumption across the 28 countries. The proportion was highest in Indonesia (40.8%), the Philippines (40.6%), and Malaysia (38.8%), and relatively low in Germany (17.2%), Japan (16.7%), and Italy (15.8%).
Expenditure related to Korean dramas increased from 7.1 USD in 2023 to 9.8 USD in 2024. Countries in the Middle East and the Anglosphere ranked highest in expenditure. However, the Philippines, which ranked first in experience rate, popularity, viewing time, and favorability toward Korean dramas, spent only 5.9 USD-below the overall average-placing it in the lower range.

Figure 2-62 Comparison of Time Spent 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.

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

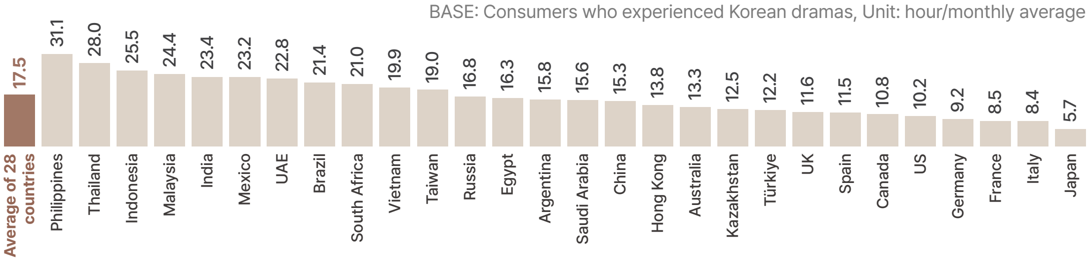


Figure 2-63 Comparison of the Proportion of Korean Drama Consumption by Country

BASE: Consumers who experienced Korean dramas, Unit: %

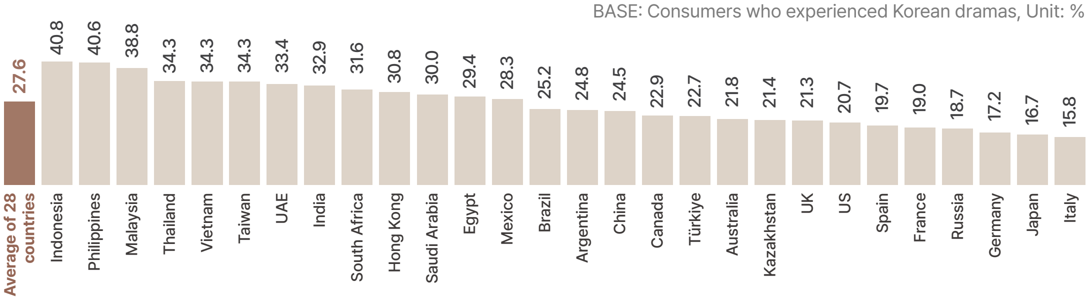
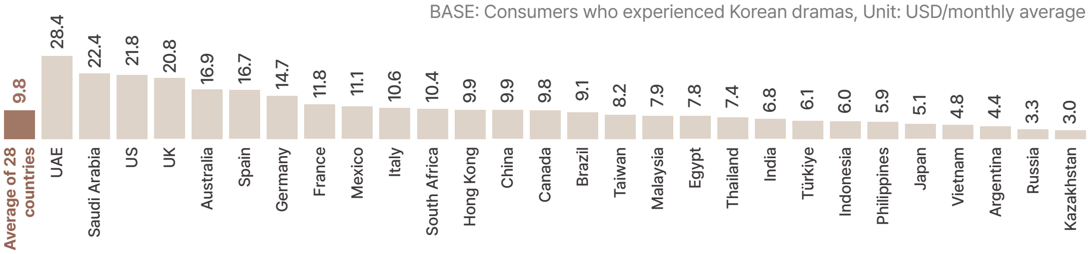


Figure 2-64 Comparison of Expenditure on Korean Dramas by Country

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



05 Favorability

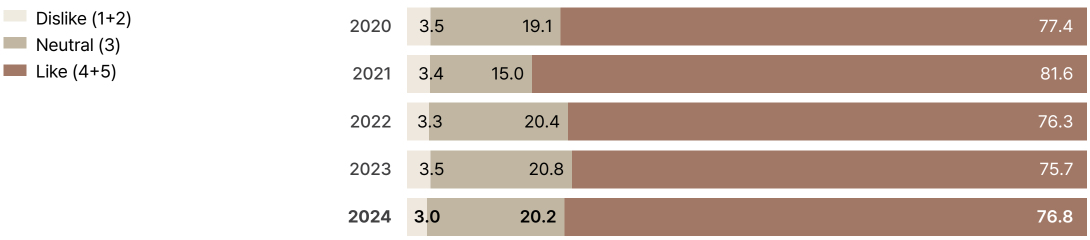
At 76.8%, favorability toward Korean dramas has remained stable over the last 5 years.

In 2024, 76.8% of consumers who experienced Korean dramas responded that they "liked" Korean dramas. This represents a 1.1 percentage point increase from the previous year (75.7%) and marks the third highest favorability after Korean variety shows and beauty. In particular, favorability toward Korean dramas has remained in the high 70% range for five consecutive years since 2021, when it reached 81.6%. In contrast, "neutral" accounted for 20.2%, and "do not like" was just 3.0%, indicating an overall trend of positive evaluation.

Figure 2-65 Comparison of Favorability Toward Korean Dramas Over the Last 5 Years by Year

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

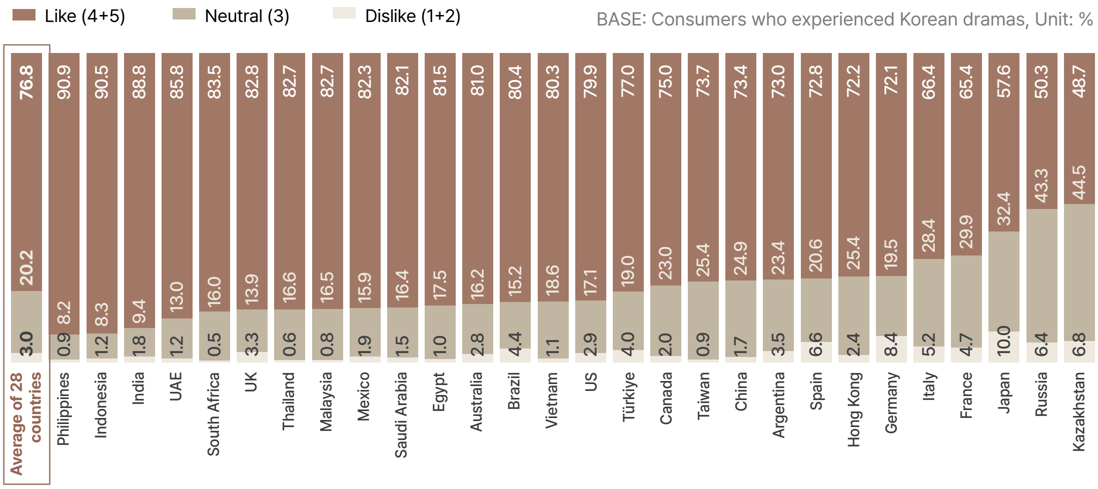
BASE: Consumers who experienced Korean dramas, Unit: %



Countries with the highest proportions of respondents selecting "like" were the Philippines (90.9%), Indonesia (90.5%), and India (88.8%), indicating a tendency for higher favorability in countries with high Korean drama consumption. In contrast, Kazakhstan (48.7%), Russia (50.3%), and Japan (57.6%) showed relatively lower favorability. Kazakhstan (44.5%) and Russia (43.3%), which are ranked lower, recorded high proportions of respondents selecting "neutral," but the "like" rates increased by 6.5 and 3.1 percentage points, respectively, compared with the previous year's. These results reflect a growing trend of positive evaluation. At the same time, the "do not like" rates declined (Kazakhstan at 6.8% and Russia at 6.4%), suggesting a gradual improvement in perceptions of Korean dramas.

Figure 2-66 Comparison of Favorability Toward Korean Dramas by Country

BASE: Consumers who experienced Korean dramas, Unit: %



06 Factors Promoting and Inhibiting Favorability

"Solid stories" and "various materials" are key factors promoting favorability. "Cultural experience" was emphasized in the Americas and Europe, and "narrative structure" in the Middle East and Africa.

The top reasons (1st + 2nd choices) for liking Korean dramas were "The story is well-structured and solid" (26.9%) and "Covers various materials or genres" (21.8%). In particular, "Covers various materials or genres" showed a significant increase compared with the previous year's.

By continent, in the Asia-Pacific, "The story is well-structured and solid" (29.6%) and "The actors have attractive looks" (25.8%) continued to rank at the top, the they did last year. "Covers various materials or genres" (21.3%) ranked third, indicating growing attention to the expansion of materials and genres in Korean dramas. In the Americas, "The love stories are innocent" (28.5%) was the most cited reason, as it was in 2023. The proportion of respondents selecting "Can indirectly experience Korean lifestyle and culture" (24.0%) as a factor promoting favorability increased, reflecting a trend of growing cultural interest. Similarly, in Europe, this factor rose to first place this year, suggesting that cultural experience through Korean dramas has become a more important factor.

In the Middle East and Africa, "The actors' acting ability is outstanding" (29.2% and 26.5%, respectively) remained the top factor, while "The story is well-structured and solid" (21.1% and 24.0%, respectively) rose to second place, indicating a strong preference for the narrative structure of Korean dramas.

In summary, Korean dramas have maintained their strengths in terms of storylines and themes while exhibiting region-specific factors promoting favorability-including diversity in genres and materials (Asia), experience of Korean culture (the Americas and Europe), and narrative structure (the Middle East and Africa)-and expanding their influence in the global market.

Inconveniences include language barriers and translation quality. Cost burden and cultural differences also have significant impact.

The key factors inhibiting favorability toward Korean dramas were "The Korean language is difficult and unfamiliar" (22.1%) and "Inconvenient to watch with translated subtitles/dubbing" (20.8%), indicating that language barriers still serve as the biggest obstacle. In addition, "Costs too much to access" (12.1%) entered the rankings, highlighting that viewing costs are becoming an increasingly important factor. This is likely due to heightened sensitivity to rising subscription fees for global OTT services such as Netflix.

By continent, language barrier issues were commonly cited across most regions. The proportion of respondents selecting "The Korean language is difficult and unfamiliar" increased compared with the previous year's in the Asia-Pacific (19.2%), the Americas (24.9%), the Middle East (27.5%), and Africa (30.0%), with the Middle East and Africa showing higher proportions of respondents selecting than other continents. In Europe, "Inconvenient to watch with translated subtitles/dubbing" (26.2%) was identified as the biggest factor inhibiting favorability, suggesting that viewing environment matters more than the language itself. In the Middle East, "Lack of consideration for cultural diversity" (16.8%) and "Inappropriate language and behavior by the cast and staff" (13.7%) were key factors, indicating that cultural differences and certain controversies can affect the image of Korean dramas. Overall, language barriers and translation quality were cited as the most crucial issues, while in some regions, cost burden and cultural differences also had an influence, highlighting the growing importance of improving subtitles and dubbing, as well as implementing localization strategies.

Lack of cultural diversity and cultural discomfort with “social class” and “lifestyle and customs.”

Regarding inappropriate or inadequate aspects of cultural diversity representation, the most common responses were “social class” (32.3%), “lifestyle and customs” (30.1%), and “traditional culture” (26.9%). In the Asia-Pacific, “social class” (39.2%) was 6.9 percentage points higher than the average of the 28 surveyed countries. In the Middle East, “lifestyle and customs” (35.7%) exceeded the average by 5.6 percentage points, suggesting relatively heightened sensitivity in this area. In Africa, “religion” (38.5%) was cited as the biggest factor of discomfort, implying that the exclusion of religious elements or the way religion is portrayed in Korean dramas may feel unfamiliar or inappropriate. In the Americas, the most frequently mentioned issue was the depiction of “sexual identity” (37.6%), likely reflecting the perception that Korean dramas do not adequately reflect more open sexual cultures and respect for diversity.

Table 2-11 Top 3 Most Uncomfortable Aspects of Cultural Diversity Representation in Korean Dramas by Continent

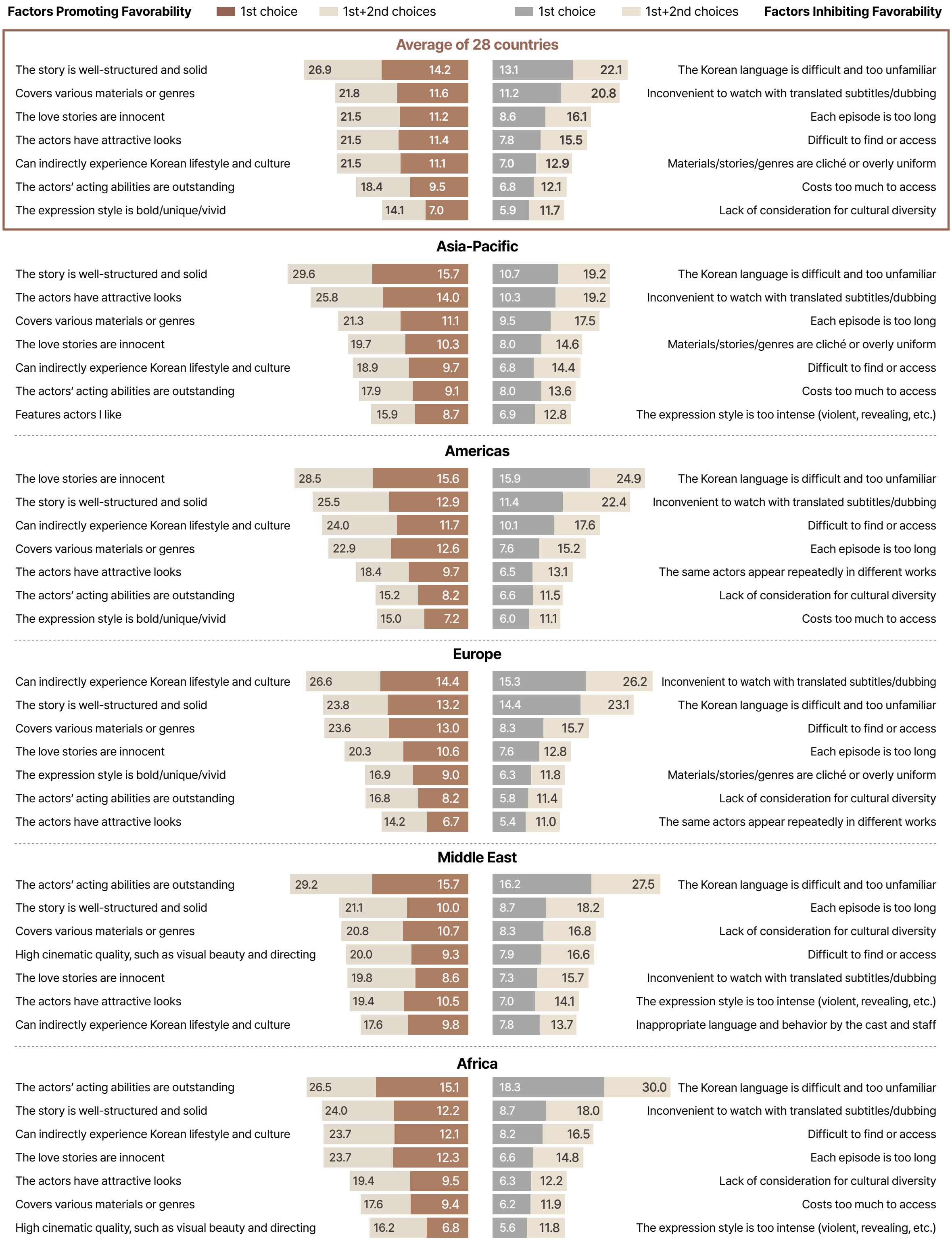
BASE: Respondents who chose “Lack of consideration for cultural diversity” as a factor inhibiting favorability toward Korean dramas

	Average of 28 countries	Asia-Pacific	Americas	Europe	Middle East	Africa
1st	Social class 32.3%	Social class 39.2%	Sexual identity 37.6%	Traditional culture 29.7%	Lifestyle and customs 35.7%	Religion 38.5%
2nd	Lifestyle and customs 30.1%	Lifestyle and customs 31.8%	Race 32.3%	Social class 27.1%	Language 33.1%	Language 30.0%
3rd	Traditional culture 26.9%	Traditional culture 30.1%	Lifestyle and customs 30.5%	Lifestyle and customs 26.1%	Religion 29.1%	Race 25.2%

Figure 2-67 Comparison of Factors Promoting and Inhibiting Favorability Toward Korean Dramas by Continent

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.
Note. Presented are the top 7 choices (options) ranked by the combined proportion of first- and second-choice responses.

BASE: Consumers who experienced Korean dramas, Unit: %



07 Preferred Dramas

Squid Game has ranked first as the most preferred drama for four consecutive years.

Squid Game (9.7%) was selected as the most preferred drama for the fourth consecutive year. As the survey was conducted in November and December 2024, the heightened expectations and interest ahead of the Season 2 release (December 26) likely contributed to this result. Netflix helped build excitement through global promotions in six cities, including Paris and LA, featuring Pink Guard performances and iconic symbols. The Season 2 campaign also brought renewed attention to Season 1, likely amplifying the overall marketing effect. Survey results showed that preference also increased from the previous year in the Americas (9.4%), the Middle East (7.6%), and Africa (9.4%), demonstrating continued popularity.

Romance dramas dominated in 2024, and *Queen of Tears* ranked first in the Asia-Pacific.

In 2024, aside from *Squid Game* (9.7%) and *Crash Landing on You* (2.2%), newly released titles such as *Queen of Tears* (6.5%) and *Lovely Runner* (1.8%) drew significant attention. In particular, *Queen of Tears* ranked first as the most preferred drama in the Asia-Pacific (8.0%), with especially high preference in the Philippines (14.7%), Hong Kong (12.1%), and Brazil (10.2%). In the Americas, the Middle East, and Africa, *Queen of Tears* ranked second, following closely behind *Squid Game* in first place, confirming its popularity in these regions. Meanwhile, *True Beauty*, which aired in 2020–2021, regained attention by ranking third in both the Americas (6.5%) and Europe (1.8%). This renewed interest can be attributed to the release of Season 2 of the animation on the global OTT platform Crunchyroll in March 2024, which aired in over 200 countries across North America, Europe, and Latin America. The anime adaptation has led to a resurgence of interest in the original webtoon and drama. While revenge and action dramas with social messages, such as *The Glory* and *Black Knight*, dominated in 2023, there was a shift toward romance dramas in 2024, with emotionally driven narratives leading the trend. This trend aligns with the fact that "solid stories" and "innocent love stories" ranked high among the key factors promoting favorability toward Korean dramas in 2024. This finding suggests that works emphasizing emotional depth have increased viewer engagement and elicited positive responses.

Figure 2-68 Comparison of top 5 Most Preferred Korean Dramas by Continent

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

BASE: Consumers who experienced Korean dramas, Unit: %, open-ended responses

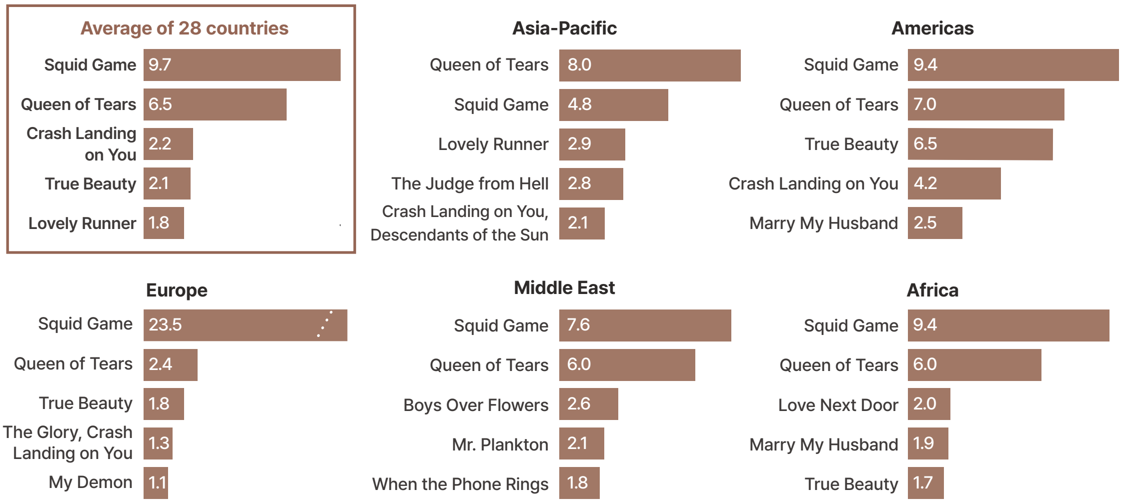


Table 2-12 Top 5 Countries in Preference Rates for Most Preferred Dramas

	1st	2nd	3rd	4th	5th
Squid Game	Italy 46.5%	France 27.4%	Canada 21.9%	Russia 19.9%	Germany 18.2%
Queen of Tears	Philippines 14.7%	Hong Kong 12.1%	Brazil 10.2%	Taiwan 9.6%	China 9.4%
Crash Landing on You	Japan 8.3%	Brazil 8.2%	Philippines 4.0%	Mexico 3.3%	Vietnam 3.0%

08 Willingness to Pay

Willingness to pay increased for the third consecutive year, with fewer respondents not willing to pay.

Over 60% of respondents in Indonesia, India, and the Philippines expressed their willingness to pay.

Willingness to pay for Korean dramas reached 50.5%, up 5.5 percentage points from the previous year (45.0%). Starting at 38.5% in 2020, willingness to pay remained in the 40% range after 2021 and surpassed 50% for the first time in 2024. The proportion of respondents stating they were “not willing to pay” (24.6%) declined from the previous year, showing an overall trend of a growing willingness to pay.
By country, Indonesia recorded the highest willingness to pay at 71.4%, up 7.3 percentage points from the previous year (64.1%). Asian countries such as India (69.9%), the Philippines (68.9%), and Thailand (68.3%), along with several countries in the Middle East and Latin America, also exceeded the 60% mark. In contrast, while Russia (28.0%), Kazakhstan (30.1%), and Canada (30.4%) showed increases in willingness to pay compared with the previous year, levels remained relatively low. Japan had the highest proportion of respondents selecting “not willing to pay.”

Figure 2-69 Comparison of the Willingness to pay for Korean Dramas Over the Last 5 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

BASE: Total, Unit: %

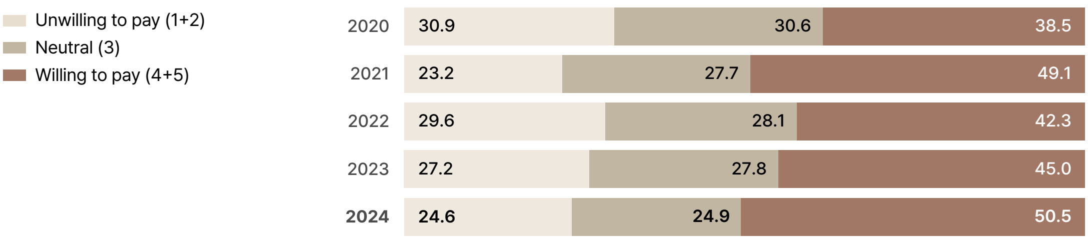
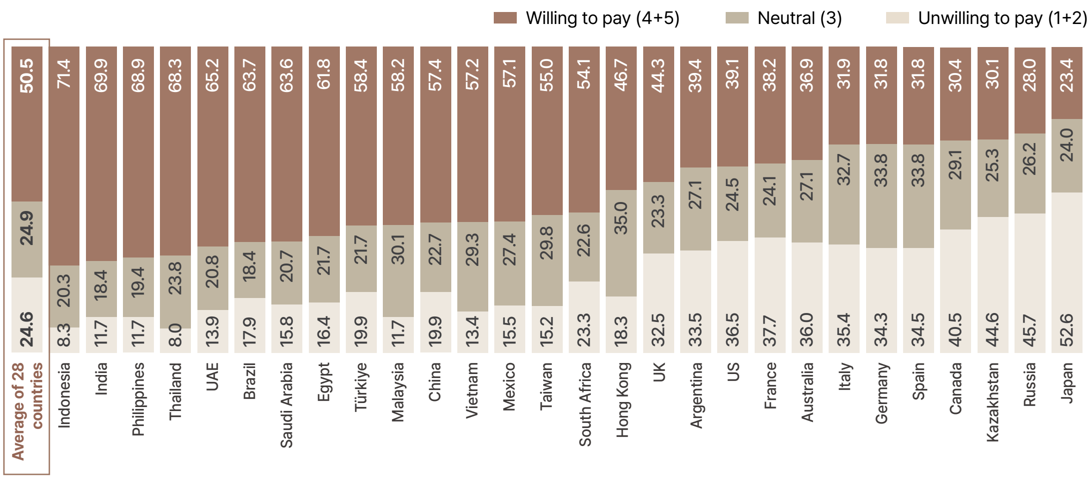


Figure 2-70 Comparison of the Willingness to pay for Korean Dramas by Country

BASE: Total, Unit: %



09 Willingness to Recommend

Approximately 75.4% of respondents were willing to recommend Korean dramas. The Philippines, South Africa, and India showed strong willingness to recommend. Willingness to recommend increased with experience rates among those in their 50s.

Among consumers who experienced Korean dramas, 75.4% said that they were "willing to recommend" them to others. Although slightly down from 2023 (75.9%), the rate remains high. "Neutral" responses accounted for 20.0%, while 4.6% of respondents reported that they were "not willing to recommend," indicating that feedback remains positive in general. While both men and women showed decreased willingness to recommend Korean dramas compared with the previous year, different trends emerged among teens and those in their 50s, with willingness increasing by 2.3 and 3.5 percentage points, respectively. The significant increase in the experience rate for Korean dramas among those in their 50s appears to have contributed to higher willingness to recommend among respondents in this age group.

By country, the Philippines showed the highest willingness to recommend (92.3%), followed by South Africa (88.8%) and India (88.6%). Notably, the Philippines ranked first in both favorability toward and popularity of Korean dramas, making it the country with the highest overall preference. In contrast, Japan (15.2%) and Kazakhstan (10.8%) showed relatively high proportions of respondents who were "not willing to recommend," indicating a continued passive attitude.

Figure 2-71 Comparison of the Willingness to Recommend Korean Dramas Over the Last 2 Years by Year

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

BASE: Total, Unit: %

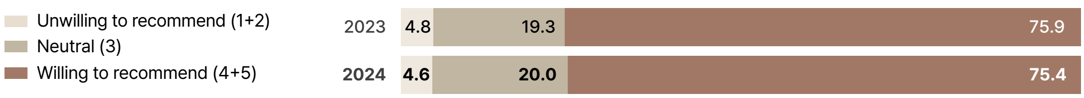


Figure 2-72 Comparison of Variation in the Willingness to Recommend Korean Dramas by Gender and age

BASE: Total, Unit: %p

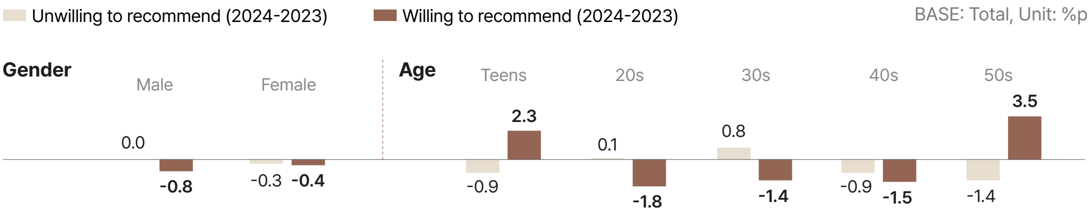
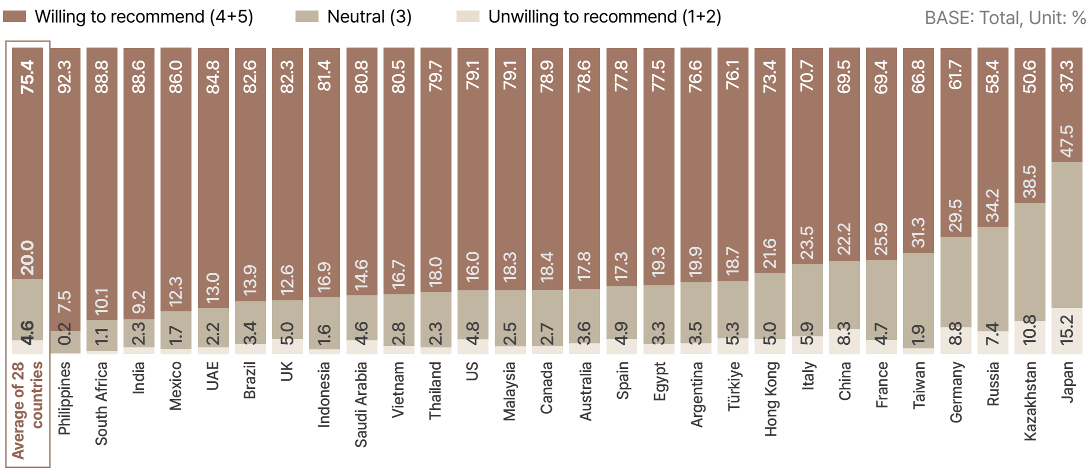


Figure 2-73 Comparison of the Willingness to Recommend Korean Dramas by Country

BASE: Total, Unit: %



10 Ease of Use

Among respondents, 72.4% found Korean dramas easy to watch in 2024. Ease of use was particularly high in Southeast Asia and the Middle East.

The percentage of respondents who said Korean dramas are “easy to watch” reached 72.4%, showing a steady upward trend for the fifth consecutive year since 2020 (67.5%). In contrast, only 7.4% of respondents said that they are “not easy to watch.” By country, ease of use was notably high in Indonesia (89.2%), Türkiye (83.5%), and the UAE (82.1%).

In particular, Türkiye showed a significant increase compared with 2023 (77.4%), suggesting improved viewing conditions. Meanwhile, despite year-on-year increases, Kazakhstan (54.0%) and Italy (54.7%) still recorded relatively low proportions of respondents selecting ease of use, remaining among the lowest-ranked countries.

Figure 2-74 Comparison of the Ease of Watching Korean Dramas Over the Last 5 Years by Year

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

BASE: Consumers who experienced Korean dramas, Unit: %

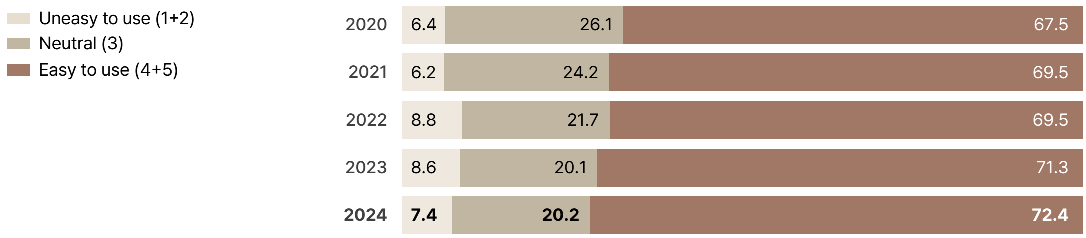
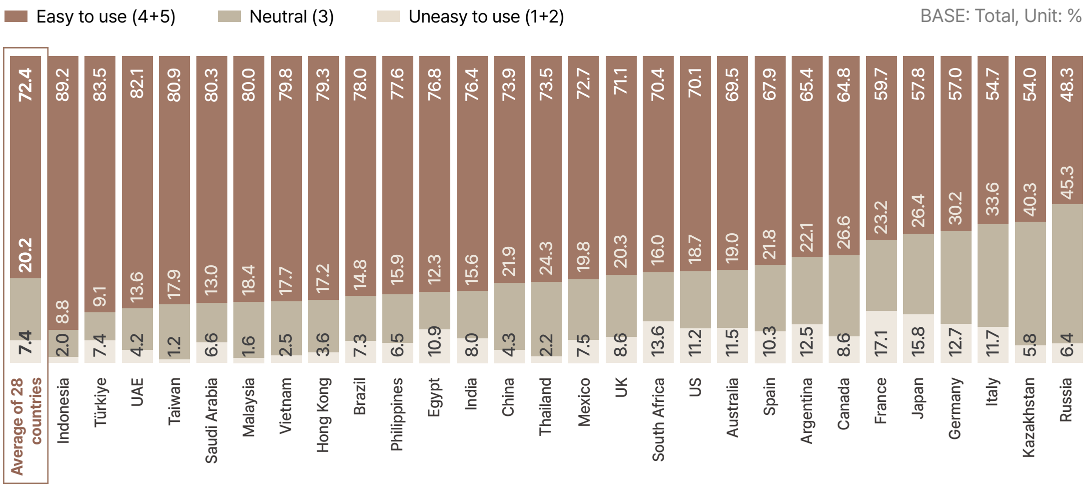


Figure 2-75 Comparison of the Ease of Watching Korean Dramas by Country

BASE: Total, Unit: %



11 Access Channels

Most respondents accessed Korean dramas through “online/mobile” channels. Access via “Hallyu communities” increased.

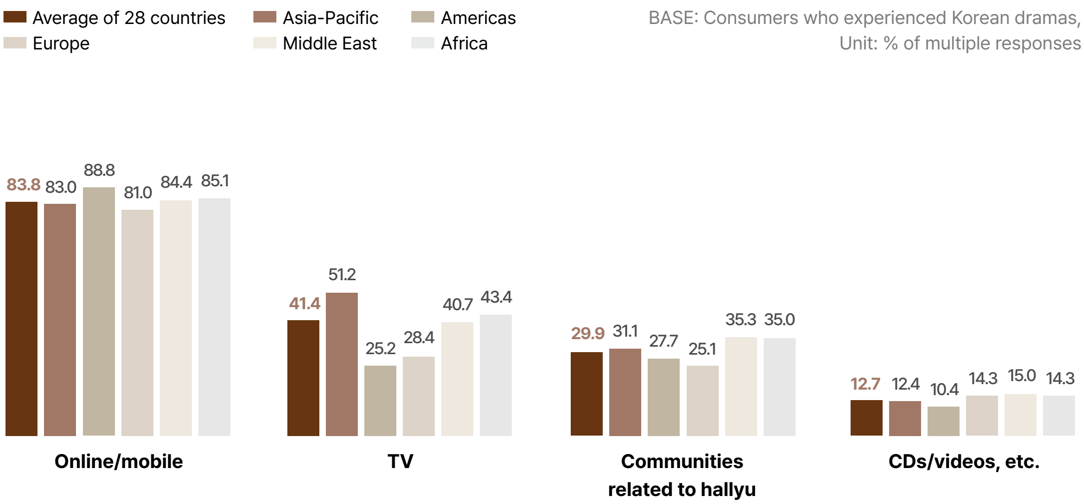
The primary access channel for Korean dramas was “online/mobile” (83.8%), followed by “TV” (41.4%), “communities related to Hallyu” (29.9%), and “CDs/videos, etc.” (12.7%). Notably, “communities related to Hallyu” increased by 6.2 percentage points from 2023 (23.7%), gradually establishing itself as a key channel of exposure and access. This rise appears to have been influenced by the growing presence of social media and active online fandoms, which have increased both the sharing and recommendations of Hallyu content.

By continent, watching dramas on “TV” was relatively high in the Asia-Pacific (51.2%), the Middle East (40.7%), and Africa (43.4%), and access through “communities related to Hallyu” was also significant in the Middle East (35.3%) and Africa (35.0%). The Americas and Europe showed relatively passive consumption patterns, with low usage of channels beyond “online/mobile.”

Regions with higher experience rates for Korean dramas tended to show greater diversity in channels of exposure. The Asia-Pacific, the Middle East, and Africa-where experience rates exceed 70%-utilized more diverse channels, whereas the Americas and Europe, where experience rates remain in the 50% range, displayed viewing patterns centered primarily on online and mobile channels.

Figure 2-76 Comparison of Korean Drama Access Channels by Continent

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



12 Online/mobile Access Platforms

Respondents in the Americas and Europe preferred "paid subscription-based OTT." Respondents in the Asia-Pacific and the Middle East showed higher usage of "free ad-supported OTT."

Among those who watched Korean dramas via online/mobile platforms, the most commonly used channel was "paid subscription-based OTT" (36.1%), followed by "free ad-supported OTT" (33.9%), "live streaming on overseas websites of Korean broadcasters" (14.8%), and "pay-per-view content" (12.9%). Korean dramas are often released exclusively or premiere early on global paid OTT platforms such as Netflix, Disney+, and Amazon Prime Video, establishing them as content available only on specific platforms. Notably, titles such as *Squid Game* and *Queen of Tears* were released worldwide simultaneously via Netflix, and this model of exclusive distribution appears to have contributed to the increased consumption of Korean dramas through paid OTT services.

By continent, the Americas (40.4%) and Europe (40.7%) reported the highest usage rates of "paid subscription-based OTT," while the Asia-Pacific (38.8%) and the Middle East (39.3%) showed greater usage of "free ad-supported OTT." This difference is related to expenditure on Korean dramas: the Americas and Europe recorded higher expenditure, while the Asia-Pacific showed relatively lower expenditure. In Africa, the usage rate of "live streaming on overseas websites of Korean broadcasters" was high (23.1%), likely due to limited access to global OTT platforms and a preference for official channels that offer free streaming.

Primarily accessed through Netflix and YouTube.

Among respondents who watched Korean dramas via online/mobile platforms, "Netflix" (70.8%) had the highest usage rate, followed by "YouTube" (51.2%). The proportion of respondents choosing "Amazon Prime" (31.7%) was about half of that for "Netflix."

Netflix and YouTube have consistently ranked as the top viewing platforms for Korean dramas, with Netflix overtaking YouTube in usage rate in 2021. While Netflix increased steadily from 51.1% in 2018 to 70.8% in 2024, YouTube showed a contrasting trend, declining from 80.0% to the 50% range over the same period.

Figure 2-77 Comparison of Online/mobile Access Platforms for Korean Dramas by Continent

Q. When you watch Korean TV dramas online/ through mobile, what type of viewing do you use? Please select all the types you watch most in order.

1. Paid subscription OTT / 2. Single-item payment content / 3. Ad-enabled free OTT / 4. Live streaming from overseas homepages of Korean broadcasters

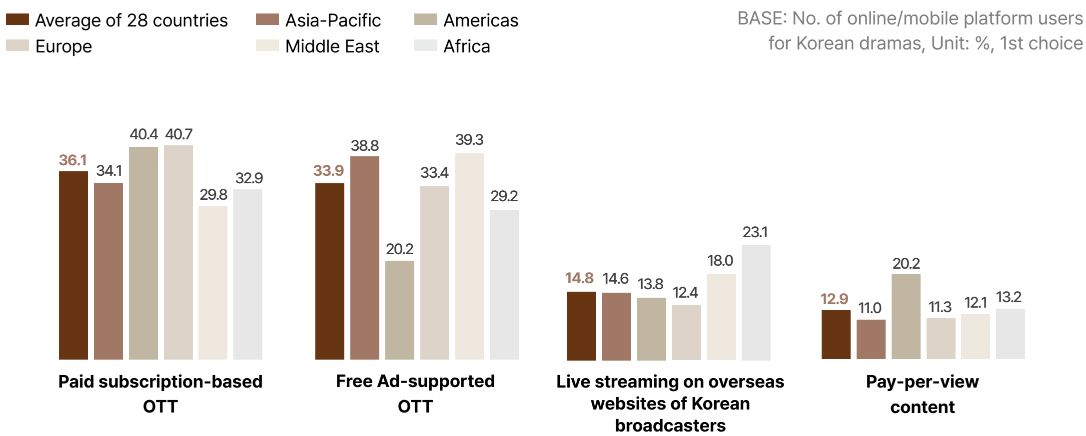
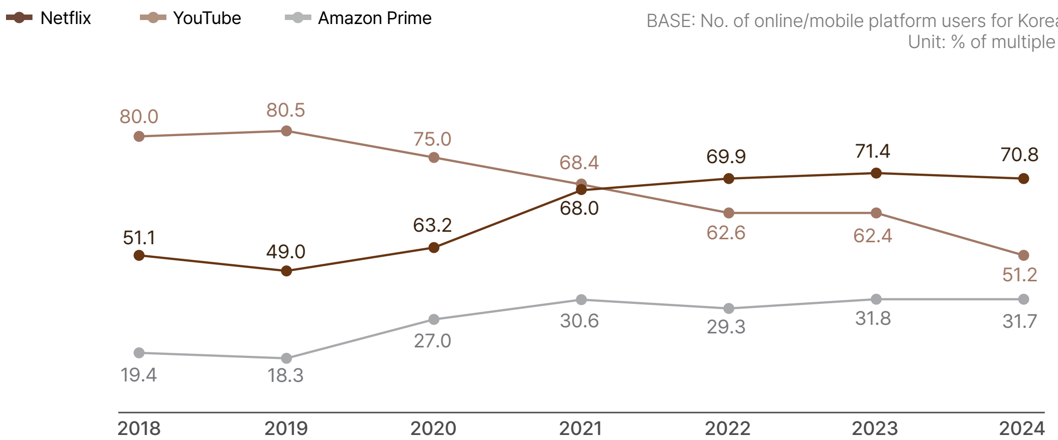


Figure 2-78 Comparison of Access to Online/mobile Platforms for Korean Dramas Over the Last 7 Years by Year

Q. Select all channels when you use 'online·mobile platform' to watch a Korean TV drama (multiple selection possible).
Note. Presented are the top 3 choices (options) ranked by the proportion of respondents.
※ Edited short videos are excluded.

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

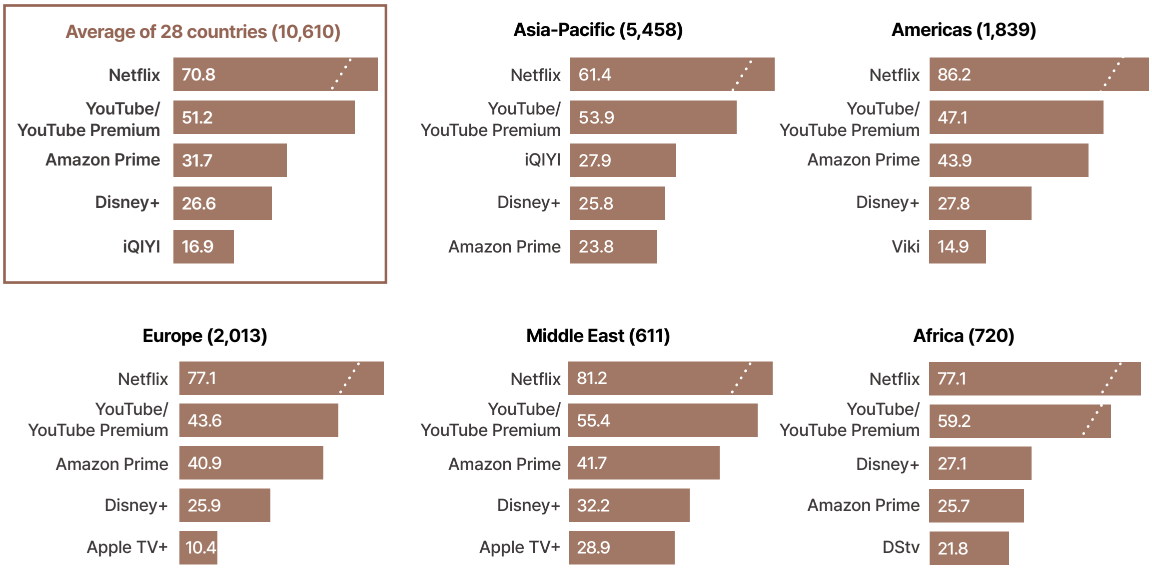


In the Asia-Pacific region, Netflix (61.4%) had the highest usage rate. In contrast to other continents, iQIYI (27.9%) ranked high in the Asia-Pacific because of the influence of China. However, at 53.9%, usage of YouTube declined from the previous year.
In the Americas (86.2%) and Europe (77.1%), where usage of paid OTT platforms was found to be high, the usage rate of Netflix exceeded that of YouTube by 39.1 percentage points in the Americas and by 33.5 percentage points in Europe. In the Middle East, the use of Amazon Prime (41.7%) was 10.0 percentage points higher than the average. Meanwhile, in Africa, Amazon Prime and Disney+ showed similar usage levels.
In addition, Viki (14.9%), the US-based global OTT streaming platform, ranked high in the Americas. In Africa, the South African-based paid satellite broadcasting service DStv (21.8%) entered the top ranks for the first time this year. These results highlight regional differences in platform usage patterns.

Figure 2-79 Comparison of Online/mobile Platforms for Korean Dramas by Continent

Note. Presented are the top 5 choices (options) ranked by proportion of respondents.

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



2

Variety Shows

VARIETY SHOWS

SUMMARY

Based on the steadily increasing international recognition, Korean variety shows appear to be strengthening their competitiveness in the global market. This can be observed through the increasing number of countries where these shows have become widely popular and considered highly favorable. Many people from these countries also recommend the shows to one another, and these shows have seen an increased ease of use.

Among consumers with Hallyu experience, 54.2% reported having encountered Korean variety shows. This is an increase of 6.0%p from the previous year. By country, experience rates were highest in Malaysia (84.8%), Thailand (81.4%), and the Philippines (79.4%).

In response to the question about the popularity of Korean variety shows in their own country, 38.5% responded that they were “widely popular.” The proportions of respondents were above average in Asia such as the Philippines (58.7%), Malaysia (57.5%), Vietnam (55.3%), and Thailand (54.3%). A similar response was also recorded in the Middle East (Saudi Arabia 51.0%, UAE 40.9%) and South America (Mexico 40.8%, Brazil 38.6%). Favorability toward Korean variety shows (77.4%) was the highest among all Korean cultural content categories, and willingness to recommend was also high (75.9%), ranking second overall.

The ease of use was 69.8%, marking the highest level this year in the past five years with a steady upward trend. The highest percentage of respondents who found Korean variety shows easy to use was in Indonesia (84.7%), while Japan and Argentina showed relatively high proportions of respondents choosing not easy to use.

The key factors promoting favorability included "interesting games and materials" (31.0%), "can indirectly experience Korean lifestyle and culture" (29.4%), and "program concepts and formats" (26.7%). In addition, “editing style such as subtitles, graphics, and screen composition" (20.5%) newly emerged as a factor promoting favorability.
On the other hand, "the Korean language is unfamiliar" and "inconvenient to watch with subtitles/dubbing" ranked among the top unfavorable factors for five consecutive years. "difficult to encounter or access" and "lack of cultural diversity" were also cited as negative factors.

01 Experience Rate

More than 5 out of 10 people watch Korean variety shows. Experience rate exceeds 80% in Malaysia and Thailand.

Among consumers with Hallyu experience, the experience rate of Korean variety shows was 54.2%, marking a 6.0%p increase from the previous year. By country, experience rates were highest in Malaysia (84.8%), Thailand (81.4%), the Philippines (79.4%), Taiwan (78.5%), and Vietnam (78.4%). Notably, the Philippines, the new addition to this year's survey, recorded an experience rate 25.2%p higher than the average of 28 countries. This placed the nation among the top countries within the survey. On the other hand, Japan (24.3%), France (28.0%), and Kazakhstan (28.9%) showed relatively low experience rates. However, all except Japan recorded slight increases from the previous year. By gender, both men (52.4%) and women (56.0%) surpassed 50% and showed an increase compared to the previous year. By age group, those in their 20s and 30s continued to show high experience rates. Those in their 50s showed the largest increase from 31.0% in 2023 to 43.4% in 2024, recording a sharp increase of 12.4%p.

Figure 2-80 Comparison of Korean Variety Show Experience Rates by Country BASE: Total, Unit: %

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

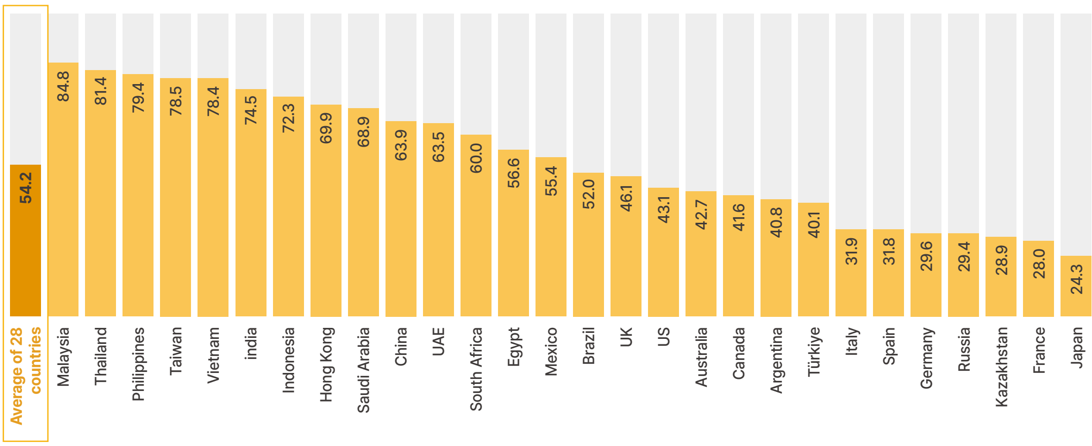
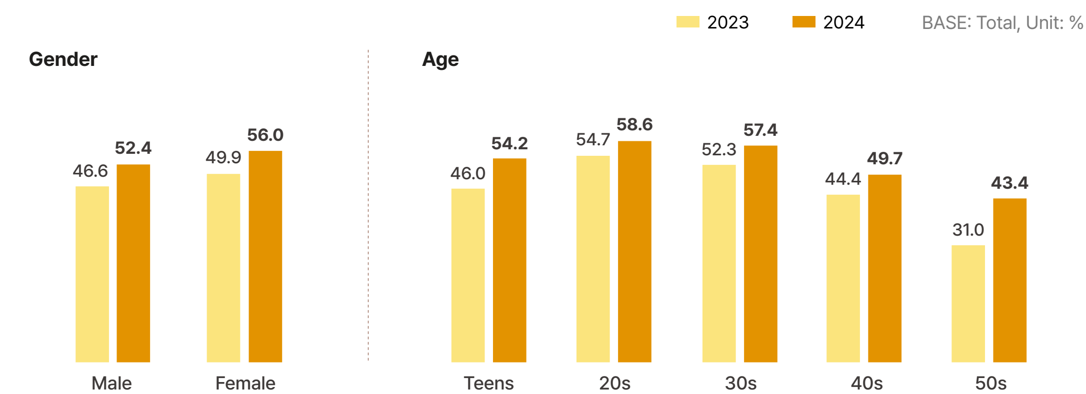


Figure 2-81 Comparison of Korean Variety Show Experience Rates Over the Last 2 Years by Gender and age



02 Popularity

38.5% said Korean variety shows are "widely popular," the highest rate over the last 5 years.

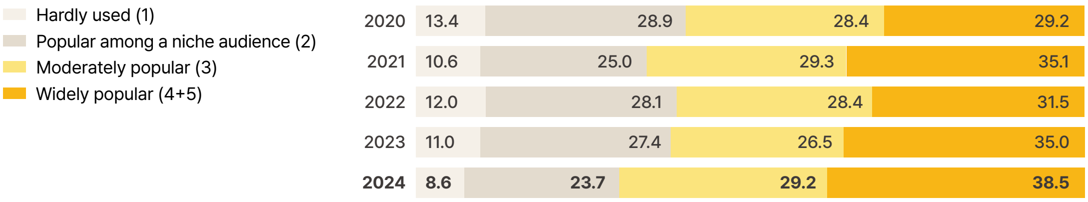
When consumers with Hallyu experience were asked about the popularity of Korean variety shows in their own countries, 38.5% responded that they were "widely popular," marking a 3.5%p increase from the previous year. The proportion of respondents selecting "moderately popular" accounted for 29.2%, and for "popular among a niche audience" was 23.7%.

Looking at response trends over the past five years, the proportion of those saying "widely popular" rose steadily from 29.2% in 2020, increasing by an average of 5.7%p annually. On the other hand, the proportion of respondents choosing "hardly used" dropped from the 10% range to 8.6%, indicating a growing perception of Korean variety shows as mainstream content.

Figure 2-82 Comparison of Korean Variety Show 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.

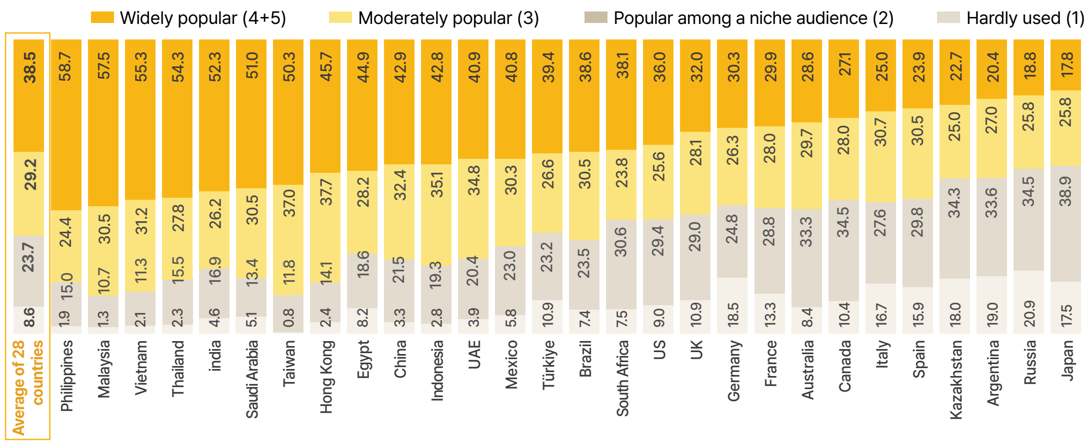
1. Hardly used by anyone / 2. Popular among a niche audience / 3. Known by a niche audience and the general public / 4. Widely known among the general public with related products being sold / 5. Widely popular among the general public with smooth sales of related products



More than 50% responded in the Philippines and Malaysia responded that Korean variety shows are "widely popular."
In six countries including Japan and Russia, the perception that they are "popular among a niche audience" was dominant.

In countries such as the Philippines (58.7%), Malaysia (57.5%), Vietnam (55.3%), and Thailand (54.3%), the proportions of respondents selecting "widely popular" exceeded 50%, outpacing both "moderately popular" and "popular among a niche audience." In contrast, in six countries including Japan (38.9%), Russia (34.5%), and Argentina (33.6%), the proportions of respondents choosing "popular among a niche audience" were higher than those for "widely popular" and "moderately popular". The survey results suggest that Korean variety shows are mainly consumed by specific fan bases in those countries. This represents a decrease by half compared to the previous year in 13 countries including Japan, Kazakhstan, and Russia, indicating that Korean variety shows are gaining broader mainstream popularity in some countries. Meanwhile, Russia (20.9%), Argentina (19.0%), and Germany (18.5%) reported relatively high proportions of respondents selecting "hardly used," revealing that there are ongoing differences in accessibility and preference for Korean variety shows across countries.

Figure 2-83 Comparison of Korean Variety Show Popularity by Country BASE: Total, Unit: %



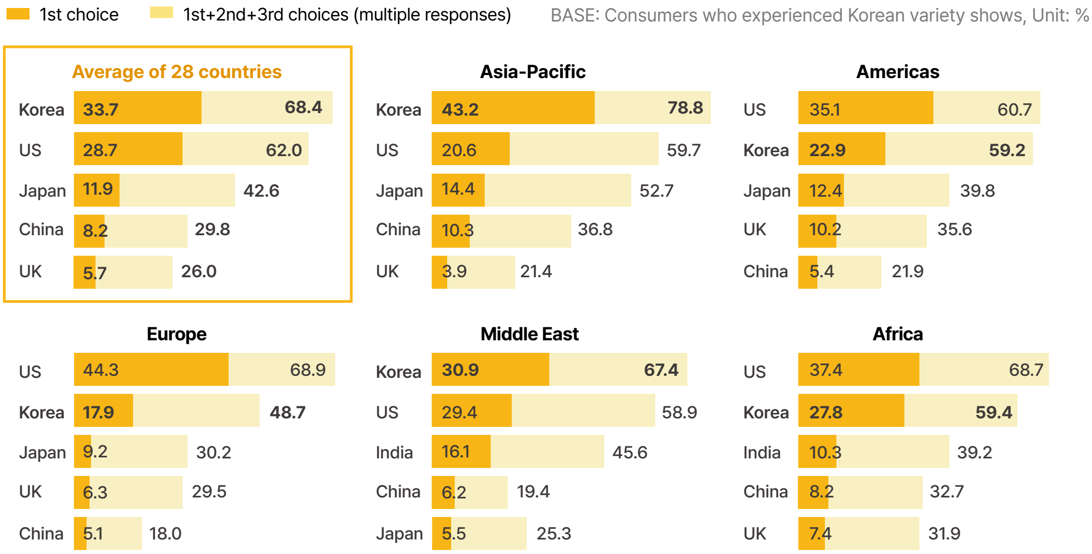
03 Popular Foreign variety shows

Korean variety shows were the most popular at 33.7%. The popularity is maintained in the Middle East and Africa, but declined in the Asia-Pacific, Americas, and Europe.

Among consumers who watched Korean variety shows, Korea (33.7%) and the US (28.7%) remained in first and second place in terms of favorite foreign variety shows as they did in the previous year (based on first-choice responses). However, proportions of respondents selecting both countries slightly declined compared to the previous year, while Japan (11.9%), China (8.2%), and the UK (5.7%) showed slight increases. By continent, Korea ranked first in the Asia-Pacific and the Middle East, whereas the US ranked first in the Americas, Europe, and Africa, with Korea following as second in those regions. In the Asia-Pacific region, the proportion of respondents choosing “Korea” (43.2%) decreased by 4.5%p from the previous year (47.7%), while Japan (14.4%) and China (10.3%) rose by 2.4%p and 2.7%p, indicating a partial shift in demand from Korean variety shows to Japanese and Chinese variety shows. The proportions of respondents selecting Korea also slightly decreased in the Americas and Europe, while those for Japan, China, and the UK slightly increased. Meanwhile, in the Middle East and Africa, the proportions of respondents choosing “Korea” stood at 30.9% and 27.8%, marking slight increases from the previous year and demonstrating sustained popularity.

Figure 2-84 Comparison of Popular Foreign Variety Shows by Continent

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

"The Korean variety show '*Culinary Class Wars*' ranked first in Taiwan, Singapore, and Hong Kong immediately after its release on Netflix and entered the top 10 in 28 Netflix regions, enjoying great popularity especially in Hong Kong. This also led to significant popularity of Hong Kong restaurant ‘Mosu’ by Sung Anh and the newly opened 'Saemaeul Restaurant' by Paik Jong Won, who both served as judges for this show.”

Hong Kong KOFICE Overseas Correspondent

"In Canada, accessibility to Korean variety shows has increased through platforms like Netflix and Disney+. Especially on short-form platforms like TikTok and Instagram, Korean variety shows are shared in short, entertaining clips with English subtitles, enjoying promotional effect.”

Canada KOTRA Toronto Trade Officer

"In Japan, Korean variety shows are mainly watched through 'KBS World.' Long-running shows such as '*2 Days & 1 Night*,' '*The Return of Superman*,' and '*Three Meals a Day*,' as well as newer shows like '*Synchro U*,' are also gaining recognition."

Japan KOFICE Tokyo Overseas Correspondent

04 Consumption Volume

High consumption of Korean variety shows in Asia and the Middle East. Expenditure highest in the Middle East and the Anglosphere.

The average monthly viewing time for Korean variety shows was found to be 17.0 hours, showing a slight increase from the previous year. By country, the Philippines (29.1 hours), which also ranked first in popularity, recorded the highest viewing time. It was followed by Indonesia (26.5 hours) and Thailand (24.0 hours), with viewing time in several Asian countries approaching 30 hours per month. While Asian countries generally dominated the upper ranks, the UAE (22.0 hours), Mexico (19.6 hours), South Africa (19.3 hours), and Brazil (19.2 hours) also exceeded the average of 28 countries. On the other hand, Japan (4.9 hours), Italy (7.7 hours), Germany (8.9 hours), and Australia (9.6 hours) fell below 10 hours per month, placing them in the lower tier.

The proportion of consumption for Korean variety shows recorded an average of 27.1% across the 28 countries. By country, Indonesia (37.5%) had the highest proportion, with its experience rate increasing compared to the previous year. However both its popularity and proportion of consumption slightly decreased. This was followed by the Philippines and Malaysia (both 35.1%), and the UAE (33.6%), all showing high proportions. Japan (15.4%) and Italy (15.8%) recorded relatively low proportions of consumption, consistent with the time spent. The average monthly expenditure on Korean variety shows was 12.0 USD, marking an increase of 3.7 USD from the previous year. Notably, the UAE recorded the highest expenditure at 34.3 USD, with the Middle East (UAE, Saudi Arabia), the Anglosphere, and Europe showed higher expenditure, while Asian countries tended to spend relatively less.

Figure 2-85 Comparison of Time Spent on Korean Variety Shows by Country

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

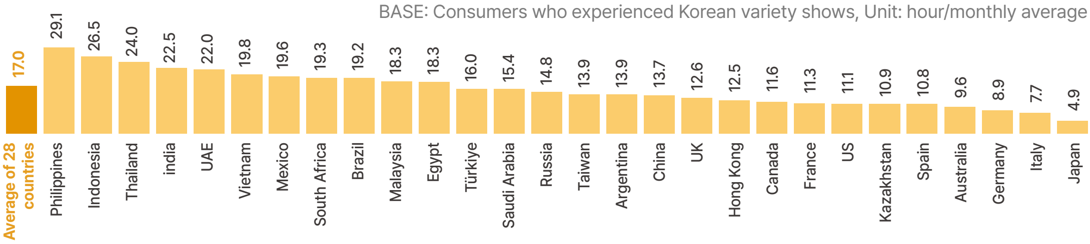


Figure 2-86 Comparison of the Proportion of Korean Variety Show Consumption by Country

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

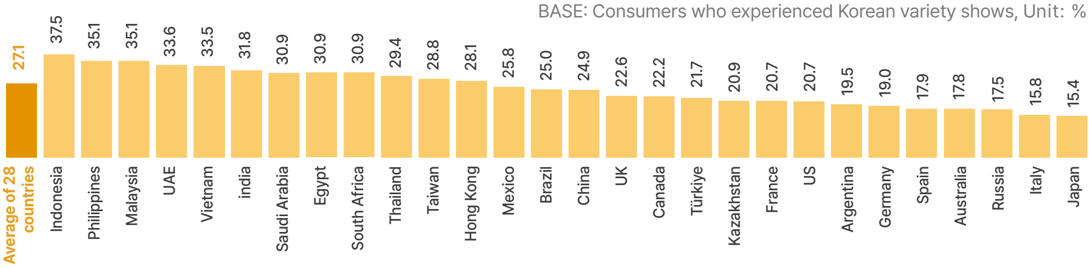
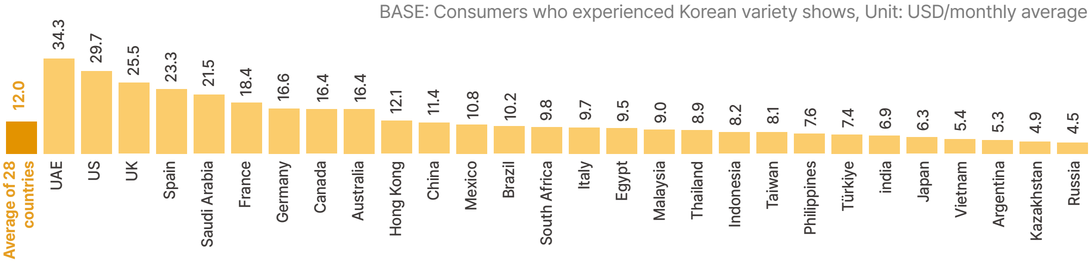


Figure 2-87 Comparison of Expenditure on Korean Variety Shows by Country

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

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



05 Favorability

77.4% of respondents liked Korean variety shows.
variety shows ranked No. 1 among Korean cultural content categories.

Among respondents who experienced Korean variety shows, 77.4% answered that they "like" them, reflecting a 2.9%p increase from the previous year. Favorability, which had been gradually declining since 2021, showed a rebound in 2024, indicating signs of recovery. Although the experience rate and popularity of Korean variety shows ranked seventh among the surveyed Korean cultural content categories, their favorability ranked the highest.

By country, Indonesia (89.9%) showed the highest favorability for the second year in a row. This was followed by India (88.0%), the Philippines (85.0%), Malaysia (83.4%), Brazil (83.2%), and the UAE (82.4%), all recording high percentages of respondents who chose "like". In contrast, countries such as Kazakhstan (46.0%), Russia (54.9%), and Japan (55.5%) recorded relatively low proportions of respondents.

Figure 2-88 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

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

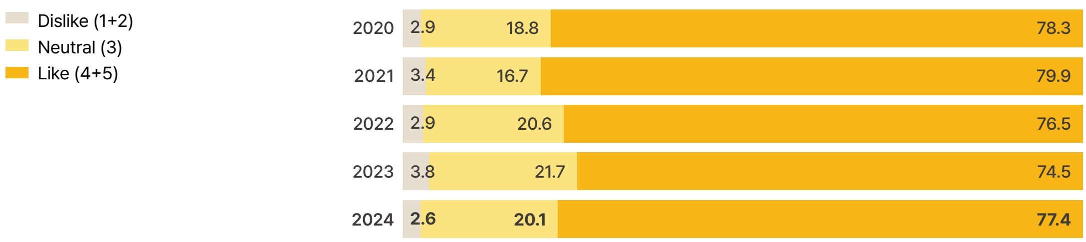
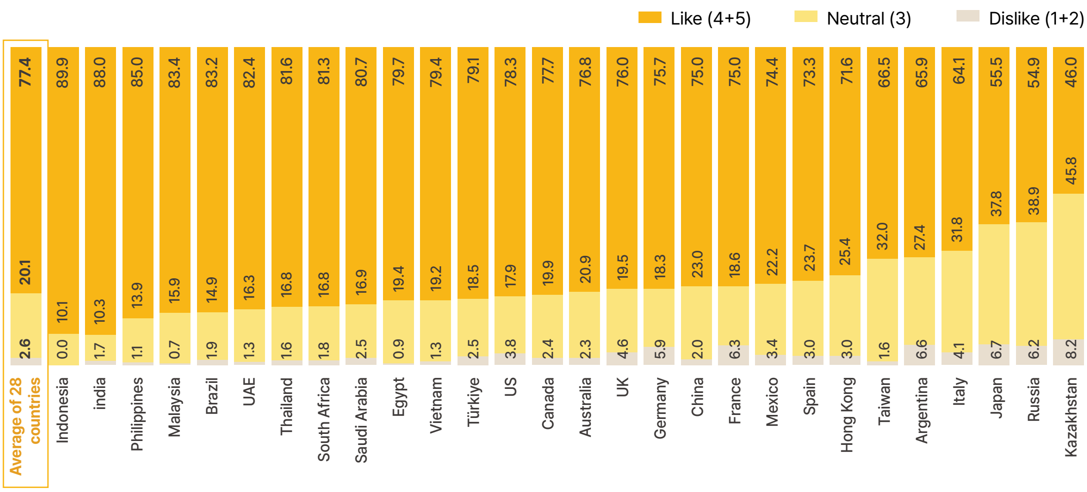


Figure 2-89 Comparison of Favorability Toward Korean Variety Shows by Country

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



06 Factors for Promoting and Inhibiting Favorability

Americas, Europe, and Africa show favorability toward "indirect experience of Korea." Asia is drawn to "interesting content," and the Middle East to "characters."

The reasons respondents liked Korean variety shows (based on 1st and 2nd choices) were "Use of interesting games and materials" (31.0%), "Can indirectly experience Korean lifestyle and culture" (29.4%), and "Great program concepts and formats" (26.7%). "Use of interesting games and materials" declined from 27.8% in 2022 to 23.9% in 2023, but rose by 7.1%p in 2024, reestablishing itself as a key factor promoting favorability. In addition, "Interesting editing style, such as subtitles, graphics, composite images, and screen composition" (20.5%) newly entered the rankings, indicating that viewers are placing greater importance on the production and editing elements of variety shows.

By continent, "Use of interesting games and materials" recorded the highest proportion of respondents in the Asia-Pacific (33.7%) and the Middle East (27.9%). In the Asia-Pacific region, the proportion of respondents choosing "Can indirectly experience Korean lifestyle and culture" rose by 6.0%p from 23.0% in 2023 to 29.0% in 2024.

In the Americas (30.5%), Europe (30.6%), and Africa (31.0%), the proportion of respondents selecting "Can indirectly experience Korean lifestyle and culture" also increased compared to the previous year, indicating that the cultural experience aspect of Korean variety shows is becoming an important factor. In particular, in Europe (22.4%), "Interesting editing style, such as subtitles, graphics, composite images, and screen composition" newly entered the rankings. A similar trend of increasing preference for editing elements was observed in other continents as well.

Korean variety shows are strengthening their role not only as a source of entertainment but also as content that offers access to Korean culture and trends. Moreover, as viewer expectations continue to rise, technical elements such as production and editing are emerging as crucial factors.

Korean language and translation/subtitles have been factors inhibiting favorability for five consecutive years. Low accessibility and lack of cultural diversity were also cited as discomforts.

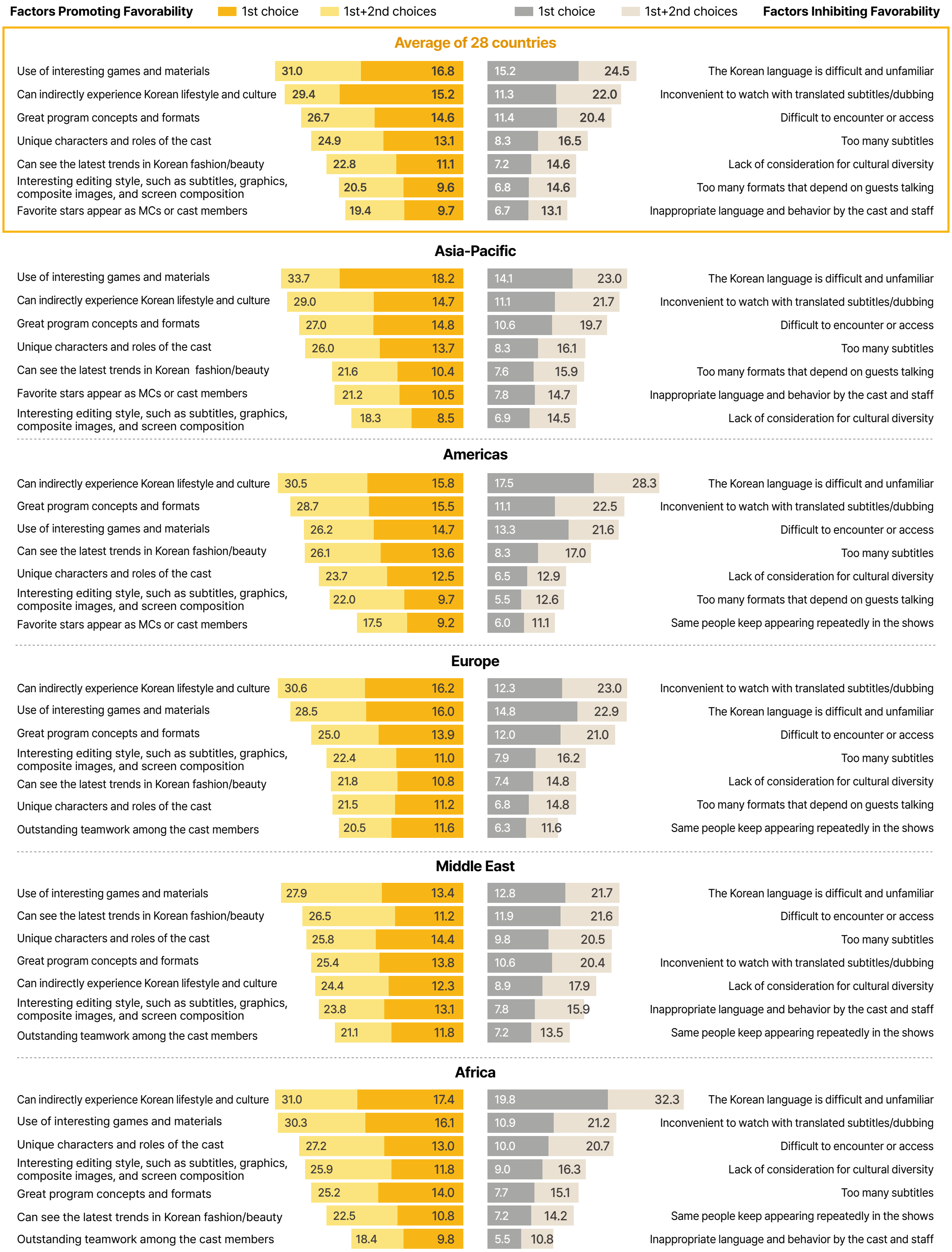
"The Korean language is difficult and unfamiliar" and "Inconvenient to watch with translated subtitles/dubbing" ranked first and second, as key factors inhibiting favorability for five consecutive years from 2020 to 2024. Additionally, "Too many formats that depend on guests talking" (14.6%) and "Inappropriate language and behavior by the cast and staff" (13.1%) newly entered the rankings compared to last year.

Proportions of respondents identifying language-related factors increased across all continents compared to the previous year, with "Difficult to encounter or access" also ranking among the top. In the Middle East, this response rose to 21.6%, a 5.8%p increase from the previous year that indicated growth in discomfort with accessibility. In the Asia-Pacific region, "Lack of consideration for cultural diversity" (14.5%) newly entered the rankings.

Figure 2-90 Comparison of Factors Promoting and Inhibiting Favorability Toward Korean Variety Shows by Continent

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.
Note. Presented are the top 7 choices (options) ranked by the combined proportion of first- and second-choice responses.

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



Respondents felt uncomfortable about "lifestyle and customs" and "social class."

Uncomfortable or lacking aspects of cultural diversity representation included "lifestyle and customs" (31.6%), "social class" (30.9%), and "traditional culture" (29.9%). These aspected were ranked among the top as recorded in other video content (dramas and movies). In the Asia-Pacific and Americas, "social class" (35.7%) and "sexual identity" (33.1%) were cited as the most uncomfortable aspects in variety shows, following dramas and movies. In Europe, "food" (27.8%) ranked second, suggesting that Korean cuisine and food culture featured in variety shows may have felt unfamiliar or uncomfortable to European viewers. In the Middle East, "religion" (31.6%) was identified as a major discomfort factor, unlike in other continents. In Africa, "language" (34.7%) was reported as the most uncomfortable aspect.

Table 2-13 Top 3 Most Uncomfortable Aspects of Cultural Diversity Representation in Korean Variety Shows by Continent

BASE: Respondents who chose "Lack of consideration for cultural diversity" as a factor inhibiting favorability for Korean variety shows

	Average of 28 countries	Asia-Pacific	Americas	Europe	Middle East	Africa
1st	Lifestyle and customs 31.6%	Social class 35.7%	Sexual identity 33.1%	Traditional culture 30.0%	Lifestyle and customs 35.2%	Language 34.7%
2nd	Social class 30.9%	Lifestyle and customs 33.7%	Social class 32.5%	Food 27.8%	Religion 31.6%	Traditional culture 32.1%
3rd	Traditional culture 29.9%	Traditional culture 31.0%	Race 31.5%	Social class 26.4%	Language 28.8%	Lifestyle 31.3%

07 Willingness to Pay

43.0% of respondents willing to pay for Korean variety shows. India is more willing, while Japan is less willing to pay.

The percentage of respondents who said they were willing to pay to watch Korean variety shows was 43.0%, a 3.3%p increase from the previous year. Those who expressed a neutral stance accounted for 28.7%, while 28.3% responded that they were not willing to pay.

Observing the changes over the past five years since 2020, the proportion of respondents willing to pay, which had declined to the 30% range from 2022, rose again to around 40%. Meanwhile, the proportions of those not willing to pay and those with a neutral stance have shown a gradual decline. Although the willingness to pay for Korean variety shows was lower compared to other video content such as movies and dramas, it was found to be higher than that for animation.

By country, India (66.9%), Thailand (58.8%), the UAE (58.1%), Indonesia (57.0%), and Saudi Arabia (55.5%) reported high percentages of respondents willing to pay. On the other hand, in Japan (62.9%), Kazakhstan (55.6%), and Russia (52.9%), more than half of the respondents said they were not willing to pay. Countries with high content consumption volumes tended to show more willingness to pay, while those with lower consumption volumes were relatively less willing.

Figure 2-91 Comparison of the Willingness to pay for Korean Variety Shows 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

BASE: Total, Unit: %

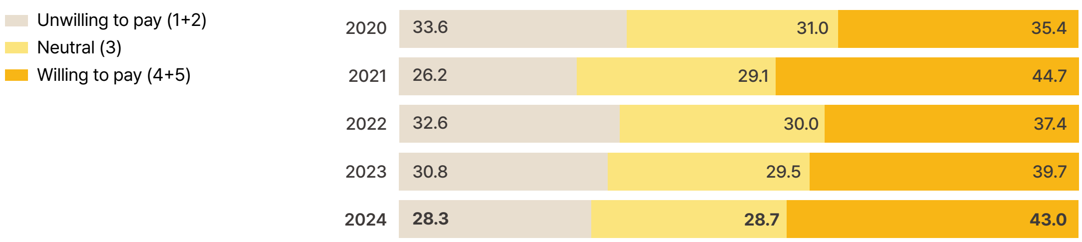
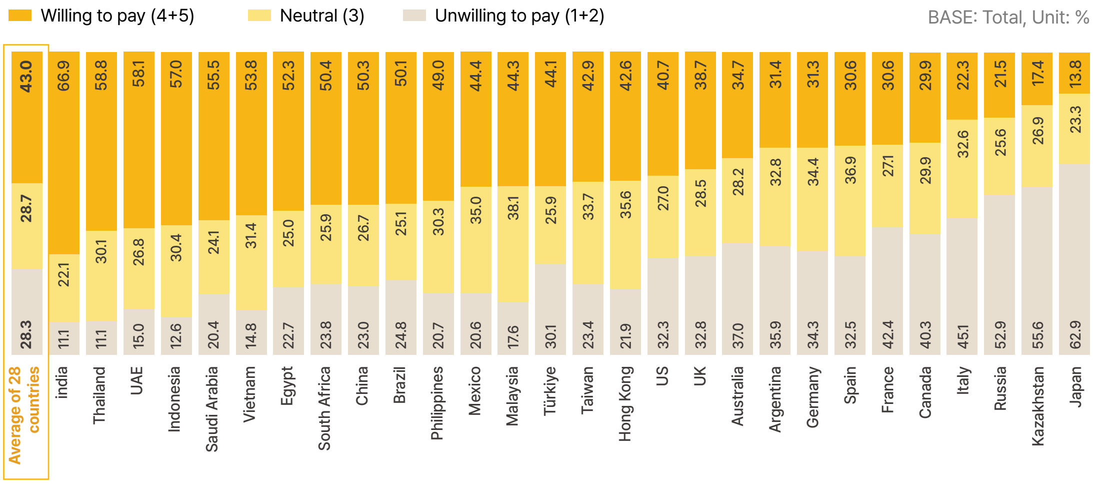


Figure 2-92 Comparison of the Willingness to pay for Korean Variety Shows by Country

BASE: Total, Unit: %



08 Willingness to Recommend

In 20 out of 28 countries, more than 70% of respondents are willing to recommend Korean variety shows.

Among those who had experienced Korean variety shows, 75.9% responded that they were willing to recommend them to others, a 2.9%p increase from the previous year. This was the second-highest recommendation rate among all Korean cultural content categories, following the Korean language. The percentage of respondents choosing "neutral" was 20.2%, while that for "not willing to recommend" accounted for only 3.9%.

Compared to the previous year, the proportions of respondents choosing "willing to recommend" increased across all gender and age groups, with the most notable rises among teens (▲6.5%p) and the 50s (▲3.8%p).

By country, the Philippines-ranked first in popularity-also showed the highest percentage for "willing to recommend" (87.7%), followed by India (86.5%), which also ranked high in favorability and willingness to pay. In contrast, Japan (37.8%) and Kazakhstan (47.7%), where Korean variety shows were relatively less popular and less favored, also showed relatively low levels of willingness to recommend.

Figure 2-93 Comparison of the Willingness to Recommend Korean Variety Shows Over the Last 2 Years by Year

BASE: Total, Unit: %

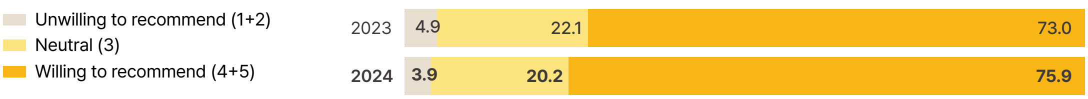


Figure 2-94 Comparison of Variation in the Willingness to Recommend Korean Variety Shows by Gender and age

BASE: Total, Unit: %p

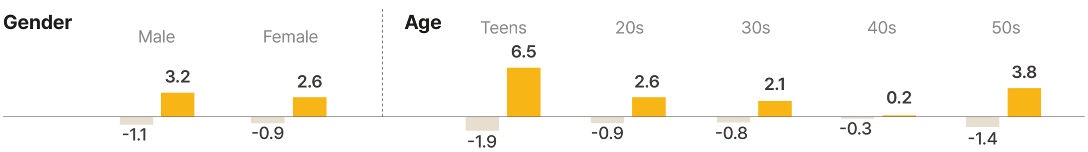
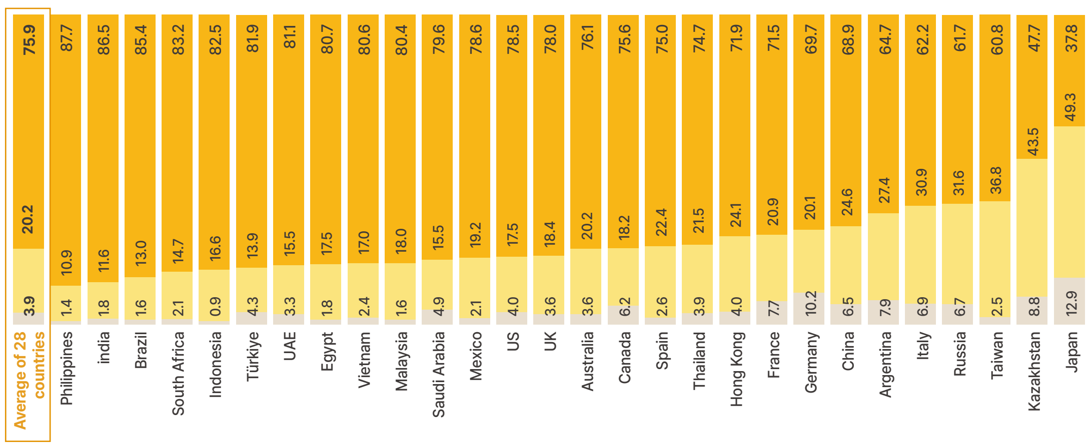


Figure 2-95 Comparison of the Willingness to Recommend Korean Variety Shows by Country

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

BASE: Total, Unit: %



09 Ease of Use

Ease of use for Korean variety shows at 69.8%, highest in five years. Active usage in Indonesia and India.

The percentage of respondents who said Korean variety shows were "easy to watch" was 69.8%, significantly higher than those who said they were "not easy to watch" (8.4%). The rate for ease of use has remained above 60% over the past five years, and this year recorded the highest rate, demonstrating an expansion in the consumer market.

By country, Indonesia-where the proportion of variety show consumption was the highest-also showed the highest percentage "easy to watch" (84.7%). In contrast, the proportion of respondents selecting "not easy to watch" was highest in Japan (20.6%) and Argentina (20.5%), where expenditure was the lowest.

Figure 2-96 Comparison of the Ease of Watching Korean Variety Shows Over the Last 5 Years by Year

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

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

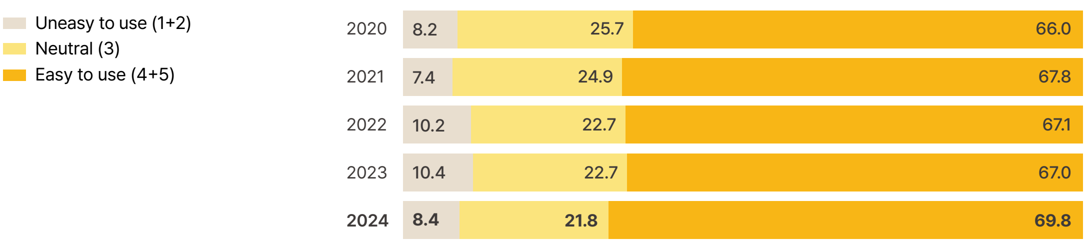
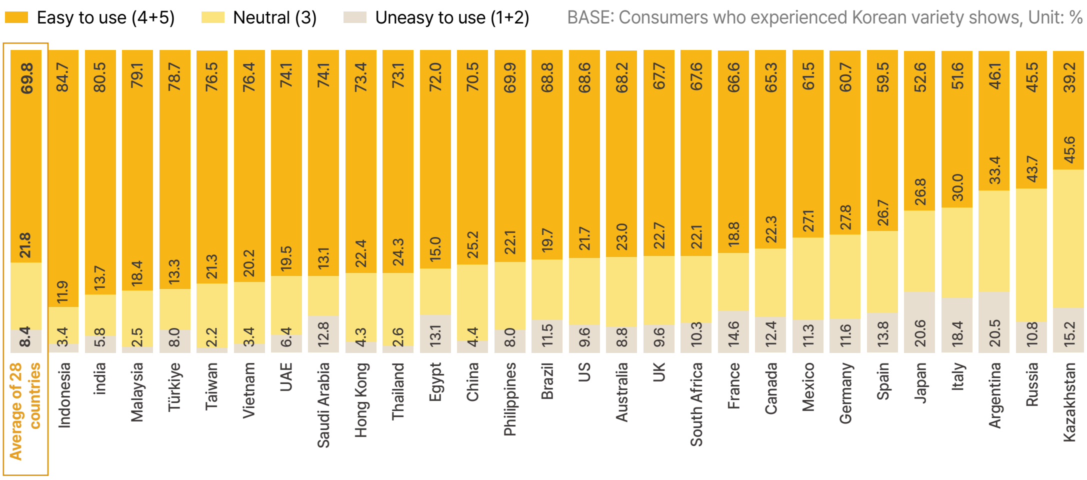


Figure 2-97 Comparison of the Ease of Watching Korean Variety Shows by Country



10 Access Channels

Highest access rate through “online/mobile” platforms. Indirect access through remade works becomes more active.

The most common access channel for Korean variety shows was "online/mobile" (79.8%), followed by "Internet search/recommendation of remakes of Korean variety shows" (50.5%), "TV" (44.4%), and "CDs/videos, etc." (15.0%). Notably, the proportion of respondents selecting "Internet search/recommendation of remakes of Korean variety shows" increased significantly by 13.4%p compared to 2023 (37.1%). This suggests that as Korean variety shows are increasingly remade overseas or distributed through social media and YouTube, this channel has naturally become a major access channel.

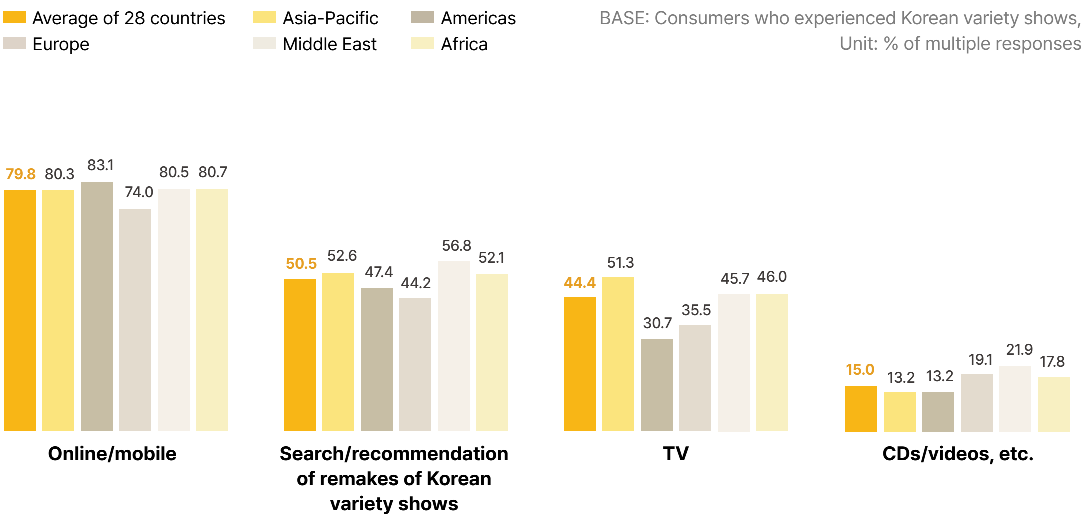
By continent, although the “online/mobile” access rate slightly declined in all continents compared to the previous year, the access rate through "Internet search/recommendation" increased. In particular, access rates in Europe, which had been generally low until last year, increased this year and led to a diversification of access channels. Considering the increased experience rate and ease of use for Korean variety shows in countries such as the UK, Italy, and Spain, it can be interpreted that awareness and accessibility of Korean variety shows are growing within Europe.

In the Americas, the use of "online/mobile" platforms was the highest (83.1%), while other access channels showed relatively low rates. In contrast, in the Middle East and Africa, there was a clear tendency to access Korean variety shows through a wide range of channels rather than relying on a specific platform.

Figure 2-98 Comparison of Korean Variety Show Access Channels by Continent

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

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



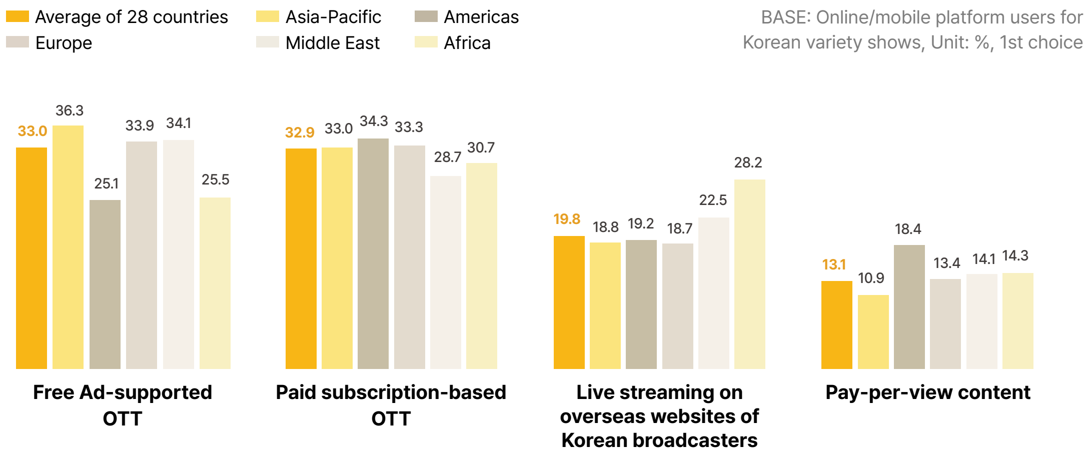
11 Online/mobile Access Platforms

Many respondents watched variety shows on paid and free OTT platforms. Africa actively used websites of Korean broadcasters.

Among respondents who watched Korean variety shows through online and mobile platforms, the highest percentages were those who used “free ad-supported OTT” (33.0%) and “paid subscription-based OTT” (32.9%). With only a 0.1%p difference between the two, viewing of Korean variety shows appears to be split between free ad-supported and paid subscription-based OTT platforms. This was followed by “live streaming on overseas websites of Korean broadcasters” (19.8%) and “pay-per-view content” (13.1%).
By region, the Asia-Pacific and Europe showed similar usage rates for “free ad-supported OTT” and “paid subscription-based OTT.” In contrast, in the Americas (34.3%) and Africa (30.7%), the usage rate of “paid subscription-based OTT” was higher. In the Middle East (34.1%), “free ad-supported OTT” had the highest usage rate, confirming regional differences.
Notably, in the Americas, the usage rate of “pay-per-view content” (18.4%) was relatively high, while in Africa, the usage rate of “live streaming on overseas websites of Korean broadcasters” (28.2%) was 8.4%p higher than average. This indicated that there were regional differences in preferences for content consumption methods.

Figure 2-99 Comparison of Online/mobile Viewing Types for Korean Variety Shows by Continent

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



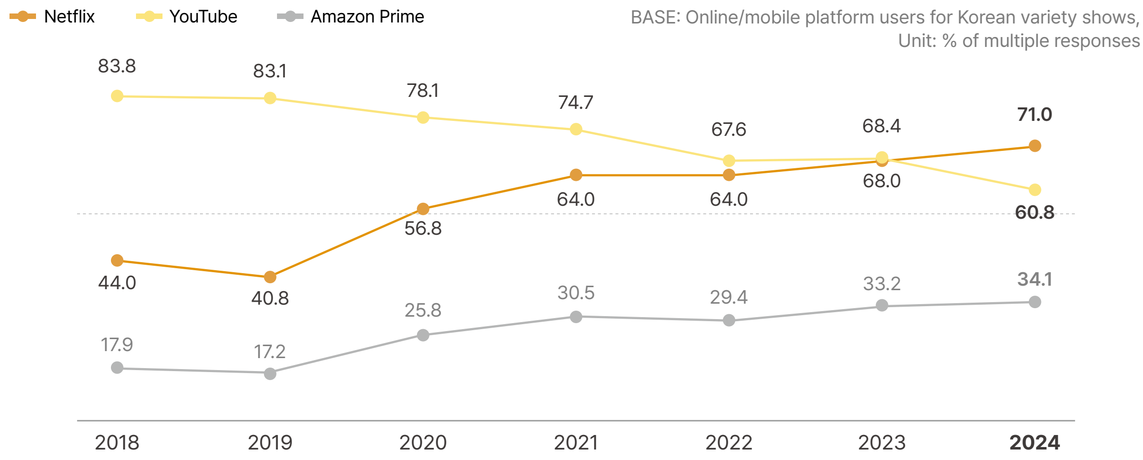
Primary access platforms are "Netflix" and "YouTube." Active use of "Disney+" and "Apple TV+" in the Middle East.

Among respondents who watched Korean variety shows through online and mobile platforms, 71.0% used "Netflix," followed by "YouTube" (60.8%). The usage rates of "Netflix" and "YouTube" were 2.1 times and 1.8 times higher, than that of the third-ranked platform "Amazon Prime" (34.1%).
These three platforms also ranked first, second, and third, for other Korean video content (dramas, movies, animation). The most notable change is that starting in 2023, "Netflix" surpassed "YouTube" in terms of usage for Korean variety shows. While the usage rate of "Netflix" rose by 27.0%p from 44.0% in 2018, "YouTube" fell by 23.0%p over the same period, indicating a rapid shift in viewing channels.

Figure 2-100 Comparison of Online/mobile Access Platforms for Korean Variety Shows Over the Last 7 Years by Year

Q. Please select all the online/mobile platforms you primarily use to watch Korean variety shows. Exclude edited short videos.
Note. Presented are the top 3 choices (options) ranked by the highest responses

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

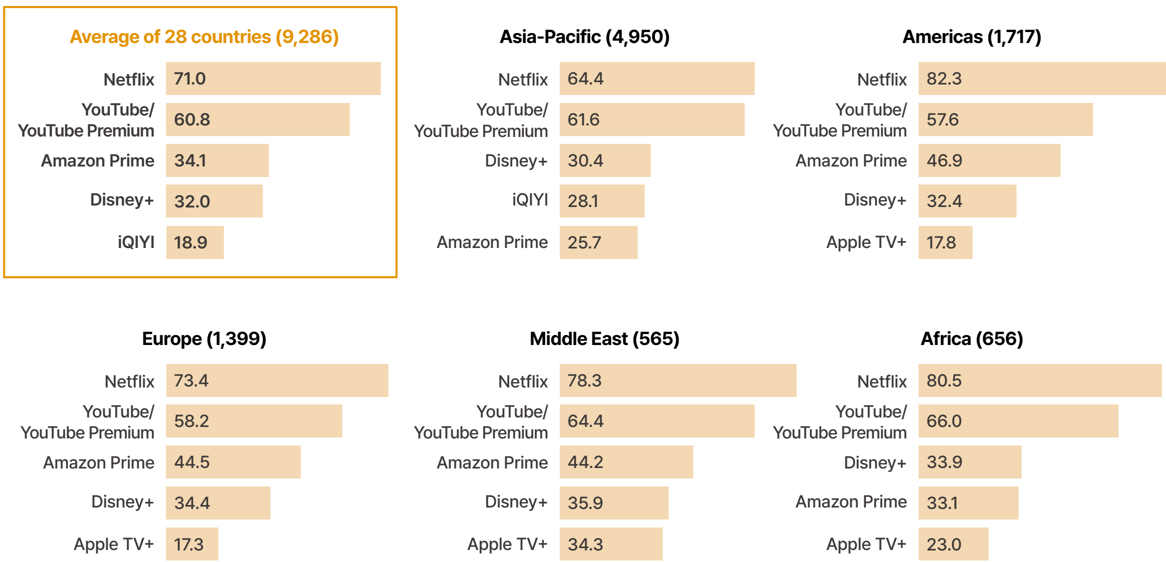


By continent, "Netflix" usage was highest in the Americas (82.3%) and Africa (80.5%), both exceeding 80%. In contrast, in the Asia-Pacific region, the usage rate of "Netflix" was relatively lower at 64.4%, while China's "iQIYI" recorded a rate 9.2%p higher than the average of the 28 countries, indicating active use of local OTT platforms. Meanwhile in the Middle East, the usage rates of "Disney+" (35.9%) and "Apple TV+" (34.3%) were higher than in other continents, showing that global OTT platforms have high shares in that market.

Figure 2-101 Comparison of Online/mobile Access Platforms for Korean Variety Shows by Continent

Note. Presented are the top 5 choices (options) ranked by the proportion of respondents.

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



3

Movies

MOVIES

SUMMARY

In 2024, Korean movies recorded the second-highest experience rate (75.6%) among Hallyu content, after food. The experience rate of Korean movies was particularly high in Asia and exhibited a gradual upward trend in the Americas. The wide popularity of Korean movies has also continued to rise. Indeed, for the first time since the survey began, Korean movies ranked fifth in "images associated with Korea."

Consumers who had experienced Korean movies watched an average of 7.3 films, an increase from the previous year, and overall favorability toward Korean movies reached 74.2%. Favorability toward Korean movies was particularly high in Asian countries, and they received positive feedback in some Western countries, such as the UK.

Key factors promoting favorability included story structure, various attempts across genres, and actors' acting ability. Expansion into diverse materials and genres received particularly positive feedback. On the other hand, difficulties in understanding the content due to the Korean language and cultural differences, along with inconvenience related to subtitles and dubbing, were still cited as key factors inhibiting favorability.

Parasite and *Train to Busan* remained the top two most preferred movies for six consecutive years, while the 2024 release *Exhuma* gained significant popularity and entered the rankings.

01 Experience Rate

Approximately 8 out of 10 respondents had experienced Korean movies. Experience rate exceeded 90% in six Asian countries.

Among consumers with Hallyu experience, 8 out of 10 (75.6%) reported having watched Korean movies. This is the second-highest figure among Korean cultural content, following food, and marks a 6.0 percentage point increase from 2023 (69.6%). Korean movies ranked second in experience rate among Korean cultural content for the second consecutive year since 2023.

By country, the experience rate of Korean movies exceeded 90% across the Asian region. Indonesia (96.3%) recorded the highest rate, followed by the Philippines (95.6%), Thailand (94.6%), Malaysia (94.1%), Taiwan (90.7%), and Vietnam (90.3%). Notably, the Philippines, newly included in this year's survey, ranked second in experience rate, close behind Indonesia. In the Americas, the experience rate of Korean movies showed an upward trend. Countries that recorded less than 50% in the previous year-such as the UK (60.4%), Australia (57.0%), the US (54.3%), and Canada (53.5%)-all surpassed 50% this year. The UK saw the sharpest increase, jumping 11.0 percentage points from the previous year.

By gender, both men and women showed an increase of approximately 6.0 percentage points compared with the previous year. By age, the experience rate rose across all age groups, with teens (74.6%) and those in their 50s (70.1%) showing the largest increases, each up by 10.1 percentage points. These findings suggest that Korean movies are gaining broader recognition in both Asia and the Americas, with growing interest across a wide range of age groups.

Figure 2-102 Comparison of Korean Movie Experience Rates by Country

BASE: Total, Unit: %

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

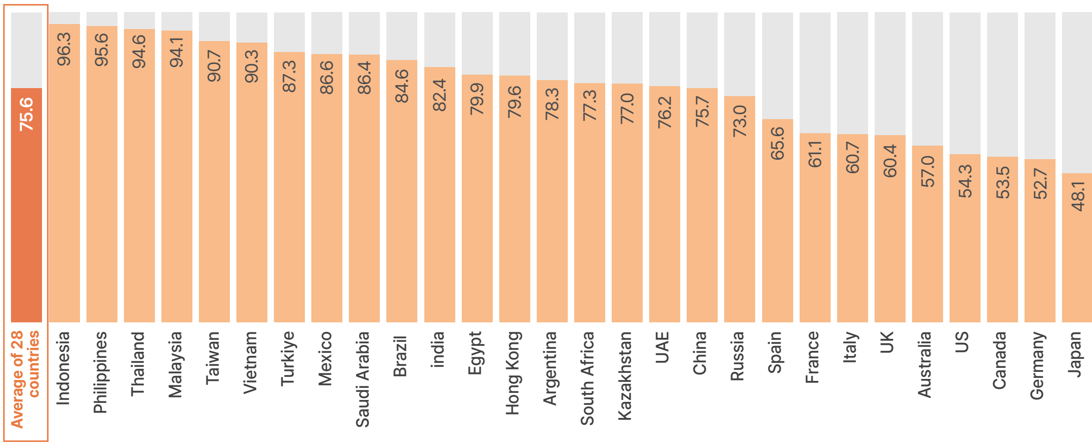
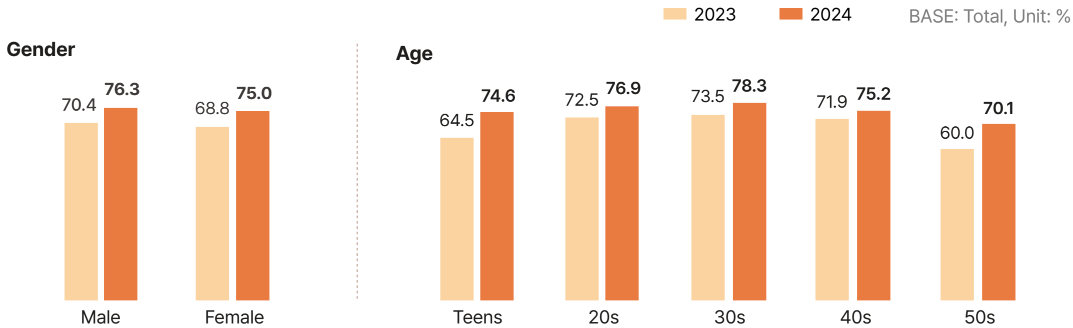


Figure 2-103 Comparison of Korean Movie Experience Rates Over the Last 2 Years by Gender and age

BASE: Total, Unit: %



02 Popularity

Approximately 47.2% of respondents said that Korean movies are "widely popular," the highest rate in the past five years.

Among consumers with Hallyu experience, 47.2% responded that Korean movies are "widely popular." This figure marks a 4.2 percentage point increase from 2023 (43.0%), with Korean movies ranking fifth after Korean food, music, beauty, and dramas. The percentage of respondents selecting "moderately popular" was 29.7%, followed by "popular among a niche audience" at 18.1% and "hardly used" at 5.0%. Notably, among Korean cultural content categories, the proportion of respondents choosing "hardly used" was the second lowest for Korean movies, after food (4.4%).

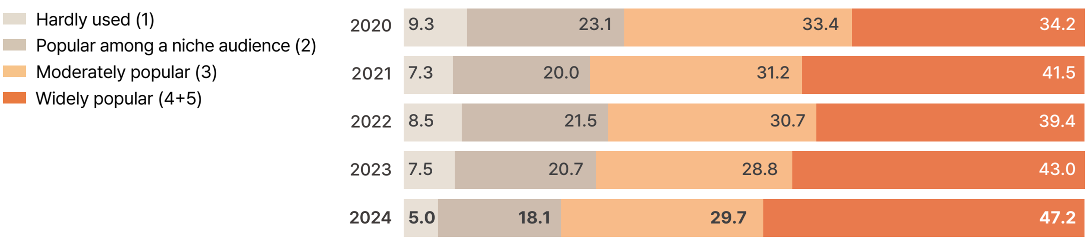
In terms of changes over the past five years, the proportion of "popular among a niche audience" responses declined slightly from the 20% range to 18.1%, while "moderately popular" decreased gradually from 33.4% in 2020 to 29.7% in 2024. In contrast, the rpercentange "widely popular" has grown steadily since 2020, when it scored 34.2%, increasing by an average of 6.6% annually to reach 47.2% in 2024. This trend indicates that Korean movies have steadily gained popularity and are establishing themselves as mainstream content.

Figure 2-104 Comparison of the Popularity of Korean Movies 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 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

BASE: Total, Unit: %



Korean movies were perceived as "widely popular" in Asia and the Middle East.

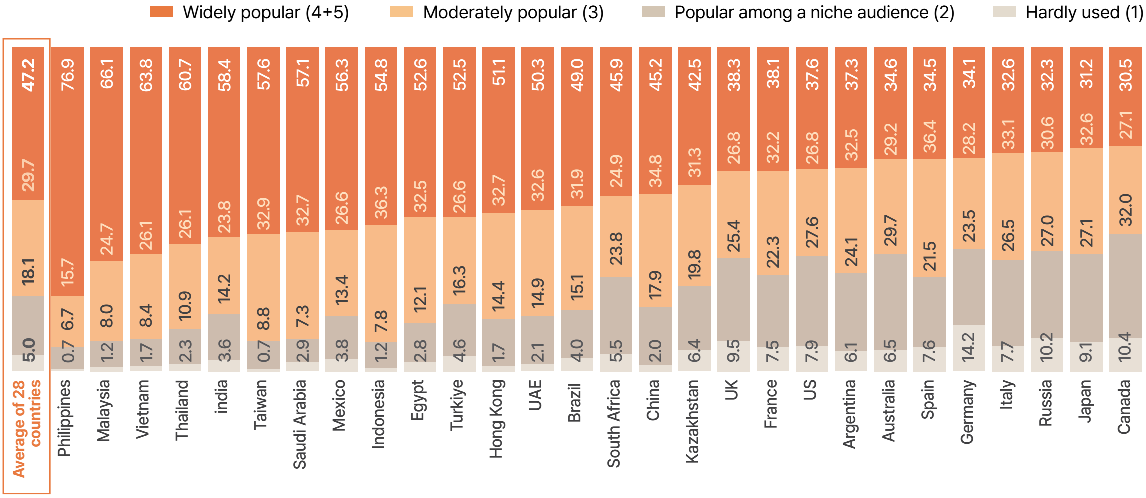
The percentage of respondents who perceived Korean movies as "widely popular" increased in all surveyed countries compared with the previous year. In Asia the Philippines (76.9%) recorded the highest rate, followed by Malaysia (66.1%), Vietnam (63.8%), Thailand (60.7%), India (58.4%), Taiwan (57.6%), Indonesia (54.8%), and Hong Kong (51.1%), with over half of the respondents in each country identifying Korean movies as "widely popular." In the Middle East and North Africa Saudi Arabia (57.1%), Egypt (52.6%), Türkiye (52.5%), and the UAE (50.3%) recorded rates of over 50% for "widely popular." In Latin America, Mexico (56.3%) exceeded the 50% mark.

On the other hand, Canada had the highest proportion of respondents who perceived Korean movies as "popular among a niche audience" (32.0%). The countries with the highest percentages for "moderately popular" were Spain (36.4%), Indonesia (36.3%), and China (34.8%).

In the US, Spain, France, the UK, Italy, Australia, and Argentina, the proportion of respondents selecting "hardly used" exceeded 10% in 2023, but decreased to below 10% in 2024, indicating that awareness of Korean movies is gradually expanding in the Americas and Europe.

Figure 2-105 Comparison of the Popularity of Korean Movies by Country

BASE: Total, Unit: %



Local News

"The 13th Korean Film Festival Frankfurt was held over a period of five days from October 23 to 27, 2024, with *Love in the Big City* screened as the opening film and receiving a warm round of applause. In addition, the 10-million-viewer films *Exhuma* and *12.12: The Day*, as well as *A Letter from Kyoto* and *The Roundup: Punishment 4*, were screened. This provided an opportunity to showcase diverse Korean movies in Frankfurt and drew interest and support from German audiences."

Germany KOFICE Frankfurt Overseas Correspondent

"Earlier this year, *Exhuma* attracted 2.6 million viewers in Indonesia, prompting Cinema XXI, Indonesia's largest movie theater chain, which had not screened Korean movies for decades, to show as many as 15 Korean films this year, confirming the local box office potential of Korean movies. The Indonesian theater market, which had been only partially open, fully opened up after *Exhuma*. Korean movie remakes are also active, and the local original sequel *2nd Miracle in Cell No. 7*, based on the Korean film *Miracle in Cell No. 7*, was released at Christmas this year and surpassed 1 million viewers. In addition, two films shot on location in Korea-*Laut Tengah* and *Cinta Tak Seindah Drama Korea*-were released consecutively in October and December this year. Hallyu is clearly gaining strong momentum in the local Indonesian film industry."

Indonesia KOFICE Jakarta Overseas Correspondent

"There is a niche audience for Korean movies that drives demand for a wide range of Korean movies. While there has not been a blockbuster like *Parasite*, interest in and the popularity of Korean movies continues, as evidenced by *Cobweb* winning both the Festival Cinema Award and the Festival Jury Award at the 22nd Florence Korea Film Fest."

Italy KOTRA Milan Trade Officer

"Interest in and demand for Korean movies have been growing in Canada since *Parasite* won at the Oscars. Cineplex, Canada's leading movie theater chain, has imported a wide range of Korean movies and concert films under its international cinema category. Korean movies have been well received at the Toronto International Film Festival (TIFF), held annually in Toronto, Canada. At the 2024 TIFF, several Korean movies, including *Harbin*, *I, the Executioner*, and *Love in the Big City*, were screened. In particular, *Harbin* starring Hyun Bin and *I, the Executioner*, directed by Ryoo Seung-wan, drew significant attention."

Canada KOTRA Toronto Trade Officer

03 Popular Foreign Movies

"Korea" ranks second after "the US" as the most popular source of foreign movies. Popularity of Korean movies rises in the Middle East and Africa.

For consumers who experienced Korean movies, "the US" (47.9%) ranked first and "Korea" (20.1%) second as the most favored foreign movies, the same ranking as the previous year. The preference rate for "the US," which was 2.4 times higher than that of "Korea," increased slightly compared with the previous year, while Korea saw a decrease of 1.9 percentage points. In Europe, the gap between "the US" (58.2%) and "Korea" (11.1%) was the largest at 5.3 times, whereas in the Middle East and Africa the gaps were 2.0 and 2.6 times, respectively. In the Asia-Pacific region, the gap was the smallest at 1.6 times, showing a relatively more competitive standing compared with other continents. Further, in the Middle East and Africa, "Korea" rose to second place in 2024, after ranking third in 2023, and the gap with "India" (ranked third) widened, confirming the growing recognition of Korean movies. Comparing the percentage of respondents who chose "the US" and "Korea" as their top foreign movie choices over the past 7 years from 2018 to 2024, "the US" decreased by an annual average of 4.0%, falling to 47.9% in 2024. "Korea" increased by an average of 2.3% annually from 2018, but declined by an average of 4.6% per year since 2021, remaining in the 20% range. While the experience rate and popularity of Korean movies are on the rise, the gap in competitiveness with movies from "the US" remains significant.

Figure 2-106 Comparison of Popular Foreign Movies by Continent

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

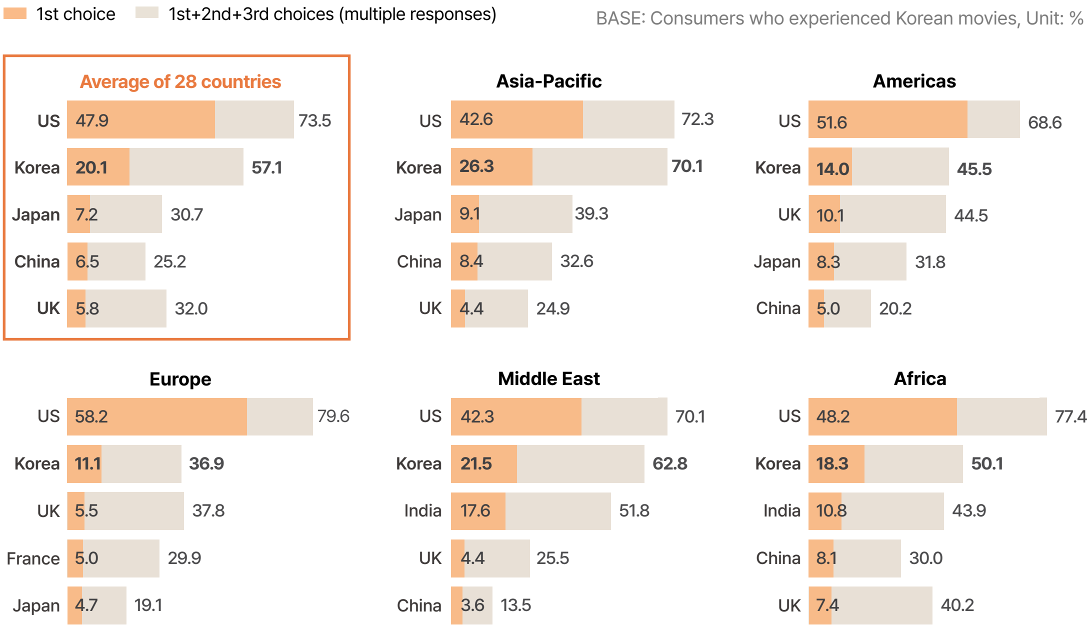
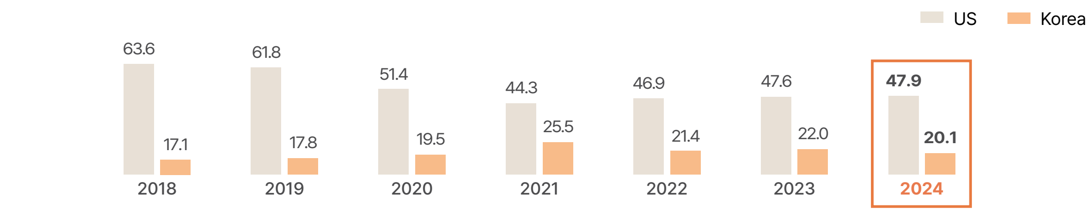


Figure 2-107 Popular Foreign Movies Over the Last 7 Years: Comparison of Proportions of Respondents Between US and Korea



04 Consumption Volume

Korean movie consumption stands out in Southeast Asia and the Middle East.

Consumers who experienced Korean movies had watched an average of 7.3 Korean films over the past three months. This is a slight increase from the previous year (6.4 films). By country, the Philippines (12.3 films) recorded the highest number of viewings, while the UAE (11.6 films), India (11.6 films), Thailand (11.2 films), Brazil (11.0 films), and South Africa (10.1 films)-which had shown above-average consumption in the previous year-also maintained high levels this year, each reporting an average of over 10 films viewed. Significantly, the rising popularity of Korean movies in the Middle East and Africa has led to increased consumption in these regions.

Of the total movie consumption, the proportion of Korean movie consumption averaged 25.4% across the 28 countries, showing a slight decrease from the previous year (26.9%).

By country, Indonesia (40.5%), the Philippines (39.1%), and Malaysia (33.7%) recorded the highest proportion of consumption, continuing the trend of strong support in Southeast Asia.

In terms of expenditure, the UAE recorded the highest at 36.7 USD, some 25.5 USD above the average. This was followed by the US (25.0 USD), Saudi Arabia (24.4 USD), and the UK (22.3 USD), all of which recorded average expenditure over 20 USD. In fact, movie ticket prices in the Middle East, North America, and the UK are higher than in other countries and rank among the highest globally.[1]

Figure 2-108 Comparison of Time Spent on Korean Movies by Country

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.

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

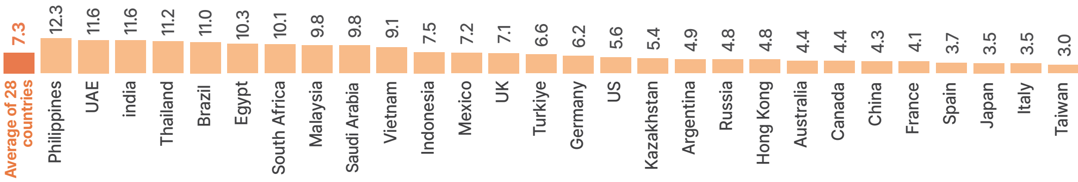


Figure 2-109 Comparison of the Proportion of Korean Movie Consumption by Country

BASE: Consumers who experienced Korean movies, Unit: %

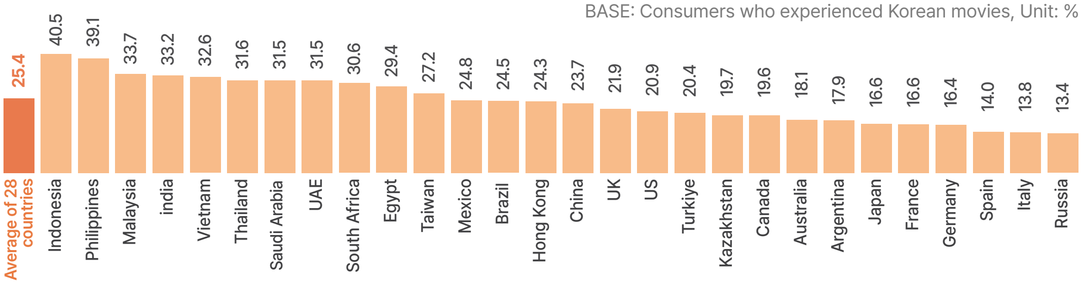
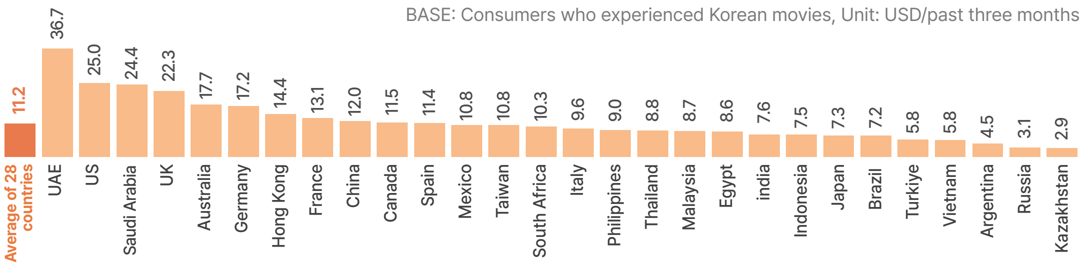


Figure 2-110 Comparison of Expenditure on Korean Movies by Country

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



1 Among the top 20 countries by GDP as of 2021, Saudi Arabia ranked first in movie ticket prices (17.8 USD), followed by Australia in fifth (11.5 USD), Germany in sixth (10.5 USD), the UK in seventh (10.1 USD), and Canada (9.6 USD) and the US (9.6 USD) tied for eighth place, all exceeding the average of 8.3 USD.
Source: *Assessment of Movie Ticket Price Appropriateness Based on the Movie Ticket Index*, Korean Film Council, 2022

05 Favorability

More than 7 out of 10 consumers liked Korean movies. Favorability exceeded 90% in the Philippines and India.

Among consumers who experienced Korean movies, 74.2% said that they "liked" the Korean movies they had recently watched, marking a slight decrease compared with the previous year. The percentage of respondents choosing "neutral" was 22.8%, and "did not like" was 3.1%. Looking at the results over the past five years, favorability surged to 80.6% in 2021, and has since remained in the mid-70% range. However compared with Korean variety shows and dramas, favorability toward movies has become relatively stagnant.

By country, the Philippines (93.1%) and India (90.0%) recorded the highest percentanges for "liked," with both exceeding 90%. These countries were followed by Indonesia (88.1%), the UAE (84.2%), Thailand (81.8%), Saudi Arabia (81.7%), Malaysia (80.5%), and the UK (80.1%). Countries with high consumption volumes of Korean movies-such as Asia, the Middle East, and the UK-tended to show high favorability. On the other hand, Russia (8.3%), Argentina (7.8%), Japan (7.8%), and Kazakhstan (6.4%) showed higher proportions of respondents choosing "did not like" compared with other countries. This appears to be related to the relatively low consumption volume of Korean movies in these countries.

Figure 2-111 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

BASE: Consumers who experienced Korean movies, Unit: %

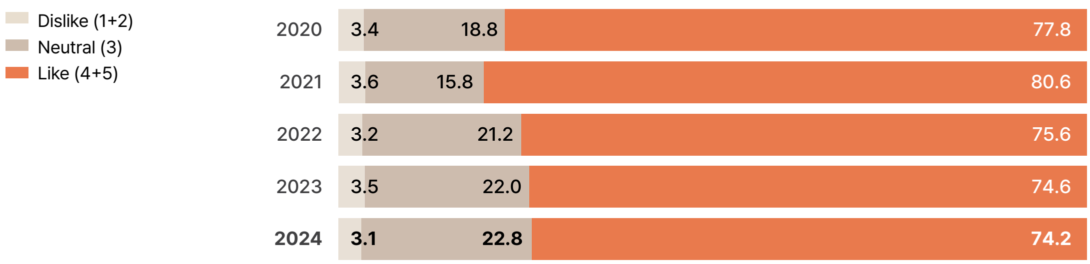
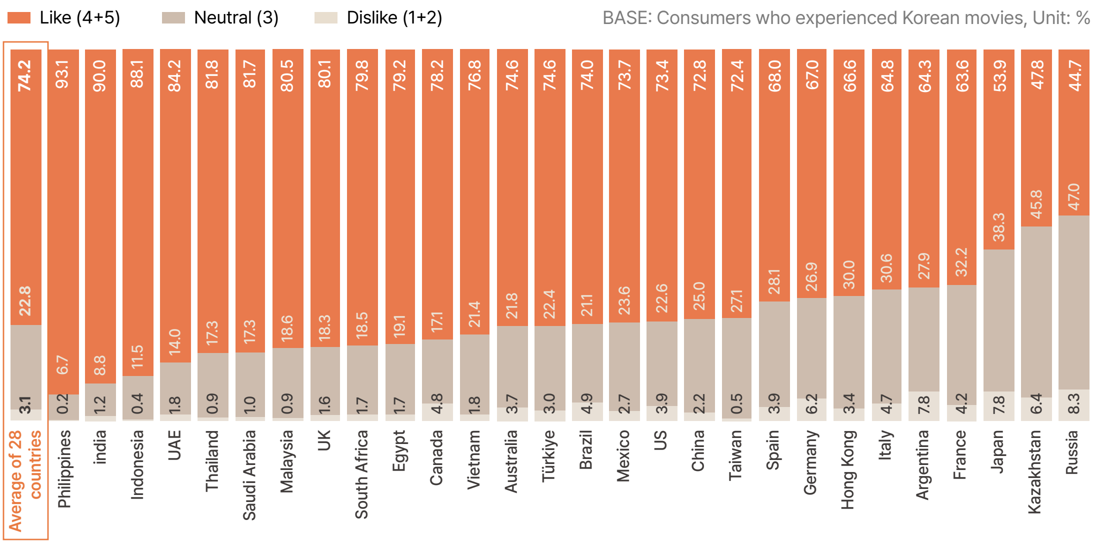


Figure 2-112 Comparison of Favorability Toward Korean Movies by Country

BASE: Consumers who experienced Korean movies, Unit: %



06 Factors Promoting and Inhibiting Favorability

Respondents in Asia and the Americas emphasized “narratives” and “cultural resonance,” while those in the Middle East and Africa valued “acting ability”.

Genre expansion and directing emerged as key factors promoting favorability.

The top reasons (1st + 2nd choices) for consumers liking Korean movies were “the story is well-structured and solid” (28.1%), “covers various materials or genres” (21.2%), and “the actors’ acting ability is outstanding” (20.5%), in that order. In particular, “covers various materials or genres” rose 3.6 percentage points compared with the previous year, climbing from sixth to second place. “The story is well-structured and solid” ranked first in the Asia-Pacific (31.2%) and the Americas (27.3%), while “the actors’ acting ability is outstanding” was the top response in the Middle East (28.3%) and Africa (26.2%). In Europe “can indirectly experience Korean lifestyle and culture” (25.7%) ranked first, as it did last year.

It is noteworthy that factors related to cinematic quality-such as various materials, visual beauty, and directing-have emerged as top responses across all continents. In the Asia-Pacific (20.9%) and the Middle East (21.7%), “covers various materials or genres” rose in the rankings compared with the previous year, placing third and second, respectively. In Africa (20.4%), “covers various materials or genres” entered the rankings for the first time, coming in at fourth. In the Americas (20.3%) and Europe (17.8%) “high cinematic quality, such as visual beauty and directing” rose in ranking compared with the previous year, serving as a key factor promoting favorability. These results suggest a direction for Korean movies, namely, to maintain their current strength in storytelling while continuing to enhance genre diversity and directorial quality.

Language and cultural barriers persist for the seventh consecutive year.

Key factors inhibiting favorability toward Korean movies were “the Korean language is difficult and too unfamiliar” (22.2%), “inconvenient to watch with translated subtitles/dubbing” (20.5%), and “difficult to understand due to language/cultural differences” (17.6%). These results have remained consistent for seven consecutive years, that is, from 2018 to 2024, indicating that language and cultural barriers persist. The issue of the language barrier is frequently raised in relation to other types of Korean video content. Given the nature of video content, where verbal and non-verbal elements interact, these barriers are likely to lead to reduced immersion.

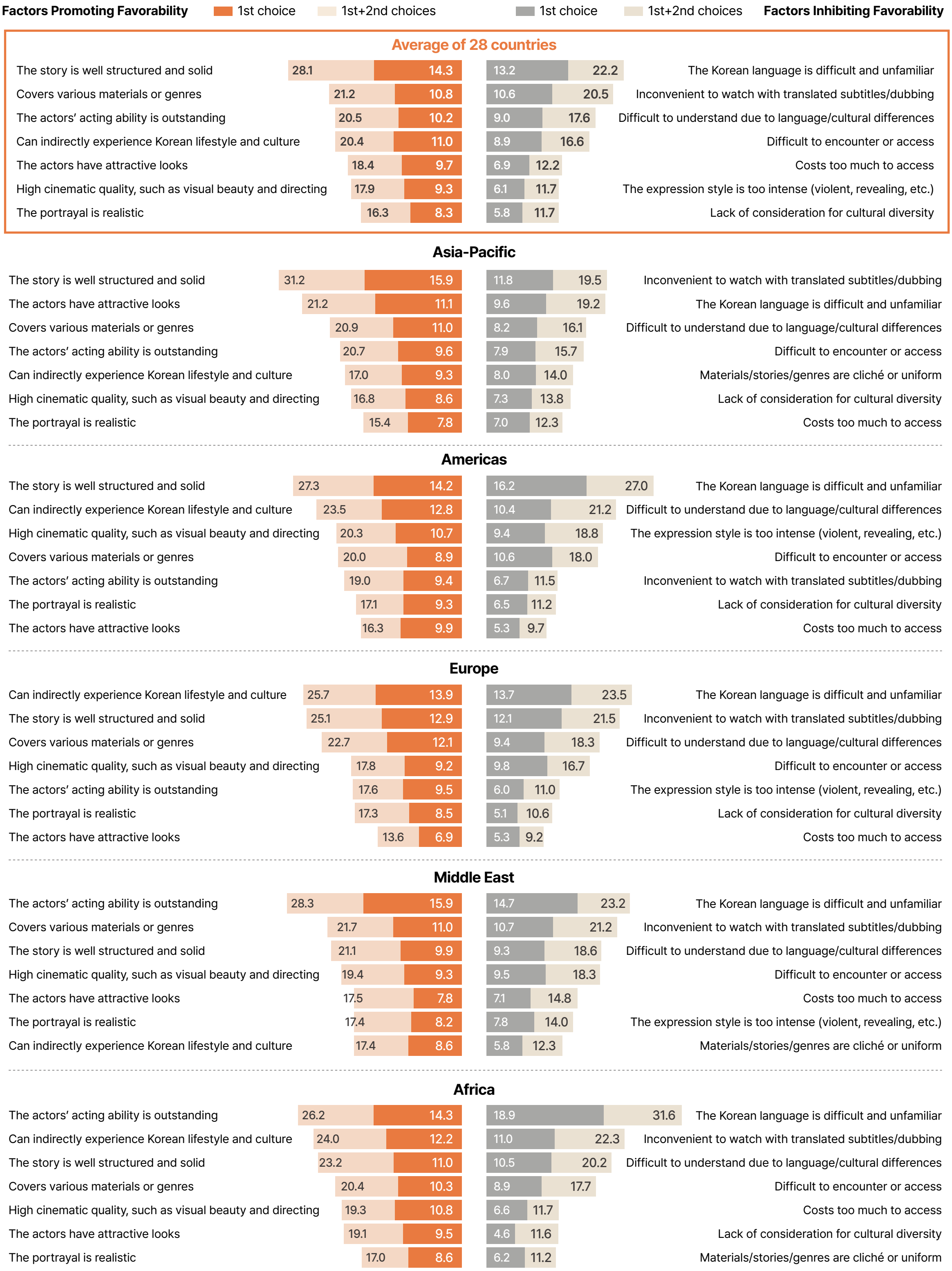
Analysis of factors inhibiting favorability toward Korean movies by region revealed that the proportion of respondents selecting “the Korean language is difficult and unfamiliar” (31.6%) stood out in Africa, while that for “inconvenient to watch with translated subtitles/dubbing” (23.5%) was prominent in Europe. In the Asia-Pacific (14.0%) and the Americas (11.5%) “costs too much to access” rose in rankings compared with the previous year, placing fifth in both regions, indicating a growing burden of cost. In the Middle East, “difficult to find or access” (18.3%) rose by 5.8 percentage points compared with the previous year, highlighting issues of low accessibility.

Korean movies are facing language and cultural barriers. The Asia-Pacific and the Americas are increasingly burdened by cost, while the Middle East is experiencing inconvenience due to limited accessibility.

Figure 2-113 Comparison of Factors Promoting and Inhibiting Favorability Toward Korean Movies by Continent

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.
Note. Presented are the top 7 choices (options) ranked by the combined proportion of respondents selecting each option as their 1st or 2nd choice.

BASE: Consumers who experienced Korean movies, Unit: %



Cultural discomfort with "social class" and "lifestyle and customs."

Consumers who experienced Korean movies reported feeling uncomfortable or dissatisfied with aspects of the representation of cultural diversity, particularly "lifestyle and customs" (29.5%), "social class" (29.4%), and "traditional culture" (25.9%). Similar to Korean drams and variety shows, these items ranked highly in the Asia-Pacific region. "Sexual identity" (31.1%) and "social class" (27.8%) caused the most discomfort among respondents in the Americas and Europe, respectively. In the Middle East (30.6%) and Africa (35.0%), "religion" was identified as the most uncomfortable factor, indicating relatively high religious sensitivity in these regions.

Specifically, the main themes of this year's top-preferred Korean movies, *Parasite* and *Exhuma*, are class conflict and religious beliefs, suggesting that these works may clash with the cultural sensitivities of different countries. While this style of directing may highlight real social issues in some countries, it likely caused feelings of discomfort in others.

Table 2-14 Top 3 Most Uncomfortable Aspects of Cultural Diversity Representation in Korean Movies by Continent

BASE: Respondents who chose "lack of consideration for cultural diversity" as a factor inhibiting favorability for Korean movies

	Average of 28 countries	Asia-Pacific	Americas	Europe	Middle East	Africa
1st	Lifestyle and customs 29.5%	Social class 36.3%	Sexual identity 31.1%	Social class 27.8%	Religion 30.6%	Religion 35.0%
2nd	Social class 29.4%	Lifestyle and customs 33.2%	Lifestyle and customs 25.9%	Traditional culture 25.6%	Lifestyle and customs 25.9%	Lifestyle and customs 26.6%
3rd	Traditional culture 25.9%	Traditional culture 28.7%	Race 24.9%	Lifestyle and customs 25.2%	Gender 24.7%	Race 24.5%

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07 Preferred Movies

Parasite remains the most preferred movie for the sixth consecutive year. The 2024 release *Exhuma* gained popularity.

In 2024, *Parasite* and *Train to Busan* (6.5%) ranked as the first and second most preferred movies, maintaining this ranking for the sixth consecutive year. While the global influence of *Parasite* and *Train to Busan* continues, the 2024 release *Exhuma* (4.1%) ranked third, showing a remarkable performance by exceeding a 4.0% preference rate.

Released in 2024, *Exhuma* made it into the rankings in the Asia-Pacific (5.9%), the Americas (2.8%), Europe (2.2%), and the Middle East (2.3%). In the Asia-Pacific region, its preference rate approached 6.0%, with particularly high rates recorded in Taiwan (12.1%) and Hong Kong (10.3%). The occult movie *Exhuma*, which was released in Korea in February 2024, surpassed 10 million domestic viewers within 32 days of its release, achieving remarkable box office success. It was sold to 133 countries worldwide and successfully released in North America, Australia, the UK, and Taiwan. In Indonesia and Vietnam, it set a record as the highest-grossing Korean movie of all time. The global success of *Exhuma* aligns with the key factors promoting favorability toward Korean movies, including well-structured stories, various materials, and the actors' acting ability.

Exhuma combines familiar horror elements with the fresh cultural backdrop of Korean traditional shamanism and funeral customs, alongside highly polished directing and outstanding visual beauty. The cast included well-established actors like Choi Min-sik, who starred in the movie *Oldboy*, the film successfully enhancing viewers' immersion through proven acting ability. Its global release on Netflix on July 15, 2024, successfully attracted new international viewers. The recent trend of movie releases through OTT platforms has played an important role in the global spread of Korean movies. Among the films to enter the ranks this year, *Escape* was released via Netflix in November 2024, and *Wonderland* premiered on Netflix in all countries except Korea and China. *Wonderland* was first released in theaters in June and made available on Netflix in the US in July. A Netflix original movie released in January 2024, *Badland Hunters* (14%) is cited as another case of Korean movies gaining traction through OTT platforms.

Figure 2-114 Comparison of Top 5 Most Preferred Korean Movies by Continent

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

BASE: Consumers who experienced Korean movies, Unit: %, open-ended responses

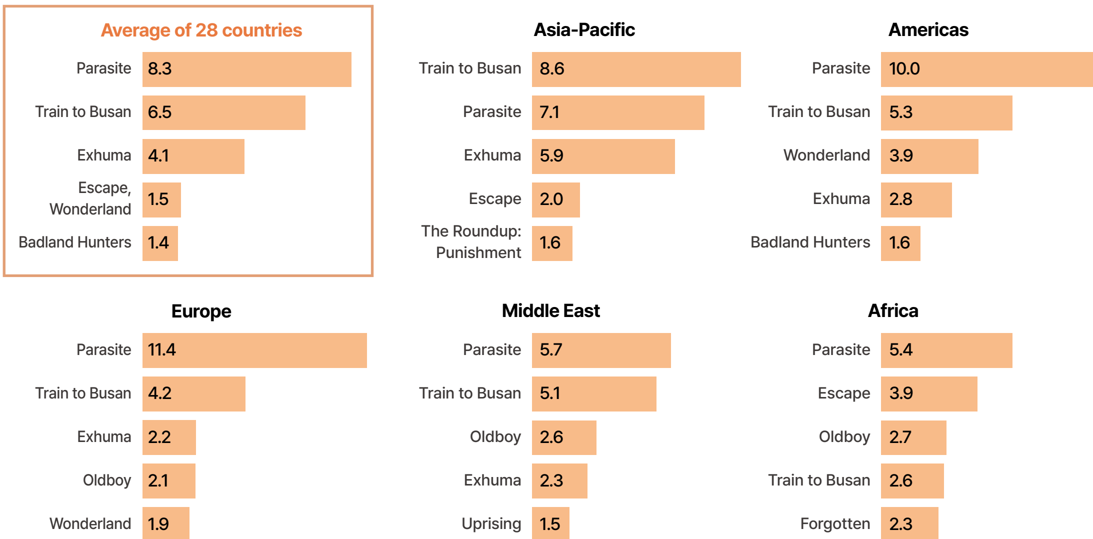


Table 2-15 Top Five Countries in Preference Rates for Most Preferred Movies

	1st	2nd	3rd	4th	5th
Parasite	Japan 20.4%	Spain 27.4%	Italy 14.2%	Australia 14.1%	France 18.2%
Train to Busan	Malaysia 17.6%	Kazakhstan 13.2%	China 11.9%	Russia 11.3%	Taiwan 9.4%
Exhuma	Taiwan 12.1%	Hong Kong 10.3%	Indonesia 9.7%	Vietnam 3.0%	Malaysia 6.0%

08 Willingness to Pay

More than half of the consumers who experienced Korean movies expressed their willingness to pay.
Willingness to pay exceeded 70% in India and Thailand.

When asked whether they are willing to pay to watch Korean movies, 52.4% of respondents answered in the affirmative-an increase of 4.8 percentage points on 2023 (47.6%). Approximately 25.0% of respondents held a neutral position, while 22.6% said that they were "not willing to pay."
Looking at the trend over the past five years, the proportions of respondents selecting "not willing to pay" and "neutral" have declined gradually, while that for "willing to pay" has increased, rising 8.3 percentage points from 44.1% in 2020 to 52.4% in 2024. Notably, compared with Korean dramas or variety shows, Korean movies showed relatively lower scores in willingness to recommend and ease of use, but a higher score for willingness to pay. These results reflect the paid consumption experience of watching movies in theaters and making individual payments for movies on OTT platforms.
By country, "willingness to pay" was high in India (73.6%), Thailand (71.8%), the Philippines (69.1%), and Indonesia (69.0%), all exhibiting increases compared with the previous year. On the other hand, "willingness to pay" in Japan (23.6%) and Italy (29.8%) remained below 30%, showing little change from the previous year. Specifically, in Japan, more than half of the respondents (51.6%) said that they were "not willing to pay," marking an increase in negative responses compared with the previous year.

Figure 2-115 Comparison of the Willingness to pay for Korean Movies 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

BASE: Total, Unit: %

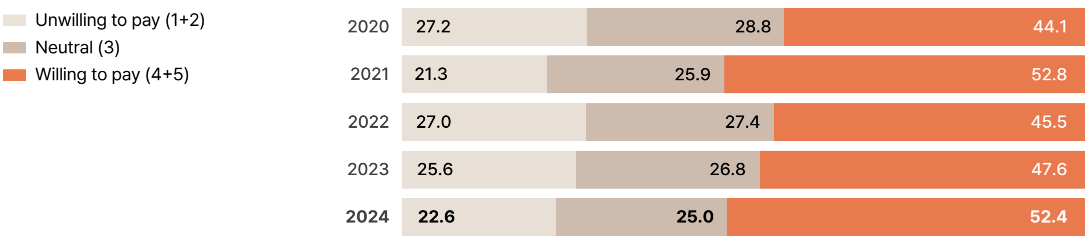
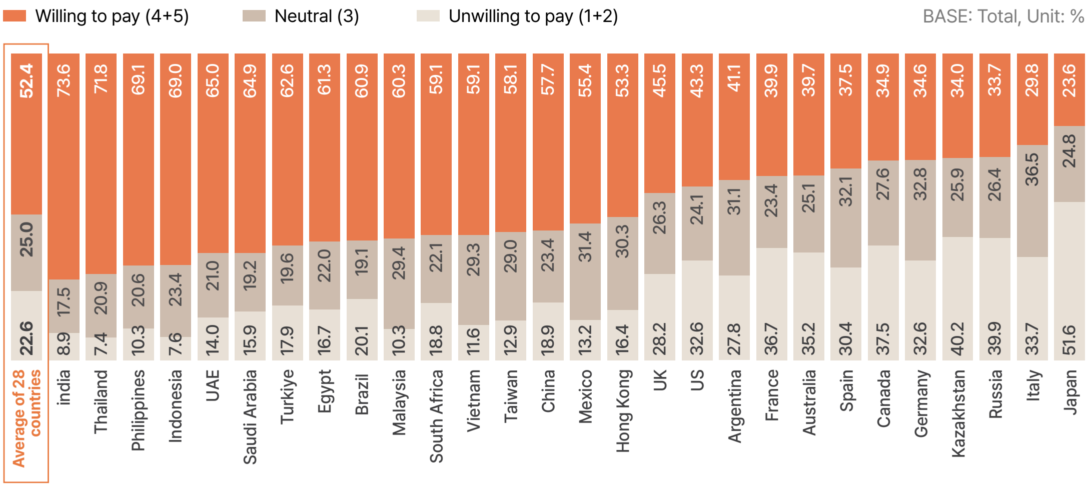


Figure 2-116 Comparison of the Willingness to pay for Korean Movies by Country

BASE: Total, Unit: %



09 Willingness to Recommend

Approximately 73.4% of respondents were willing to recommend Korean movies

Respondents in the Philippines and India were willing to recommend, while those in Japan, Germany, and Kazakhstan had a more passive attitude.

Among consumers who experienced Korean movies, 73.4% responded that they were "willing to recommend" them to others, an increase of 1.7 percentage points on 2023 (75.1%). Meanwhile, 22.3% of respondents were "neutral," while 4.3% were "not willing to recommend." By gender, proportions of respondents selecting "willing to recommend" among men declined by 3.0 percentage points compared with the previous year. By age group, willingness to recommend decreased among those in their 20s–40s, and increased among teens (▲0.6 percentage points) and those in their 50s (▲1.3 percentage points). In particular, among teens and those in their 50s, willingness to recommend increased alongside the experience rate of Korean movies, suggesting that perceptions of Korean movies are becoming more diverse across age groups.

By country, willingness to recommend was highest in the Philippines (91.7%) and India (90.3%), followed by the UAE (84.5%), South Africa (82.2%), Mexico (81.2%), and Indonesia (79.6%). Among the 28 countries surveyed, 19 recorded a 70% or higher proportions of respondents selecting "willingness to recommend," with Asian and Middle Eastern countries showing particularly high willingness to recommend, consistent with their high favorability and willingness to pay. In contrast, willingness to recommend was low in Japan (11.3%), Germany (9.4%), Kazakhstan (8.4%), China (7.5%), and Russia (7.3%), indicating a more passive attitude toward recommending Korean movies in these countries.

Figure 2-117 Comparison of the Willingness to Recommend Korean Movies Over the Last 2 Years by Year

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

BASE: Total, Unit: %

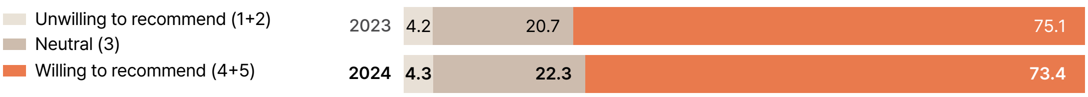


Figure 2-118 Comparison of Variation in the Willingness to Recommend Korean Movies by Gender and age

BASE: Total, Unit: %p

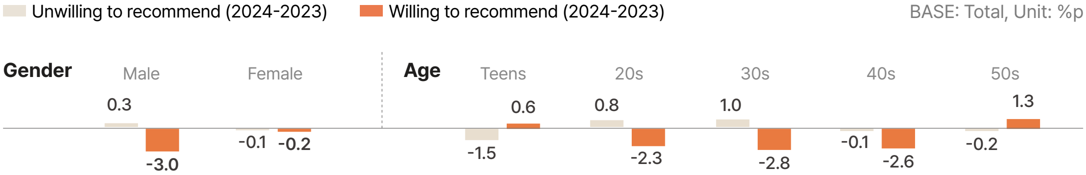
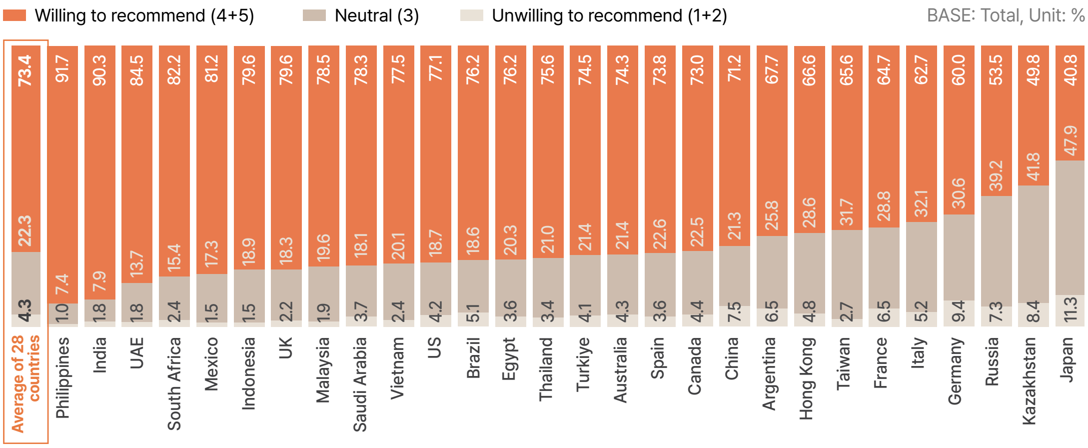


Figure 2-119 Comparison of the Willingness to Recommend Korean Movies by Country

BASE: Total, Unit: %



10 Ease of Use

Approximately 67.0% of respondents said that Korean movies are "easy to watch." Responses were particularly high in Indonesia, Türkiye, and the Philippines .

The percentage of respondents who said Korean movies are "easy to watch" was 67.0%. In contrast, 8.3% responded that they are "not easy to watch." Perceptions toward ease of use for Korean movies have fluctuated since 2020 but have consistently remained in the medium to high 60% range.
By country, proportions of respondents selecting "easy to watch" were particularly high in Indonesia (81.7%), Türkiye (80.3%), and the Philippines (80.0%), where experience rates for Korean movies were also high. On the other hand, the proportion of respondents who found it difficult to watch Korean movies decreased slightly compared with the previous year in France (20.4%), Argentina (15.6%), and Spain (13.6%), which reported the highest rates last year. Nonetheless, compared with other regions, relatively high percentages of respondents in these countries did not find it easy to watch Korean movies.

Figure 2-120 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

BASE: Consumers who experienced Korean movies, Unit: %

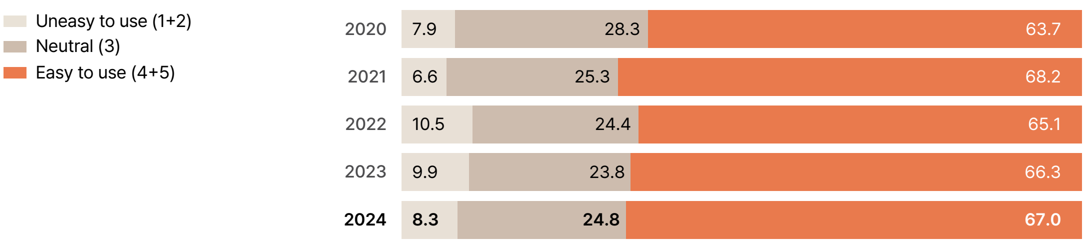
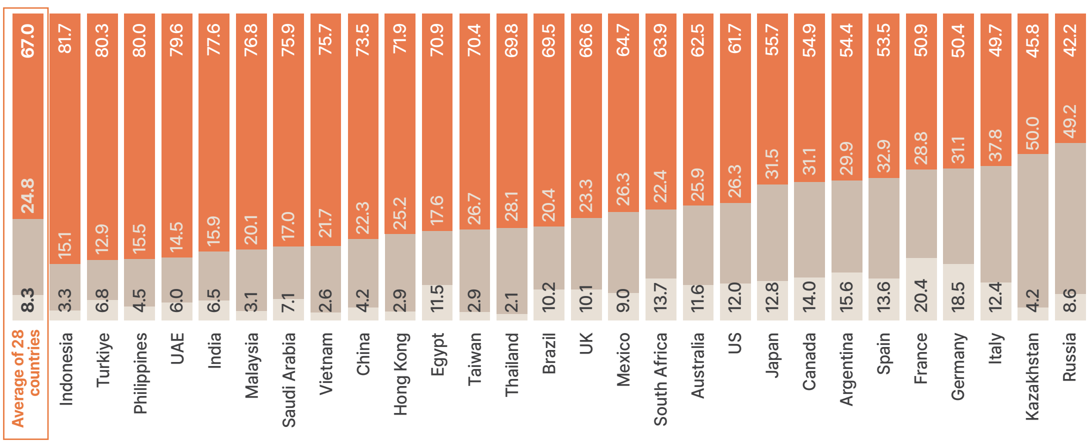


Figure 2-121 Comparison of the Ease of Watching Korean Movies by Country

Easy to use (4+5) Neutral (3) Uneasy to use (1+2) BASE: Consumers who experienced Korean movies, Unit: %



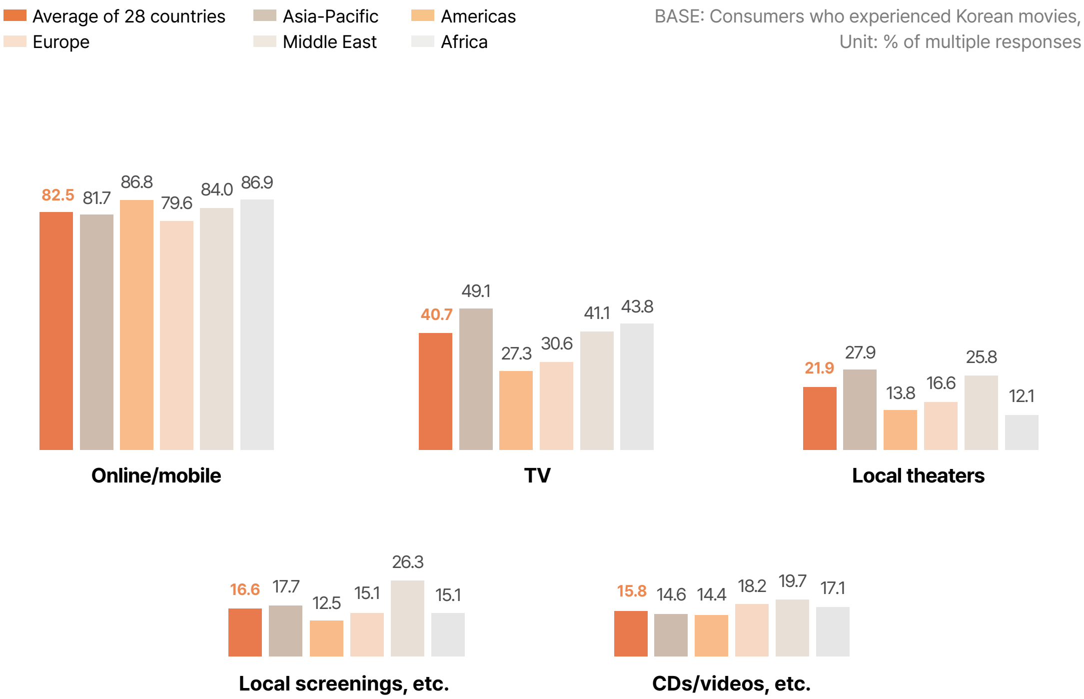
11 Channels of Exposure

Channels of exposure expanded from online to offline. Exposure via “local theaters” and ”local screenings” has increased.

The main channels of exposure for Korean movies were “online/mobile” (82.5%), “TV” (40.7%), “local theaters” (21.9%), “local screenings, etc.” (16.6%), and |CDs/videos, etc.” (15.8%), in that order. While exposure via “online/mobile,” “TV,” and “CDs/videos, etc.” decreased compared with the previous year, exposure through “local theaters” and “local screenings” increased. This reflects the growing awareness of Korean movies, leading to more releases in global theaters and an extension from primarily online experiences to offline ones. By continent, the Americas (86.8%) and Africa (86.9%) reported the highest access rates via “online/mobile,” continuing the trend from the previous year. In the Asia-Pacific region exposure through “local theaters” (27.9%) was higher than in other regions, increasing compared with the previous year, indicating a rise in theater viewership of Korean movies in that region.
Compared with last year, exposure through “local screenings, etc.” rose by 5.9 and 10.8 percentage points in Europe (15.1%) and the Middle East (26.3%), respectively. This suggests that interest in Korean movies is growing in Europe where awareness of Korean movies is increasing, and the Middle East, where content consumption is high.

Figure 2-122 **Comparison of Korean Movie Channels of Exposure by Continent**

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



12 Online/mobile Platforms

High usage rates for "paid subscription-based OTT" reported in the Americas and Europe.

Among respondents who watched Korean movies via online/mobile platforms, the highest proportion (42.7%) reported using "paid subscription-based OTT," followed by "free ad-supported OTT" (38.7%) and "pay-per-view content" (16.7%). Similar to Korean dramas, this trend can be attributed to the continued release of Korean movies on global paid OTT platforms, resulting in increased paid usage. By continent, the Americas (47.4%) and Europe (45.2%) showed higher usage rates for "paid subscription-based OTT" than the average of the 28 countries surveyed.

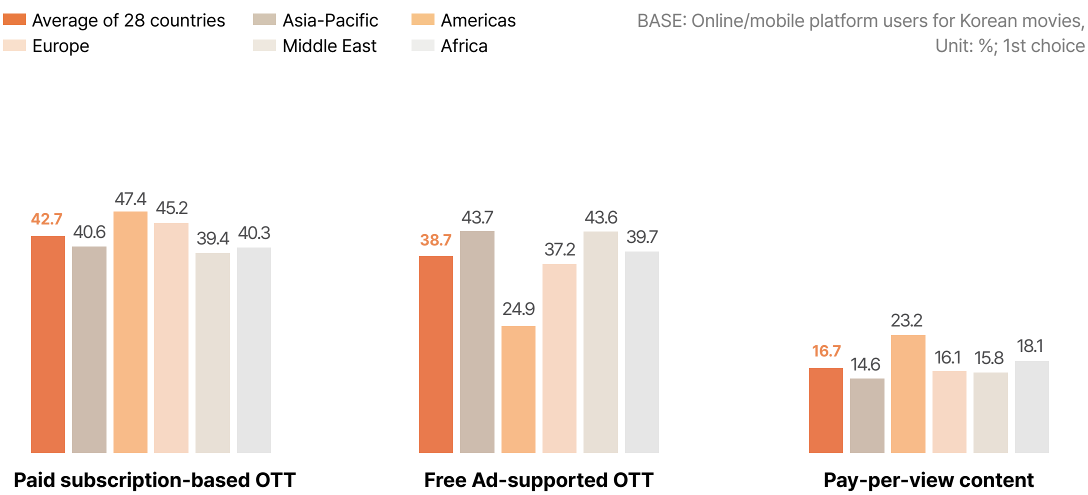
In contrast, the Asia-Pacific (43.7%), Middle East (43.6%), and Africa (39.7%) showed relatively higher usage of "free ad-supported OTT." Notably, the Americas (23.2%) recorded the highest usage of "pay-per-view content." In fact, countries such as the US and Canada in the Americas, and the UK, Germany, and France in Europe ranked within the top 10 among the 28 countries in terms of average expenditure on Korean movies, indicating active paid consumption of Korean movies in these countries.

Figure 2-123 Comparison of Online/mobile Viewing Types for Korean Movies by Continent

Q. When you watch Korean movies online/ through mobile, what type of viewing do you use? Please select all the types you watch most in order.

※ Edited short videos are excluded.

BASE: Online/mobile platform users for Korean movies, Unit: %; 1st choice



Netflix has ranked first for four consecutive years.
Increased use of local platforms such as iQIYI in Asia and Kinopoisk in Europe.

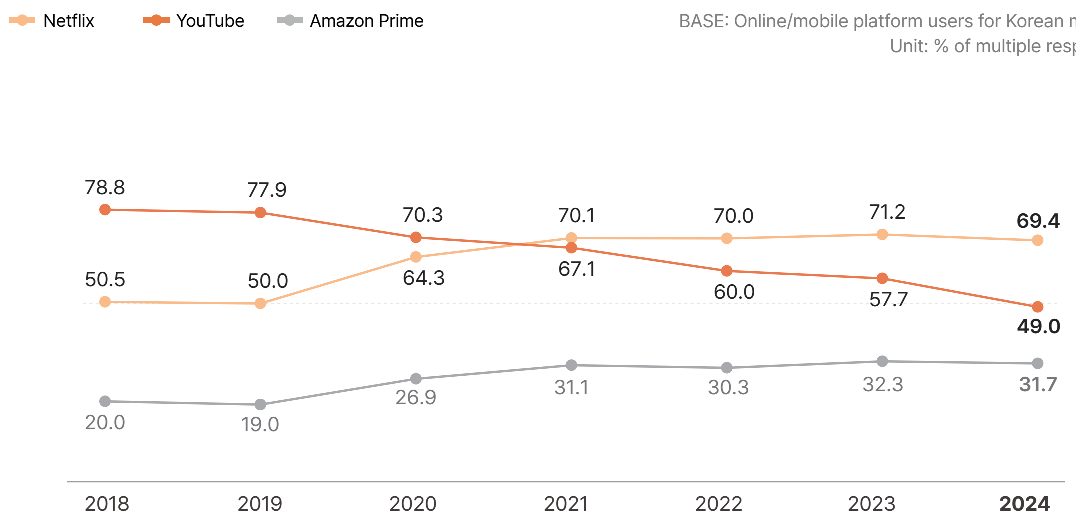
Among respondents who watched Korean movies via online/mobile platforms, 69.4% said they used "Netflix," while 49.0% used "YouTube." Usage rates for "Netflix" and "YouTube" were 2.2 and 15 times higher, respectively, than that for "Amazon Prime" (31.7%). While "Netflix," "YouTube," and "Amazon Prime" maintained similar rankings for Korean dramas, variety shows, and animation, it is worth noting that "YouTube" had the lowest access rate for movies. This suggests that while "YouTube" excels in free ad-supported content or short-form video consumption, it is relatively less competitive in long-form content consumption, such as movies.

Figure 2-124 Comparison of Online/mobile Platforms for Korean Movies Over the Last 7 Years by

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

Note. Presented are the top 3 choices (options) ranked by the proportion of respondents.

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

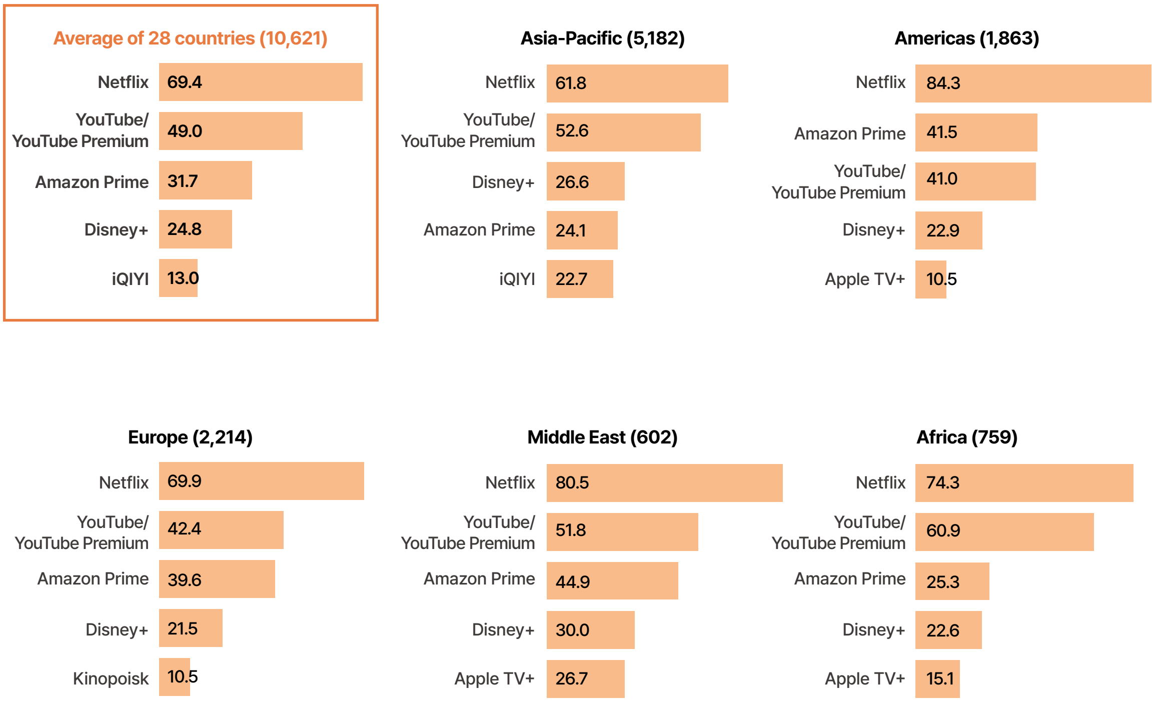


While "Netflix" and "YouTube" ranked first and second, in most continents. But in the Americas, "Netflix" (84.3%) ranked first followed by "Amazon Prime" in second place. In the Asia-Pacific the usage rate for "iQIYI" (22.7%), a China-based platform, was some 9.7 percentage points higher than the 28-country average. In Europe "Kinopoisk" (10.5%), based in Russia, ranked among the top, indicating high usage of local OTT platforms. "Netflix" (80.5%) had the highest usage rate in the Middle East, while the usage rate of "YouTube" (60.9%) was higher in Africa than in other continents.

Figure 2-125 Comparison of Online/mobile Platforms for Korean Movies by Continent

Note. Presented are the top 5 choices (options) ranked by the proportion of respondents.

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



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4

Music

MUSIC

SUMMARY

Among consumers with Hallyu experience, 7 out of 10 (70.6%) had experienced Korean music, making it the third most experienced content category after food and movies. Experience rates were particularly high in Southeast Asian countries and relatively low in parts of the Middle East, Africa, and Europe. Over the past five years, the proportion of respondents indicating “widely popular” for Korean music has increased steadily, surpassing 50% for the first time in 2024. Meanwhile, the proportion indicating “hardly used” has shown a downward trend.

Key factors promoting favorability toward Korean music were musicality, performance, and style. There was a strong preference toward the “K-pop universe” in Europe, “cultural diversity” in Asia and Africa, and “personal appeal” in the Middle East. The biggest factor inhibiting favorability was “unfamiliar lyrics.” In the Middle East and Africa, the issue of “fandom culture” emerged as a new factor inhibiting favorability.

The most preferred artists were still BTS and BLACKPINK, who ranked first and second, while TWICE, Stray Kids, and Jung Kook also showed high preference rates across regions. Notably, Lim Young-woong ranked within the top 20 in some countries, indicating the genre expansion of Korean music.

01 Experience Rate

Of respondents, 7 out of 10 had experienced Korean music. Experience rates were particularly high in Southeast Asia, including the Philippines and Malaysia.

Among consumers with Hallyu experience, 7 out of 10 (70.6%) reported having experienced Korean music. This marks an increase of 6.0 percentage points on the previous year, making it the third most experienced category of Korean cultural content after food and movies. Countries with high experience rates for Korean music were mostly in Southeast Asia, including the Philippines (95.6%), Malaysia (91.5%), Thailand (88.3%), Indonesia (87.3%), and Vietnam (85.8%). Experience rates were lower in the Middle East, Africa, and Europe, such as Egypt (38.3%), Italy (52.0%), Türkiye (57.6%), and Saudi Arabia (57.8%). Japan (71.7%), which ranked low in experience rates for dramas, variety shows, and movies, showed a contrasting trend in reporting an experience rate above the 28-country average. By gender and age group, the highest experience rates were among women (72.7%) and those in their 20s (75.5%). While those in their 50s (57.2%) had relatively lower experience rates compared with other age groups, they showed the largest increase compared with the previous year (▲8.4 percentage points). Moreover in all gender and age groups, the experience rate exceeded the non-experience rate, indicating a trend of expanding Korean music consumption across demographics.

Figure 2-126 Comparison of Korean Music Experience Rates by Country BASE: Total, Unit: %

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

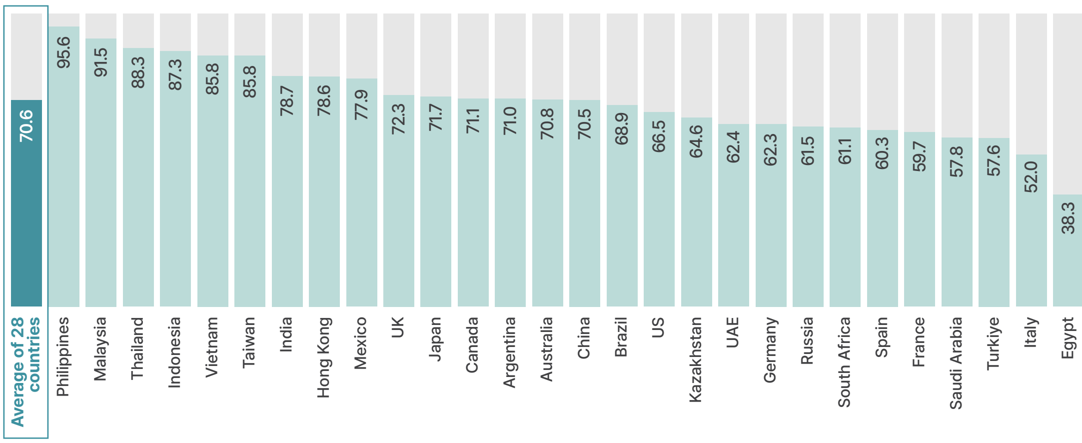
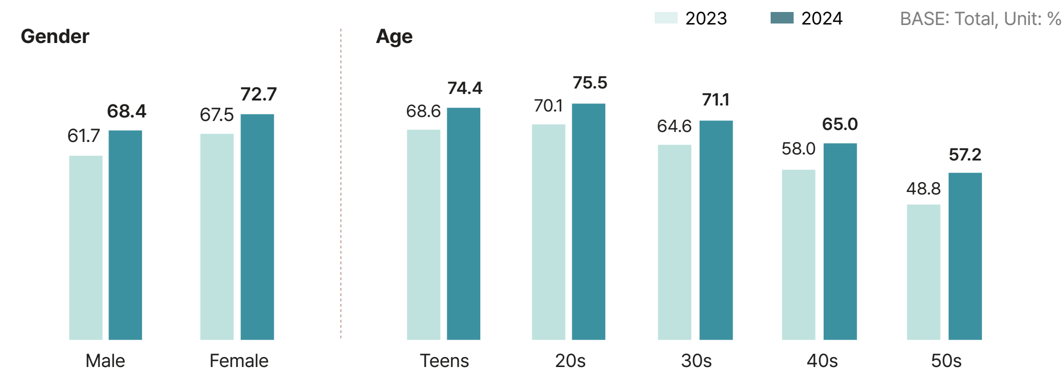


Figure 2-127 Comparison of Korean Music Experience Rates Over the Last 2 Years by Gender and age



02 Popularity

More than half of the respondents perceived Korean music as “widely popular.”

When consumers with Hallyu experience were asked how popular Korean music is in their own countries, 51.2% responded that it is “widely popular.” This is the second-highest figure among Korean cultural content categories, following food, similar to the experience rate. The percentage of respondents selecting “moderately popular” was 25.9%, while “popular among a niche audience” accounted for 17.4% of responses and “hardly used” only 5.5%.

Over the past five years, the proportion of respondents choosing “widely popular” remained in the 40% range, but surpassed 50% for the first time in 2024, reaching 51.2%. Meanwhile, both “popular among a niche audience” and “hardly used” have steadily declined since 2022, with the rate for “hardly used” dropping to just 5.5%, indicating that Korean music is gradually becoming mainstream.

Particularly high popularity in Asia and Latin America. Popularity in Japan is notably high, exceeding 50%.

By country, a high percentage of respondents in Asia and Latin America perceived Korean music as “widely popular,” including those in the Philippines (79.3%), Malaysia (68.1%), Taiwan (66.2%), Vietnam (66.1%), Mexico (63.8%), Indonesia (60.3%), Thailand (59.5%), India (57.8%), Hong Kong (57.0%), Japan (55.4%), and Brazil (52.4%). On the other hand, the proportion of respondents in Russia (31.7%), Germany (37.9%), Italy (38.1%), and South Africa (39.5%) were low, remaining in the 30% range.

While Japan (55.4%) generally showed lower-than-average proportion of respondents choosing “widely popular” in other types of content, the percentage for “widely popular” was higher than average for Korean music, second only to food (65.3%). In Egypt, Russia, South Africa, Italy, and Germany, the percentage of respondents reporting “hardly used” exceeded 10%.

Figure 2-128 Comparison of the Popularity of Korean Music 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

BASE: Total, Unit: %

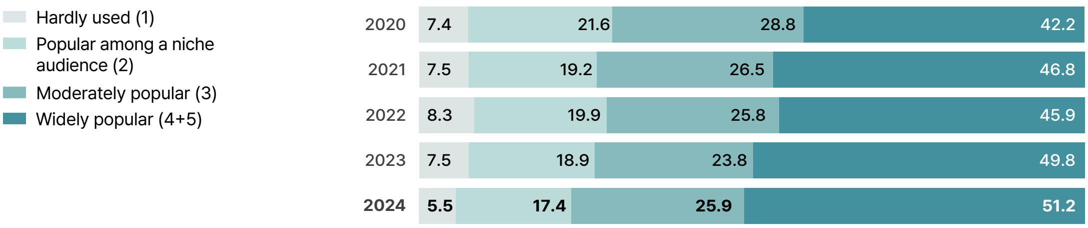
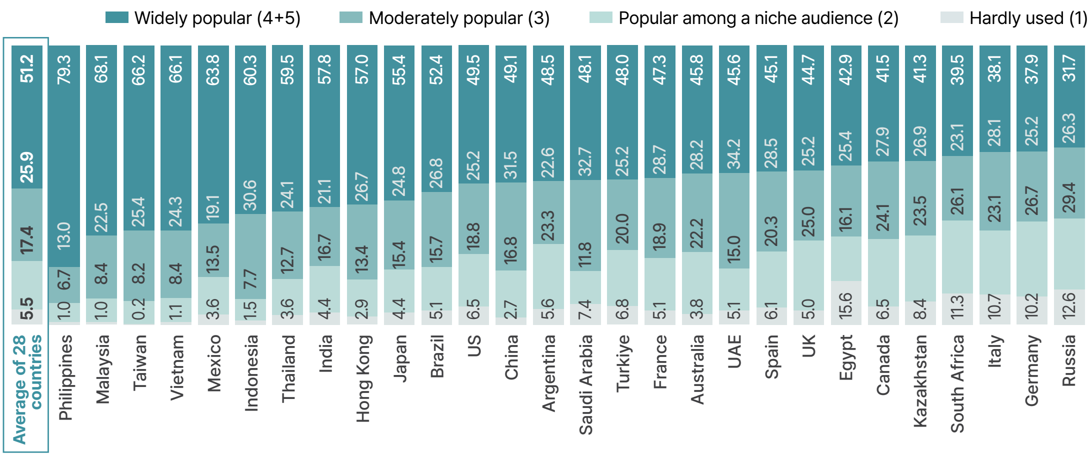


Figure 2-129 Comparison of the Popularity of Korean Music by Country

BASE: Total, Unit: %



Local News

“In October 2024, Germany aired its first-ever radio program dedicated exclusively to K-pop, “Beste Musik K-pop,” on the public station, RBB. The program can be streamed live via the app, and replays are also available on Germany’s primary public broadcaster, ARD. As this marks the first time a K-pop-exclusive program has aired on German broadcasting, there is growing hope that more aspects of Korean culture will be shared.”

Germany KOFICE Frankfurt Overseas Correspondent

“2024 was a year filled with performances by many K-pop artists. Among them, Stray Kids received the most love. With members Bang Chan and Felix from Australia, Stray Kids visited Australia for their first stadium tour, receiving an enthusiastic welcome from fans. BLACKPINK’s ROSÉ, who released the collaborative single *APT*. with Bruno Mars, also became the first K-pop artist to top Australia’s ARIA Charts in the single album category."

Australia KOFICE Sydney Overseas Correspondent

“In 2024, ROSÉ’s *APT*. gained huge popularity, and I received many questions about whether Koreans really play drinking games like the apartment game. There was also strong interest in (G)I-DLE, which includes Taiwanese member Shuhua. Songs like *Fate* were frequently heard on the streets and widely used in short-form content.”

Taiwan KOFICE Taipei Overseas Correspondent

“K-pop continued to maintain their strength in Thailand in 2024. In Spotify Thailand’s year-end roundup, K-pop tracks occupied the top 9 most-streamed songs in the country. Artists like LISA, BTS, NCT, and aespa were especially loved, and a variety of singers held concerts, fan meetings, and pop-up events in Thailand."

Thailand KOFICE Bangkok Overseas Correspondent

“K-pop still enjoys the highest level of recognition among Korean content. There’s even a joke that NCT needs an Indonesian ID because of how frequently they visit. SEVENTEEN’s fandom has grown steadily, and DAY6 has rapidly gained fans in Indonesia. Their concert tickets in three cities were sold out, and they held around 20 concerts this year.”

KOCCA Indonesia Business Center Assistant Manager

“In Japan, K-pop has enjoyed the most enthusiastic popularity among all aspects of Hallyu. Male idol groups like BTS, Stray Kids, ENHYPEN, and SEVENTEEN, as well as female groups like TWICE, LE SSERAFIM, IVE, and NewJeans, have gained immense popularity. Korean artists have frequently appeared on large screens and posters at Shibuya Station. Interest has also expanded beyond idols to Korean band music, with FTISLAND, CNBLUE, and DAY6 consistently drawing attention with their performances in Japan.”

Japan KOFICE Tokyo Overseas Correspondent

“In downtown Kuala Lumpur, K-pop can be heard frequently, and Korean music is often used as background sound on radio or online platforms like social media. When new songs are released, it is common to see local students filming TikTok cover dance videos.”

Malaysia KOTRA Kuala Lumpur Trade Officer

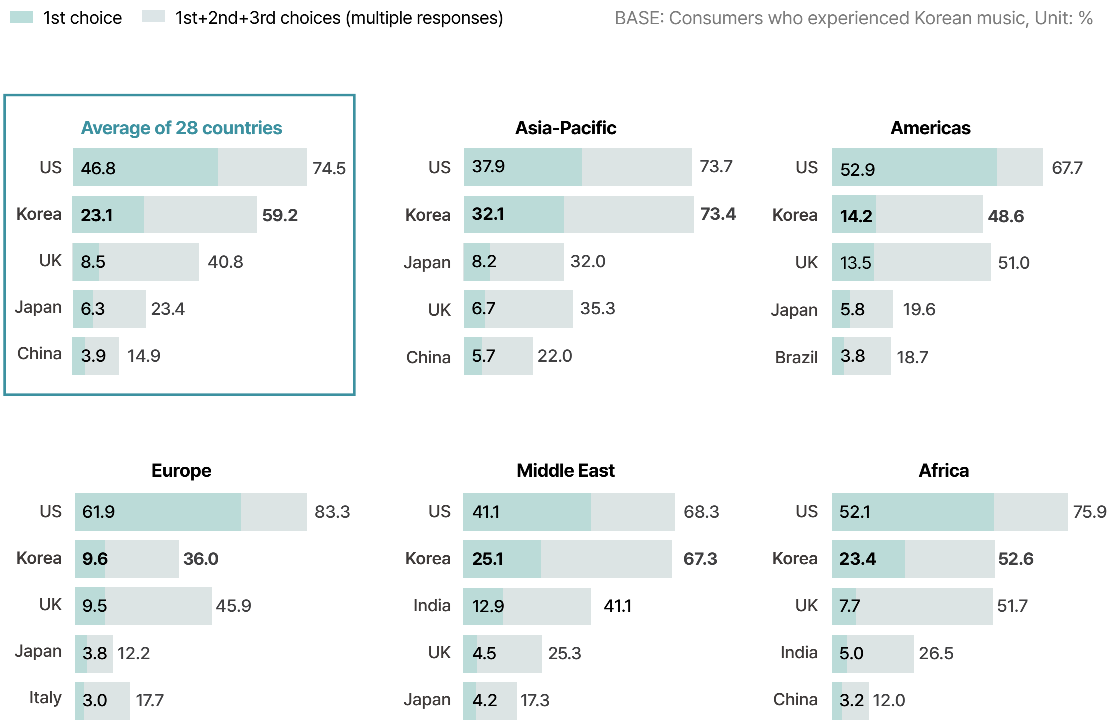
03 Popular Foreign Music

Music from "the US" ranked first and "Korea" second as the most popular foreign music.
Close competition between "the US" and "Korea" in the Asia-Pacific.

Among consumers who experienced Korean music across the 28 countries, "the US" (46.8%) was selected as the most preferred source of foreign music (1st choice) for the second consecutive year since 2023, followed by "Korea" (23.1%) in second place. While the preference rates for the top three countries-"the US," "Korea," and "the UK"-declined slightly compared with last year, preference for the fourth and fifth countries, "Japan" (6.3%) and "China" (3.9%), increased slightly.
Across all continents "the US" and "Korea" ranked first and second, while new countries entered the top 3–5 rankings by continent, showing fluctuations. In the Americas preference for "Brazil" reached 3.8%, inducting it into the rankings. In Europe "Italy" (3.0%) emerged as a preferred country for music for the first time.
In the Middle East and Africa "India" recorded preference rates of 12.9% and 5.0%, with Indian music ranking third in the Middle East at about half the rate of preference for Korean music. Meanwhile, in the Asia-Pacific region preference for both "the US" and "Korea" declined compared with the previous year, while preference for "Japan" increased slightly, moving up from fourth to third place. These results suggest that music consumption is becoming more diversified rather than concentrated in specific countries, indicating broader global demand across a wider range of countries.

Figure 2-130 Comparison of Popular Foreign Music by Continent

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

The Philippines, Thailand, and Indonesia recorded an average of over 20 hours of monthly usage.

Expenditure has increased in the Middle East and the Anglosphere.

Consumers who experienced Korean music spent a monthly average of 12.8 hours per person consuming Korean music, up 1.4 hours from the previous year. The longest hours were spent in Southeast Asia, including the Philippines (24.0 hours), Thailand (23.1 hours), and Indonesia (22.4 hours), which recorded nearly twice the average of the 28 countries surveyed. Egypt (18.6 hours) in Africa and the UAE (18.5 hours) in the Middle East also showed high usage times, while rates in Japan (3.9 hours), Canada (4.8 hours), Germany (5.0 hours), and the UK (5.4 hours) were among the lowest. Although the experience rate and popularity of Korean music were higher in Japan than the 28-country average, the time spent consuming Korean music was 8.9 percentage points lower than the overall average. On average, Korean music accounted for 23.2% of overall music content consumption across the 28 countries. Indonesia (39.7%), Vietnam (36.3%), the Philippines (36.3%), Malaysia (33.5%), Thailand (32.0%), Egypt (31.0%), Saudi Arabia (30.4%), and India (30.1%) all exceeded 30%, ranking among the highest for the second consecutive year. Expenditure was generally higher in the Middle East and the Anglosphere, which tended to exhibit relatively higher average content spending. In particular, the UAE (23.7 USD) and Saudi Arabia (17.6 USD) saw significant increases of 6.1 USD and 9.5 USD, respectively, compared with the previous year. On the other hand, Kazakhstan (2.0 USD), Russia (2.4 USD), and Argentina (2.8 USD) ranked at the bottom with an average expenditure below 3.0 USD. This trend may reflect the combined effect of rising overseas streaming subscription fees and the growing global recognition of Korean music, which may have influenced expenditure on Korean music to some extent.[1]

Figure 2-131 Comparison of Time Spent 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.

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

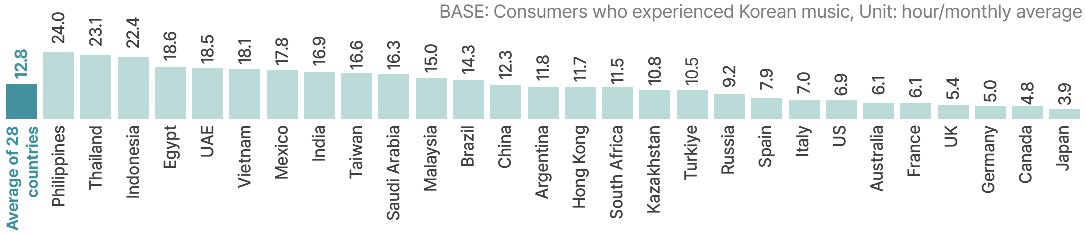


Figure 2-132 Comparison of the Proportion of Korean Music Consumption by Country

BASE: Consumers who experienced Korean music, Unit: %

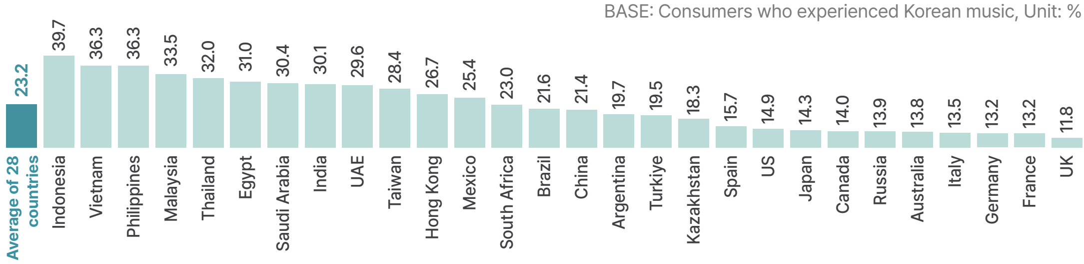
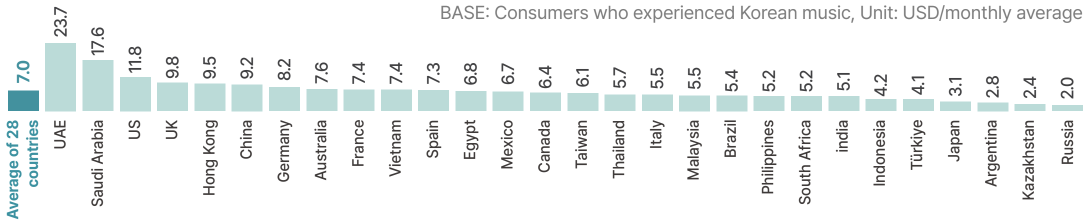


Figure 2-133 Comparison of Expenditure on Korean Music by Country

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



1 In July 2023, Spotify raised its subscription fee for the first time since entering the U.S. market, and implemented another increase 11 months later. YouTube Premium also raised its prices in 2024 across major countries in Europe and Southeast Asia, reflecting a broader trend of price adjustments among global music streaming services.

05 Favorability

Approximately 66.4% of respondents said that they like Korean music, marking a 2.3 percentage point increase on the previous year.

Among consumers who experienced Korean music, 66.4% responded that they “like” it. Favorability remained in the 70% range during 2020–2021 but has remained in the mid-60% range since 2022. In 2024, 25.3% of respondents were “neutral,” while 8.3% said that they “do not like” it. The favorability rate rose by 2.3 percentage points compared with 2023, while the unfavorability rate fell by 1.3 percentage points.

Countries with high percentage of respondents who chose “like” were India (86.7%), the UAE (84.5%), Indonesia (84.5%), Philippines (82.6%), and Egypt (80.6%), and thus concentrated in Southeast Asia, the Middle East, and Africa. In contrast, Russia (40.6%), Kazakhstan (40.8%), France (46.6%), and Italy (50.8%) recorded relatively low favorability rates. Notably, the proportion of respondents choosing “do not like” was 24.6% in France, making it the country with the highest unfavorability toward Korean music.

Similar to experience rates, women (69.1%) reported higher favorability than men (63.6%). By age group, favorability increased among teens (69.2%, ▲6.9 percentage points) and those in their 50s (59.2%, ▲7.8 percentage points) compared with the previous year, marking significant increases compared with other age groups.

Figure 2-134 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

BASE: Consumers who experienced Korean music, Unit: %

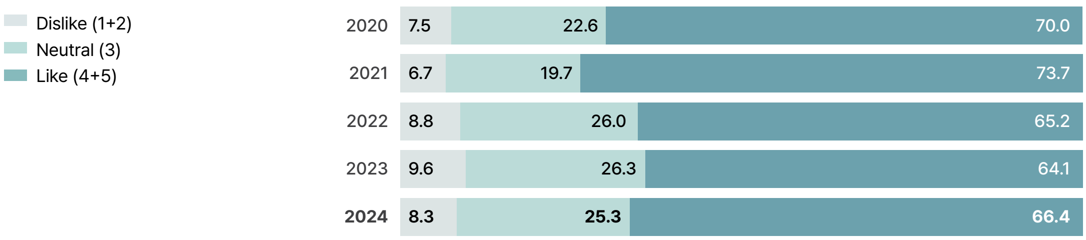


Figure 2-135 Comparison of Favorability Toward Korean Music by Gender and age

BASE: Consumers who experienced Korean music, Unit: %

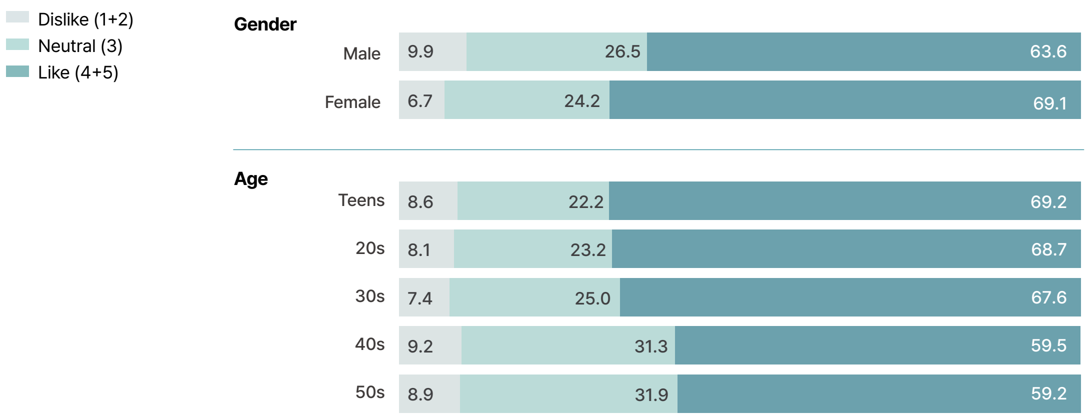
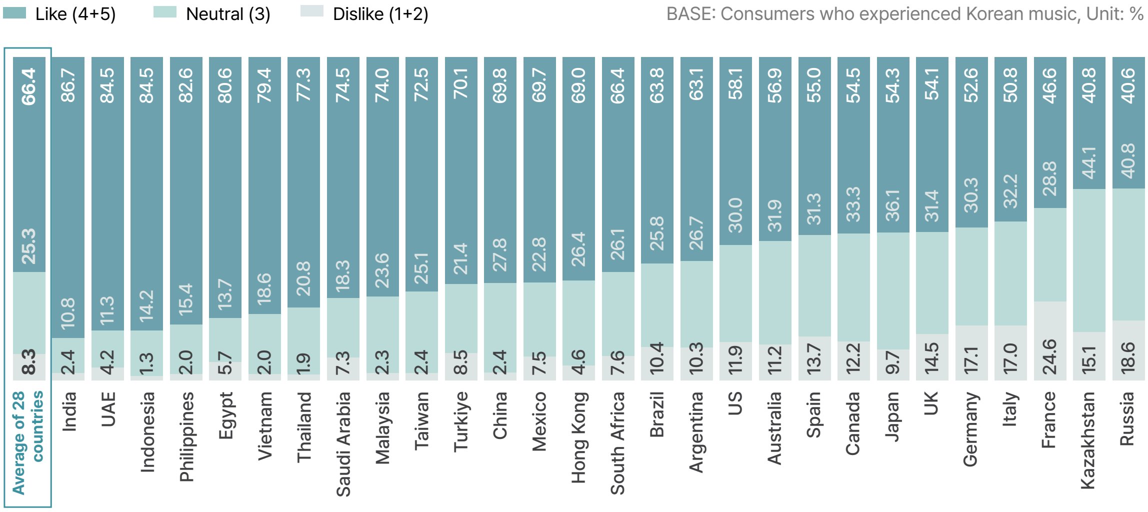


Figure 2-136 Comparison of Favorability Toward Korean Music by Country



©ROSÉ & BRUNO MARS "APARTMENT" MUSIC VIDEO. PHOTO BY THE BLACK LABEL

06 Factors Promoting and Inhibiting Favorability

Musicality was a key factor across all continents. Europe liked the "K-pop universe," Asia-Pacific and Africa liked "cultural diversity," and the Middle East like the "personal appeal."

The most common reasons for liking Korean music (1st + 2nd choices) were "the music itself is great" (40.3%), "outstanding performance" (30.1%), and "attractive looks or style" (25.9%), emerging as the top three factors promoting favorability. In particular, "the music itself is great" ranked first across all continents, and the overall ranking of the top seven factors promoting favorability remained consistent with that of the previous year.

By continent, there were changes in the factors promoting favorability, excluding that ranked in first place. In the Asia-Pacific (9.8%) and Africa (17.8%), "reflects cultural diversity well" entered the rankings for the first time, reflecting favorable responses to the cultural elements based on music and performance. In Europe, "like the K-pop universe/storytelling" (11.4%) made it into the rankings, emphasizing the appeal of narrative and concept in Korean music. Meanwhile, in the Middle East, "like their personal appeal" (26.8%) rose by 8.1 percentage points on the previous year, becoming a key factor promoting favorability. "Reflects cultural diversity well" (17.2%) was another new entrant, highlighting the diverse appeal of Korean music. These results suggest that Korean music is shaping a positive perception among consumers not only through its musical elements but also through complex factors such as performance, style, the K-pop universe, and cultural diversity.

"Fandom culture" was newly cited as a factor inhibiting favorability.

Consistent with last year, the main factors inhibiting favorability toward Korean music were "Korean lyrics are difficult and unfamiliar" (22.5%), "too commercial" (16.4%), and "the genre of music is monotonous" (14.1%). This year, "lack of fan events held in country of residence" (13.6%) and "the fandom culture is closed/exclusive" (12.3%) newly entered the list of factors inhibiting favorability across the 28 countries.

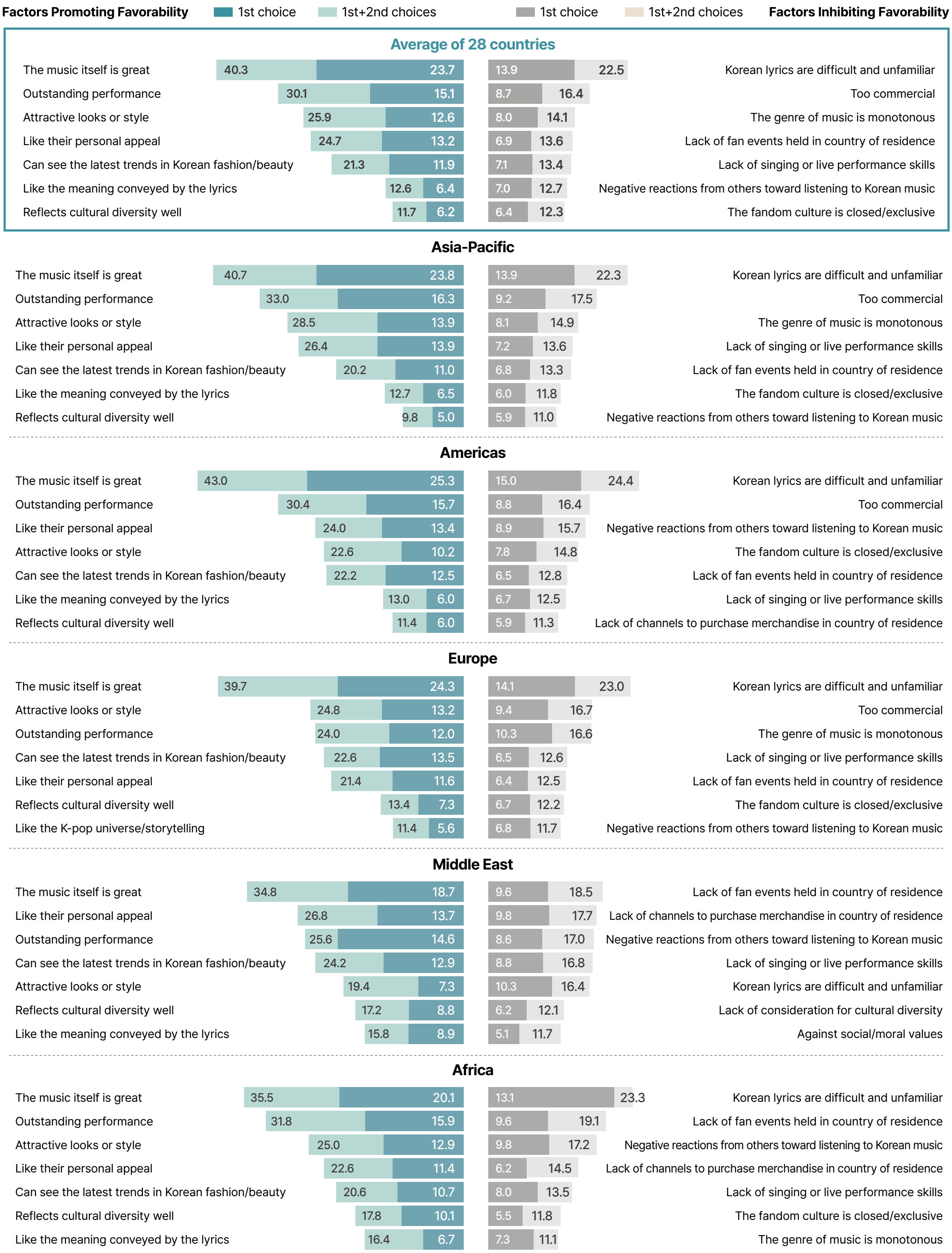
By continent, "Korean lyrics are difficult and unfamiliar" and "too commercial" ranked first and second in the Asia-Pacific, the Americas, and Europe, indicating that unfamiliar lyrics and perceived commercialism are key factors inhibiting favorability.

In the Middle East and Africa, the lack of channels through which to engage in fandom activities within the country of residence emerged as a key factor inhibiting favorability. In the Middle East, "lack of fan events held in country of residence" (18.5%) and "lack of channels to purchase merchandise in country of residence" (17.7%) ranked first and second, respectively, showing that fans in the region face greater difficulty engaging with fandom activities compared with other regions. In Africa, "lack of fan events held in country of residence" (19.1%) and "lack of channels to purchase merchandise in country of residence" (14.5%) ranked second and fourth, highlighting significant discomfort related to fandom activities. These findings suggest that as awareness of Korean music grows, limitations in fandom activities-along with existing language and cultural barriers-are increasingly becoming a key factor inhibiting favorability.

Figure 2-137 Comparison of Factors Promoting and Inhibiting Favorability Toward Korean Movies by Continent

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.
Note. Presented are the top 7 choices (options) ranked by the combined proportion of first- and second-choice responses.

BASE: Consumers who experienced Korean music, Unit: %



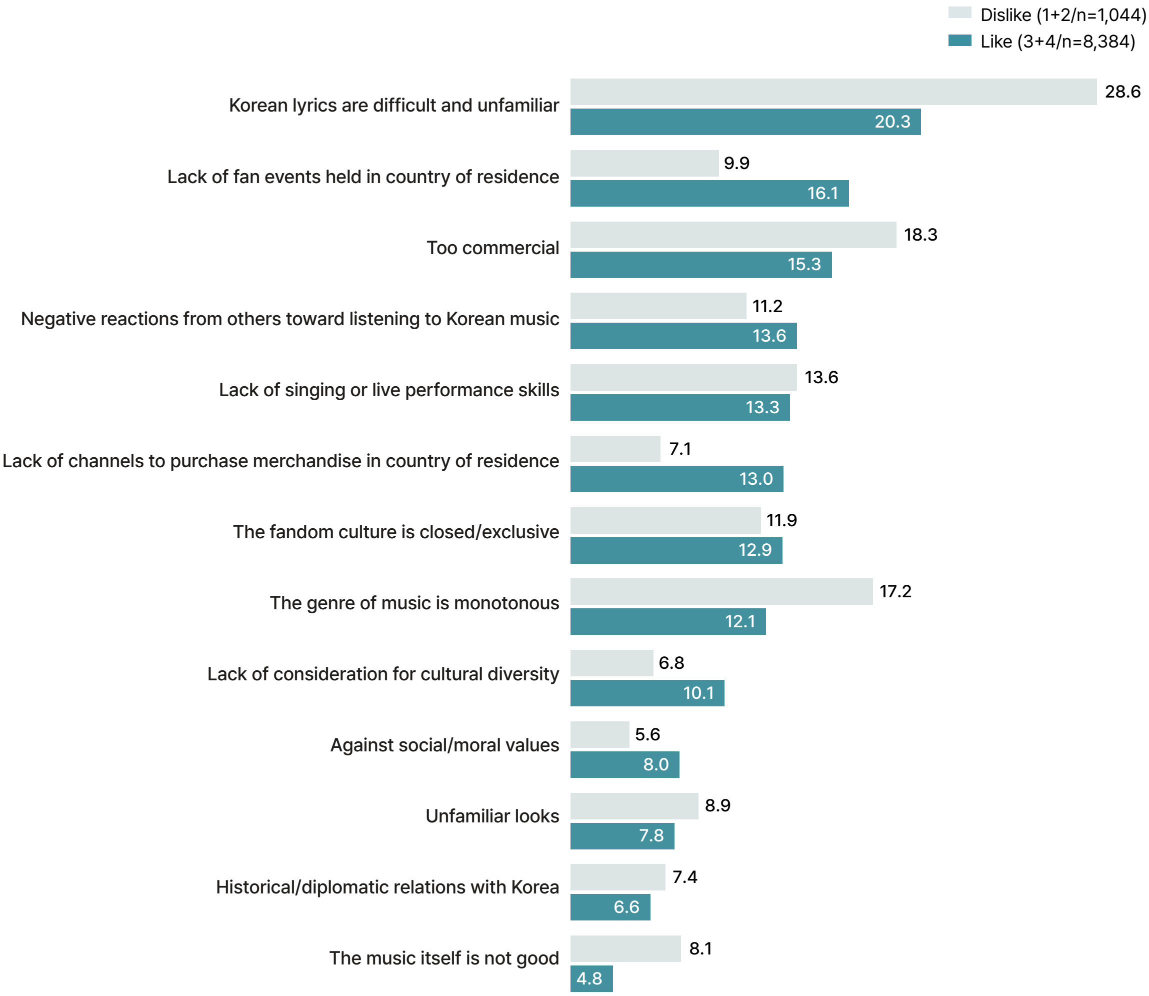
Unfavorable respondents were particularly uncomfortable with unfamiliar language. Fandom culture must be considered for favorable respondents.

Factors inhibiting favorability toward Korean music were analyzed by dividing the sample into favorable ("like") and unfavorable ("do not like") respondents. Both groups cited "Korean lyrics are difficult and unfamiliar" as the top factor inhibiting favorability. However, unfavorable respondents were more likely to perceive language barriers and music itself as greater factors inhibiting favorability, with higher agreement rates for "Korean lyrics are difficult and unfamiliar" (28.6%), "too commercial" (18.3%), and "the genre of music is monotonous" (17.2%) compared with favorable respondents. In particular, the percentage of respondents selecting "Korean lyrics are difficult and unfamiliar" was 8.3 percentage points higher among unfavorable respondents compared with favorable ones (20.3%), underscoring the need to address language barriers. On the other hand, favorable respondents showed higher percentages for unfavorability toward fandom culture, such as "lack of fan events held in country of residence" (16.1%) and "lack of channels to purchase merchandise in country of residence" (13.0%), as well as "lack of consideration for cultural diversity" (10.1%).

Figure 2-138 Comparison of Factors Inhibiting Favorability Toward Korean Music Depending on Korean Music Favorability

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

Note. Presented in the order of the highest proportions of respondents selecting "like it."



Respondents felt cultural discomfort toward "social class" and "lifestyle and customs."

Among aspects of cultural diversity representation perceived as inappropriate or insufficient by respondents, "social class" (26.4%) and "lifestyle and customs" (26.4%) were tied for first place, followed by "language" (26.0%) and "fashion/costumes" (25.8%). It is notable that "fashion/costumes" ranked higher here compared to Korean video content such as dramas and movies.

Consumers in Europe (25.7%) and Africa (33.1%) expressed the greatest discomfort with the fashion and costumes presented in Korean music. Social class (30.4%) and language (32.4%) were the most uncomfortable aspects in the Asia-Pacific region and the Middle East, respectively.

Table 2-16 Top 3 Most Uncomfortable Aspects of Cultural Diversity Representation in Korean Music by Continent

BASE: Respondents who chose "lack of consideration for cultural diversity" as a factor inhibiting favorability toward Korean music

	Average of 28 countries	Asia-Pacific	Americas	Europe	Middle East	Africa
1st	Social class, lifestyle and customs 26.4%	Social class 30.4%	Sexual identity 30.5%	Fashion/ costumes 25.7%	Language 32.4%	Fashion/ costumes 33.1%
2nd	Language 26.0%	Lifestyle and customs 29.3%	Social class 24.6%	Language 23.5%	Lifestyle and customs 30.4%	Food 32.9%
3rd	Fashion/ costumes 25.8%	Traditional culture 28.0%	Traditional culture 22.1%	Social class 22.5%	Fashion/ costumes 30.4%	Lifestyle and customs 26.2%

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07 Preferred Artists

BTS ranked first for the seventh consecutive year. TWICE and Stray Kids expanded their global presence.

The most preferred Korean artist (1st choice) was “BTS” (24.6%), followed by “BLACKPINK” (12.3%), ranking first and second for seventh and sixth consecutive year, proving overwhelming preference for these artists. “IU” (3.1%) and “PSY” (2.2%) also maintained their popularity, while “TWICE” (1.8%) returned to the rankings after appearing in 2019–2020 and 2022.
“TWICE,” a girl group in their tenth year, confirmed their global presence with the release of their 13th mini album, *With YOU-th*, in February 2024, which topped the US Billboard 200 album chart for the first time. They secured a fandom in the Asia-Pacific (2.7%) and also in the Americas (1.6%).
This year, “Stray Kids,” who launched their largest-ever world tour "dominaATE", continued to gain global popularity, ranking in the top ranks in the Americas (1.7%), Europe (1.9%), and Africa (1.7%). In the Middle East, BLACKPINK’s “ROSÉ” (1.0%) ranked fifth, gaining significant attention for her collaboration with Bruno Mars, *APT*.. Meanwhile, “Jung Kook,” who sang the official theme song of the 2022 Qatar World Cup, maintained steady popularity in Africa (4.1%), the Middle East (3.2%), and Europe (1.6%), reaffirming his sustained influence in the global market.
While K-pop artists were generally the most preferred, Lim Young-woong ranked within the top 20 in certain countries (China, Thailand, Kazakhstan, and the UAE), drawing particular attention. Lim Young-woong’s music emphasizes emotional melodies and strong vocals rooted in trot and ballad genres, which appear to have resonated as key factors promoting favorability in these countries with musical elements. The consumption of Korean music has expanded among middle-aged consumers in their 50s, as reflected in experience rates and favorability, and this demographic has likely formed an emotional connection with trot music. This indicates that Korean music is expanding across diverse genres and age groups.

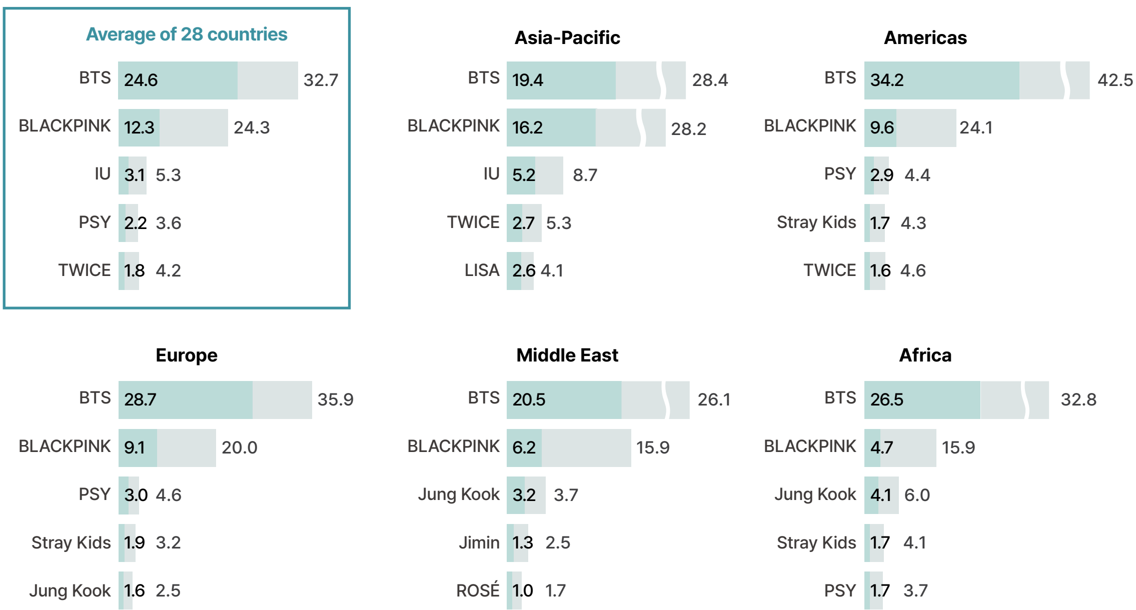
Figure 2-139 Comparison of Most Preferred Korean Artists by Continent

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 28 countries, based on the highest percentage of first-choice responses.

1st choice 1st+2nd choices

BASE: Consumers who experienced Korean music, Unit: %, open-ended responses



08 Willingness to Pay

Approximately 45.9% of respondents said that they were willing to pay for Korean music.
Particularly high willingness was reported in India, the Philippines, and Indonesia.

When asked whether they were willing to pay for Korean music, 45.9% of respondents answered in the affirmative. Approximately 25.7% of respondents were neutral, while 28.3% said that they were "not willing to pay."

The percentage of respondents selecting "willing to pay" has increased by 7.7 percentage points since 2020, growing from 38.2% in 2020 to 45.9%, marking the highest level of willingness in the past five years. The proportion of respondents choosing "not willing to pay" rose to the 30% range after 2021 (27.6%) but decreased to the 20% range in 2024 (28.3%).

By country, the proportion of respondents selecting "willing to pay" was high in India (65.7%), the Philippines (64.1%), Indonesia (63.3%), Thailand (59.7%), and the UAE (57.5%). In contrast, Russia (52.5%), Japan (49.8%), Kazakhstan (49.1%), Italy (45.4%), and France (41.0%) reported proportion of respondents choosing "not willing to pay" in the 40–50% range, indicating low willingness for paid consumption.

Figure 2-140 Comparison of the Willingness to pay for Korean Music 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

BASE: Total, Unit: %

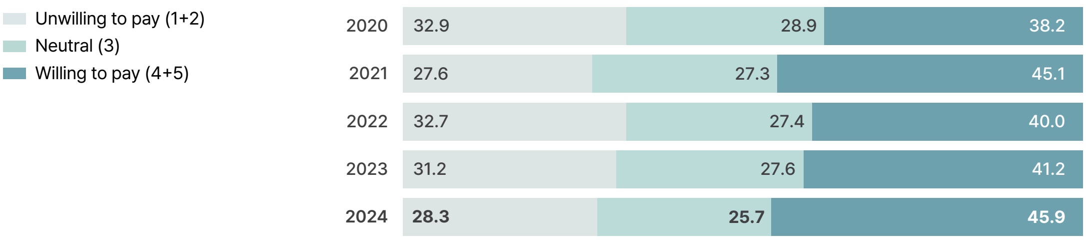
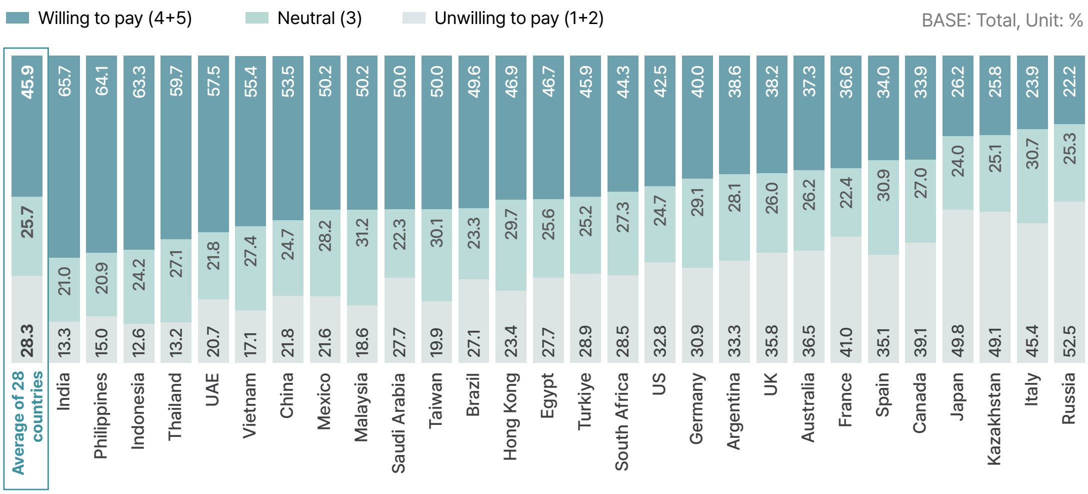


Figure 2-141 Comparison of the Willingness to pay for Korean Music by Country

BASE: Total, Unit: %



09 Willingness to Recommend

India, the UAE, and the Philippines showed strong willingness to recommend, while Japan, Kazakhstan, and Russia were relatively passive.

Among consumers who experienced Korean music, 64.9% said that they would recommend Korean music to others. Although this marks an increase of 1.6 percentage points compared with 2023 (63.3%), it is the lowest willingness to recommend rate among Korean cultural content categories, such as dramas and variety shows. Among respondents, 25.2% were "neutral" and 10.0% were "not willing to recommend," which is higher than the 4.0-5.0% range seen in other content categories. By gender, the percentage for "willingness to recommend" increased among both men and women compared with the previous year.

By age group, similar to experience rate and favorability, the willingness to recommend increased significantly among teens (▲5.8 percentage points) and those in their 50s (▲7.4 percentage points), indicating that the positive perception of Korean music is growing. By country, India (86.2%), the UAE (84.9%), the Philippines (84.6%), and Vietnam (80.7%) showed high willingness to recommend, while Japan (33.0%), Kazakhstan (40.0%), and Russia (44.7%) showed relatively low willingness. In particular, France (23.0%) and Germany (22.3%) recorded high proportions of respondents selecting "not willing to recommend" in the 20% range.

Figure 2-142 Comparison of the Willingness to Recommend Korean Music Over the Last 2 Years by Year

BASE: Total, Unit: %

Figure 2-143 Comparison of Variation in the Willingness to Recommend Korean Music by Gender and age

BASE: Total, Unit: %p

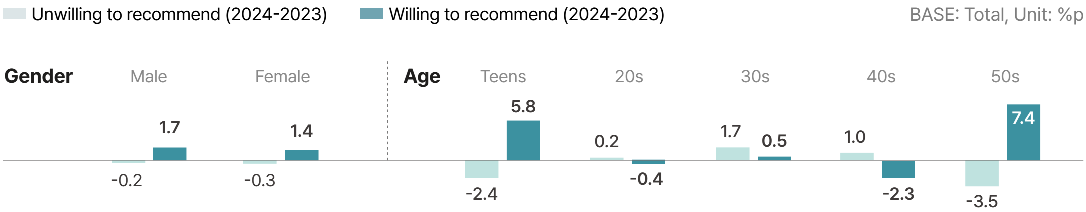
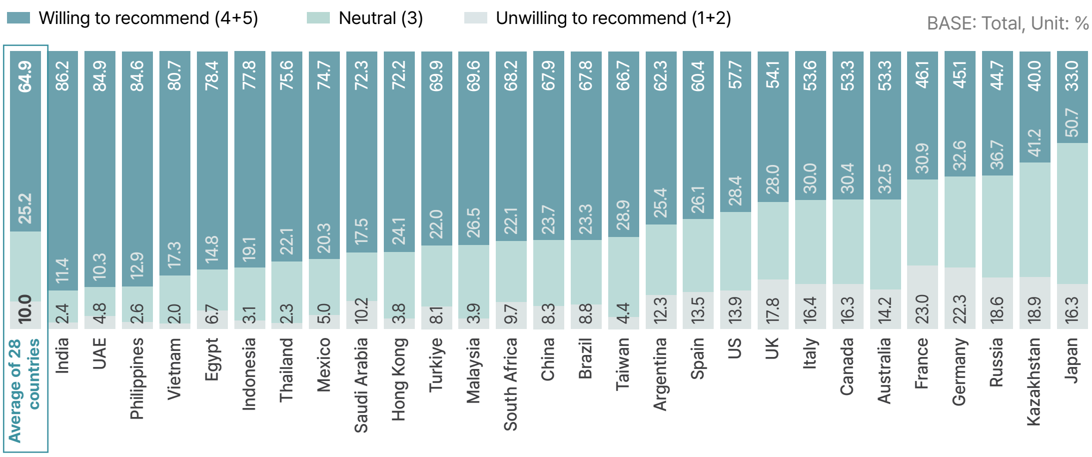


Figure 2-144 Comparison of the Willingness to Recommend Korean Music by Country

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

BASE: Total, Unit: %



10 Ease of Use

Among the 12 types of Korean content, Korean music ranked first in ease of use.

Approximately 76.4% of respondents said that Korean music is "easy to consume," the highest among all Korean cultural content categories, and 4.0 percentage points higher than the second-ranked category, dramas. In contrast, only 4.8% responded that it is "not easy to consume." The perception that Korean music is easy to consume has been increasing steadily from 69.3% in 2020, continuing its upward trend for five consecutive years.

By country, the perception of Korean music as "easy to consume" was high in countries with a high consumption of Korean music, including Indonesia (90.6%), Mexico (87.3%), the Philippines (86.3%), Türkiye (85.1%), the UAE (84.8%), and Saudi Arabia (84.7%). On the other hand, the proportion of respondents choosing "not easy to consume" was relatively high in countries with relatively low consumption rates, such as Germany (11.5%), South Africa (10.6%), and France (10.1%).

Figure 2-145 Comparison of the Ease of Consuming Korean Music Over the Last 5 Years by Year

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

BASE: Consumers who experienced Korean music, Unit: %

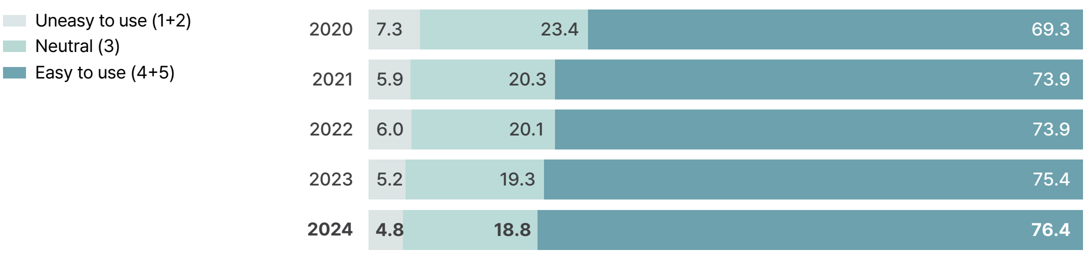
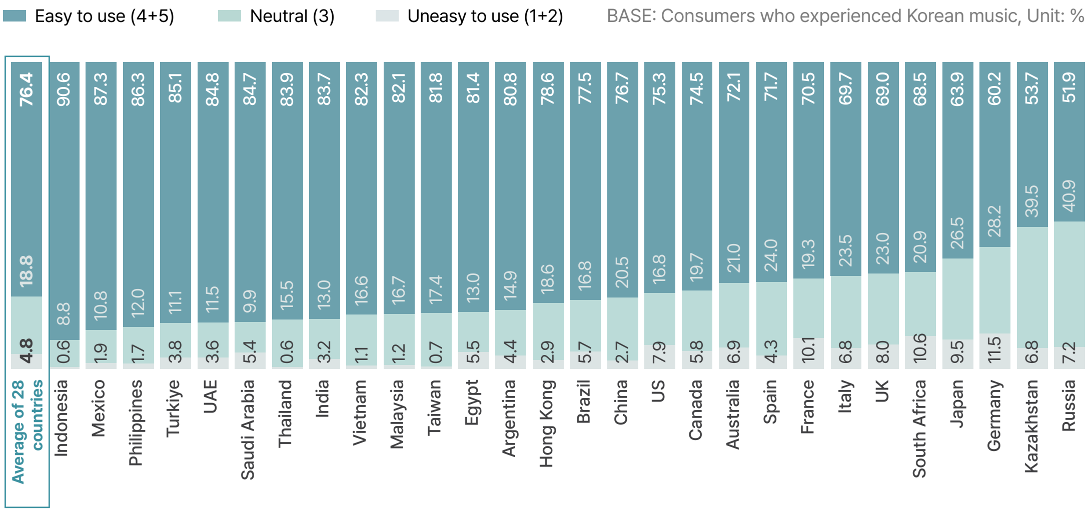


Figure 2-146 Comparison of the Ease of Consuming Korean Music by Country

BASE: Consumers who experienced Korean music, Unit: %



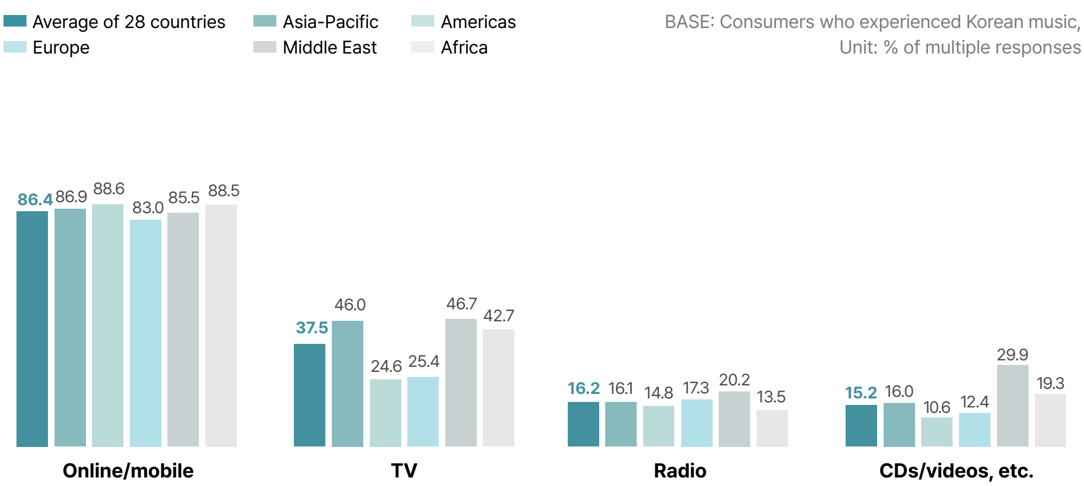
11 Channels of Exposure

“Online/mobile” was the most frequently used channel. The Middle East and Africa accessed Korean music through multiple channels.

The main channel of exposure for Korean music was “online/mobile” (86.4%), which showed high usage rates across all continents, followed by “TV” (37.5%), “radio” (16.2%), and “CDs/videos, etc.” (15.2%). Compared with the previous year, percentages of respondents reporting all channels except “radio” declined, while usage of “radio” increased from the 2023 average of 12.6% to 16.2% in 2024, marking a rise of 3.6 percentage points. Notably, the Middle East (20.2%), Europe (17.3%), and Africa (13.5%) showed significant increases. By continent, Asia-Pacific recorded the highest exposure rate via “online/mobile” (86.9%), followed by “TV” (46.0%), which was second only to the Middle East (46.7%). In the Americas (88.6%), the access rate via “online/mobile” was higher than the 28-country average and other continents, but the usage rates of other media were below average. In Europe, access rates for all media except “radio” were below average, indicating a relatively passive usage pattern. The Middle East ranked first for all channels of exposure except “online/mobile” (85.5%), suggesting that Korean music is accessed through a variety of channels. Africa also showed higher percentages of respondents than other continents across all channels except “radio” (13.5%), indicating a more active media usage pattern.

Figure 2-147 Comparison of Korean Music Channels of Exposure by Continent

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



12 Online/mobile Platform Channels of Exposure

Approximately 51% of respondents used free ad-supported OTT.

Among respondents who accessed Korean music via online/mobile platforms, the usage rate of “free ad-supported OTT” was 51.0%, accounting for more than half the respondents. This was followed by “paid subscription-based OTT” (28.2%) and “pay-per-view content” (18.6%). Notably, the usage rate of “free ad-supported OTT” for Korean music was higher than that for other Korean content types (dramas, variety shows, movies, and animation). This trend can be attributed to the widespread availability of ad-supported free services on global music streaming platforms such as “YouTube” and “Spotify,” along with various convenient features such as data-saving modes, offline playback, and background playback options, which create an environment for enjoying music without the burden of cost.

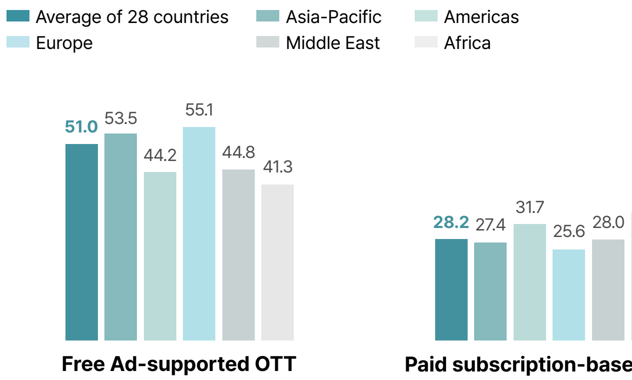
By continent, the usage rate for “free ad-supported OTT” was higher than the average of 28 countries in the Asia-Pacific (53.5%) and Europe (55.1%), while usage rates for “paid subscription-based OTT” were higher in the Americas (31.7%) and Africa (34.5%). Meanwhile, the Middle East (25.8%) had the highest usage rate for “pay-per-view content.”

Figure 2-148 Comparison of Online/mobile Consumption Types for Korean Music by Continent

Q. When encountering Korean music (K-pop) online/ through mobile, what type of viewing/listening do you use? Please select the top 3 modes of viewing/listening by frequency. Please select all the types you view or listen most in order.

※ Edited short musics are excluded.

BASE: Online/mobile platform users for Korean music; Unit: %, 1st choice



Active use of YouTube/YouTube Music and Spotify was observed, along with an increased usage rate of Google Play Music.

The usage rate of online/mobile platforms has changed over the past seven years. Specifically, the usage rate of “YouTube/YouTube Music,” which was dominant at 90.6% in 2018, decreased gradually to 72.0% in 2024. In contrast, the usage rate of “Spotify” increased from 33.8% in 2018 to 52.8% in 2024.

As of 2024, “Amazon Music” recorded a usage rate of 20.0%, ranking third among major platforms. However, the gap with “Spotify” remains large and its growth rate has slowed down. Meanwhile, “Google Play Music” (18.0%) saw a significant increase in its usage rate compared with the previous year, surpassing “Apple Music” (17.3%) and entering the top ranks among the average of 28 countries.

By region, “YouTube/YouTube Music” and “Spotify” ranked first and second across all continents, respectively, demonstrating the strong dominance of these platforms. In the Asia-Pacific (20.7%) and Africa (30.6%), usage of “Google Play Music” increased, placing it among the top platforms. In the Americas (24.0%) and Europe (18.8%), usage of “Amazon Music” rose compared with the previous year, ranking third. Meanwhile, in the Middle East, usage of “Apple Music” stood out at 39.8%, 2.3 times higher than the average of the 28 countries.

Figure 2-149 Comparison of Online/mobile Platforms for Korean Music Over the Last 7 Years by Year

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

Note. Presented are the top 3 choices (options) ranked by the proportions of respondents.

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

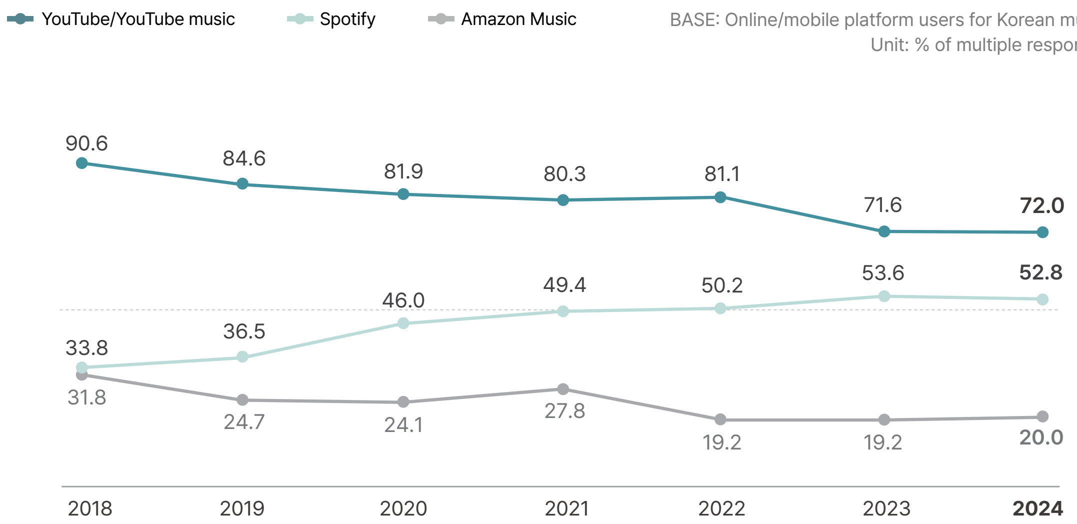
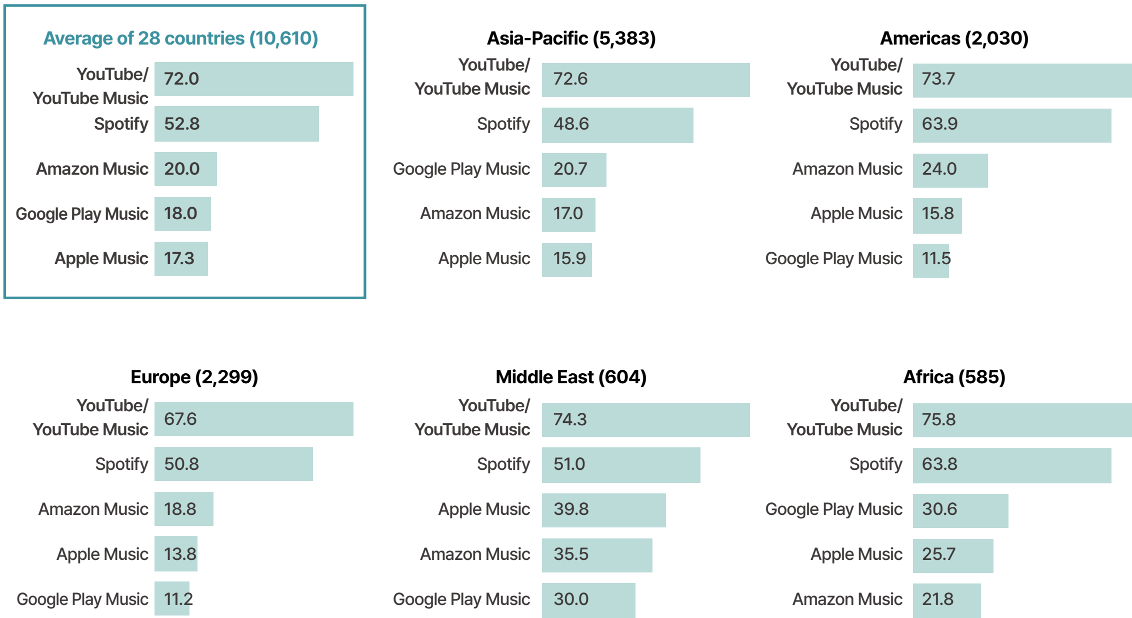


Figure 2-150 Comparison of Online/mobile Platforms for Korean Music by Continent

Note. Presented are the top 5 choices (options) ranked by the proportions of respondents.

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



5

Animation

ANIMATION

SUMMARY

While the experience rate and popularity of Korean animation have increased, they remain lower than those of other Korean video content. Interest was particularly high in the Middle East, Africa, and Latin America, with favorability and willingness to recommend increasing primarily among teens and those in their 50s. In contrast, interest and consumption remained low in Japan and some European countries, where language barriers and cultural differences act as major constraints.

Among consumers with Hallyu experience, 53.5% (5 out of 10) have watched Korean animation, with experience rates notably high in the Middle East, Africa, and Latin America. Approximately 26.2% of respondents perceived it as “widely popular,” the same level as last year, while the proportion of respondents selecting “hardly used” was 8.6%, the lowest in the past five years.

The popularity and favorability of Korean animation were higher than the overall average in Asia (India, the Philippines, Vietnam, and Thailand), the Americas (Brazil and the US), the Middle East (Saudi Arabia and the UAE), and Africa (Egypt and South Africa). In the Middle East the most popular foreign animation was from “Korea” (28.4%), ranking first for the second consecutive year, surpassing “the US” (23.6%).

The factors promoting favorability toward Korean animation were “visual appeal” and “characters,” with particularly high preference for characters in the Middle East. On the other hand, “language barriers” were cited as a key factor inhibiting favorability for the third consecutive year, with low accessibility also pointed out as an ongoing issue.

As for the most preferred animation (based on 1st choice), *Pucca* reclaimed the top spot following its lead in 2018–2020 and 2022, while *Larva* ranked second. In particular, the popularity of *Pucca* (23.4%) was overwhelmingly high in the Americas.

01 Experience Rate

Approximately 53.5% of respondents had experienced Korean animation. Experience rates were particularly high in the Middle East, Africa, and Latin America.

Among consumers with Hallyu experience, 53.5% had experienced Korean animation, up 2.6 percentage points from the previous year. However, it remained the lowest among Korean video content categories, such as dramas, variety shows, and movies. By country, relatively high experience rates were recorded in India (72.9%), as well as in the Middle East, Africa, and Latin America, including Saudi Arabia (69.7%), Egypt (67.9%), Brazil (66.6%), and Mexico (64.7%). Notably, Saudi Arabia showed a significant increase of 13.3 percentage points compared with last year. Unlike the high experience rates for dramas, variety shows, and movies in Southeast Asia, Korean animation showed relatively higher rates in regions outside Southeast Asia, marking a distinctive trend. In contrast, among all surveyed Korean cultural content, Japan recorded the lowest experience rate for Korean animation at 15.8%.

The experience rate for Korean animation increased across all gender and age groups compared with the previous year. In particular, experience among those in their 50s rose to 41.3%, up 5.3 percentage points. This aligns with a broader trend of increasing experience rates among the 50s age group across Korean video content overall, suggesting the potential for expansion across age groups.

Figure 2-151 Comparison of Korean Animation Experience Rates by Country BASE: Total, Unit: %

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

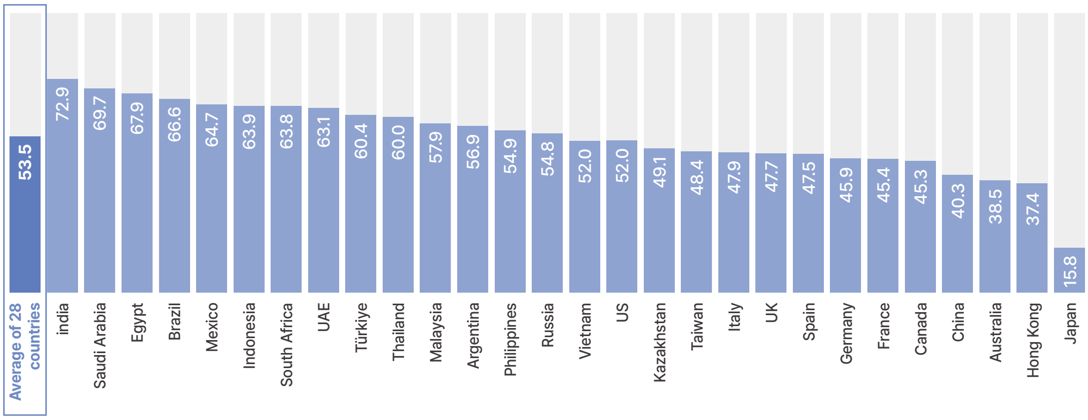
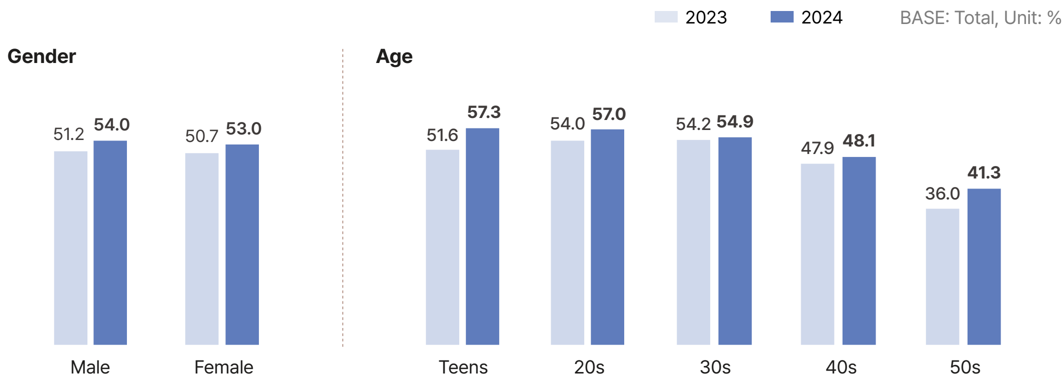


Figure 2-152 Comparison of Korean Animation Experience Rates Over the Last 2 Years by Gender and age BASE: Total, Unit: %



02 Popularity

The proportion of respondents choosing "widely popular" remained at 36.2%.

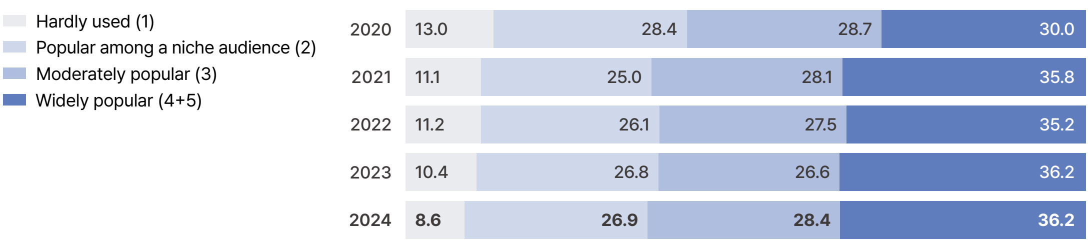
When consumers with Hallyu experience were asked about the popularity of Korean animation in their own countries, 36.2% responded that it was "widely popular," maintaining the same level as last year. Meanwhile, 28.4% of respondents said "moderately popular," 26.9% said "popular among a niche audience," and 8.6% said "hardly used."
Looking at the changes in percentages of respondents over the past five years, the percentage of respondents selecting "hardly used" decreased from 13.0% in 2020 to 8.6%, marking its lowest point. In contrast, the percentage of respondents choosing "popular among a niche audience" increased slightly from 25.0% in 2021 to 26.9%. While the "widely popular" percentage of respondents has gradually increased from 30.0% in 2020, it remains within the 30% range. This suggests that, although Korean animation has maintained a certain level of popularity, it still faces limitations in achieving full mainstream appeal.

Figure 2- 153 Comparison of the Popularity of Korean Animation 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 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

BASE: Total, Unit: %



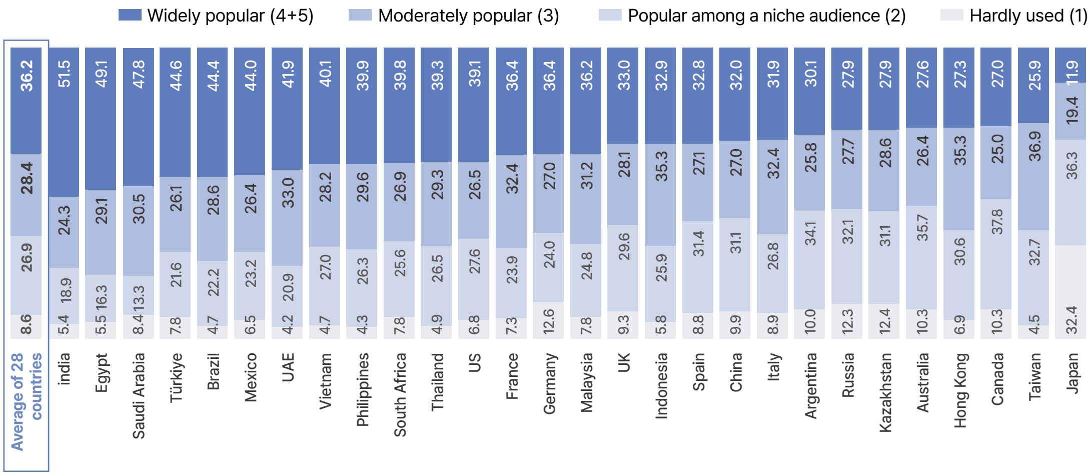
In 14 countries, the percentage of respondents choosing "widely popular" exceeded the average of the 28 countries.

The US showed the highest percentage of respondents for "widely popular" among all video content categories.

Among consumers with Hallyu experience, 14 countries recorded proportions of respondents indicating "widely popular" that were above the 28-country average, including India (51.5%), Egypt (49.1%), Saudi Arabia (47.8%), Türkiye (44.6%), Brazil (44.4%), and Mexico (44.0%). Notably, in the US, the percentage for "widely popular" (39.1%) was higher for animation than for dramas and movies (37.6%) or for variety shows (36.0%).

On the other hand, in countries such as Canada (37.8%), Japan (36.3%), Australia (35.7%), Argentina (34.1%), Russia (32.1%), and Kazakhstan (31.1%), the proportion of respondents choosing "popular among a niche audience" exceeded those for "widely popular," "moderately popular," and "hardly used." In particular, Japan had the highest "hardly used" (32.4%) and lowest "widely popular" (11.9%) responses for Korean animation among all Korean cultural content categories.

Figure 2-154 Comparison of the Popularity of Korean Animation by Country BASE: Total, Unit: %



Local News

"In Japan, the Japanese-dubbed version of the animation based on the Korean webtoon *True Beauty* was released this October following its rising popularity. Also, *The Haunted House*, which is suitable for all age groups, gained global popularity and aired in Japan. In addition, various family-friendly Korean animations such as *Duda & Dada* and *Super Secret* are being released in Japan through multiple platforms."

Japan KOFICE Tokyo Overseas Correspondent

"One of the most popular Korean animations in Australia in 2024 was *Bebefinn Playtime* based on *Pinkfong's Baby Shark*. This animation ranked first on the Australia Netflix chart and also reached first place in the Top 10 Kids Today category in countries like the UK, Canada, and South Africa, gaining worldwide popularity."

Australia KOFICE Sydney Overseas Correspondent

"Children's TV animations produced in Korea account for about half of the Top 10 most popular shows airing in China, but these animations are distributed as Chinese works with Chinese dubbing."

KOCCA China Beijing Business Center Director

"From November 4 to 8, 2024, eight Korean animation companies held a showcase and B2B business meetings during the Global Showcase in Canada. Aiming to promote co-production and attract investment in Korean animation, the event achieved a total deal volume of USD 22.18 million and served as an important stepping stone for Korean animation's push into the global market."

Canada KOTRA Toronto Trade Officer

"Korean animation has yet to establish a strong foothold in Germany. Although the Korean animated series *Lookism* aired on Netflix, it did not generate enough interest to warrant a follow-up season, clearly showing that K-animation still has a long way to go in Germany."

Germany KOTRA Frankfurt Trade Officer

03 Popular Foreign Animation

Animation from "Korea" enjoy steady popularity in the Middle East .

As for the most preferred foreign animation (1st choice), "Japan" (35.0%) and "the US" (23.3%) ranked first and second for the second consecutive year, respectively, while "Korea" (20.7%) came in third. While preference for "the US" and "Korea" declined compared with the previous year, preference for "Japan" rose by 4.0 percentage points, maintaining its position at the top.

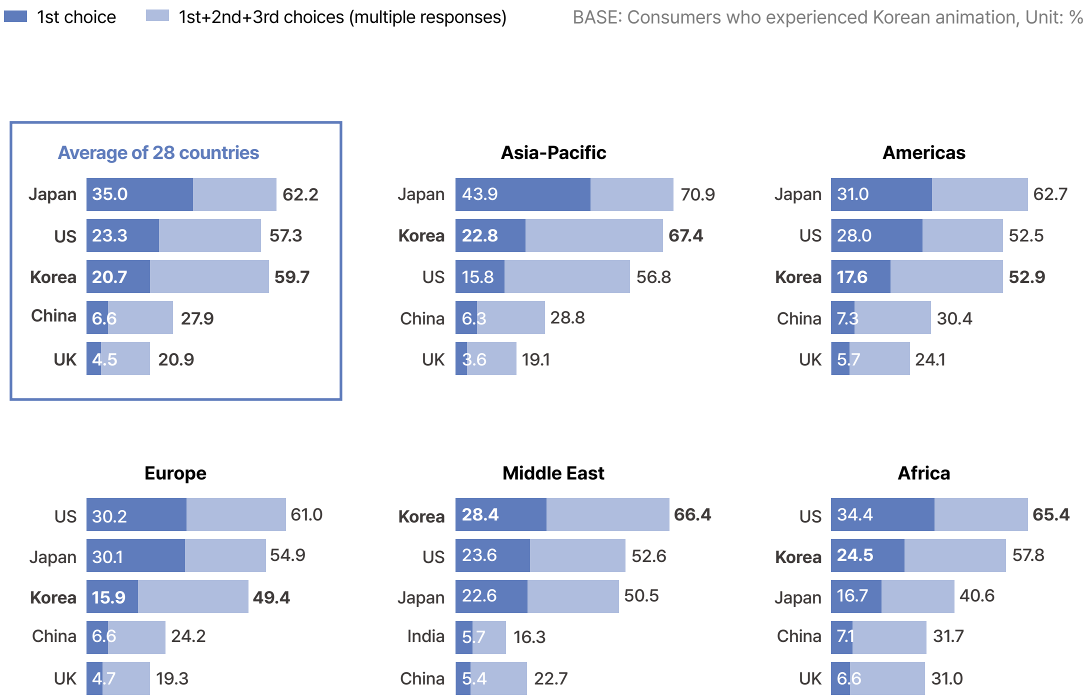
By continent, the Middle East showed the highest preference for Korean animation at 28.4%, which was up 3.8 percentage points from the previous year. In Africa (24.5%), preference also increased by 4.4 percentage points, maintaining its popularity, and Europe (15.9%) saw a slight increase as well.

In contrast, in the Asia-Pacific region, the preference gap between Japan (43.9%) and Korea (22.8%) became wider compared with the previous year. In the Americas, preference for Japanese animation rose to 31.0%, while preference for Korean animation declined slightly to 17.6%. Overall, while preference for Japanese animation continues to grow, Korean animation showed relatively weaker competitiveness.

Figure 2-155 Comparison of the Popularity of Foreign Animation by Continent

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

Respondents in the Philippines spent an average of 20 hours per month consuming Korean animation. In the UAE, expenditure increased by 16.5 USD compared with the previous year.

The average monthly viewing time among consumers who experienced Korean animation was 12.6 hours per person, up 1.8 hours from the previous year. The Philippines, newly included in the survey, recorded the highest viewing time (20.8 hours), followed by India (18.1 hours), South Africa (17.7 hours), and Thailand (17.5 hours). Notably, South Africa's viewing time increased by 4.2 hours compared with the previous year, indicating that not only the experience rate but also the consumption volume of Korean animation is growing in the African region.
The proportion of consumption of Korean animation averaged at 23.9% across the 28 countries. Notably, Indonesia (32.0%), Vietnam (31.9%), India (30.9%), the UAE (30.3%), and Malaysia (30.0%) showed high proportions exceeding 30%.
In terms of expenditure, the UAE reported an average of 35.1 USD, 3.3 times higher than the average of all 28 countries and representing an increase of 16.5 USD on the previous year. This was followed by the US (25.5 USD), the UK (21.6 USD), and Saudi Arabia (21.1 USD), indicating that, as with other video content categories, expenditure on animation was higher in the Middle East and Anglosphere.

Figure 2-156 Comparison of Time Spent 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.

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

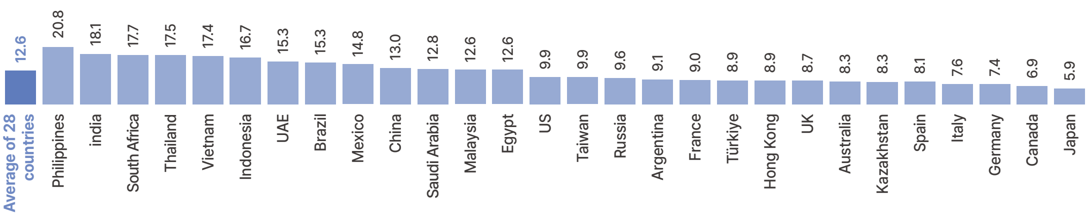


Figure 2-157 Comparison of the Proportion of Korean Animation Consumption by Country

BASE: Consumers who experienced Korean animation, Unit: %

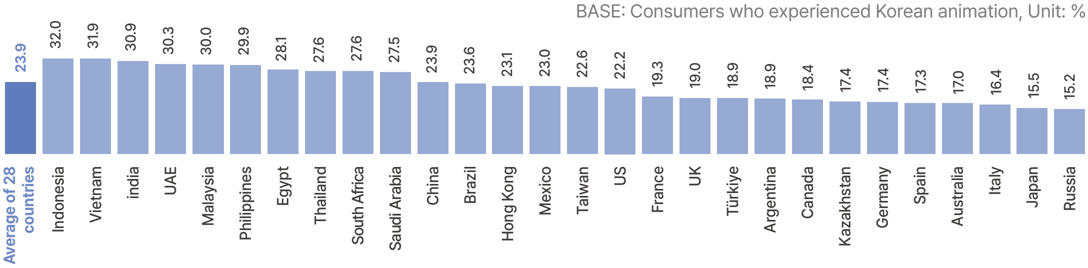
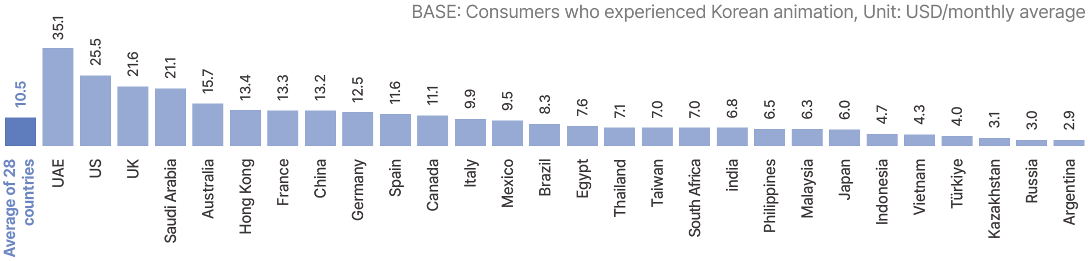


Figure 2-158 Comparison of Expenditure on Korean Animation by Country

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



05 Favorability

Approximately 70.5 of respondents were favorable toward Korean animation, up 4.8 percentage points compared with the previous year.

Among consumers who experienced Korean animation, 70.8% responded that they “like” it (favorable), marking an increase of 4.8 percentage points from 2023 (66.0%). In contrast, the proportion of respondents selecting “do not like” (unfavorable) dropped by 1.3 percentage points to 5.2%, indicating an overall rise in favorability.

By year, favorability peaked in 2021 at 74.7%, and then gradually declined; however, it rebounded in 2024, exceeding 70% once again. Nevertheless, compared with other Korean video content such as dramas, variety shows, and movies, animation still shows the lowest level of favorability.

By country, high favorability toward Korean animation was observed in Southeast Asia and the Middle East, including India (85.5%), the Philippines (79.2%), the UAE (79.0%), Saudi Arabia (78.2%), and Thailand (77.9%). On the other hand, countries such as Germany (16.1%), Kazakhstan (12.0%), Japan (11.6%), and Russia (10.0%) showed relatively high percentages of respondents choosing “do not like.”

Figure 2-159 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

BASE: Consumers who experienced Korean animation, Unit: %

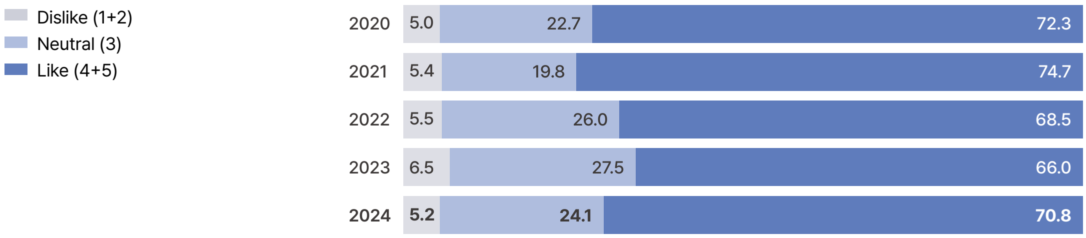
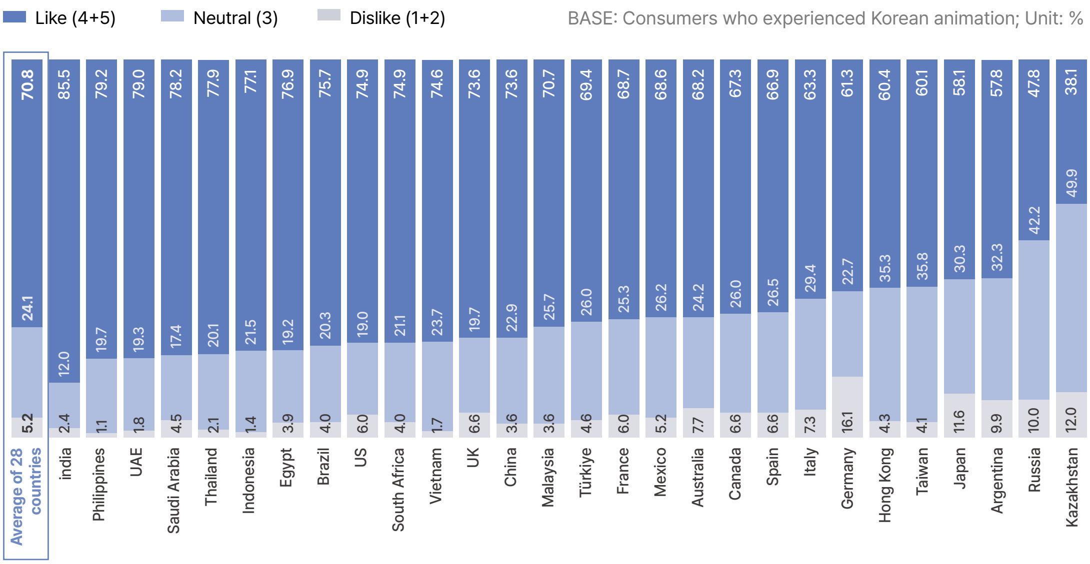


Figure 2-160 Comparison of Favorability Toward Korean Animation by Country

BASE: Consumers who experienced Korean animation; Unit: %



06 Factors Promoting and Inhibiting Favorability

The top factor promoting favorability is "visual beauty." High preference for "characters" was observed in the Middle East.

The main reason for liking Korean animation (1st + 2nd choices) was "has good visual beauty" (37.7%), which has ranked first since 2023 and showed a slight increase this year. This factor was followed by "like the looks of the characters" (30.3%) and "like the personalities/roles of the characters" (29.9%), which ranked second and third, respectively, showing that character-related elements remain key factors promoting favorability. Additionally, "contains little violent/revealing content" (13.0%) entered the rankings for the first time.

Specifically, "has good visual beauty" was ranked as the top factor promoting favorability in all continents except the Middle East. In the Middle East, "like the looks of the characters" (31.4%) and "like the personalities/roles of the characters" (29.4%) ranked first and second, respectively, indicating that character appeal was a relatively more important factor than visual beauty in the Middle East. Overall, both "visual beauty" and "characters" consistently ranked high across all continents, establishing them as core strengths of Korean animation.

Distinct differences were observed by continent. "Has good visual beauty" showed relatively high percentages of respondents in the Asia-Pacific (39.8%), the Americas (38.8%), and Africa (37.0%), with slight increases compared with the previous year. Meanwhile, "contains little violent/revealing content" increased in Europe (13.4%) compared with the previous year and newly entered the rankings in the Middle East (17.5%). Additionally, the proportions of respondents selecting "rich in content that can be used in education" increased slightly in Europe (13.2%) and the Middle East (19.0%), suggesting that the educational aspects, which differentiate Korean animation from other Korean video content, serve as a strength for animation. While the main consumer groups for dramas, variety shows, and movies are people in their 20s and 30s, Korean animation has the highest experience rate among teens, which may have contributed to such differences. As much of the content is aimed at children and adolescents, the presence of educational elements and the relative lack of violent or provocative content are factors promoting favorability, reflecting the genre-specific characteristics of animation.

Language barriers have persisted for three consecutive years. "Low accessibility" was cited as a factor inhibiting favorability across all continent. In the Middle East, "cultural differences" were perceived as particularly uncomfortable.

Factors inhibiting favorability toward Korean animation included "the Korean language is difficult and unfamiliar" (22.9%) and "inconvenient to watch with translated subtitles/dubbing" (20.8%), which ranked first and second for the third consecutive year, respectively, indicating that language barriers remain a persistent issue.

"Difficult to find or access" (19.0%) rose by 3.4 percentage points from the previous year and ranked third. Proportions of respondents selecting this factor increased across all continents, highlighting the issue of low accessibility. This result appears to be related to the relatively lower experience rate and public awareness of Korean animation compared with other types of Korean video content.

Meanwhile, in the Middle East, the proportion of respondents selecting "does not fit with my country's cultural code" (18.2%) was 5.6 percentage points above the 28-country average, indicating that cultural differences act as a key factor inhibiting favorability. Overall, language barriers, low accessibility, and cultural differences are factors limiting the global spread of Korean animation.

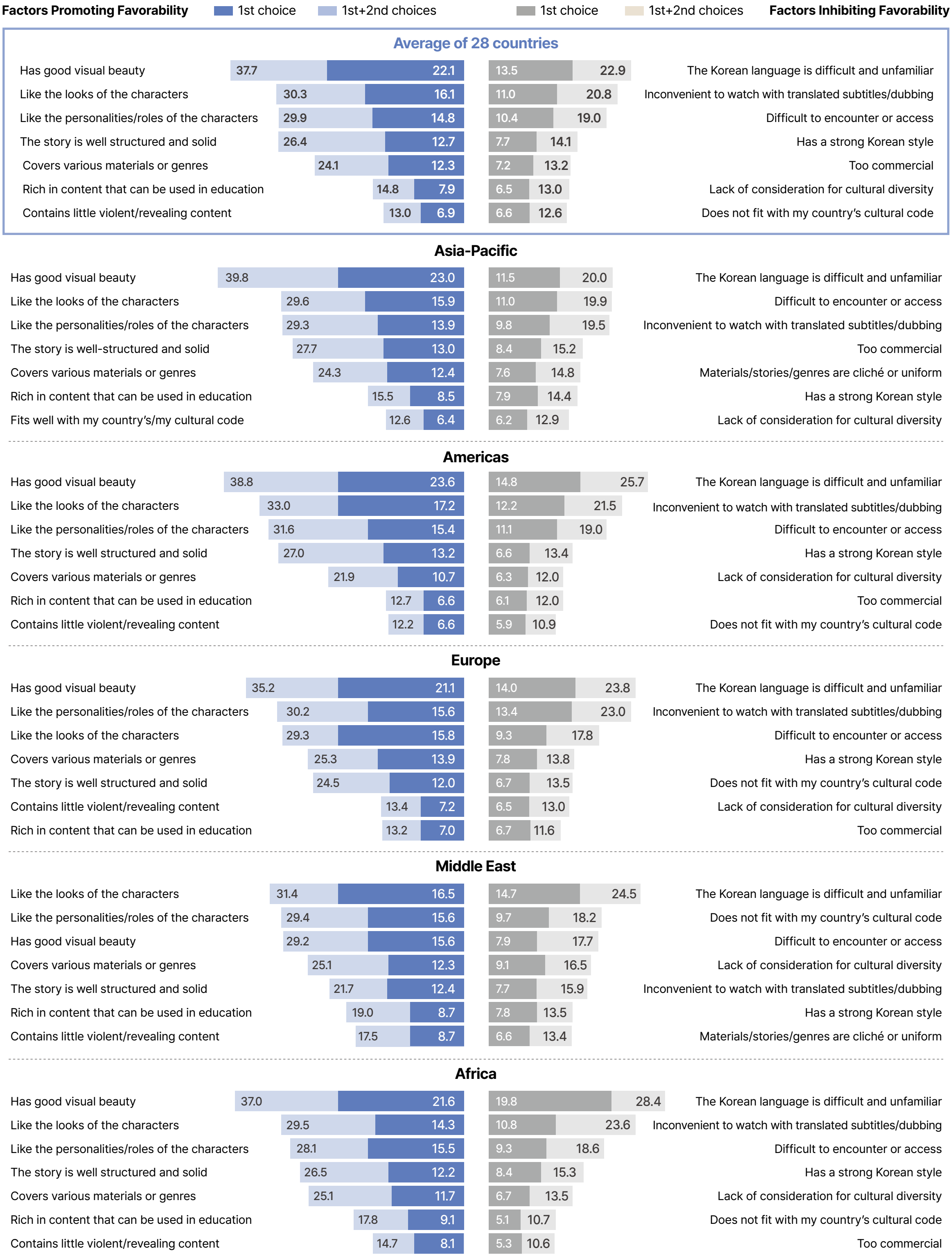
Figure 2-161 Comparison of Factors Promoting and Inhibiting Favorability Toward Korean Animation by Continent

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.

Note. Presented are the top 7 choices (options) ranked by the the combined proportion of first- and second-choice responses.

BASE: Consumers who experienced Korean animation, Unit: %



Lack of cultural diversity such as “lifestyle and customs” constituted the biggest issue.

In terms of inappropriate or insufficient aspects related to cultural diversity, “lifestyle and customs” (30.6%), “language” (27.1%), and “social class” (26.3%) and “traditional culture” (26.3%) were the top three most unconformable aspects among the average of 28 countries. In particular, “language” was identified as a major aspect of discomfort in Korean animation, just as it was for dramas, variety shows, and movies.
By continent, “lifestyle and customs” was the most frequently cited factor in the Asia-Pacific (32.7%) and Africa (39.5%), while lack of “traditional culture” received the highest percentage of respondents in Europe (27.1%) and the Middle East (30.9%). Meanwhile, in the Americas (31.0%), “sexual identity” emerged as the most uncomfortable factor, as was the case for dramas, variety shows, and movies. Therefore, demands for cultural diversity differ by continent.

Table 2-17 Top 3 Most Uncomfortable Aspects of Cultural Diversity Representation in Korean Animation by Continent

BASE: Respondents who chose “lack of consideration for cultural diversity” as a factor inhibiting favorability for Korean animation

	Average of 28 countries	Asia-Pacific	Americas	Europe	Middle East	Africa
1st	Lifestyle and customs 30.6%	Lifestyle and customs 32.7%	Sexual identity 31.0%	Traditional culture 27.1%	Traditional culture 30.9%	Lifestyle and customs 39.5%
2nd	Language 27.1%	Social class 30.2%	Social class 28.8%	Lifestyle and customs 26.7%	Sexual identity 29.5%	Language 36.7%
3rd	Social class, Traditional culture 26.3%	Traditional culture 27.5%	Traditional culture 27.1%	Language 24.4%	Fashion/ costumes 29.2%	Religion 29.8%

07 Preferred Animation

The most preferred animation was *Pucca*.
Pucca was the most popular Korean animation in Latin America, while *Larva* was the most popular in Southeast Asia.

When asked to name their favorite Korean animation (1st choice), 9.2% of respondents chose "*Pucca*," which once again ranked first after topping the list in 2018–2020 and 2022. "*Larva*" followed closely in second, followed by "*Pororo the Little Penguin*" (5.7%), "*The Haunted House*" (5.6%), and "*Super Wings*" (5.3%), all of which showed similar levels of preference with proportions in the 5% range.
By continent, "*Larva*" (13.6%) was especially popular in the Asia-Pacific region, exceeding the 28-country average by 5.5 percentage points. In the Americas, "*Pucca*" (23.4%) was the only one to exceed 20%, recording the highest preference. In Europe, "*Super Wings*" showed a relatively high proportion of respondents, while "*The Haunted House*" (7.9%) was cited as the most popular animation in Africa. In the Middle East, "*Red Shoes and the Seven Dwarfs*" (8.4%) and "*Pinkfong*" (7.6%) ranked first and second, respectively, showing a distinct preference compared with other continents.
By country, "*Pucca*" recorded high proportion of respondents selecting in Latin America, including Mexico (47.0%) and Argentina (43.5%). "*Larva*" was highly popular in Southeast Asia, including Indonesia (26.6%) and Vietnam (23.9%). Meanwhile, preference rates for "*Pororo the Little Penguin*" were high in Asian countries, such as Kazakhstan (16.2%) and the Philippines (12.9%).

Figure 2-162 Comparison of the Top 5 Most Preferred Korean Animation by Continent

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

1st choice   1st+2nd choices   BASE: Consumers who experienced Korean animation, Unit: %, open-ended responses

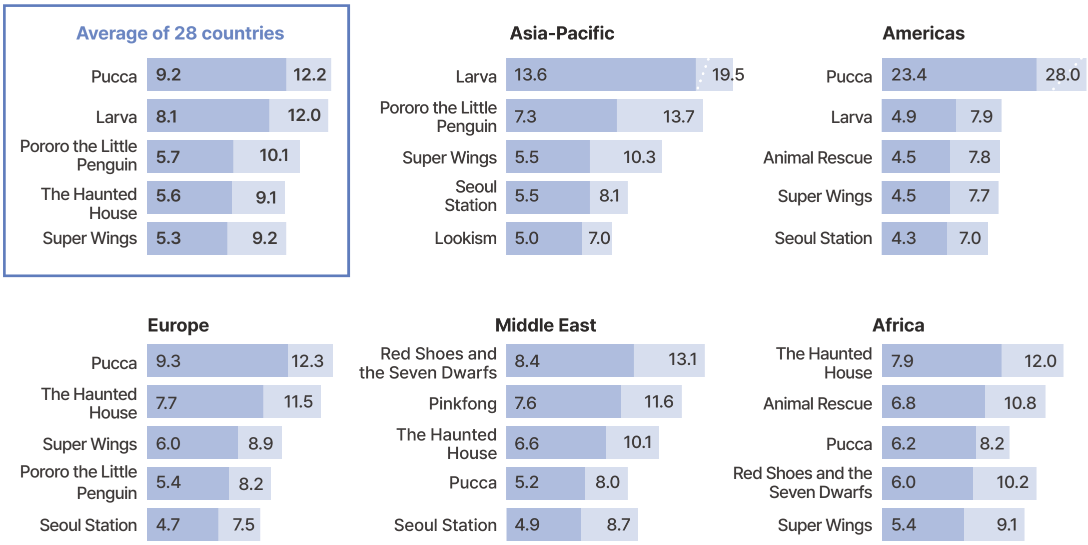


Table 2-18 Top 5 Countries in Preference Rates for Most Preferred Animation

Note. Presented are the top 5 choices (options) ranked by the proportion of first-choice responses.

BASE: Consumers who experienced Korean animation, Unit: %, open-ended responses

	1st	2nd	3rd	4th	5th
Pucca	Mexico 47.0%	Argentina 43.5%	Italy 23.8%	Brazil 20.3%	Spain 18.2%
Larva	Indonesia 26.6%	Vietnam 23.9%	Malaysia 22.5%	China 21.3%	Philippines 19.9%
Pororo the Little Penguin	Kazakhstan 16.2%	Philippines 12.9%	Indonesia 11.9%	Japan 10.9%	Russia 10.7%

08 Willingness to Pay

Willingness to pay for Korean animation was expressed by approximately 39.9% of respondents.

Willingness to pay was high in India, the UAE, and Egypt, and low in Japan, Kazakhstan, and Russia.

When asked about their willingness to pay for Korean animation, 39.9% of respondents answered in the affirmative, an increase of 2.6 percentage points on 2023 (37.3%). Approximately 28.8% of respondents were neutral, while 31.3% said that they were "not willing to pay," showing an 8.6 percentage point gap between those willing to pay and those who are not.

Looking at the trend over the past five years, after willingness to pay surged to 42.6% in 2021, it gradually began to increase again in 2022, approaching 40% in 2024 (39.9%), indicating steady growth.

By country, India (61.7%) showed the highest willingness to pay, up 4.8 percentage points from the previous year. India was followed by the UAE (57.4%), Egypt (53.7%), and Saudi Arabia (53.3%), indicating high willingness to pay in the Middle East and Africa. On the other hand, Japan (65.1%) continued to exhibit a passive consumption attitude, with the proportion of respondents selecting "not willing to pay" increasing compared with last year. While proportions in Kazakhstan (49.9%) and Russia (47.0%) declined, respondents in these countries still reflected negative perceptions toward paid use.

Figure 2-163 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

BASE: Total, Unit: %

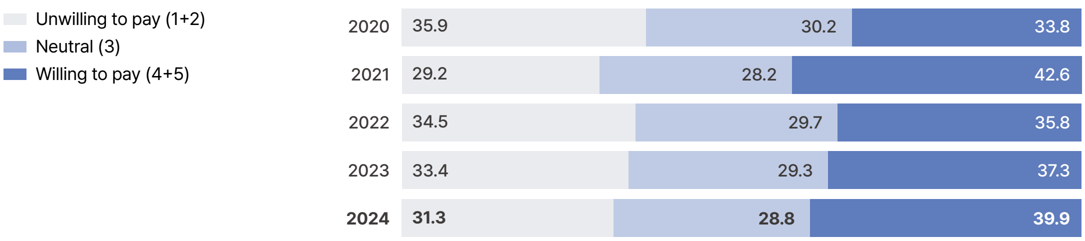
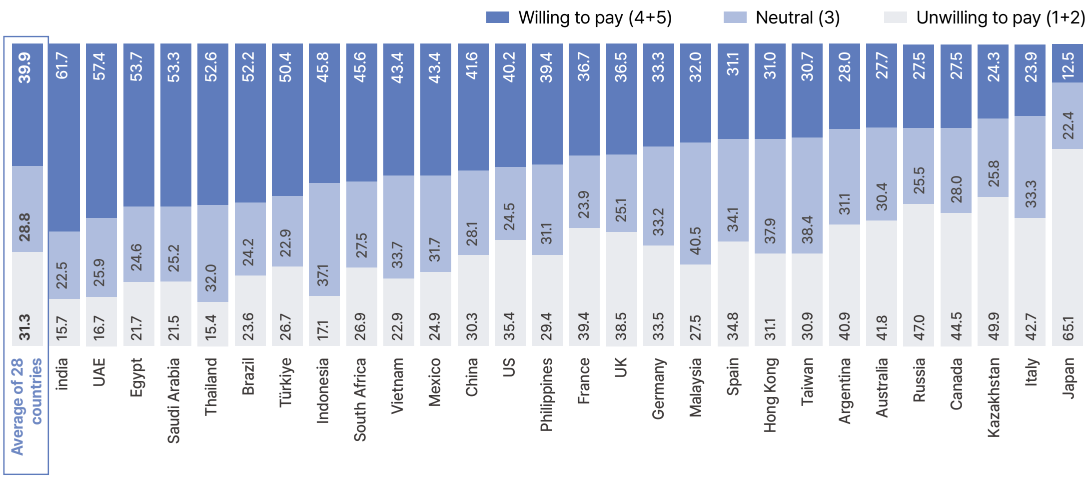


Figure 2-164 Comparison of the Willingness to pay for Korean Animation by Country

BASE: Total, Unit: %



09 Willingness to Recommend

Among respondents, 72.3% were willing to recommend Korean animation. Willingness to recommend was high in the Philippines, India, and Vietnam, but low in Japan, Germany, and Kazakhstan.

Among consumers who experienced Korean animation, 72.3% responded that they would recommend it to others. This represents an increase of 4.3 percentage points on the 2023 rate for "willingness to recommend." Approximately 22.3% were "neutral," while 5.5%% said that they were "not willing to recommend," indicating an overall trend of increasing willingness to recommend and decreasing unwillingness.
By gender and age, willingness to recommend increased across all groups, with women showing a notably larger increase (▲4.5 percentage points). By age group, there were significant increases in willingness to recommend among those in their teens (▲7.4 percentage points) and 50s (▲7.3 percentage points), indicating a broadening positive evaluation of Korean animation across diverse age ranges.
By country, willingness to recommend exceeded 80% in the Philippines (87.7%), India (87.7%), Vietnam (81.9%), and South Africa (80.2%), reflecting strong enthusiasm for actively recommending Korean animation. In contrast, Japan (16.1%), Germany (15.1%), and Kazakhstan (13.9%) showed relatively high proportions of respondents choosing "not willing to recommend."

Figure 2-165 Comparison of the Willingness to Recommend Korean Animation Over the Last 2 Years by Year

BASE: Total, Unit: %

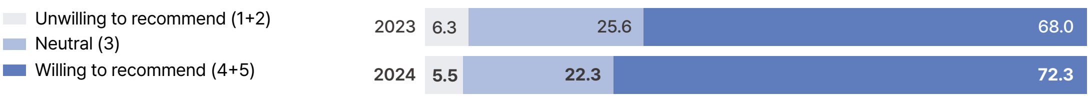


Figure 2-166 Comparison of Variation in the Willingness to Recommend Korean Animation by Gender and age

BASE: Total, Unit: %p

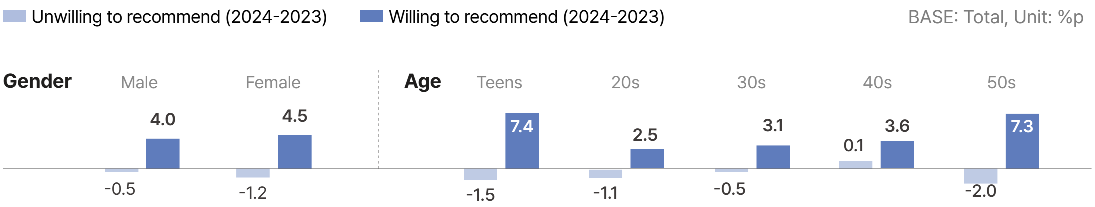
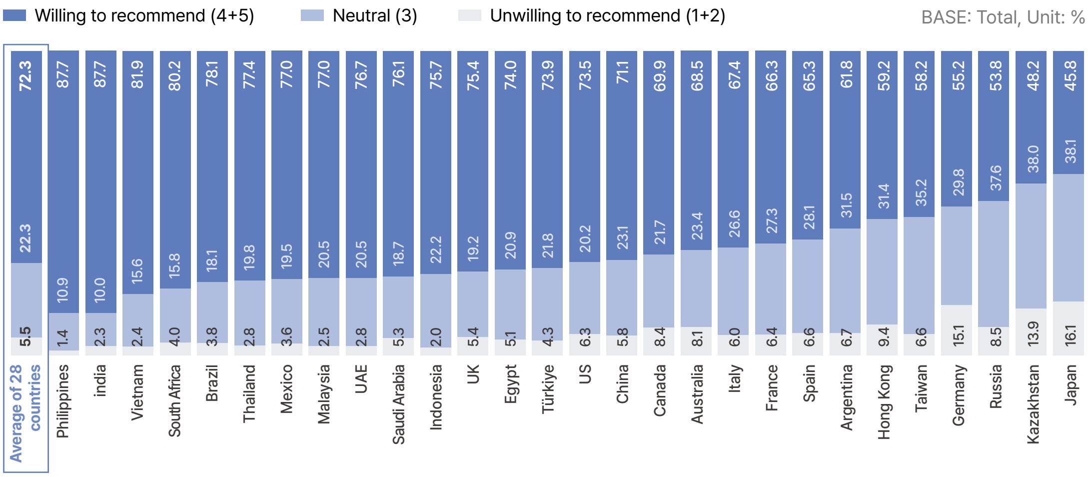


Figure 2-167 Comparison of the Willingness to Recommend Korean Animation by Country

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

BASE: Total, Unit: %



10 Ease of Use

Approximately 67.1% of respondents rated Korean animation as easy to consume, the highest level in five years.
Ease of use was especially high in India and the UAE.

The proportion of respondents who said Korean animation is “easy to consume” reached 67.1%, a slight increase from the previous year. Conversely, 8.3% of respondents said it is “not easy to consume.” Positive perceptions of ease of use have steadily increased from 60.9% in 2020, reaching the highest level in this year’s survey.
By country, India (80.4%) ranked first, up 6.4 percentage points from last year. India was followed by the UAE (77.9%), Indonesia (76.2%), and China (75.5%), where high percentages of respondents said that Korean animation is “easy to consume.”
In contrast, Argentina (17.5%) and Germany (16.9%) showed increases in the proportions of respondents selecting “not easy to consume” compared with the previous year, indicating relatively lower accessibility to Korean animation in these countries.

Figure 2-168 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

BASE: Consumers who experienced Korean animation, Unit: %

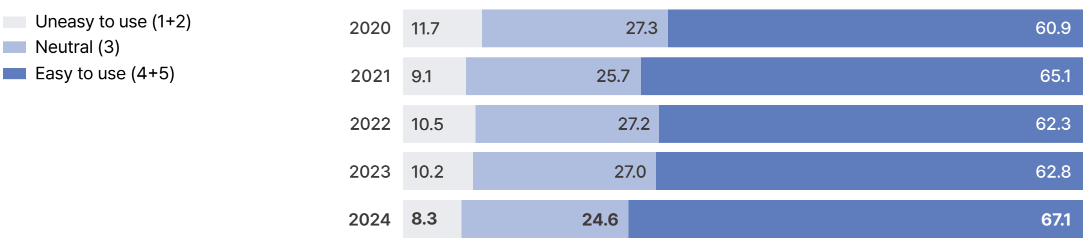
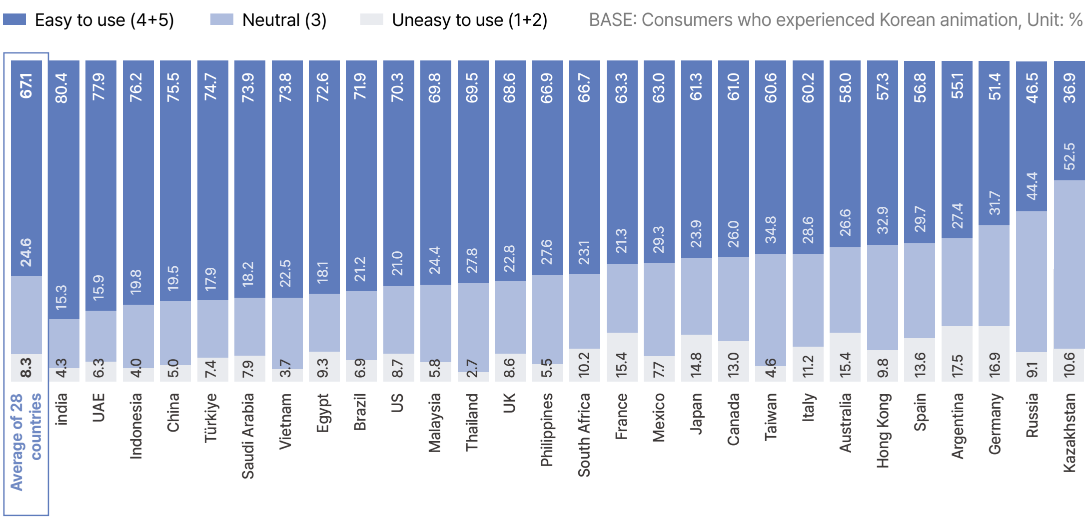


Figure 2-169 Comparison of the Ease of Consuming Korean Animation by Country

BASE: Consumers who experienced Korean animation, Unit: %



11 Channels of Exposure

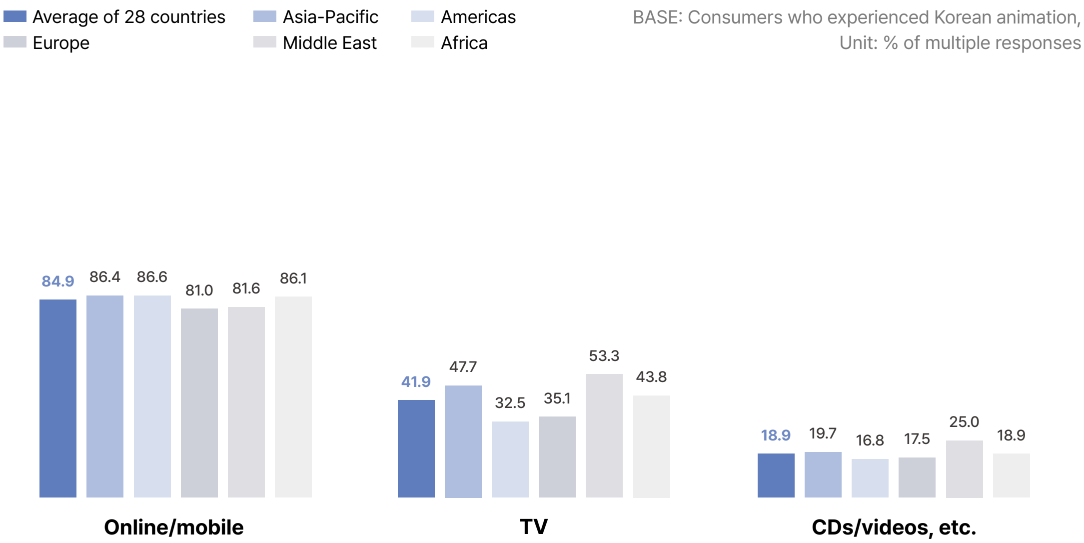
Approximately 84.9% of respondents were exposed to Korean animation via “online/mobile” channels.
Use of “CDs/videos, etc.” increased.

The main channels of exposure to Korean animation were “online/mobile” (84.9%) and “TV” (41.9%), evidencing similar trends to other Korean cultural content categories (dramas, movies, music, etc.). Exposure via “CDs/videos, etc.” accounted for 18.9% of responses, roughly one-quarter of the “online/mobile” access rate.
While the “online/mobile” access rate showed a slight decrease from the previous year, that for “TV” increased slightly. Meanwhile, access via “CDs/videos, etc.” increased across all continents. Notably, access through “CDs/videos, etc.” was higher for animation than for dramas, variety shows, and movies.
In all continents, the “online/mobile” access rate exceeded 80%, and the Middle East reported higher exposure rates through “TV” (53.3%) and “CDs/videos, etc.” (25.0%) compared with other continents. In Africa (43.8%), access through “TV” was also high. However, in the Americas and Europe, access through channels other than “online/mobile” was relatively low.

Figure 2-170 Comparison of Korean Animation Channels of Exposure by Continent

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

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



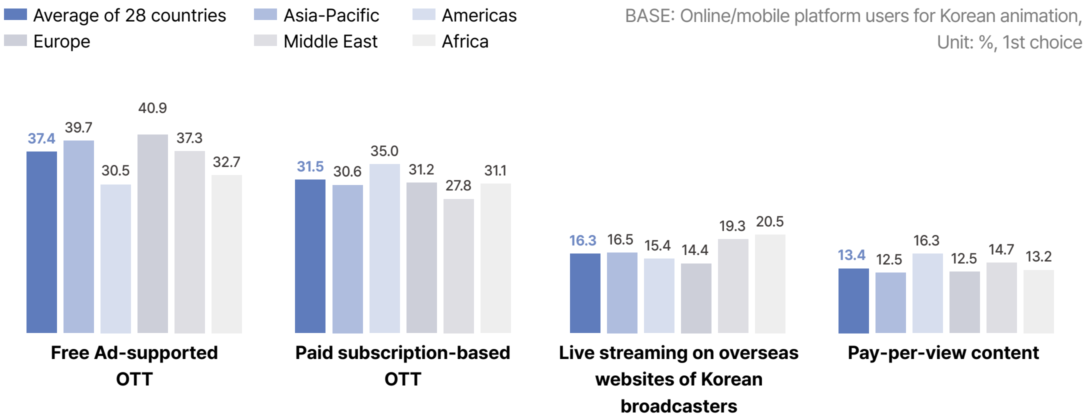
12 Online/mobile Platforms

Respondents actively utilized "free ad-supported OTT." In the Americas, "paid subscription-based OTT" had the highest usage rate.

Among respondents who watched Korean animation through online/mobile platforms, 37.4% reported using "free ad-supported OTT," which had the highest usage rate, followed by "paid subscription-based OTT" (31.5%), "live streaming on overseas websites of Korean broadcasters" (16.3%), and "pay-per-view content" (13.4%). These viewing patterns are similar to those for variety shows among Korean cultural content categories.
By continent, "free ad-supported OTT" was the most commonly used channel across all continents except for the Americas, where "paid subscription-based OTT" (35.0%) had the highest usage rate. The Middle East (19.3%) and Africa (20.5%) showed relatively active use of "live streaming on overseas websites of Korean broadcasters" compared with other continents. In the Asia-Pacific region, both "free ad-supported OTT" (39.7%) and "live streaming on overseas websites of Korean broadcasters" (16.5%) exceeded the average of the 28 countries. In Europe, only the proportion of respondents selecting "free ad-supported OTT" (40.9%) was above the average, while other viewing methods showed a more passive trend.

Figure 2-171 Comparison of Online/mobile Consumption Types for Korean Animation by Continent

Q. When you watch Korean animations online/ through mobile, what type of viewing do you use? Please select all the types you watch most in order.
※ Edited short videos are excluded.



Netflix rose to first place in terms of usage, while YouTube dropped to second. The Asia-Pacific reported the highest usage rate for YouTube.

Among respondents who watch Korean animation via online/mobile platforms, 63.1% reported using "Netflix" the most, followed by "YouTube" (58.4%). The usage rate of "Amazon Prime" (32.1%) remains at about half that of "Netflix."
Looking at the changes in usage rates over the past seven years, usage of "YouTube" exceeded that of "Netflix" until 2023, but dropped by 19.5 percentage points-declining from 82.6% in 2018 to 63.1% in 2024-and falling into second place. While "Netflix" gradually rose to first place for Korean animation, it recorded the lowest usage rate among Korean video content categories.
By country, "Netflix" ranked first in all continents except the Asia-Pacific, rising from second place in 2023 to first in 2024 in the Middle East and Africa, demonstrating its expanding influence. On the other hand, "YouTube" (61.5%) recorded the highest percentage in the Asia-Pacific, where the local brand "iQIYI" (23.2%) also ranked among the top platforms.
In the Americas, "Netflix" (73.4%) ranked first, recording the highest usage rate among the five continents, while "Hulu" (15.4%), a subsidiary of

Disney, ranked fifth. In Europe and the Middle East, the rankings of the top five platforms mirrored those of the average across the 28 countries. Notably, in the Middle East, the access rate for “Apple TV+” (30.6%) was 15.4 percentage points above the average.

Meanwhile, in Africa, the usage rate of “YouTube” (63.8%) was higher than that in other continents, indicating that this platform plays a significant role in the viewing of Korean animation.

Figure 2-172 Comparison of Online/mobile Platforms for Korean Animation Over the Last 7 Years by Year

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

Netflix YouTube Amazon Prime

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

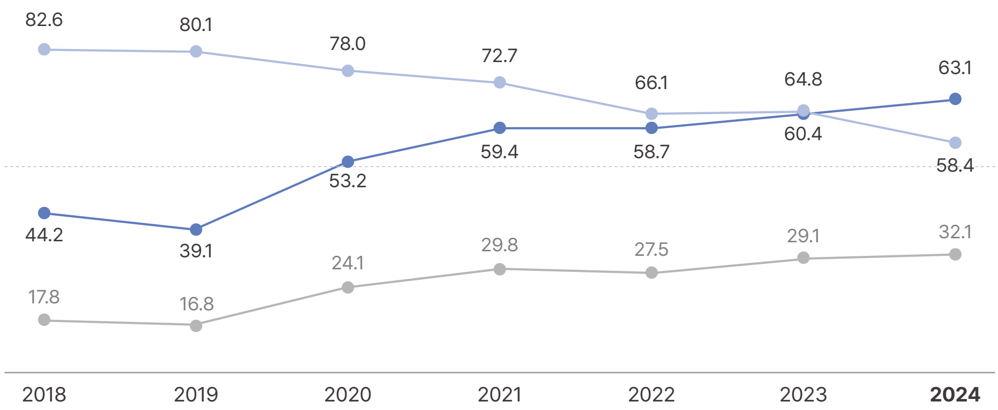
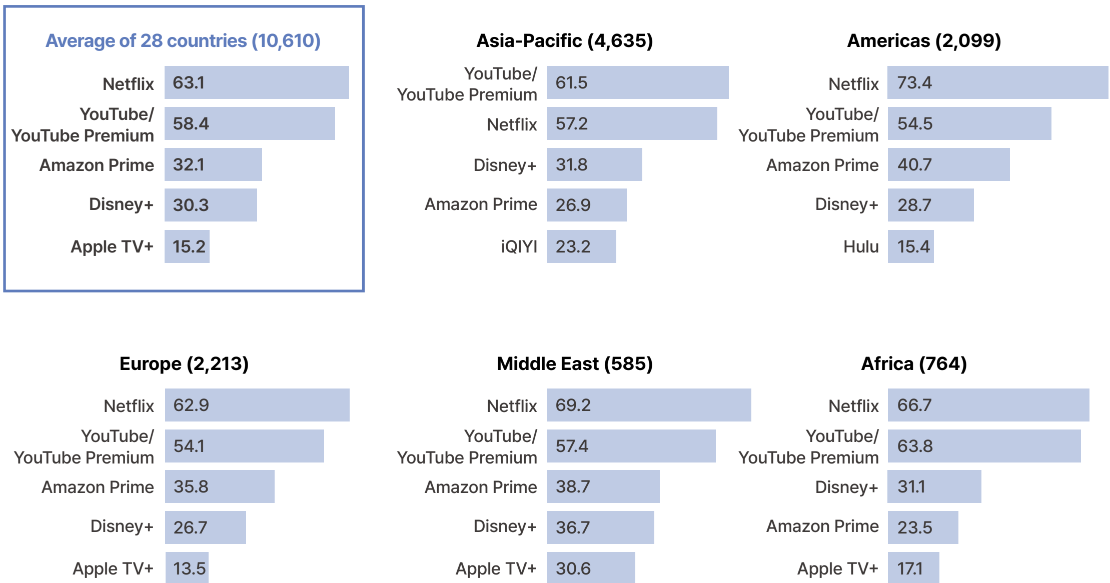


Figure 2-173 Comparison of Online/mobile Platforms for Korean Animation by Continent

Note. Presented are the top 5 choices (options) ranked by the proportion of respondents.

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



6

Publications
(Books/e-Books, etc.)

BOOK

SUMMARY

The year 2024 demonstrated the potential for Korean publications to expand in the global market. Author Han Kang's Nobel Prize win increased global interest in and access to Korean publications, which naturally led to a rise in experience rates. A notable increase in positive perception of Korean publications was also observed. However, to secure a sustained overseas readership, ongoing challenges such as inadequate translation must be addressed.

Approximately 31.3% of consumers with Hallyu experience had engaged with Korean publications, with relatively high experience rates reported in Latin America (i.e., Mexico and Brazil) and lower rates observed in North America (i.e., the US and Canada). In response to a question on the popularity of Korean publications in their country, the rates for "popular among a niche audience" (29.9%) and "widely popular" (28.9%) were similar. In the Middle East, "widely popular" was more commonly selected, whereas a higher proportion of respondents in Europe chose "popular among a niche audience."

Countries with high favorability rates included India, the UAE, and Egypt, while Kazakhstan, Russia, and Japan showed relatively low favorability and popularity. When asked about the most popular foreign publications in their countries, "the US" and "Korea" competed for the top two positions in all five continents. Across all continents, "the stories are good" was cited as the biggest factor promoting favorability toward Korean publications, while accessibility issues such as "the translation is inadequate," "difficult to purchase," and "difficult to understand" were identified as major factors inhibiting favorability.

01 Experience Rate

The experience rate of Korean publications rose by 1.6 percentage points from the previous year.
High rates were observed in Latin America, including Mexico and Brazil.

Among consumers with Hallyu experience, 31.3% reported having experienced Korean publications. Although this marks an increase of 1.6 percentage points in 2023 (29.7%), the rate remains relatively low compared to the overall consumption of Korean cultural content. Countries with high experience rates included Mexico (45.4%), Indonesia (45.3%), Vietnam (44.0%), and Brazil (42.4%), while Japan (13.5%), Australia (17.6%), and Canada (17.8%) showed low rates. Notably, experience rates were high in Southeast Asia, which is culturally close to Korea, and Latin America.

The experience rate among men increased compared to the previous year, partially narrowing the gender gap. By age group, those in their 30s and younger showed experience rates exceeding 30%, while those in their 40s and 50s had relatively lower rates. The high experience rate of Korean publications among younger generations appears to be linked to the recent emergence of reading as a fashionable cultural activity among the youth, along with the popularity of neologisms such as "issability" (a Korean term referring to coolness factor) and "Text Hip."

Figure 2-174 **Comparison of Korean Publication Experience Rates by Country** BASE: Total, Unit: %

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

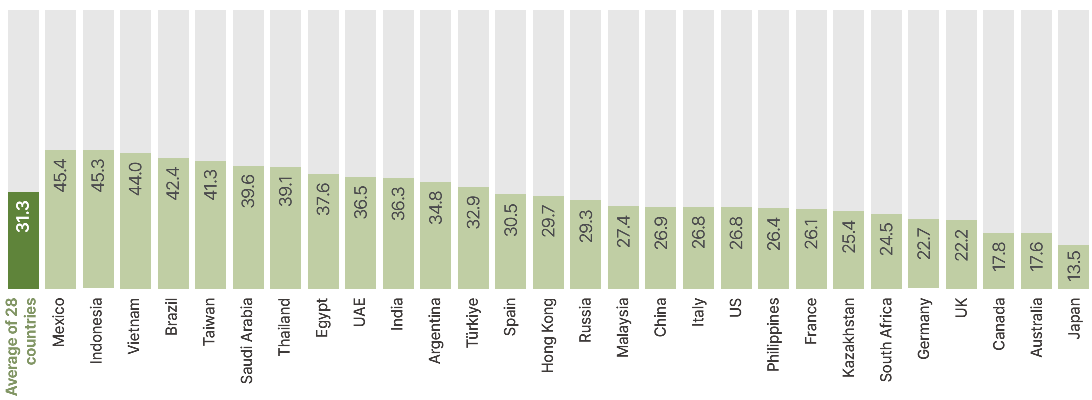
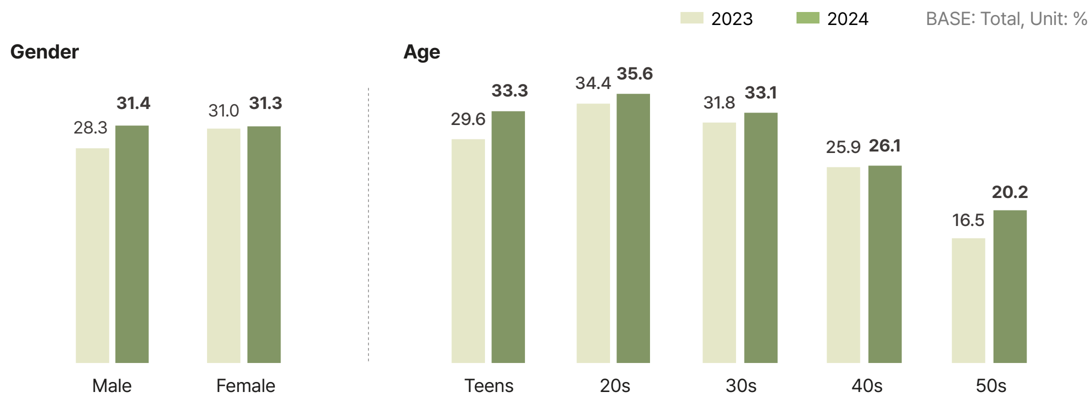


Figure 2-175 **Comparison of Korean Publication Experience Rates Over the Last 2 Years by Gender and age**



02 Popularity

Approximately 29.9% of respondents viewed Korean publications as "popular among a niche audience."
There was a notable decline in the proportion of respondents selecting "hardly used."

Among consumers with Hallyu experience, 29.9% perceived Korean publications as "popular among a niche audience" in their country, while 28.9% selected "widely popular," and 14.0% chose "hardly used." Compared to the 2023 survey, although "popular among a niche audience" (29.9%) remained the most popular response, the proportion of those who answered "moderately popular" increased by 3.3 percentage points. "hardly used" also decreased by 4.3 percentage points, indicating a positive change. According to local news, although the language barrier is most acute in Korean publications, Korean literature is gaining broader international recognition and accessibility through events such as author Han Kang winning the Nobel Prize in 2024.

Countries with high percentages for "widely popular" included India (39.8%), Thailand (38.6%), and Egypt (38.4%), while those with high percentages for "popular among a niche audience" included Australia (39.3%), Canada (38.0%), and Taiwan (36.9%). Although country-level differences in the popularity of Korean publications were not significant, the proportion of "hardly used" responses decreased in most countries compared to the previous year, an encouraging fact.

Figure 2-176 Comparison of the Popularity of Korean Publications 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

BASE: Total, Unit: %

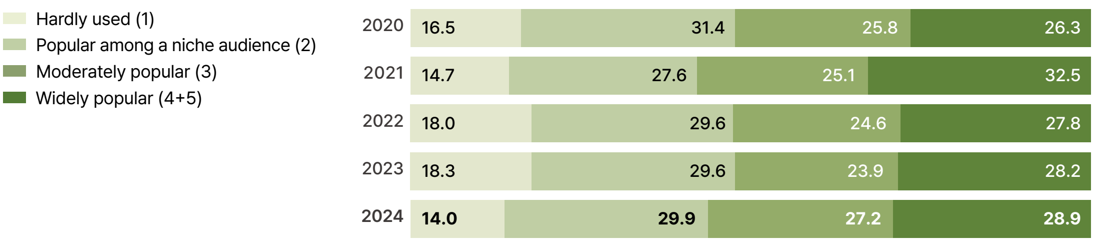
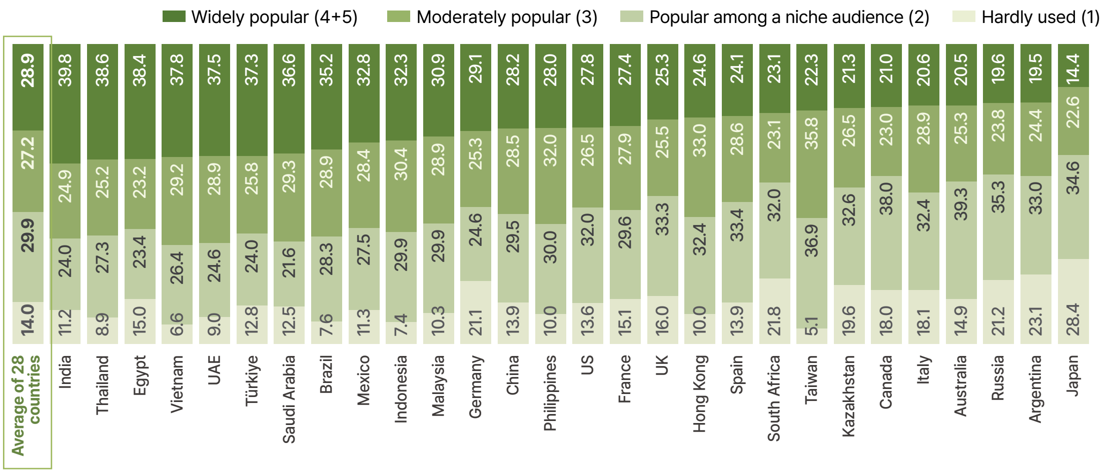


Figure 2-177 Comparison of the Popularity of Korean Publications by Country

BASE: Total, Unit: %



Local News

"In 2024, the Korean Picture Book Publishers Association made an official visit to Taiwan and held a joint traveling exhibition at local bookstores, including Kuo's Astral Bookshop and The Isle Bookstore."

Taiwan KOTRA Taipei Trade Officer

"Kim Ho-yeon's novel *The Second Chance Convenience Store* was published in Taiwan in September 2022, surpassed 100,000 copies sold, and became the #1 bestseller in translated literature. It received a strong positive response again this year."

Taiwan KOFICE Taipei Overseas Correspondent

"Han Kang's Nobel Prize win significantly increased the visibility of Korean literature in Germany. At Thalia, a major bookstore chain, *The Vegetarian*, entered the online bestseller list at #3. Although Korean novels are not as widely known as K-pop or dramas, Han's award has helped raise awareness of Korean authors and literature."

Germany KOTRA Frankfurt Trade Officer

At the Frankfurt Book Fair, which attracts hundreds of thousands of visitors annually, five of Han Kang's works were displayed by German publisher Aufbau."

Germany KOFICE Frankfurt Overseas Correspondent

"At local bookstores, the English version of *I Want to Die but I Want to Eat Tteokbokki* received attention."

Malaysia KOTRA Kuala Lumpur Trade Officer

"Following Han Kang's Nobel Prize, her books were featured at the main booth of Sanborns, a large chain store in Mexico."

Mexico KOFICE Mexico City Overseas Correspondent

"Following last year's *The Dallergut Dream Department Store*, the English translation of *The Second Chance Convenience Store* was released this year, and Korean authors' works started appearing in local bookstores. After Han Kang's Nobel Prize win in Literature at the end of the year, English translations of several of her works were displayed at the entrances and main display tables of nearly every bookstore in the city. Korean American authors such as Juhea Kim were also popular."

U.S. KOFICE New York Overseas Correspondent

"*The Vegetarian* ranked among the best-selling books at Spain's major bookstore chain, Fnac. Hwang Bo-reum's *Welcome to the Hyunam-dong Bookshop* was included in the October bestsellers list of the Spanish daily, *La Vanguardia*, and received significant media attention."

Spain KOFICE Madrid Overseas Correspondent

"Haemin Sunim's *The Things You Can See Only When You Slow Down and Love for Imperfect Things*, along with Oh Su-hyang' *Positive Habits*, remain steady bestsellers. In Indonesia, it is not uncommon to see books with Korean subtitles on the cover or books designed to reflect Korean vibes. Korean books perform particularly well in the fiction, self-help, children's, and educational comic categories."

Indonesia KOFICE Jakarta Overseas Correspondent

"*The Second Chance Convenience Store* was frequently seen in Thai bookstores, along with a wide range of Korean self-help and fiction titles. Korean educational comic series continue to sell steadily, including the *Why?* series, *Survival* series, and *Cookie Run* Learning Comics, which blend entertainment and learning. There seems to be consistent demand for such content."

Thailand KOFICE Bangkok Overseas Correspondent

03 Popular Foreign Publications

“Korea” was selected as the second-most popular foreign publications overall. “Korea” ranked first in the Middle East and Africa.

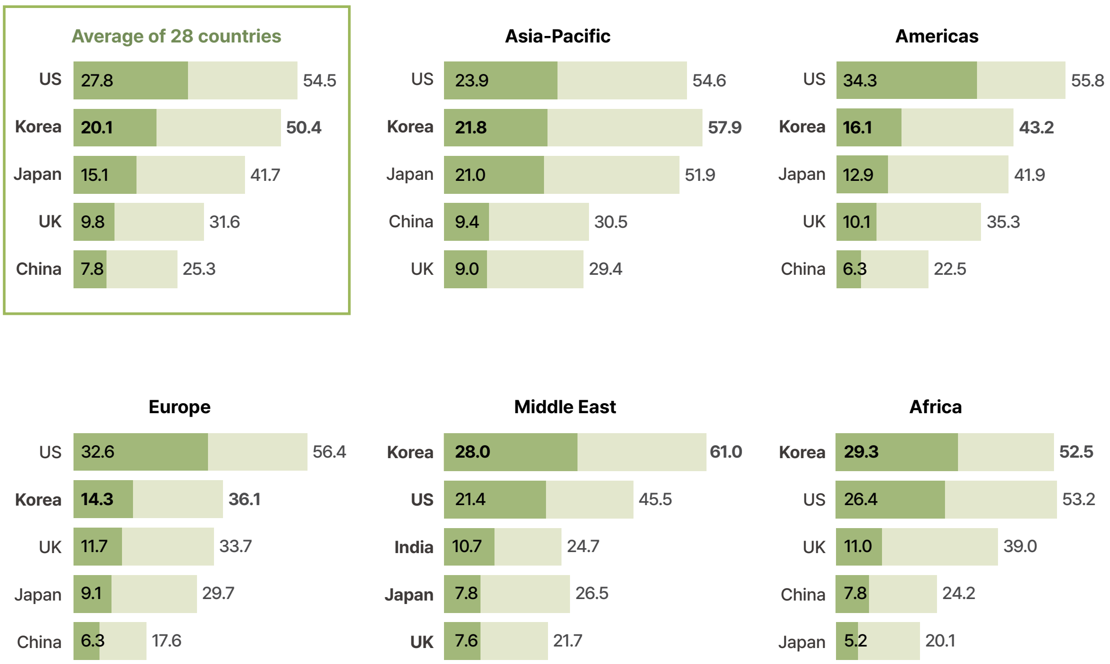
“Korea” (20.1%) ranked second after “the US” (27.8%) as the most popular country for foreign publications (1st choice) among respondents.
Based on first-choice responses, “Korea” ranked highest in preference in the Middle East (28.0%) and Africa (29.3%). While “the US” took the top spot in the Americas and Europe, “Korea” also ranked highly. This demonstrated a strong sense of competitiveness, especially considering it is not an English-speaking country.

In the Asia-Pacific region, the preference gap between “the US” (23.9%) and “Korea” (21.8%) was only 2.1 percentage points. Furthermore, when considering combined responses for the top three choices, “Korea” recorded a higher proportion of respondents than “the US”-“Korea” may have higher latent preference. Thus, the Asia-Pacific region, “the US,” and “Korea” have a comparable level of popularity.

Figure 2-178 Comparison of Popular Foreign Publications by Continent

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).

1st choice   1st+2nd+3rd choices (multiple responses)   BASE: Consumers who experienced Korean publications, Unit: %



04 Consumption Volume

Respondents spent an average of 12.4 hours per month on Korean publications. The average was 18 hours in the Philippines and UAE.

Consumers who experienced Korean publications spent an average of 12.4 hours per month on this category, an increase of 1.7 hours compared to the average a year ago (10.7 hours). Countries with longer average times included the Philippines (18.9 hours), the UAE (18.3 hours), India (16.8 hours), Australia (16.1 hours), and Thailand (16.1 hours), with the majority concentrated in the Asia-Pacific region. However, Japan (4.8 hours) and European countries such as Germany (7.6 hours) and France (7.9 hours) spent fewer hours on Korean publications a month.
The proportion of consumption of Korean publications out of total publication consumption averaged 22.8% across all 28 countries. In particular, the UAE (30.1%) and Malaysia (30.0%) maintained a high proportion in the 30% range for 2023 and 2024, securing a leading position. Conversely, countries where the use of the national language is prevalent-such as Japan (13.6%), Germany (15.7%), and Russia (15.7%)-showed relatively low proportions of Korean publication consumption. Generally, the proportion of consumption was higher in Asia-Pacific, the Middle East, and Africa and lower in Europe and the Americas. This appears to be the result of various factors, including the cultural characteristics of each region, language barriers, and access to distribution channels.
In terms of expenditure, the Middle East (the UAE and Saudi Arabia), Anglosphere (the UK, the US, Australia, etc.), and European countries generally ranked.

Figure 2-179 Comparison of Time Spent 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.

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

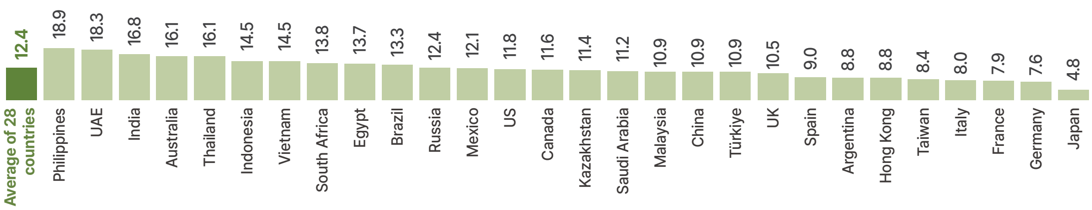


Figure 2-180 Comparison of the Proportion of Korean Publication Consumption by Country

BASE: Consumers who experienced Korean publications, Unit: %

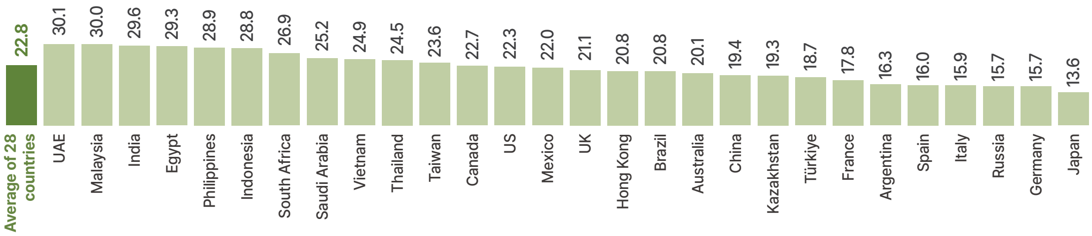
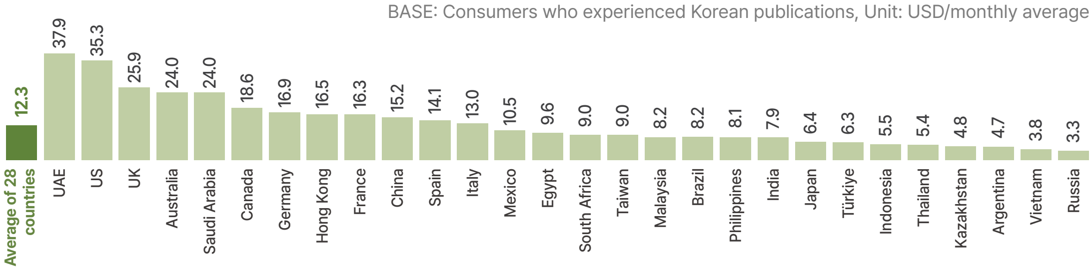


Figure 2-181 Comparison of Expenditure on Korean Publications by Country

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



05 Favorability

Approximately 73.9% of respondents said they liked Korean publications.

Among consumers who experienced Korean publications, 73.9% responded that they "like" Korean publications-a 3.6 percentage point increase from the previous year's result (70.3%). Favorability toward Korean publications has stayed within the 70% range since 2020. In 2024, the proportion of respondents choosing "do not like" was 3.6%, the lowest in the past five years, indicating increasingly positive evaluations. Countries with high favorability included India (87.1%), the UAE (83.9%), and Egypt (83.2%), while those with lower favorability included Kazakhstan (47.9%), Russia (49.2%), and Taiwan (59.2%). Compared to the previous year, there was little change in the country rankings for favorability. Thus, rather than significant rises in specific countries, favorability toward Korean publications has increased overall.

Figure 2-182 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

BASE: Consumers who experienced Korean publications, Unit: %

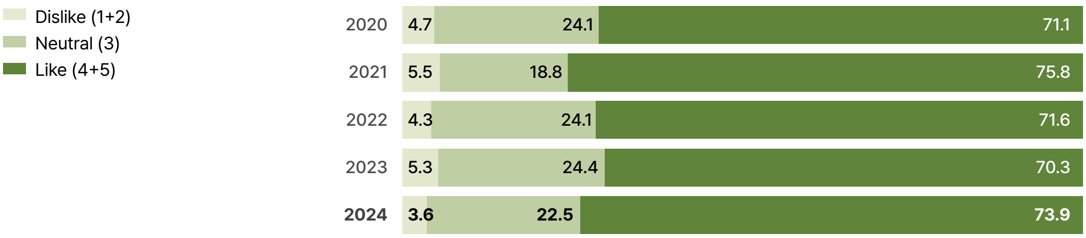
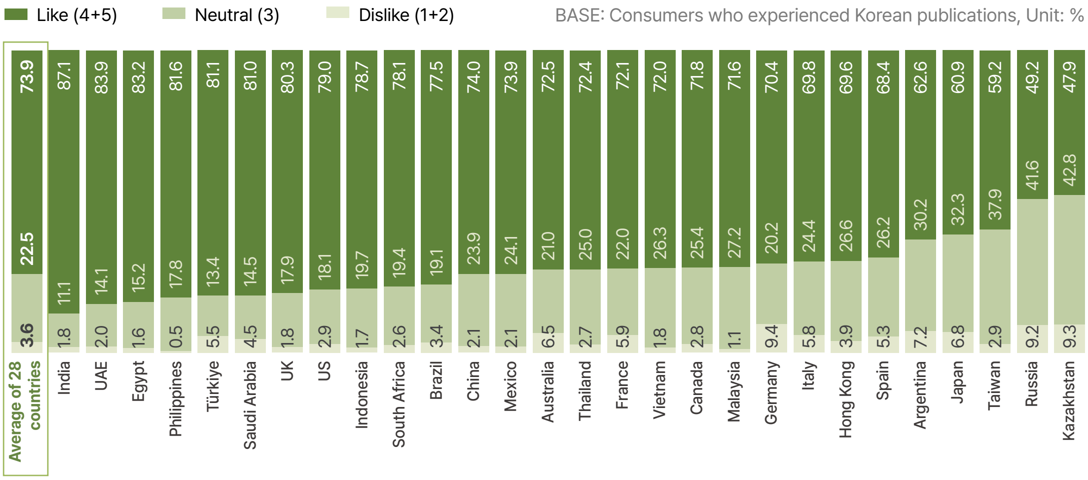


Figure 2-183 Comparison of Favorability Toward Korean Publications by Country

BASE: Consumers who experienced Korean publications, Unit: %



06 Factors Promoting and Inhibiting Favorability

The leading factor promoting favorability was "the stories are good." "Original works behind popular Hallyu content" ranked high in Asia-Pacific, the Middle East, and Africa.

The most cited factor promoting favorability toward Korean publications (1st + 2nd choices) was "the stories are good" (33.0%), which emerged as the most important factor promoting favorability across all regions. Interestingly, the percentage of respondents selecting "often the original works behind popular Hallyu content" increased in 2024 compared to the previous year. Thus, interest in Hallyu content leads to increased favorability toward publications, with the original novels[1] behind dramas released on OTT platforms, such as Netflix and Apple TV+, gaining popularity. The proportion of respondents selecting "award-winning work" also increased, with a growing tendency for readers to choose award-winning titles amid expanding awareness of and trust in such works.

Regarding second-choice responses by continent, "often the original works behind popular Hallyu content" ranked high in Asia-Pacific (29.3%), the Middle East (25.0%), and Africa (24.6%). In the Americas, "like the personalities/roles of the characters" (24.4%) was the second most selected factor, while "covers various materials or genres" (24.3%) took the second place in Europe. Notably, the proportion of respondents for "increasing interest in and demand for learning the Korean language" was higher in the Middle East (21.4%) compared to the overall average of the 28 countries.

Therefore, based on the excellent storytelling of Korean publications, consumers in the Americas and Europe appreciate detailed story elements such as characters, materials, and genres, whereas in Asia-Pacific, the Middle East, and Africa, interest in Hallyu content leads to favorability toward publications.

"The translation is inadequate" was the most frequently cited factor that inhibits favorability, followed by "difficult to purchase."

The main factors inhibiting favorability toward Korean publications were "the translation is inadequate" (23.6%), "difficult to purchase" (22.1%), and "difficult to understand" (20.6%). Notably, in 2024, inadequate translations were more prominent than difficulties purchasing. Thus, after Han Kang won the Nobel Prize, awareness of Korean publications improved in many countries. Although this led to increased usage, it also highlighted translation-related issues.

The main factors inhibiting favorability were similar across continents. However, "the translation is inadequate" was perceived as the most serious issue in Asia-Pacific (24.7%), the Middle East (23.3%), and Africa (24.1%), while "difficult to purchase" was identified as a significant problem in the Americas (25.0%) and Europe (21.7%).

Regarding inappropriate or insufficient aspects of cultural diversity representation, "social class" (32.3%) and "lifestyle and customs" (31.9%) exceeded 30%, followed by "traditional culture" (29.4%), "language" (27.5%), and "religion" (27.5%). By continent, "race" was the most frequently cited factor in Europe (26.9%), as were "lifestyle and customs" in the Middle East (36.6%) and "language" in Africa (37.2%).

Table 2-19 Top 3 Most Uncomfortable Aspects of Cultural Diversity Representation in Korean Publications by Continent

BASE: Respondents who chose "lack of consideration for cultural diversity" as a factor inhibiting favorability toward Korean publications

	Average of 28 countries	Asia-Pacific	Americas	Europe	Middle East	Africa
1st	Social class 32.3%	Social class 38.6%	Social class 31.5%	Race 26.9%	Lifestyle and customs 36.6%	Language 37.2%
2nd	Lifestyle and customs 31.9%	Lifestyle and customs 35.9%	Lifestyle and customs 28.0%	Social class 25.3%	Traditional culture 34.6%	Lifestyle and customs 35.9%
3rd	Traditional culture 29.4%	Traditional culture 32.6%	Traditional culture 28.0%	Food 25.0%	Religion 28.9%	Food 29.7%

1 Dramas based on novels such as *Pachinko* by Lee Min Jin and *The Trunk* by Kim Ryeo-ryeong have been released on Netflix and Apple TV+.

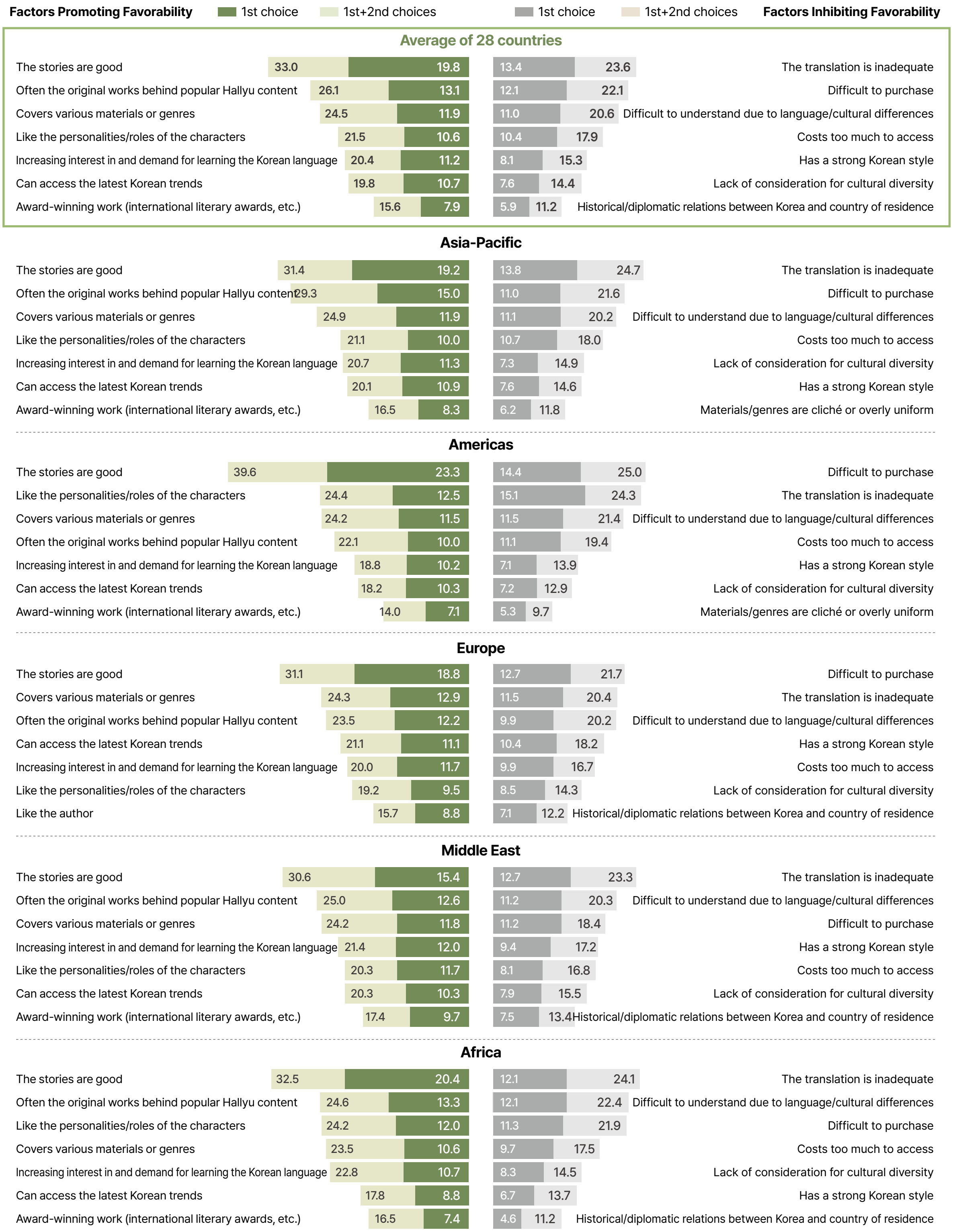
Figure 2-184 **Comparison of Factors Promoting and Inhibiting Favorability Toward Korean Publications by Continent**

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.

Note. Presented are the top 7 choices (options) ranked by the combined proportion of first- and second-choice responses.

BASE: Consumers who experienced Korean publications, Unit: %



07 Genres Used

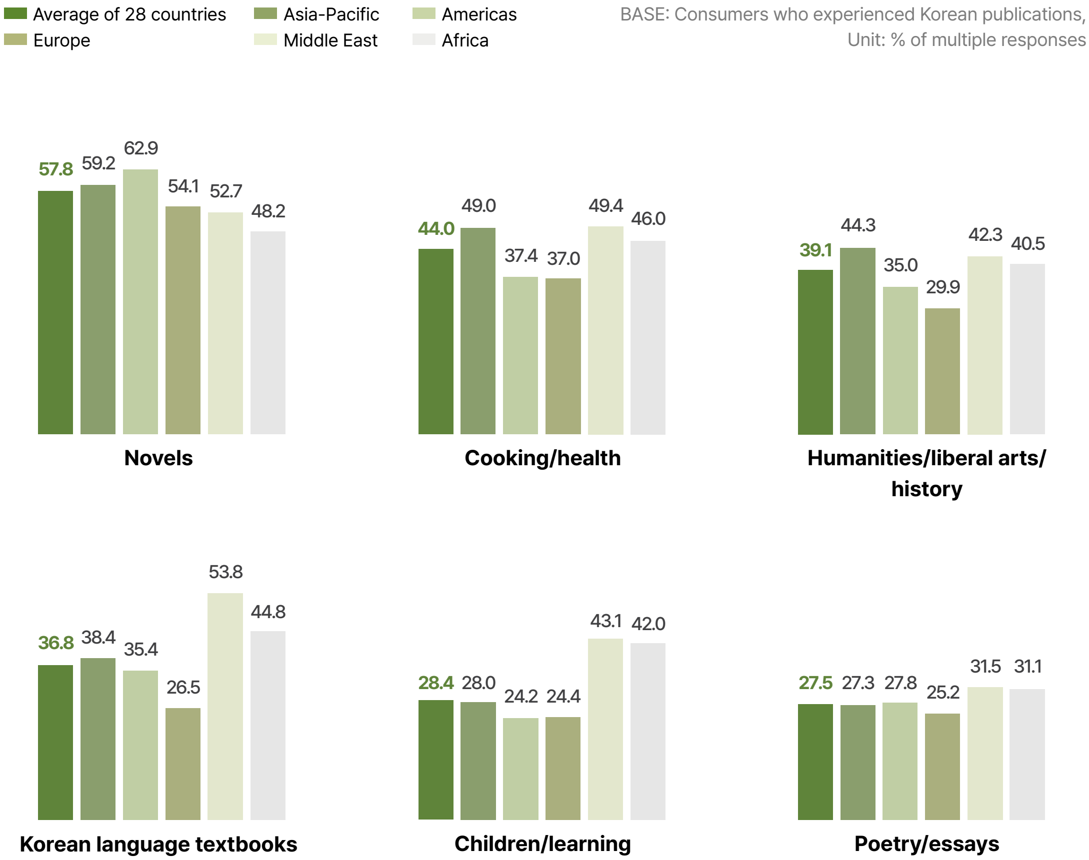
The most frequently read genre was "novels." High usage rates for "Korean language textbooks" and "children/learning," especially in the Middle East and Africa.

The most popular genre among users of Korean publications was "novels" (57.8%), followed by "cooking/health" (44.0%) and "humanities/liberal arts/history" (39.1%).
The usage rate for "novels" was particularly high in the Americas (62.9%), while the genres of "cooking/health" (49.0%) and "humanities/liberal arts/history" (44.3%) were more frequently used in the Asia-Pacific region.

The Middle East and Africa showed higher usage rates across most genres compared to the average of the 28 countries, indicating strong interest in Korean publications. The genres of "Korean language textbooks" and "children/learning" were particularly prominent, reflecting the growing enthusiasm for learning Korean in these regions.

Figure 2-185 Comparison of Korean Publication Genres Experienced by Continent

Q. Which genres of Korean publications have you experienced? Please select all.



08 Willingness to Pay

Approximately 35.5% of respondents were willing to pay, while 33.6% were not Over half of the respondents in India and the UAE were willing to pay. The proportion of respondents not willing to pay was particularly high in Japan and Kazakhstan.

When asked whether they were willing to pay for Korean publications, 35.5% of respondents said they were "willing to pay," some 1.9 percentage points higher than those who answered that they were "not willing to pay" (33.6%). Meanwhile, 30.9% of respondents were "neutral."

Willingness to pay for Korean publications recorded the highest positive proportion of respondents in the 2021 survey. However, over the past five years, it has generally remained in the 30% range, showing no significant difference from the "not willing to pay" responses. In 2024, the positive proportion of respondents was the second highest after 2021, with the "willing to pay" rate surpassing that for "not willing to pay."

By country, India (53.2%) and the UAE (50.9%) showed a high willingness to pay, with more than half of respondents indicating they were willing to pay for Korean publications. Similarly, in Egypt (45.8%), Saudi Arabia (45.2%), Brazil (45.1%), Türkiye (44.6%), Indonesia (44.3%), Thailand (42.3%), and Vietnam (41.9%), the proportion of respondents selecting "willing to pay" was higher than that for "not willing to pay."

Conversely, Japan (64.2%) and Kazakhstan (51.4%) recorded particularly high proportion of respondents choosing "not willing to pay." The "not willing to pay" percentage was also higher in Russia (47.2%), Australia (46.3%), Canada (45.8%), Italy (41.7%), and France (41.6%).

Figure 2-186 Comparison of the Willingness to pay for Korean Publications 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

BASE: Total, Unit: %

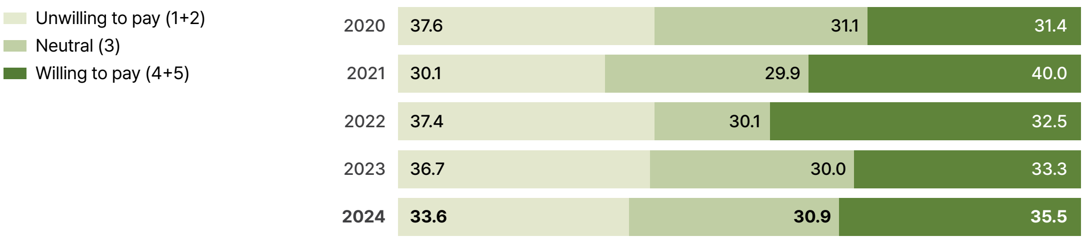
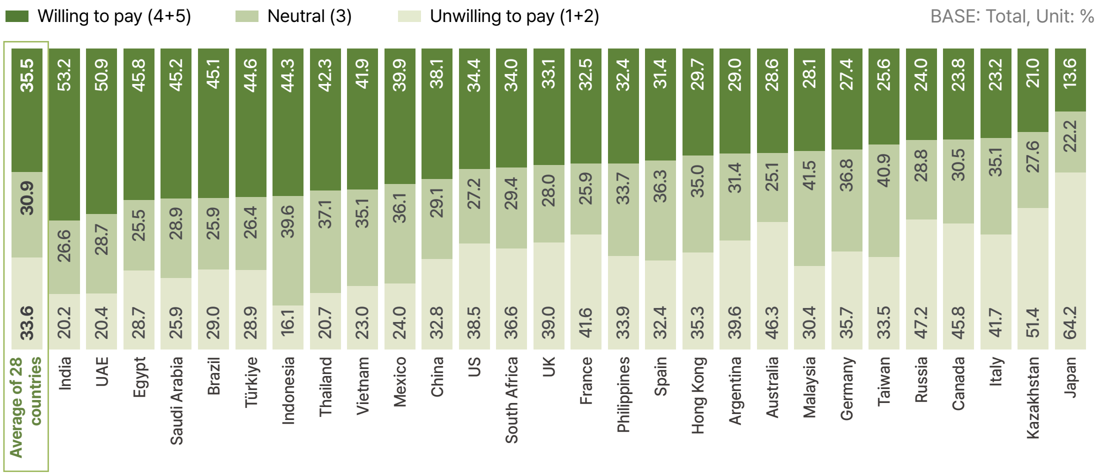


Figure 2-187 Comparison of the Willingness to pay for Korean Publications by Country

BASE: Total, Unit: %



09 Willingness to Recommend

Seven out of ten consumers were willing to recommend Korean publications. Over 80% of respondents in India, the UAE, Saudi Arabia, and Egypt were willing to recommend Korean publications.

Among consumers who experienced Korean publications, 72.2% responded that they were "willing to recommend" Korean publications-an increase of 3.2 percentage points compared to the rate in the 2023 survey (69.0%). The proportion of respondents choosing "neutral" was 23.0%, while that for "not willing to recommend" remained low at 4.8%.
By age group, those in their 30s showed the most significant change, with an increase of 5.5 percentage points in the proportion of respondents selecting "willing to recommend" and decrease of 2.4 percentage points in that for "not willing to recommend" compared to 2023. Willingness to recommend among teens was also more positive than it was in last year's survey.
India was most positive about recommending Korean publications, with 86.8% of respondents reporting willingness to recommend. The UAE (80.5%), Saudi Arabia (80.3%), and Egypt (80.2%) also showed high willingness to recommend, all proportions exceeding 80%. Conversely, less than 50% of respondents in Kazakhstan (48.0%) and Japan (48.1%) were willing to recommend Korean publications, indicating a more passive attitude toward recommendation compared to other regions.

Figure 2-188 Comparison of the Willingness to Recommend Korean Publications Over the Last 2 Years by Year

BASE: Total, Unit: %

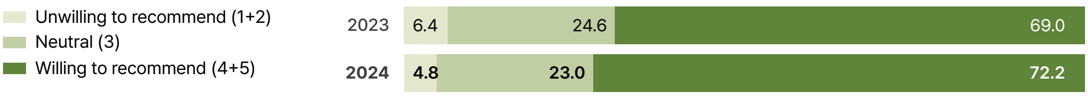


Figure 2-189 Comparison of Variation in the Willingness to Recommend Korean Publications by Gender and age

BASE: Total, Unit: %p

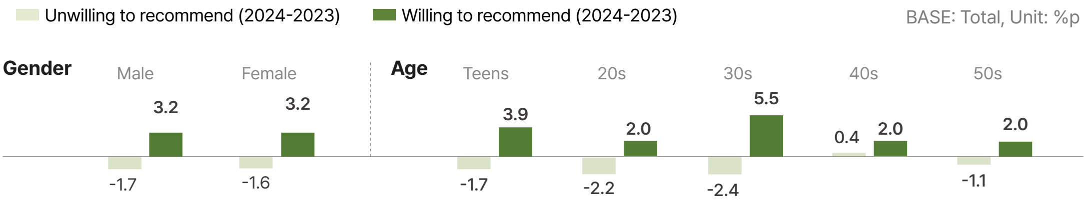
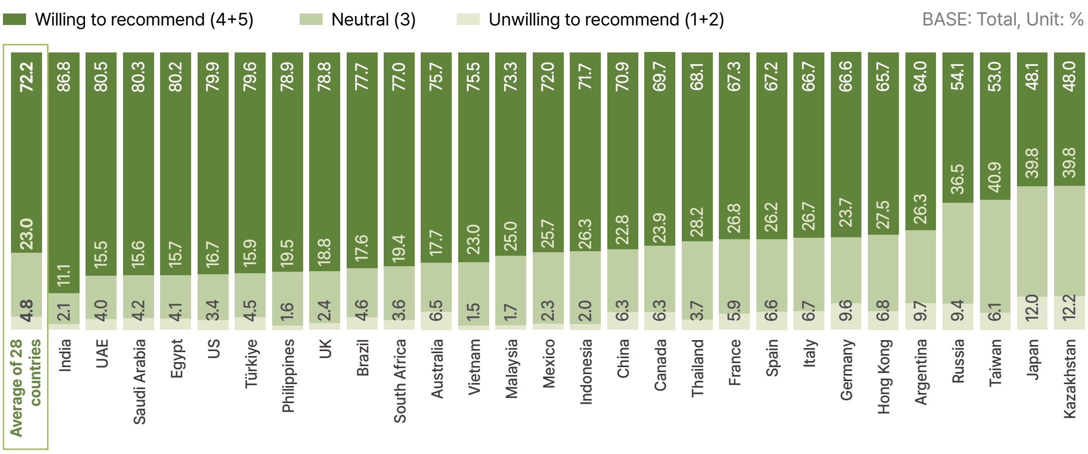


Figure 2-190 Comparison of the Willingness to Recommend Korean Publications by Country

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

BASE: Total, Unit: %



10 Ease of Use

Approximately 62.8% of respondents found Korean publications easy to consume.

Approximately 62.8% of consumers who experienced Korean publications said they were "easy to consume"-significantly higher than the 11.8% of respondents who answered that it was "not easy to consume" and 25.4% who were "neutral." Over the past five years, the positive appraisal of the ease of consuming Korean publications has remained steady at around 60%. This year, the proportion of respondents expressing positive views rose by 2.9 percentage points compared to last year, suggesting improved accessibility of Korean publications.

Countries with the highest proportion of respondents choosing "easy to consume" included India (77.3%) and the UAE (76.6%), while Kazakhstan (35.3%), Argentina (37.8%), and Russia (38.8%) reported low percentages for "easy to consume." Notably, while eight countries had "not easy to consume" responses exceeding 20% in last's year survey, this number dropped to just two-Argentina and France-this year, signifying the improved accessibility of Korean publications.

Figure 2-191 Comparison of the Ease of Consuming Korean Publications Over the Last 5 Years by Year

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

BASE: Consumers who experienced Korean publications, Unit: %

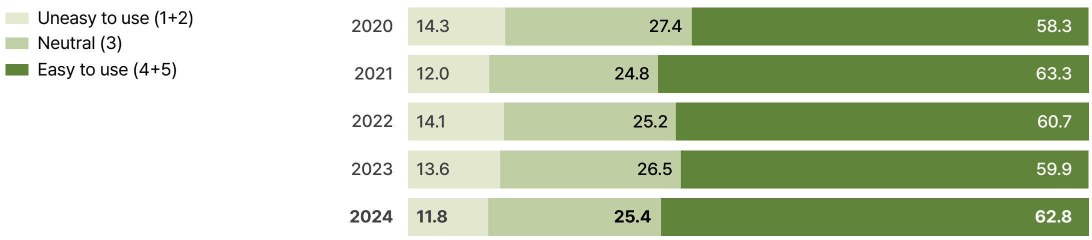
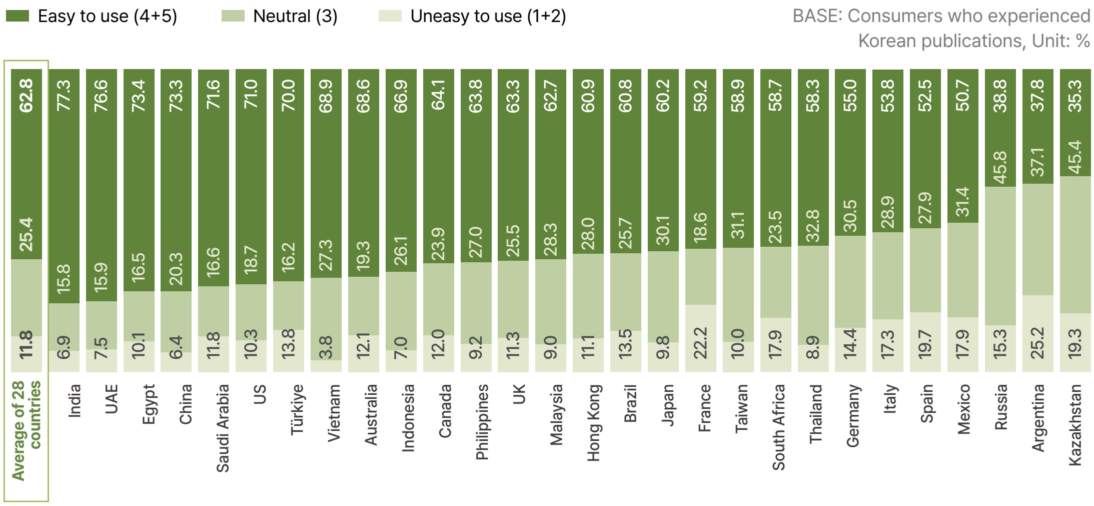


Figure 2-192 Comparison of the Ease of Consuming Korean Publications by Country

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



11 Channels of Exposure

Respondents in Asia-Pacific and Africa mostly used “local websites/apps.” Respondents in Americas, Europe, and Middle East primarily used “global websites/apps.”

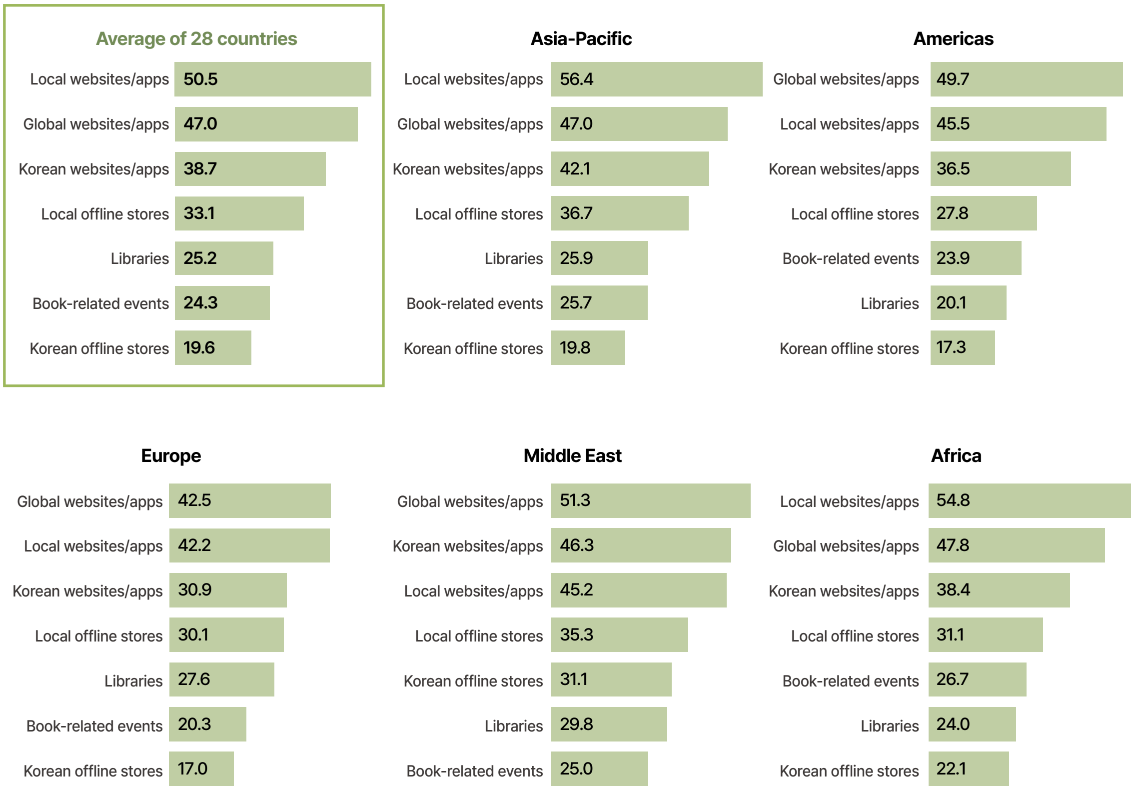
Online channels were the primary means by which respondents accessed Korean publications, with the highest proportion using “local websites/apps” (50.5%), followed by “global websites/apps” (47.0%) and “Korean websites/apps” (38.7%), which were also popular. Offline channels of exposure, such as offline stores or libraries, showed lower usage rates compared to online channels, with respondents citing “local offline stores” (33.1%), “libraries” (25.2%), “book-related events” (24.3%), and “Korean offline stores” (19.6%) in that order.

By continent, access through “local websites/apps” was most common in Asia-Pacific and Africa, while the proportion of respondents selecting “global websites/apps” was higher in the Americas, Europe, and the Middle East. In all five continents, “Korean websites/apps” ranked within the top three responses. Additionally, in the Middle East, “Korean websites/apps” slightly surpassed “local websites/apps.”

Figure 2-193 Comparison of Korean Publication Channels of Exposure by Continent

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

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




WEB TOON
ON WEBTOON WE
WEB TOON
FOOD COURT
JUMP STORE

7

Webtoon

WEBTOON

SUMMARY

The experience rate of Korean webtoons among consumers with Hallyu experience was 34.5%, with particularly high rates in Indonesia (64.8%), Thailand (60.9%), and Mexico (55.3%). When asked about the popularity of Korean webtoons in their countries, the highest response was "widely popular" (31.0%), followed by "popular among a niche audience" (28.6%) and "moderately popular" (27.0%).

In the category of popular foreign webtoons, "Korea" ranked second after "Japan." In the Middle East and Africa, "Korea" ranked first, further demonstrating the high popularity of Korean webtoons in these regions.

For Korean webtoons, "solid stories," "detailed illustrations," and "various genres and materials" were commonly cited as major factors promoting favorability. Meanwhile, in the Middle East, the fact that Korean webtoons are "original works behind Hallyu content" stood out as the most significant factor promoting favorability. In 2024, various webtoon-based dramas such as *Hellbound Season 2* and *Light Shop* were released through Netflix and Disney+. With new dramas and movies based on Korean webtoons being produced each year, the synergy between webtoons and video content is worth monitoring. However, some challenges must be addressed. Notably, "inadequate translations" and "accessibility issues" were cited as factors inhibiting webtoon consumption, with translation issues emerging as the most prominent inconvenience across all continents. In the Asia-Pacific region, the cost of using webtoons was also found to be a major burden.

01 Experience Rate

Approximately 34.5% of respondents had experienced Korean webtoons. Indonesia and Thailand showed high experience rates in the 60% range.

Among consumers with Hallyu experience, 34.5% responded that they had experienced Korean webtoons.
By country, Indonesia (64.8%), Thailand (60.9%), and Mexico (55.3%) showed the highest experience rates. Asian countries generally reported high experience rates for Korean webtoons, with particularly high rates observed in Southeast Asia. Japan (11.3%) had the lowest experience rate among countries in the Asia-Pacific region, presenting a stark contrast. In the Americas, South American countries (Mexico and Argentina) recorded high experience rates, while North American countries (the US and Canada) showed relatively lower rates.
By gender, women (35.2%) reported a slightly higher experience rate than men (33.7%). By age group, those in their 30s and younger-who tend to be more familiar with webtoons-showed higher experience rates (teens: 38.4%, 20s: 40.9%, and 30s: 35.5%) compared to those in their 40s and older.

Figure 2-194 Comparison of Korean Webtoon Experience Rates by Country BASE: Total, Unit: %

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

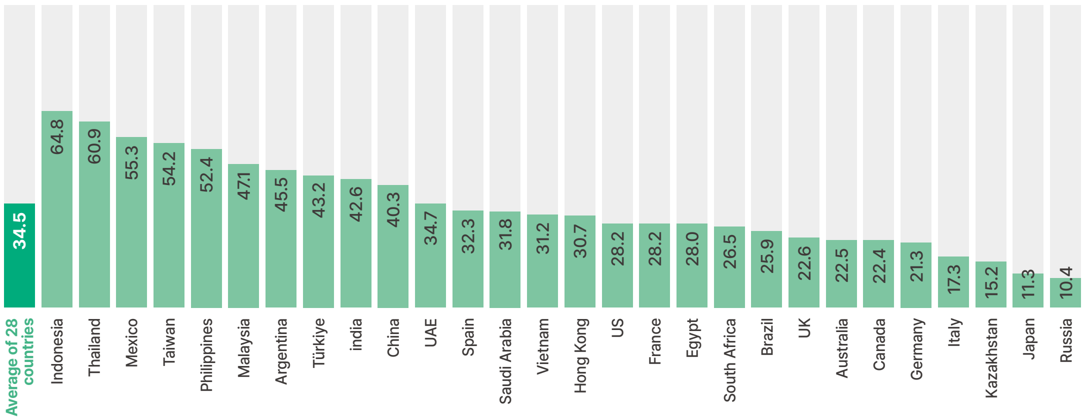
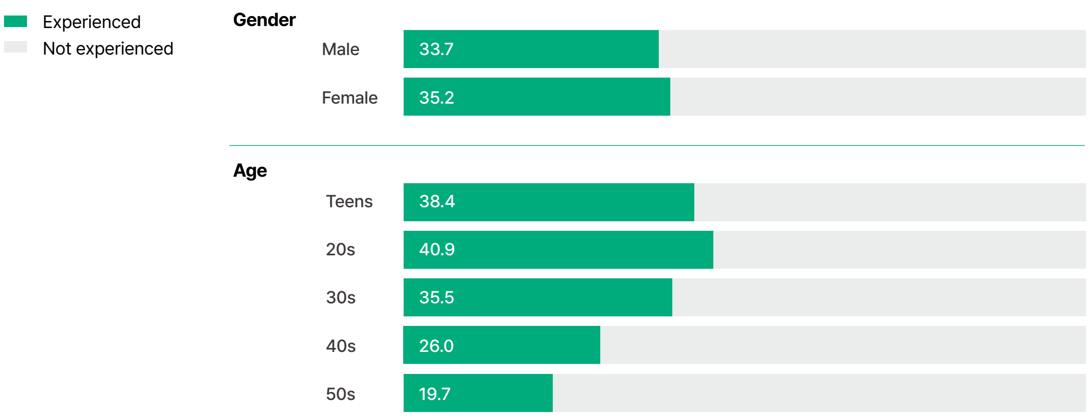


Figure 2-195 Comparison of Korean Webtoon Experience Rates by Gender and age BASE: Total, Unit: %



02 Popularity

Approximately 3 out of 10 respondents considered Korean webtoons "widely popular." The percentage for "hardly used" decreased by 3.1 percentage points. Percentages for "widely popular" exceeded 40% in India, Thailand, and Türkiye.

The popularity of Korean webtoons as perceived by consumers with Hallyu experience was as follows: "widely popular" (31.0%), "moderately popular" (27.0%), and "popular among a niche audience" (28.6%). Notably, 13.4% responded that they hardly used Korean webtoons. Looking at popularity trends over the past five years, the percentage for "widely popular" has surpassed that for "popular among a niche audience" since 2021 and has remained in the 30% range since 2023. In this survey, the proportion of respondents choosing "hardly used" decreased by 3.1 percentage points compared to that in the previous year.

Countries with high proportions of respondents reporting "widely popular" included India (43.5%), Thailand (40.8%), and Türkiye (40.3%). Conversely, Japan (31.7%) and Russia (32.1%) showed higher percentages for "hardly used," indicating relatively low awareness of Korean webtoons. Countries with high experience rates of Korean webtoons also tended to show positive perceptions of their popularity.

Figure 2-196 Comparison of the Popularity of Korean Webtoons 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

BASE: Total, Unit: %

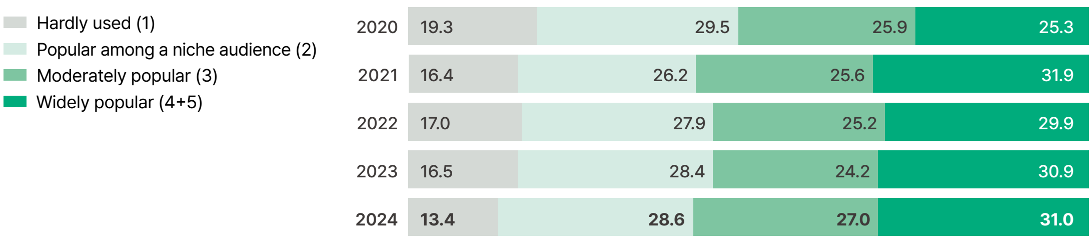
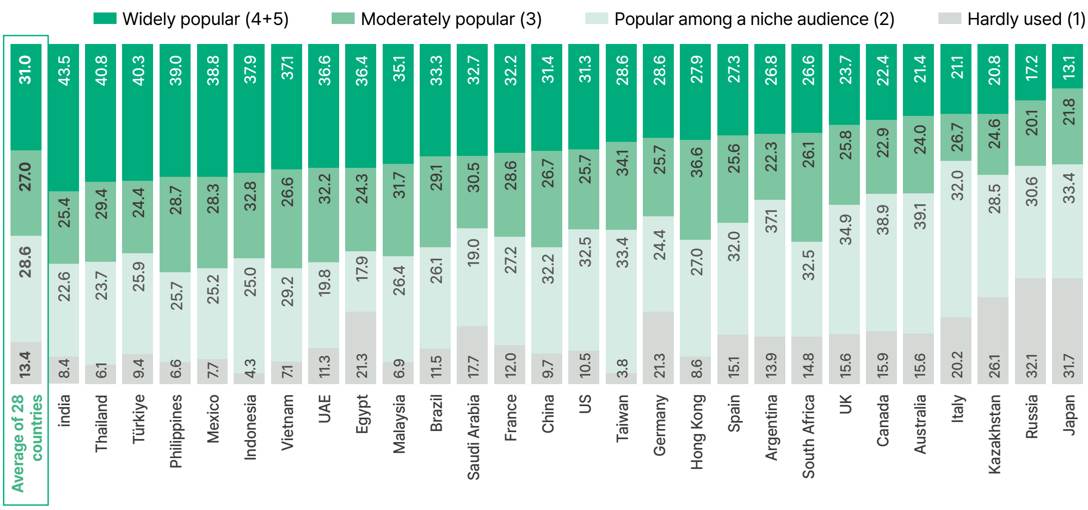


Figure 2-197 Comparison of the Popularity of Korean Webtoons by Country

BASE: Total, Unit: %



Local News

"The Naver Webtoon platform, which successfully went public on the New York Stock Exchange, ran billboard ads in Times Square and participated in New York Comic Con with its own booth, expanding its presence in New York."

U.S. KOFICE New York Overseas Correspondent

"It seems that the popularity of Korean webtoons has grown, as many popular dramas are known to be based on webtoons."

Spain KOFICE Madrid Overseas Correspondent

"Works have started to be introduced in Spanish through the platform webtoon, gradually gaining popularity."

Argentina KOFICE Buenos Aires Overseas Correspondent

"The withdrawal of Kakao webtoon from the Indonesian market has been met with disappointment. On Naver webtoon, titles such as *Serena, Cry, or Better Yet, Beg, Just Twilight*, and *The Remarried Empress* are extremely popular, and it is common to see readers purchasing coins to access paid episodes."

KOCCA Indonesia Business Center Assistant Manager

"On Kuaikan comics, the largest webtoon platform in China, the most popular section is Korean webtoons. However, compared to web novels and short-form videos, Chinese youth seem relatively less enthusiastic about webtoons."

KOCCA China Beijing Business Center Director

"Korean webtoons are gradually gaining more recognition in Canada. According to Security Market Insights, Naver and Kakao were selected as the most influential players in the Canadian webtoon platform market."

Canada KOTRA Toronto Trade Officer

"*Solo Leveling* ranked 10th in the comics/animation category of Google Trends 2024 for Thailand and was the only Korean comic to make the list."

Thailand KOFICE Bangkok Overseas Correspondent

"Although it is difficult to gauge exact popularity, Korean webtoon authors, such as Joo Dong-geun of *All of Us Are Dead* and Min Song-ah of *The Girl Downstairs (Doona!)*, were invited to the major comic-related exhibition, Oz Comic-Con Sydney."

Australia KOFICE Sydney Overseas Correspondent

03 Popular Foreign Webtoons

"Korea" ranked second for the most popular webtoons. Percentages for "Korea" were high in the Middle East and Africa.

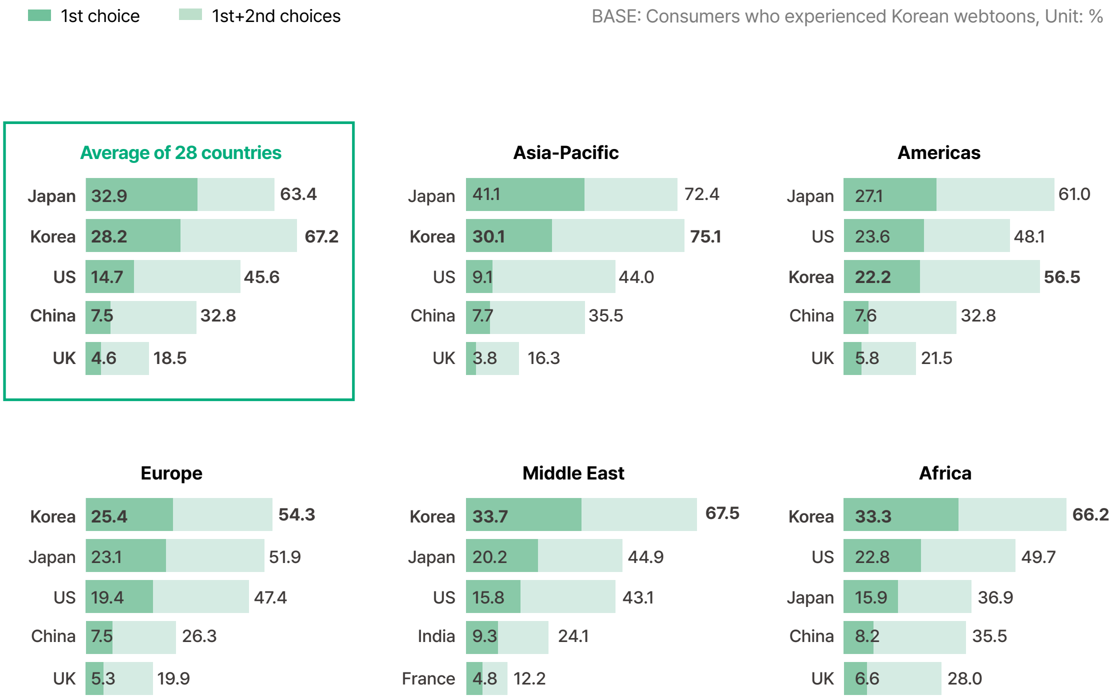
Regarding popular foreign webtoons, "Japan" ranked at the top as the first choice of 32.9% of respondents, followed by "Korea" with 28.2%. However, when considering multiple responses, webtoons from "Korea" led with 67.2%, surpassing Japanese webtoons (63.4%). Thus, while overseas users tend to consider Japanese webtoons as their primary option, Korean webtoons also enjoy widespread popularity.

By continent, Asia-Pacific showed a similar pattern to the overall average across the 28 countries surveyed. In the Americas and Europe, "Korea," "Japan," and "US" were close contenders for the top three. Meanwhile, "Korea" ranked first in the Middle East (33.7%) and Africa (33.3%)-consumers in these regions who have experienced Korean webtoons tend to perceive them as particularly popular.

Figure 2-198 Comparison of Popular Foreign Webtoons by Continent

Q. Which country's webtoons 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

Respondents spent an average of 14.5 hours consuming Korean webtoons per month.
High usage was reported in the Philippines, the UAE, and Indonesia.

Across the 28 countries, respondents spent an average of 14.5 hours consuming Korean webtoons a month. Countries with long hours of consumption included the Philippines (23.6 hours), the UAE (21.1 hours), and Indonesia (19.7 hours), whereas relatively shorter time was reported in Japan (5.4 hours) and some European countries (e.g., Italy and Germany). The proportion of Korean webtoons in total webtoon consumption averaged 27.2%. The highest proportions of consumption were observed in Indonesia (35.6%), Vietnam (34.0%), the Philippines (33.8%), the UAE (32.6%), and Malaysia (31.8%). Specifically, the Philippines, the UAE, and Indonesia ranked high in time spent and proportion. Conversely, Japan showed relatively low consumption of Korean webtoons, likely due to the high competitiveness of its domestic comics and animation industry. Expenditure was generally higher in European countries, except Russia and the Middle East, and relatively lower in Asian countries.

Figure 2-199 Comparison of Time Spent 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.

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

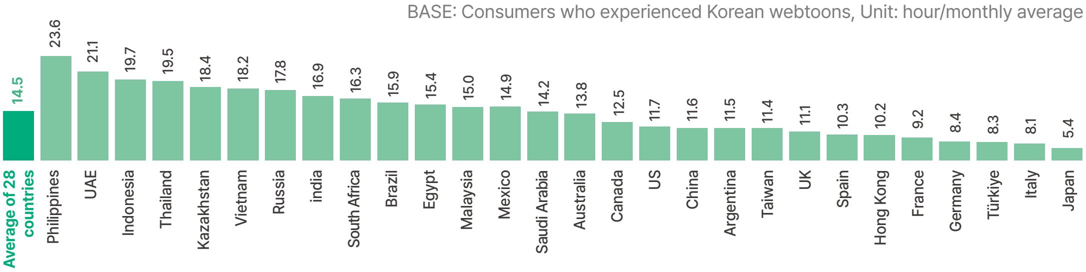


Figure 2-200 Comparison of the Proportion of Korean Webtoon Consumption by Country

BASE: Consumers who experienced Korean webtoons, Unit: %

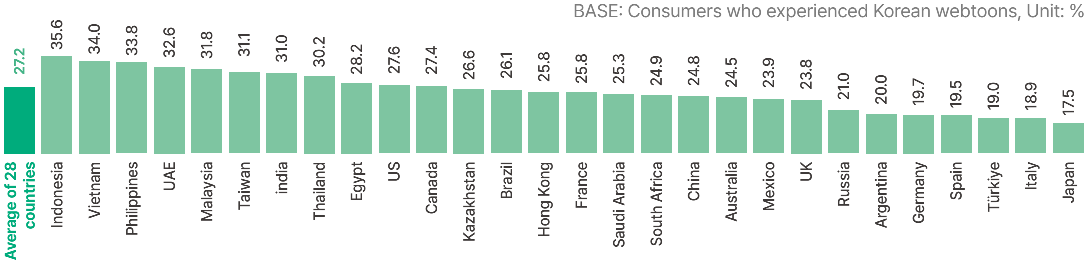
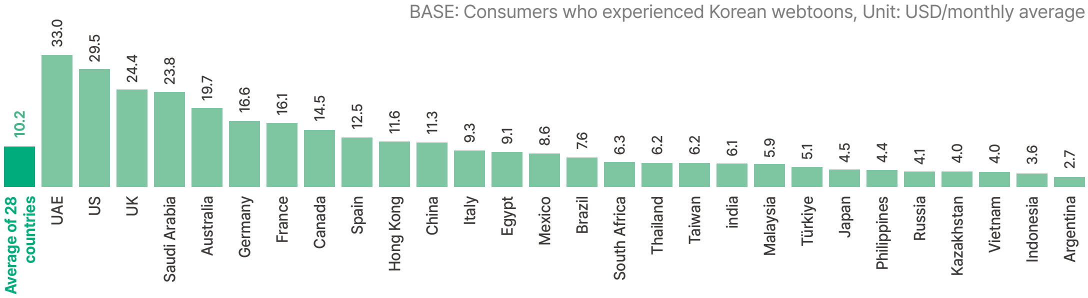


Figure 2-201 Comparison of Expenditure on Korean Webtoons by Country

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



05 Favorability

Three out of four respondents liked Korean webtoons.

Among consumers who experienced Korean webtoons, 75.7% responded that they "liked" them-three out of four respondents evaluated them positively. High favorability toward Korean webtoons, despite the relatively low experience rate of webtoons among Korean cultural categories, indicates the excellent quality of Korean webtoons.

Since 2022, the proportion of respondents selecting "like it" has exceeded 70%, and this year witnessed an increase of 4.0 percentage points compared to the previous year. Countries with high favorability rates included Brazil (85.0%), the UAE (84.8%), and the Philippines (84.1%), while lower favorability was observed in Japan (54.9%) and Russia (59.3%).

Figure 2-202 Comparison of Favorability Toward Korean Webtoons Over the Last 3 Years by Year

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

BASE: Consumers who experienced Korean webtoons, Unit: %

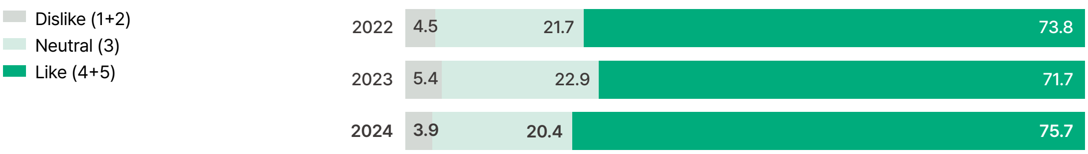
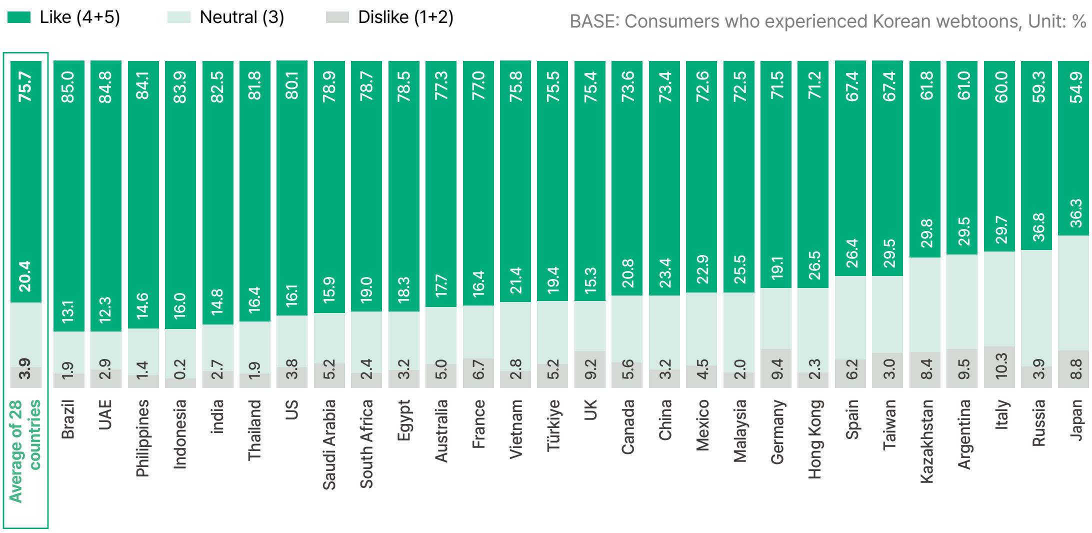


Figure 2-203 Comparison of Favorability Toward Korean Webtoons by Country

BASE: Consumers who experienced Korean webtoons, Unit: %



06 Factors Promoting and Inhibiting Favorability

"Story structure," "detailed illustrations," and "various materials/genres" were key factors promoting favorability.

The Middle East liked Korean webtoons because they are often "the original works behind Hallyu content."

Among the reasons for liking Korean webtoons (1st + 2nd choices), "the story is well-structured and solid" had the highest percentage at 27.5%, followed by "the illustrations are realistic and detailed" (26.5%), "covers various materials or genres" (25.7%), "like the personalities/roles of the characters" (24.7%), and "often the original works behind popular Hallyu content" (24.3%). By continent, "story structure," "detailed illustrations," and "various materials/genres" were generally cited as the key factors promoting favorability, while the Middle East showed a different pattern.

The most frequently cited factor in countries in the Asia-Pacific and the Americas was "story structure"- the complex and engaging storylines of Korean webtoons resonate well with users in these regions who are familiar with narrative-driven content. Respondents in Europe, which places a high value on artistry and visual expression, selected "detailed illustrations" as the top factor promoting favorability. Those in Africa, a continent with diverse cultures and traditions, chose "various materials and genres" as the most significant factor.

Meanwhile in the Middle East, "often the original works behind popular Hallyu content" (28.0%) was the top factor promoting favorability. High preference rates for "the user interface (UI) is convenient" were reported in the Middle East (26.6%) and Africa (23.8%). These results reflect the growing trend of webtoons being adapted into video content[1] and the tendency of users in the Middle East and Africa to prioritize user convenience.

"Inadequate translations" and "low accessibility" were selected as common challenges.

The leading factor inhibiting favorability toward Korean webtoons was "the translation is inadequate" (21.9%), followed by "difficult to encounter or access" (17.7%). Indeed, "the translation is inadequate" ranked first across all continents, highlighting a shared need to improve translation quality. Meanwhile, the high percentage for "difficult to encounter or access" underscores the need for improvements in user environments. In particular, in the Asia-Pacific region, "costs too much to access" received a relatively high proportion of 15.7%, indicating a higher sensitivity to price.

In terms of inappropriate or insufficient aspects of cultural diversity representation, the most frequently cited factor was "lifestyle and customs" (30.4%), followed by "social class" (30.3%) and "sexual identity" (29.4%). By continent, discomfort related to "gender" was notably higher in the Americas and Europe, while discomfort related to "traditional culture" was more pronounced in Europe and the Middle East. In Africa, discomfort regarding "food," "race," and "disability" stood out, indicating a distinct pattern compared to other continents.

Table 2-20 Top 3 Most Uncomfortable Aspects of Cultural Diversity Representation in Korean Webtoons by Continent

BASE: Respondents who chose "lack of consideration for cultural diversity" as a factor inhibiting favorability for Korean webtoons

	Average of 28 countries	Asia-Pacific	Americas	Europe	Middle East	Africa
1st	Lifestyle and customs 30.4%	Social class 35.8%	Gender 28.1%	Lifestyle and customs 29.1%	Social class 29.4%	Food 37.6%
2nd	Social class 30.3%	Sexual identity 34.9%	Social class 27.8%	Traditional culture 26.6%	Traditional culture 27.4%	Race 30.6%
3rd	Sexual identity 29.4%	Lifestyle and customs 34.5%	Lifestyle and customs 26.8%	Gender 22.8%	Religion 25.6%	Disability 24.9%

1 In 2024, several webtoon-based titles, such as A Killer Paradox, Chicken Nugget, *The 8 Show*, *Hierarchy*, *Hellbound 2*, and *Light Shop*, were released on platforms such as Netflix and Disney+.

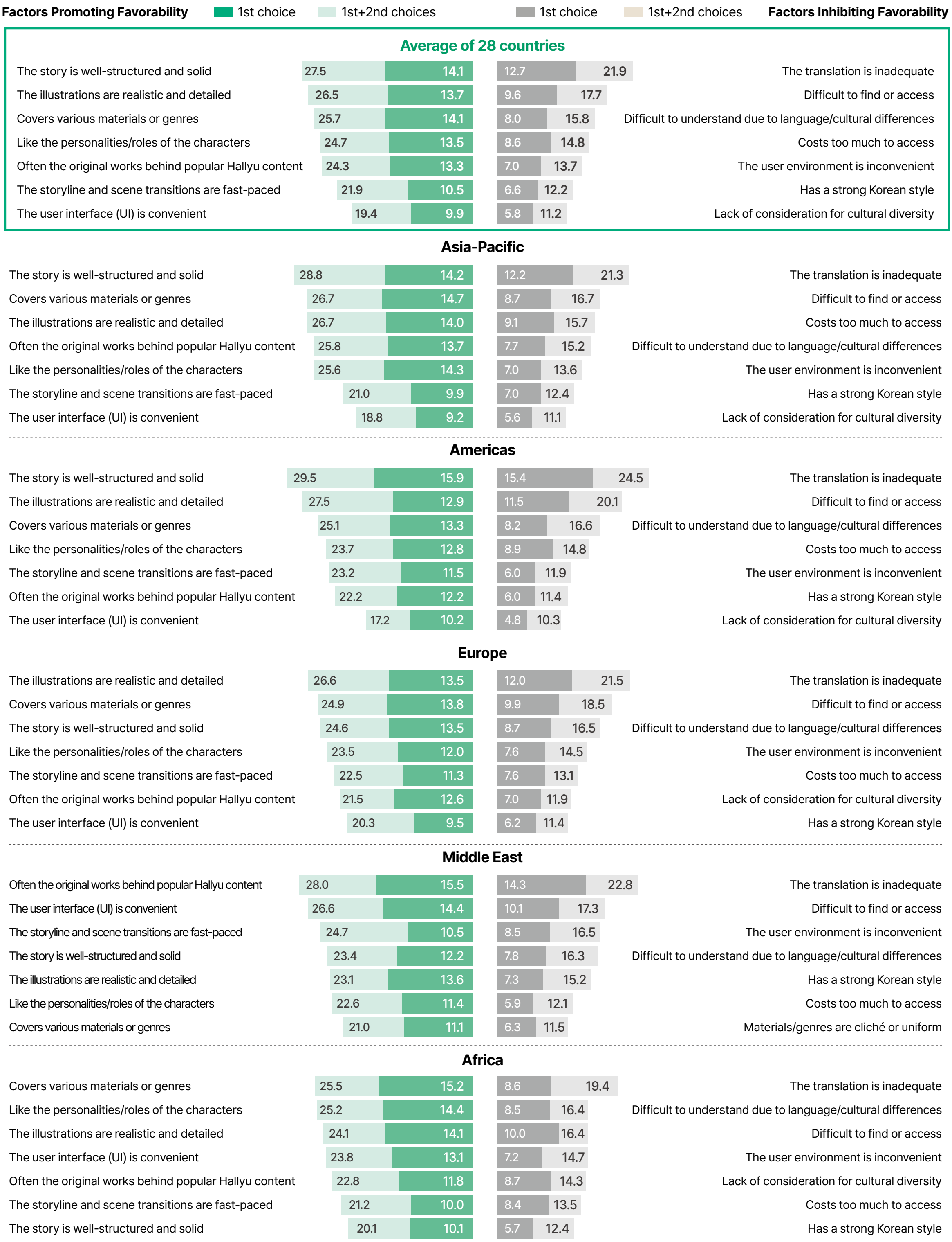
Figure 2-204 **Comparison of Factors Promoting and Inhibiting Favorability Toward Korean Webtoons by Continent**

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.

Note. Presented are the top 7 choices (options) ranked by the combined proportion of first- and second-choice responses.

BASE: Consumers who experienced Korean webtoons, Unit: %



07 Usage Pattern

Six out of ten respondents said they regularly read Korean webtoons.

Among Korean webtoon users, 62.2% reported that they regularly read webtoons. Among respondents, 20.1% said they "read regularly every week but not on fixed days," while 22.1% said they "read regularly every week on specific days." Meanwhile, 33.3% reported that they "binge-read irregularly."
Compared to the previous year, the proportion of respondents selecting "binge-read irregularly" (33.3%) increased by 3.6 percentage points, while that for "read regularly every week on specific days" (22.1%) decreased by 3.3 percentage points.

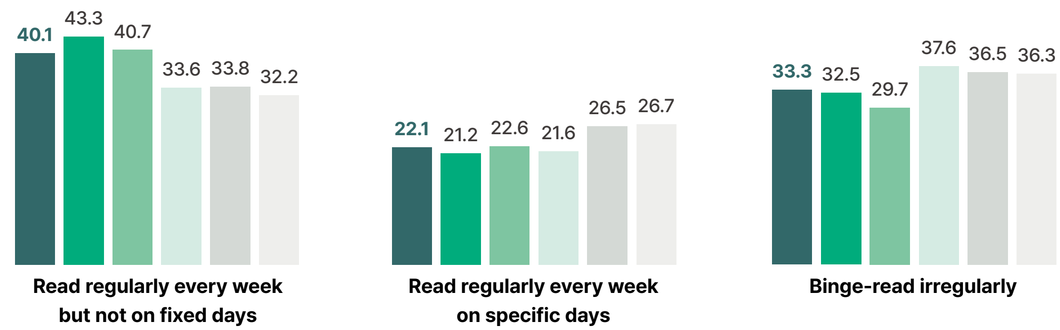
These results indicate that webtoon consumption patterns are increasingly moving toward a Netflix-style binge-watching pattern. In other words, rather than following weekly serialized updates, users are showing a growing preference for binge-reading after a series is completed or has progressed to a sufficient point.
By continent, "read regularly every week but not on fixed days" was most common in the Asia-Pacific and the Americas, while "binge-read irregularly" was highest in Europe, the Middle East, and Africa.

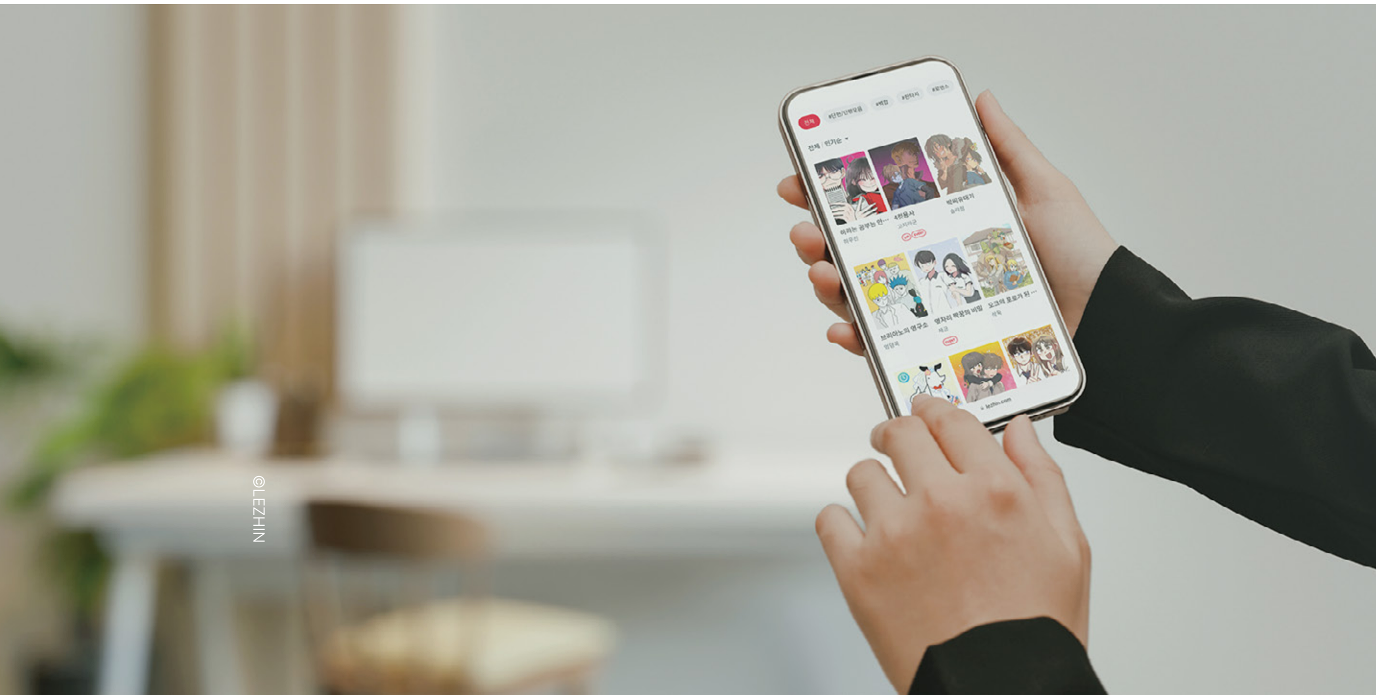
Figure 2-205 Comparison of Webtoon Reading Times by Continent

Q. When do you usually read Korean webtoons?

Average of 28 countries / Asia-Pacific / Americas / Europe / Middle East / Africa

BASE: Consumers who experienced Korean webtoons, Unit: %





08 Willingness to Pay

Approximately 35.5% of respondents were willing to pay, while 35.0% were not. Thailand and India showed particularly high willingness to pay.

Regarding willingness to pay for Korean webtoons, 35.5% of respondents answered they were “willing,” and 35.0% answered they were “not willing,” showing similar proportions. Approximately 29.5% of respondents said they were “neutral.” Since 2022, the percentage for “not willing to pay” has been decreasing, while that for “willing to pay” has been increasing, narrowing the gap between these two responses in this survey.

By country, respondents in Thailand (53.9%) and India (51.9%) showed particularly high willingness to pay. Countries with high proportions of consumption, such as Indonesia (48.8%) and the UAE (47.9%), also showed positive attitudes toward future willingness to pay. Conversely, Japan (63.9%), Russia (57.2%), and Kazakhstan (54.0%) recorded high percentages for “not willing to pay.” Korean webtoons in Thailand are particularly noteworthy. Naver Webtoon (LINE Webtoon) ranked first (as of January 2024) in revenue and monthly active users (MAU) in Thailand, indicating a high level of acceptance of Korean webtoons in the country. IP expansion is also active, with the webtoon *My ID is Gangnam Beauty*! being adapted into a local Thai drama under the title *Beauty Newbie*.

Willingness to pay for Korean webtoons remains relatively low compared to other types of Korean cultural content. This can be attributed to the fact that various Korean webtoons are available for free through unauthorized sites, as well as to the passive attitude toward webtoon content consumption.

Figure 2-206 Comparison of the Willingness to pay for Korean Webtoons Over the Last 5 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

BASE: Total, Unit: %

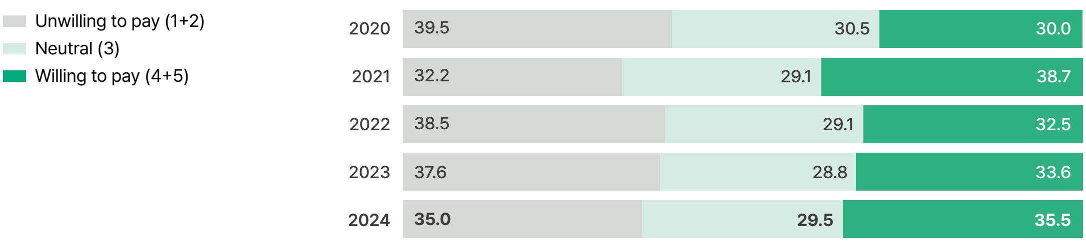
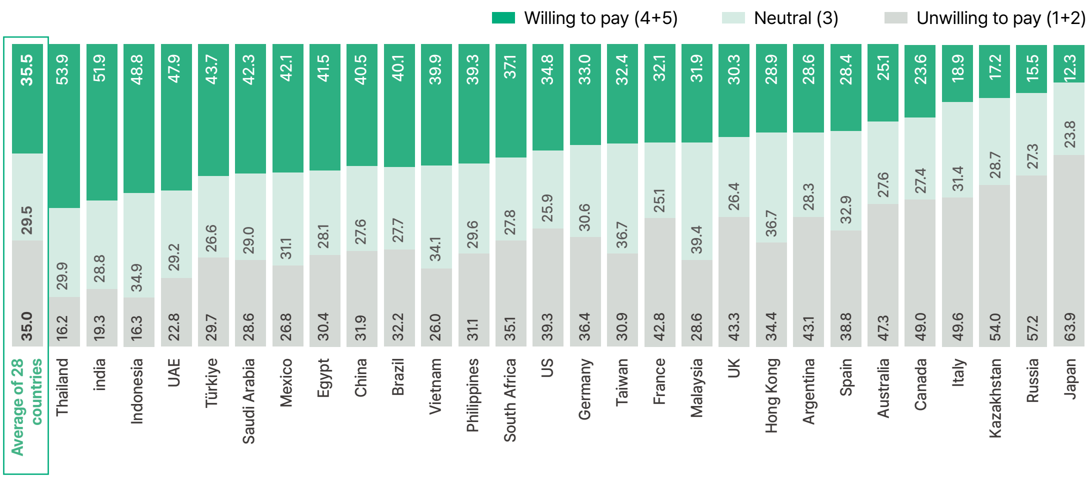


Figure 2-207 Comparison of the Willingness to pay for Korean Webtoons by Country BASE: Total, Unit: %



09 Willingness to Recommend

Approximately 74.8% of respondents were willing to recommend Korean webtoons. Brazil, India, and Philippines showed particularly high willingness to recommend.

Among respondents who had experience reading Korean webtoons, a significant portion showed a positive willingness to recommend. According to the survey, 74.8% of Korean webtoon users said they would recommend them to others, while 20.7% were "neutral." Only 4.5% of respondents said they were not willing to recommend Korean webtoons, a relatively small share of responses. Willingness to recommend saw an increase of 3.5 percentage points compared to the 2023 survey (71.3%). In the 2024 survey, the willingness to recommend rate increased across all age groups and genders. Specifically, the willingness to recommend rate increased by 3.5 and 3.4 percentage points among men and women. There was also a notable increase of 5.6 and 4.5 percentage points in willingness to recommend among those in their teens and 30s. Although those in their 40s and 50s recorded relatively smaller increases, an overall positive change was observed. By country, the proportion of respondents choosing for "willing to recommend" was highest in Brazil (86.6%), India (84.9%), and the Philippines (84.6%), which also showed high favorability toward Korean webtoons. Meanwhile, Japan (45.1%), Kazakhstan (56.6%), and Argentina (57.7%) showed relatively lower rates.

Figure 2-208 Comparison of the Willingness to Recommend Korean Webtoons Over the Last 2 Years by Year

BASE: Total, Unit: %

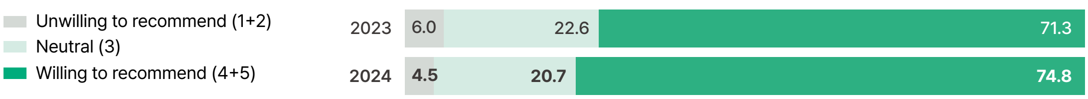


Figure 2-209 Comparison of the Willingness to Recommend Korean Webtoons Over the Last 2 Years by Gender and age

BASE: Total, Unit: %p

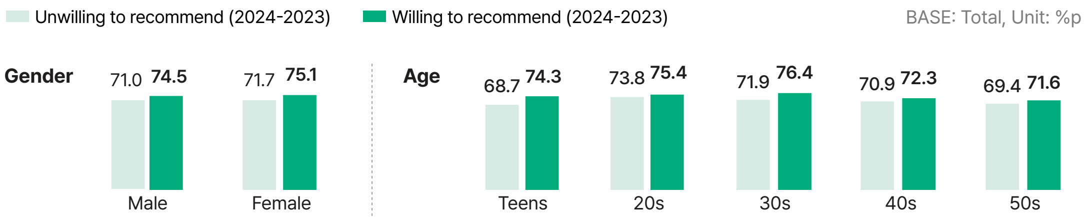
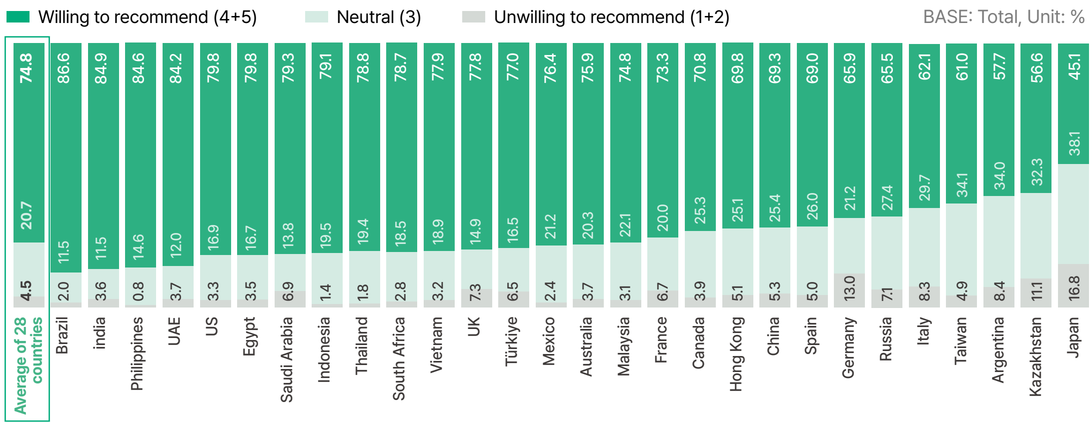


Figure 2-210 Comparison of the Willingness to Recommend Korean Webtoons by Country

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

BASE: Total, Unit: %



10 Ease of Use

Seven out of ten respondents found it easy to consume Korean webtoons. Respondents in European countries such as Russia and Kazakhstan found it relatively more difficult to access Korean webtoons.

The positive evaluation of the ease of use of Korean webtoons has increased. According to the survey, 71.5% of respondents found Korean webtoons “easy to consume,” surpassing 70% for the first time since the survey began. Approximately 7.6% of respondents said they found it “not easy to consume,” while 21.0% were “neutral.” This result can be attributed to various factors, including the growing spread of smartphones, the global expansion of webtoon platforms, and the expansion of multilingual support, all of which have positively influenced ease of use. Additionally, the listing of WEBTOON Entertainment, the US headquarters of Naver Webtoon, on the Nasdaq in June 2024 demonstrates the growing global influence of the Korean webtoon industry.

Countries with high proportion of respondents selecting “easy to consume” included the UAE (83.1%), Indonesia (81.3%), and India (80.8%), while lower rates were observed in European countries such as Russia (46.9%) and Kazakhstan (49.1%).

Figure 2-211 Comparison of the Ease of Consuming Korean Webtoons Over the Last 3 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

BASE: Consumers who experienced Korean webtoons, Unit: %

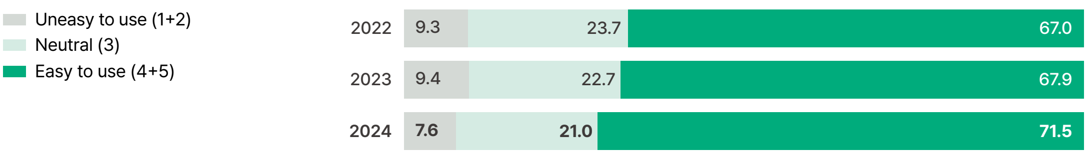
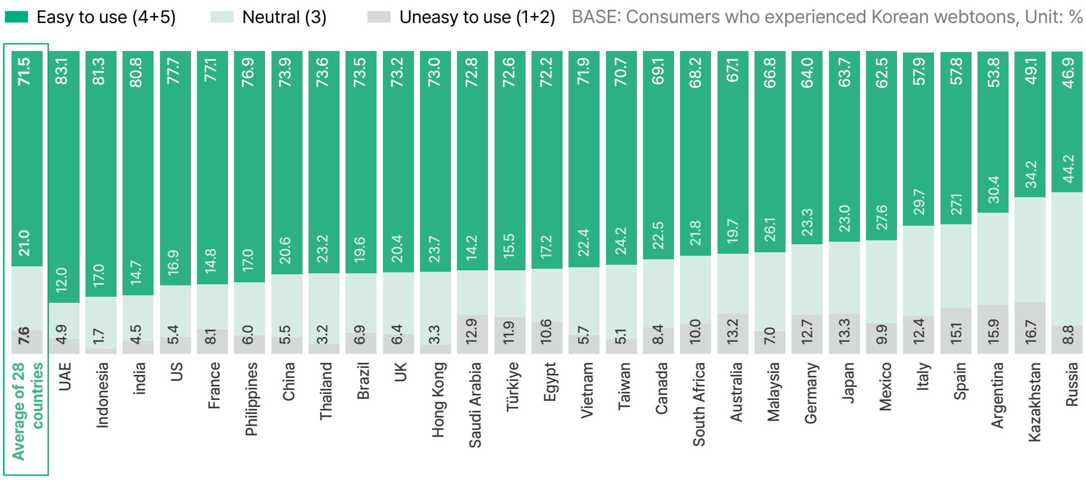


Figure 2-212 Comparison of the Ease of Consuming Korean Webtoons by Country

BASE: Consumers who experienced Korean webtoons, Unit: %



11 Channels of Exposure

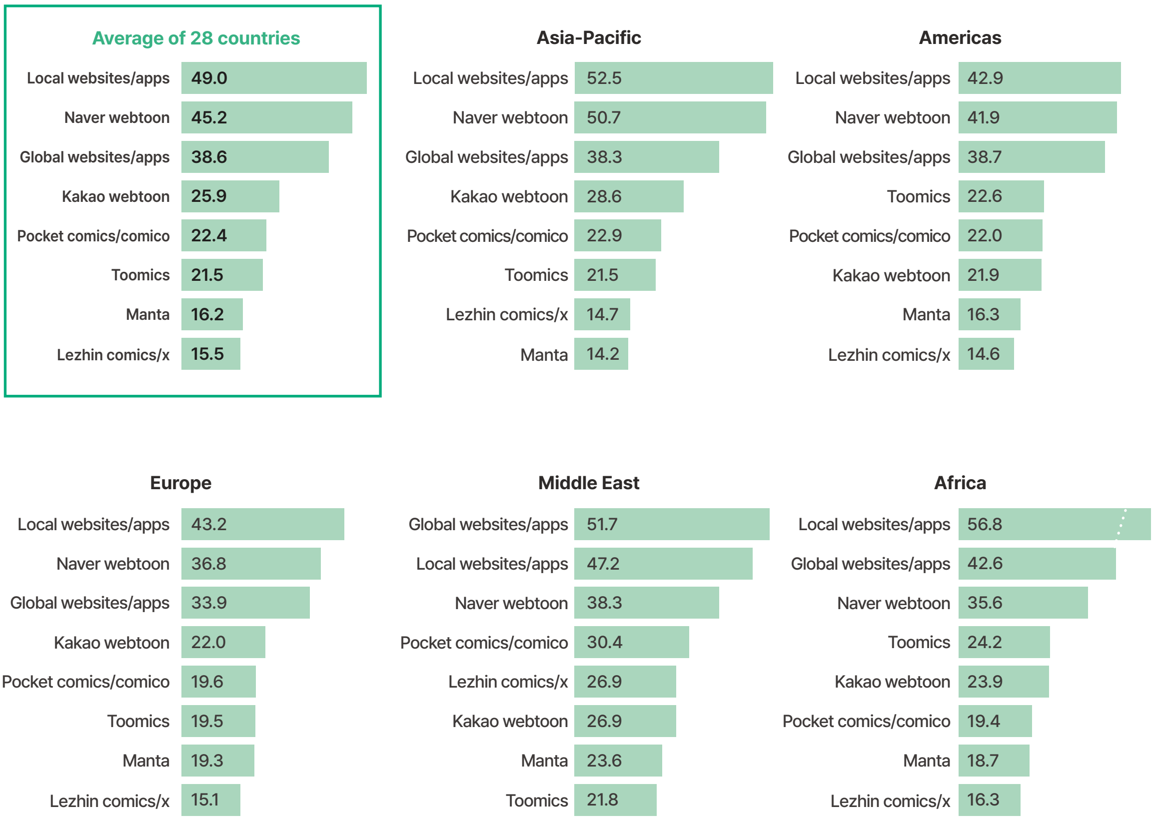
"Local websites/apps" and "Naver Webtoon" were the most common channels of exposure.
Channels of exposure were more diverse in the Middle East.

The main channel of exposure for Korean webtoons was "local websites/apps" (49.0%), followed by "Naver Webtoon" (45.2%) and "global websites/apps" (38.6%). The higher usage rate of "local websites/apps" compared to the Korean platform "Naver Webtoon" appears to be the result of various factors, including the growth of local platforms and the export of Korean webtoons to overseas platforms. By continent, "local websites/apps" and "Naver Webtoon" showed high usage rates in Asia-Pacific, the Americas, and Europe. However, "Naver Webtoon" ranked third in the Middle East and Africa. In particular, the Middle East recorded higher usage rates for all channels of exposure compared to the average of the 28 countries-Korean webtoons are being accessed through various platforms in the region.

Figure 2-213 Comparison of Korean Webtoon Channels of Exposure by Continent

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

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



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8

Games

GAME

SUMMARY

Although the experience rate of Korean games showed a slight decline compared to the previous year, they continued to enjoy high popularity in the Middle East and Africa. Overall, time spent and the proportion of consumption are on the rise, with a clear tendency toward longer time spent in Southeast Asia. *Battlegrounds* was selected as the most preferred game for the seventh consecutive year, and preferences varied somewhat by region. As willingness to pay and willingness to recommend increased overall, positive perceptions of Korean games are expanding.

Among consumers with Hallyu experience, 47.7% reported having played Korean games, marking a slight decline from the previous year. By country, Egypt, India, and Saudi Arabia recorded high experience rates, while Japan and Kazakhstan showed relatively low rates.

Regarding the domestic popularity of Korean games, the proportion of respondents choosing "widely popular" was the highest, although some countries showed a consumption trend centered on niche audiences. Korean games were highly popular in India, Egypt, and Saudi Arabia. Favorability showed the largest increase compared to the previous year, with especially strong positive responses in the Middle East and Africa. Conversely, Kazakhstan, France, and Hong Kong recorded relatively low levels of favorability.
"Graphics/visuals are of high quality" and "gameplay or composition is well designed" were selected as key factors promoting favorability. In particular, the individuality of characters and the growing influence of game streamers have emerged as new factors promoting favorability. However, cost burden and negative perceptions of paid items constituted major factors inhibiting favorability. Requirements for high device specifications and issues with game service operations were also cited as factors promoting user dissatisfaction.

Battlegrounds was selected as the most preferred game for the seventh consecutive year, with preferences varying by region. In particular, high preference rates for *Crossfire* and *Gunship Battle* were reported in Africa and the Middle East.

01 Experience Rate

Approximately 47.7% of respondents had experienced Korean games. Experience rates were highest in Egypt, India, and Saudi Arabia.

Among consumers with Hallyu experience, 47.7% had experienced Korean games, showing a slight decrease from the previous year (48.7%). By country, Egypt recorded the highest experience rate (64.0%), followed by India (60.9%), Saudi Arabia (60.3%), and the UAE (58.6%), all showing an upward trend compared to the previous year and remaining in the top tier. However, Japan (21.8%), Kazakhstan (34.0%), Malaysia (35.7%), and the Philippines (35.9%) showed relatively low experience rates. Notably, Malaysia and the Philippines ranked within the top five for experience with Korean cultural content (dramas, variety shows, movies, etc.) but showed low experience rates for Korean games, indicating a contrasting pattern.

By gender and age, males (55.2%), those in their 20s (51.3%), and those in their 30s (51.1%) showed relatively high experience rates. Nevertheless, all gender and age groups, except those in their 50s, showed a downward trend compared to the previous year. Experience rate for Korean games only increased among those in their 50s. This finding suggests an overall rise in the experience rates for Korean cultural content among this age group.

Figure 2-214 Comparison of Korean Game Experience Rates by Country

BASE: Total, Unit: %

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

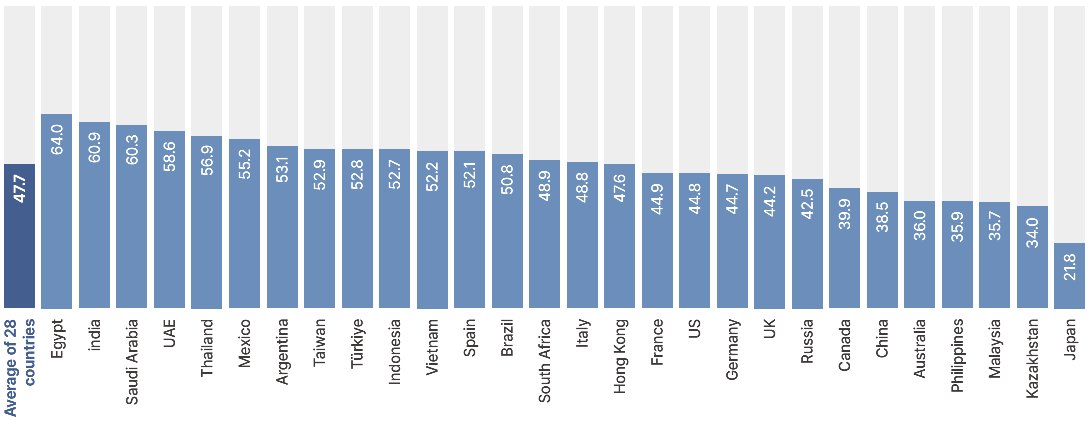
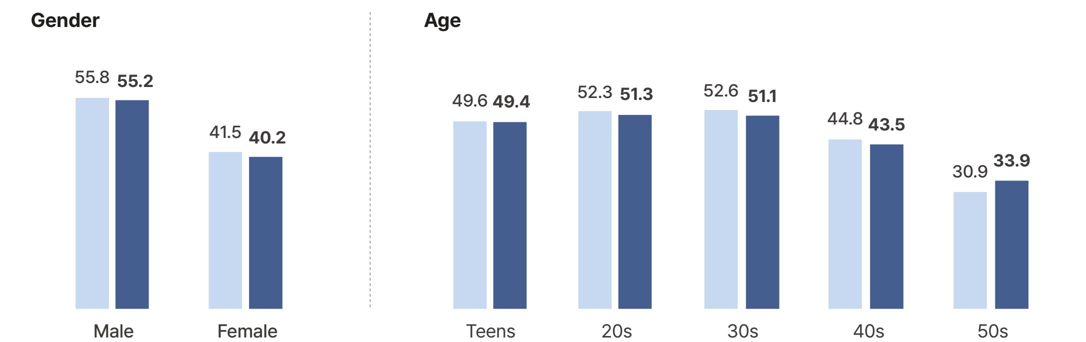


Figure 2-215 Comparison of Korean Game Experience Rates by Gender and age

BASE: Total, Unit: %



02 Popularity

Approximately 38.1% of respondents perceived Korean games as "widely popular." Japan, Kazakhstan, Russia, and Australia reported a consumption trend centered on niche audiences.

When consumers with Hallyu experience were asked about the popularity of Korean games in their countries, 38.1% responded that they are "widely known among the general public with related products being sold" or "widely popular among the general public with smooth sales of related products"-they were "widely popular." Approximately 27.8% answered "moderately popular," while 25.3% said they are "popular among a niche audience." Looking at the response trends over the past five years, the proportion of respondents who answered "hardly used" decreased by 4.3 percentage points from 13.1% in 2020 to 8.8% in 2024. Conversely, the percentages for "popular among a niche audience" and "moderately popular" showed a slight increase compared to the previous year, while the percentage for "widely popular" remained similar to that of 2023 (38.2%).

By country, the proportion of respondents who perceived Korean games as "widely popular" was highest in India (51.0%), Egypt (48.2%), and Saudi Arabia (47.3%), where the experience rates were also high. This was followed by 14 countries, including Türkiye (45.7%) and the UAE (45.4%), all of which recorded higher proportions of respondents than the average across the 28 countries. Conversely, Japan (25.9%), Kazakhstan (16.6%), Russia (14.0%), and Australia (11.3%) showed relatively high percentages for "hardly used," placing them in the lower ranks in terms of popularity. In these countries, the proportions of respondents selecting "popular among a niche audience" also exceeded those for "widely popular" and "moderately popular"-Korean games are primarily consumed by a niche audience.

Figure 2-216 Comparison of the Popularity of Korean Games 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

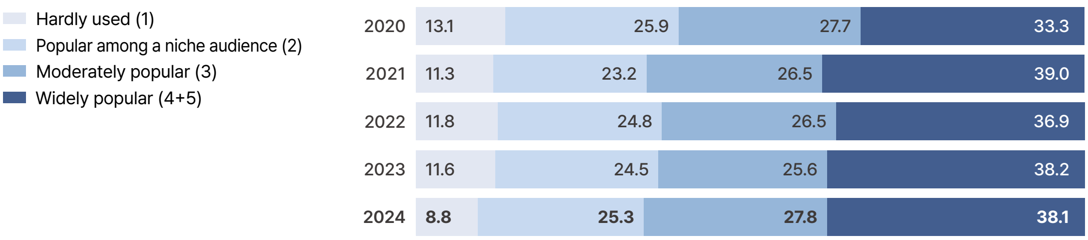
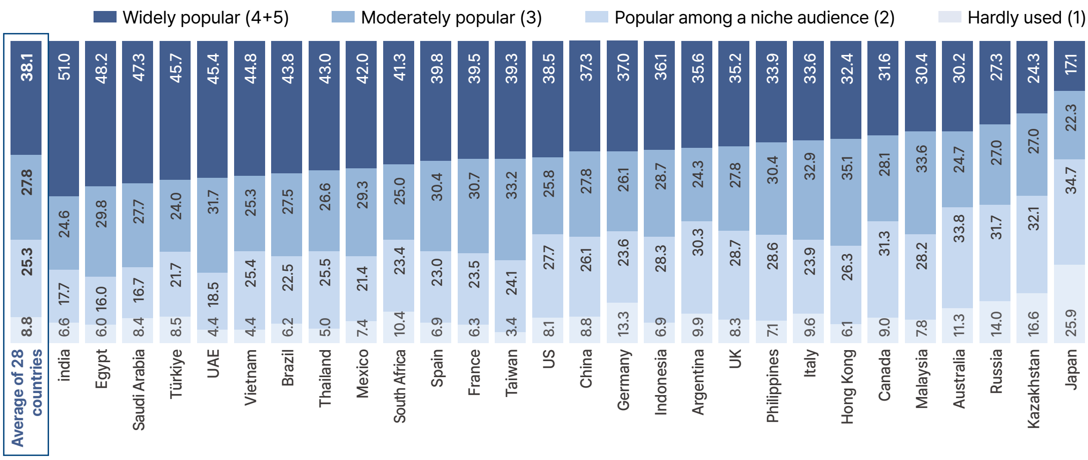


Figure 2-217 Comparison of the Popularity of Korean Games by Country BASE: Total, Unit: %



Local News

"The reason Korean games are popular in Japan is because of their familiar characters. When Korean games first entered the Japanese market, it was difficult for Japanese users to fully engage, but now they are seen as increasingly aligning with the needs of the Japanese market. This is believed to be because a generation that grew up watching Japanese content is now working as developers at Korean game companies. It is also considered an advantage that the games are playable on platforms such as PlayStation, PC, and mobile."

Japan KOFICE Tokyo Overseas Correspondent

"In 2024, Pearl Abyss's flagship title *Black Desert* released a major expansion in Germany, capturing the attention of European gamers."

Germany KOFICE Frankfurt Overseas Correspondent

"Korean mobile games have been steadily growing in the Hong Kong market. In particular, RPGs and incremental games are gaining great popularity, with *Goddess of Victory: Nikke* being a typical example, along with titles like *Ragnarok* and *Blue Archive* also receiving much love."

Hong Kong KOFICE Overseas Correspondent

"In the case of the *Cookie Run* series, the game and its characters are well-loved. A comic series featuring the characters as protagonists is currently on sale, and collaborations have been carried out with Thai franchise Inthanin Coffee and barbecue franchise Bar B Q Plaza."

Thailand KOFICE Bangkok Overseas Correspondent

"In 2024 alone, 11 Korean games were granted licensing permits (game service permits) and officially distributed in China. In particular, Nexon's online game *Dungeon & Fighter* was a box office success, earning over KRW 1.5 trillion in revenue."

KOCCA China Beijing Business Center Director

"In Malaysia, *Battlegrounds* has received considerable attention this year. The e-sports market is gaining huge popularity across Southeast Asia, and Malaysia stands out as a particularly promising market. In December, the *Battlegrounds* Grand Finals was held at the Gardens Mall Convention Center in Kuala Lumpur, Malaysia. Despite the limited seating of around 600, 2,050 fans attended, making the event a grand success, with enthusiastic support continuing even outside the venue."

Malaysia KOTRA Kuala Lumpur Trade Officer

"Canada's government-run TCS (Trade Commissioner Service) established a new games division in 2023 and has been actively promoting investment in Korea by Canadian companies, indicating that the Korean game industry is also having a significant impact in Canada. In Canada, the proportion of video games is greater than that of online games, and the way users watch live streams of these games through streaming services like Twitch makes Korean games more popular."

Canada KOTRA Toronto Trade Officer

03 Popular Foreign Games

Korea and Japan are close competitors. Korea exhibited competitiveness in the Middle East and Africa.

When asked about the most popular country for foreign games (1st choice) in their country, "the US" (31.7%) recorded the highest proportion of respondents, as in the previous year. "Korea" (20.7%) and "Japan" (20.1%) followed closely, ranking second and third. Compared to last year, preference rates for "the US" and "Korea" decreased, while that for "Japan" increased slightly, narrowing the gap with "Korea."

By continent, in the Americas, "Japan" (21.7%) recorded a percentage of respondents 7.0 percentage points higher than that for "Korea" (14.7%). In Europe, "Japan" (17.5%) led "Korea" by 3.4 percentage points, with "Korea" ranking third.

In the Asia-Pacific region, the preference rate for "Japan" rose sharply compared to the previous year, with "Korea" (25.3%) and "Japan" (23.5%) engaged in a close race, separated by just 1.8 percentage points.

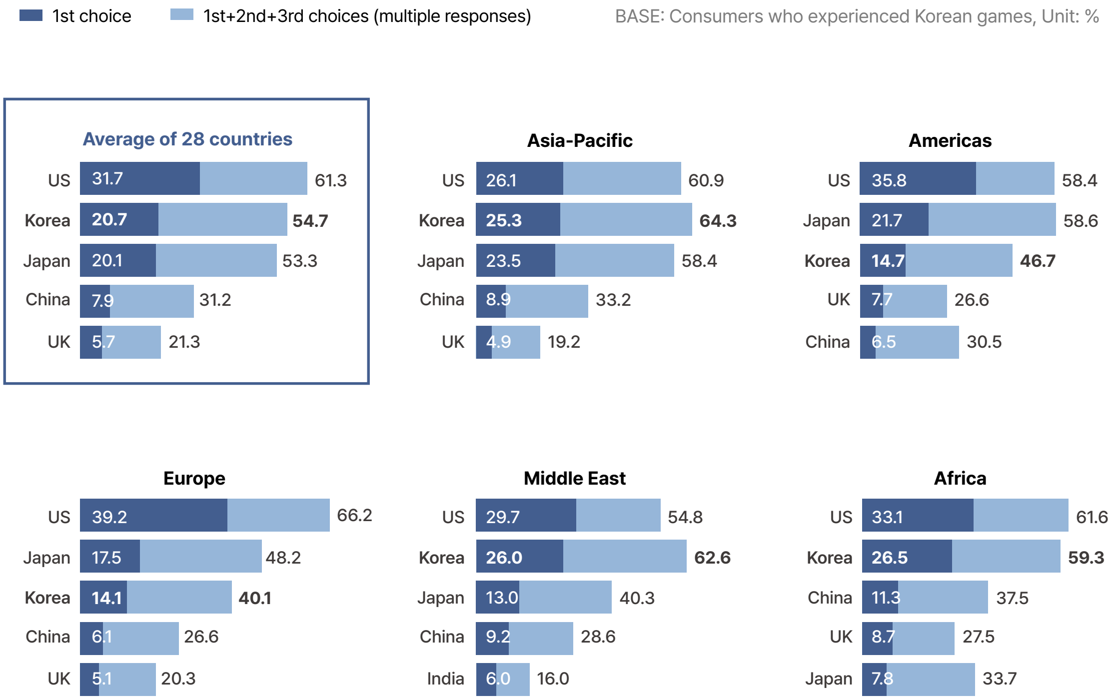
However in the Middle East (26.0%) and Africa (26.5%), the proportion of respondents selecting for "Korea" exceeded 26.0%, demonstrating competitiveness. The preference rate for "the US" declined compared to the previous year while that for "Korea" increased, narrowing the gap. In Africa, Korea recorded a proportion of respondents some 15.2 percentage points higher than third-ranked "China" (11.3%), showing a significant gap.

Figure 2-218 Comparison of Popular Foreign Games by Continent

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).

BASE: Consumers who experienced Korean games, Unit: %



04 Consumption Volume

Time spent on games increased compared to last year, averaging at 15.4 hours per month. Overall consumption volume was high in Southeast Asia.

Among consumers who experienced Korean games, the average monthly time spent on Korean games increased by 2.9 hours on the previous year, reaching 15.4 hours. By country, the Philippines (26.3 hours) reported the longest time spent despite a relatively low experience rate. The Philippines was followed by Southeast Asian countries, such as Thailand (22.1 hours), Vietnam (20.4 hours), and Indonesia (20.0 hours), all of which reported high usage times of 20 hours or more. Conversely, Japan (8.6 hours) as well as major European countries-including Italy (8.7 hours), Germany (9.3 hours), the UK (9.6 hours), and France (9.8 hours)-recorded relatively low usage times of less than 10 hours. In terms of the proportion of consumption, Indonesia (33.6%), the UAE (32.5%), and Malaysia (32.5%) rose in the ranks compared to the previous year, ranking among the top countries. Meanwhile, countries with lower usage times-such as Italy (16.7%), Japan (17.4%), Germany (18.3%), and Spain (18.4%)-also ranked low in proportion of consumption.

The average expenditure across 28 countries was 14.8 USD, an increase of 5.1 USD from the previous year. By country, active consumption was observed in the Middle East (the UAE and Saudi Arabia) and the Anglosphere (the US, the UK, and Australia). Conversely, Kazakhstan, Russia, and Argentina showed relatively passive consumption patterns.

Figure 2-219 Comparison of Time Spent 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.

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

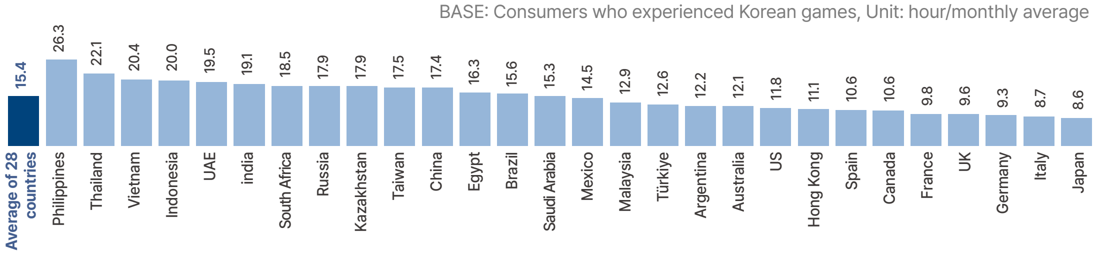


Figure 2-220 Comparison of the Proportion of Korean Game Consumption by Country

BASE: Consumers who experienced Korean games, Unit: %

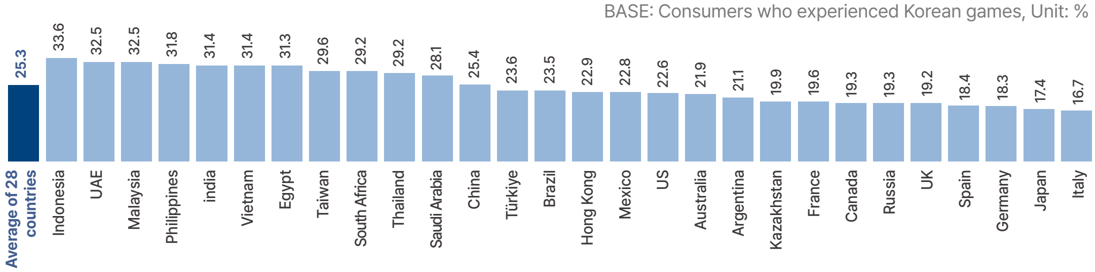
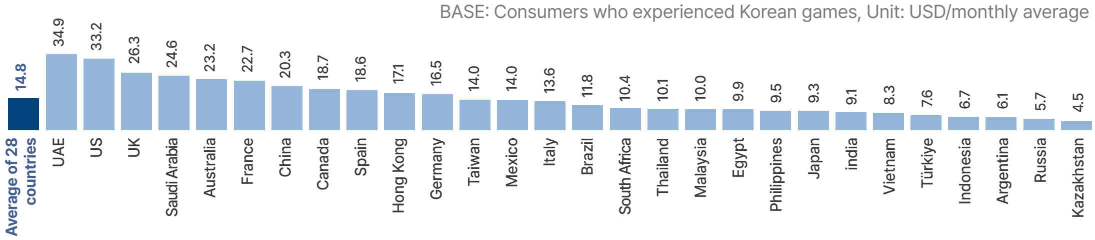


Figure 2-221 Comparison of Expenditure on Korean Games by Country

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



05 Favorability

Approximately 73.8% of respondents were favorable toward Korean games. Favorability was particularly high in the Middle East and Africa.

Among consumers who experienced Korean games, 73.8% responded that they “like” them (favorable), marking an increase of 7.5 percentage points on 2023 (66.3%)-the highest increase among all Korean cultural content categories. Meanwhile, the “do not like” (unfavorable) percentage decreased from 6.3% in 2023 to 4.7% in 2024, indicating increasingly positive perceptions of Korean games.
By country, the highest favorability rates were observed in India (84.4%), the UAE (83.8%), Egypt (83.0%), Saudi Arabia (81.8%), and South Africa (80.6%), with positive responses primarily concent-rated in the Mid-dle East and Africa. Conversely, Kazakhstan (17.3%), France (9.5%), and Hong Kong (9.0%) recorded higher percentages of respondents expressing unfavorable views. Notably, compared to the overall average, Hong Kong-newly included in this year’s survey-reported a significantly lower percentage of respondents indicating "widely popular" and a relatively higher percentage expressing unfavorable views, highlighting a marked contrast.

Figure 2-222 **Comparison of Favorability Toward Korean Games Over the Last 5 Years by Year**

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

BASE: Consumers who experienced Korean games, Unit: %

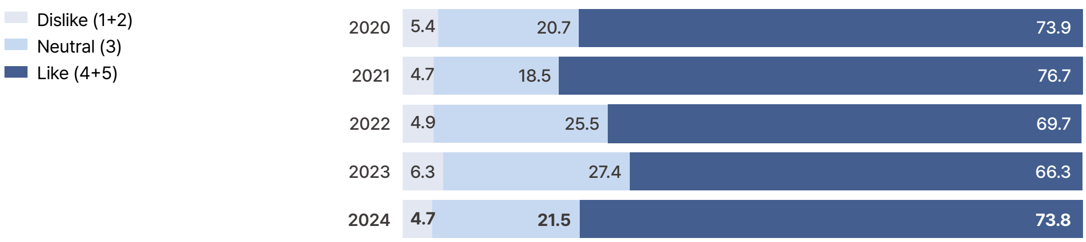
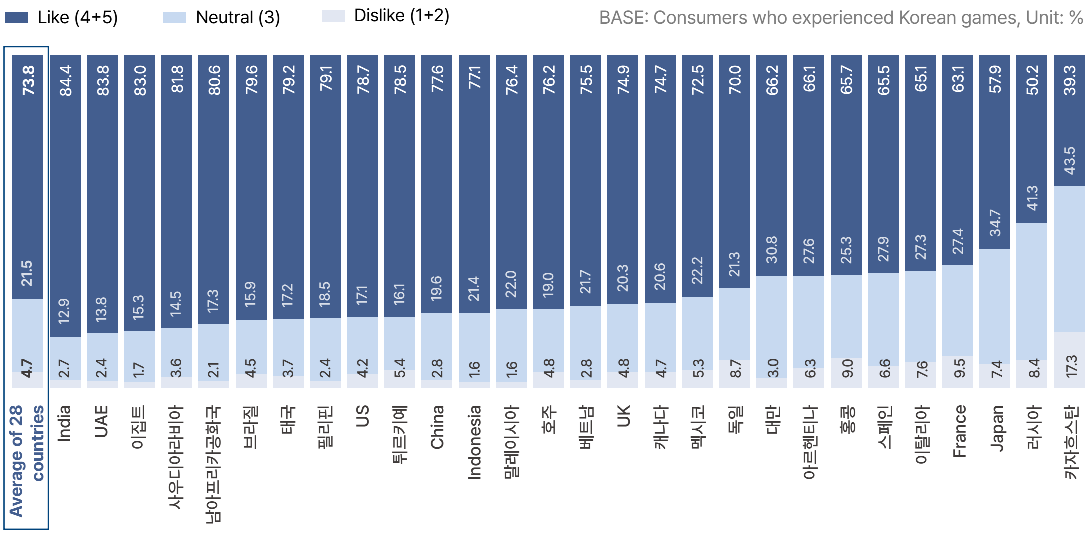


Figure 2-223 **Comparison of Favorability Toward Korean Games by Country**

BASE: Consumers who experienced Korean games, Unit: %



06 Factors Promoting and Inhibiting Favorability

Preference for "gameplay video streamers" increased in the Middle East, Africa, and Europe.
The Asia-Pacific region highlighted the importance of "game composition," while the Americas emphasized "unique characters."

The top reasons for favorability toward Korean games (1st + 2nd choices) in 2024 were, once again, "graphics/visuals are of high quality" (28.1%) and "gameplay or composition is well designed" (25.9%). "The characters have unique personalities/roles" (19.2%) saw an increase of 3.5 percentage points compared to the previous year, emerging as a key factor promoting favorability. Meanwhile, "like Korean gameplay video streamers" (14.3%) entered the ranks for the first time, a trend likely influenced by increased use of game streaming platforms like YouTube and Twitch. In fact, according to KOCCA[1], "watching live game streaming broadcasts" was identified as a major source of exposure to Korean games in some countries, including Canada and Brazil. Indeed, the percentage for "watching game streaming videos" surpassed that of other game service usages, confirming its establishment as a key method of consumption.

In the Asia-Pacific region, "gameplay or composition is well designed" (28.2%) ranked first, with a relatively small gap between this and the second-ranking factor. In all continents except Asia-Pacific, "graphics/visuals are of high quality" and "gameplay or composition is well designed" ranked first and second.

In the Americas, "the characters have unique personal-ities/roles" (19.0%) rose significantly compared to the previous year. Meanwhile, in the Middle East (18.0%), Africa (15.9%), and Europe (14.0%), "like Korean gameplay video streamers" newly entered the rankings. Additionally, in the Middle East (18.6%) and Africa (19.3%), the percentage of respondents selecting "the user interface (UI) is convenient" increased compared to the previous year, recording higher rates than in other continents.

Economic burden was perceived as a major factor inhibiting favorability, as it was last year.
Technical limitations were also pointed out, such as "high device specifications" and "inadequate service operations."

The most frequently cited factors that inhibit favorability toward Korean games were "costs too much to access" (17.8%) and "encourages excessive spending on paid items, character cards, etc." (17.6%), indicating strong dissatisfaction with the cost of games.

Technical issues such as "requires high device specifications" (17.0%) and "game service operations are inadequate" (15.2%) were also identified as major sources of inconvenience.

By continent, "encourages excessive spending on paid items, character cards, etc." was the most commonly cited factor inhibiting favorability in Asia-Pacific (18.8%) and Europe (17.7%). Meanwhile, "costs too much to access" had a higher proportion in the Americas (21.8%) than in other continents, making financial burden the most significant inhibiting factor.

In Africa (22.8%) and the Middle East (17.5%), "requires high device specifications" was cited as the top inhibiting factor-technical barriers affect game usage in these regions.

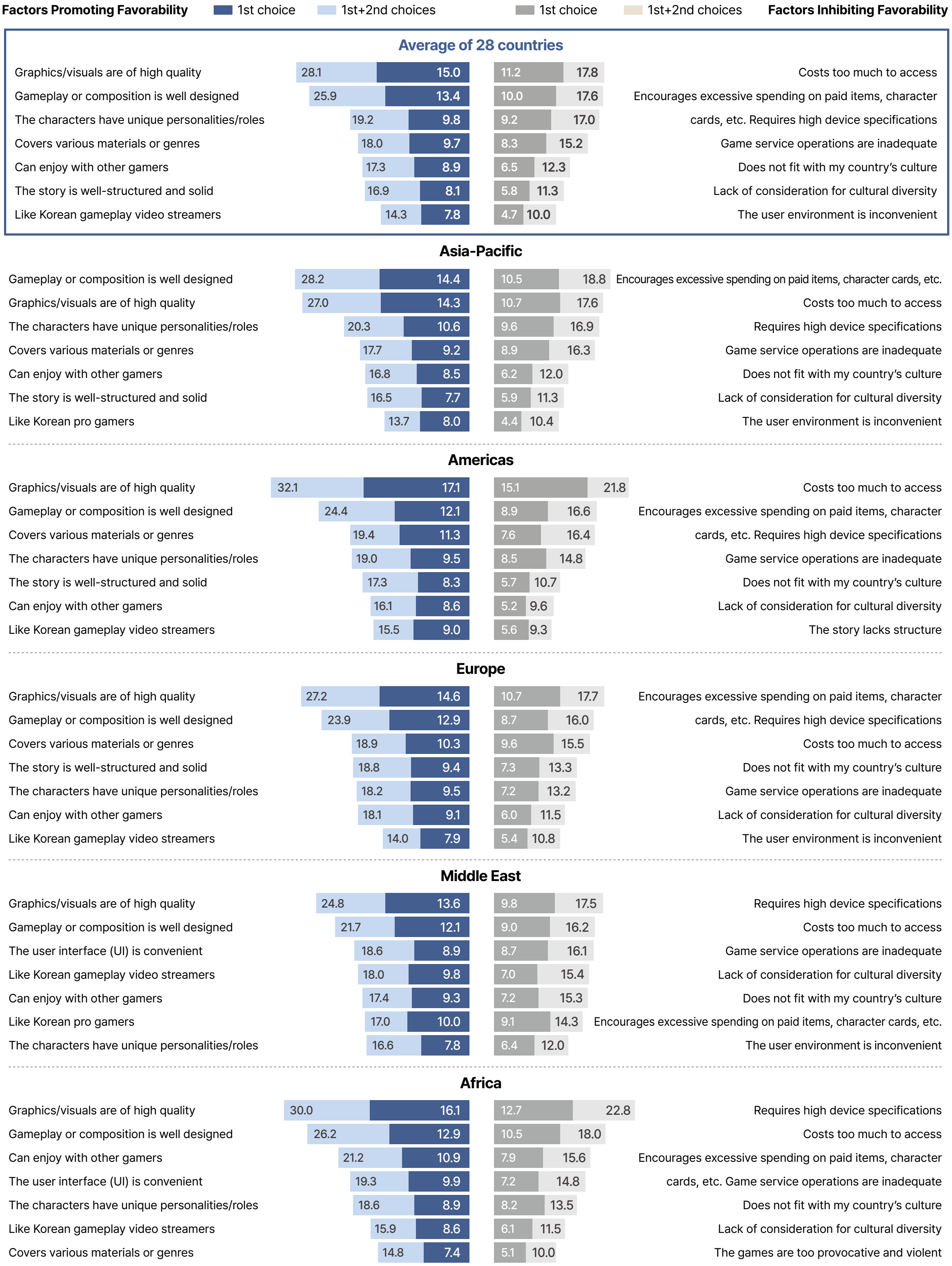
In addition to technical issues, "does not fit with my country's culture" emerged as a major inhibiting factor. This factor entered the rankings in Asia-Pacific (12.0%), the Americas (10.7%), and Africa (13.5%) for the first time, while the percentange for this item increased in Europe and the Middle East compared to the previous year. These results suggest that cultural differences are increasingly contributing to the decline in favorability toward Korean games.

1 "Survey of Korean Game Users in Overseas Markets," KOCCA, 2024

Figure 2-224 **Comparison of Factors Promoting and Inhibiting Favorability Toward Korean Games by Continent**

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.
Note. Presented are the top 7 choices (options) ranked by the combined proportion of first- and second-choice responses.

BASE: Consumers who experienced Korean games, Unit: %



“Language” was deemed the most uncomfortable aspect in the Americas, Europe, and Africa.
Lack of diversity in “lifestyle and customs” was most frequently cited in Asia-Pacific and the Middle East.

Among the inappropriate or inadequate aspects of cultural diversity representation, “lifestyle and customs” (29.2%) and “language” (29.1%) ranked first and second, by a narrow margin, followed by “traditional culture” (25.7%) in third place.
In particular, “language” was cited as the most uncomfortable aspect in the Americas (27.4%), Europe (28.2%), and Africa (34.8%), indicating a need for improvement in this area.
By continent, “sexual identity” (25.9%) was a prominent factor causing discomfort in the Americas, while “food” (23.8%) predominated in Europe-perspectives on cultural differences differed across regions.

Table 2-21 Top 3 Most Uncomfortable Aspects of Cultural Diversity Representation in Korean Games by Continent

BASE: Respondents who chose “lack of consideration for cultural diversity” as a factor inhibiting favorability for Korean games

	Average of 28 countries	Asia-Pacific	Americas	Europe	Middle East	Africa
1st	Lifestyle and customs 29.2%	Lifestyle and customs 30.2%	Language 27.4%	Language 28.2%	Lifestyle and customs 39.4%	Language 34.8%
2nd	Language 29.1%	Social class 29.9%	Sexual identity 25.9%	Lifestyle and customs 27.1%	Language 29.8%	Religion 28.3%
3rd	Traditional culture 25.7%	Traditional culture 29.2%	Lifestyle and customs 25.6%	Food 23.8%	Religion 28.1%	Lifestyle and customs 27.5%

07 Preferred Games

Battlegrounds ranked first for the seventh consecutive year. *Crossfire* was preferred in the Americas and Africa, and *Gunship Battle* in the Middle East.

In 2024, *Battlegrounds* (11.0%) was selected as the most preferred game for the seventh consecutive year. *Crossfire* (8.6%) and *Ragnarok* (7.7%) maintained their positions at second and third, following the 2023 results. Meanwhile, *Dungeon & Fighter* (6.7%) and *Black Desert* (6.4%) switched places by a narrow margin.

Although the ranking of most preferred games remained the same across all continents compared to last year, *Battlegrounds* (14.3%) was the most preferred in Asia-Pacific, while *Crossfire* (12.4%) topped the list in Africa. In the Americas, *Battlegrounds* ranked relatively low, coming in fourth place (7.6%). Rankings differed across regions, with *Lost Ark* (5.4%) ranking in Europe, *Seven Knights* (6.5%) in the Middle East, and *Gunship Battle* (10.6%) in Africa. Notably, in the Middle East, *Gunship Battle* (11.4%) was selected as the most preferred game, and *Battlegrounds*, which did not feature in the rankings in 2023, rose to second place, indicating a shift in preferences. By country, China (26.1%), Malaysia (18.5%), and Türkiye (18.1%) reported high preference rates for Battleground. In addition to recording the highest preference in Vietnam (30.6%), *Crossfire* showed relatively high popularity in the Americas when looking at the results by continent. Meanwhile, *Ragnarok* was highly preferred in the Philippines (22.9%) and Thailand (19.2%).

Figure 2-225 Comparison of the Top 5 Most Preferred Korean Games by Continent

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

BASE: Consumers who experienced Korean games, Unit: %, open-ended responses

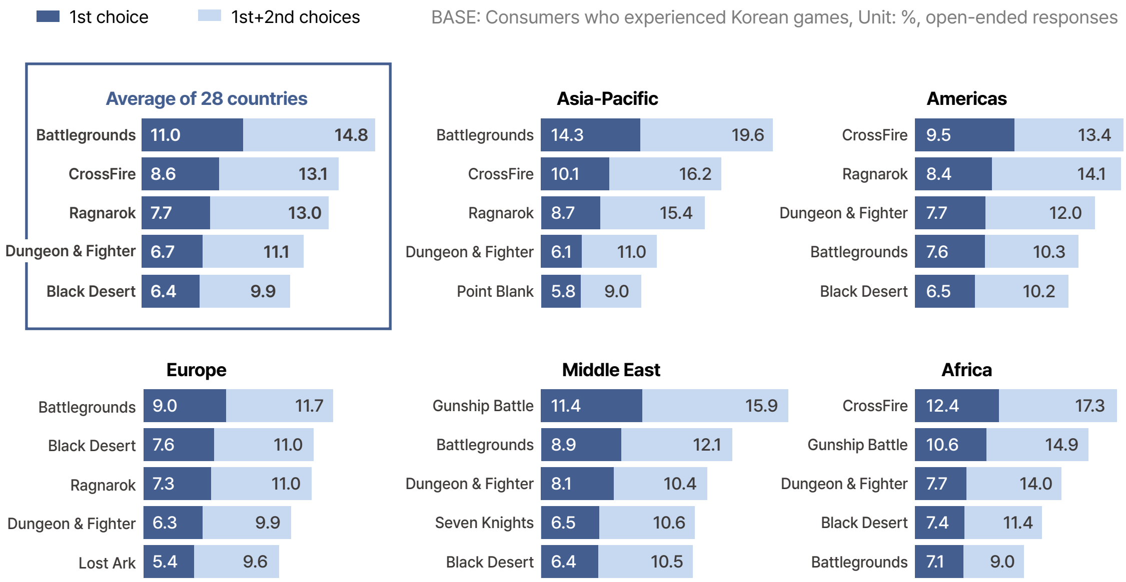


Table 2-22 Top 5 Countries in Preference Rates for Most Preferred Games

BASE: Consumers who experienced Korean games, Unit: %, open-ended responses

Note. Presented are the top 5 choices (options) ranked by the proportion of first-choice responses.

	1st	2nd	3rd	4th	5th
Battlegrounds	China 26.1%	Malaysia 18.5%	Türkiye 18.1%	Australia 15.6%	Indonesia 15.1%
Crossfire	Vietnam 30.6%	China 18.3%	Philippines 16.3%	Egypt 14.5%	Brazil 14.1%
Ragnarok	Philippines 22.9%	Thailand 19.2%	Taiwan 15.0%	Brazil 13.0%	Indonesia 11.7%

08 Willingness to Pay

There is an upward trend in those willing to pay.
Over 50% of respondents in India, Egypt, and the Middle East expressed willingness to pay.

In the survey regarding the willingness to pay for Korean games, 42.6% of respondents said they were “willing to pay”, showing a slight increase from the previous year. On the other hand, 30.2% responded that they were “not willing to pay.”
Looking at the trend over the past five years (2020–2024), the percentages for “not willing to pay” and “neutral" have been declining since 2022, whereas that for “willing to pay” has increased slightly.

By country, more than 50% of respondents in India (59.8%), Egypt (58.9%), the UAE (55.7%), Saudi Arabia (55.2%), Brazil (52.7%), Thailand (50.3%), and Türkiye (50.1%) said they were “willing to pay,” showing active consumption tendencies in these countries. Conversely, Japan (59.6%), Kazakhstan (53.3%), and Russia (47.2%) continued to report relatively high proportion of respondents indicating “not willing to pay,” maintaining the passive consumption tendency seen in the previous year.

Figure 2-226 Comparison of the Willingness to pay for Korean Games Over the Last 5 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. Willingness to pay for Korean games began to be surveyed in 2020.

BASE: Total, Unit: %

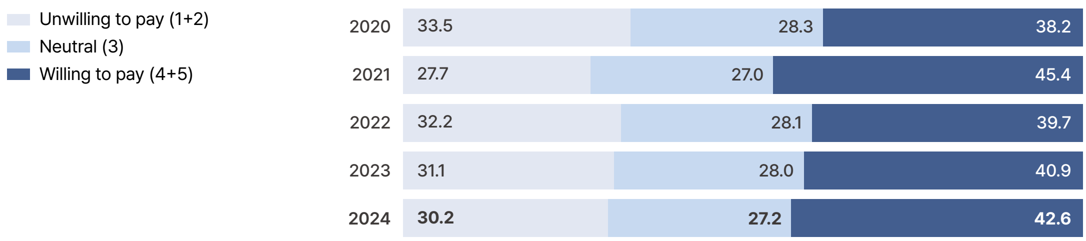
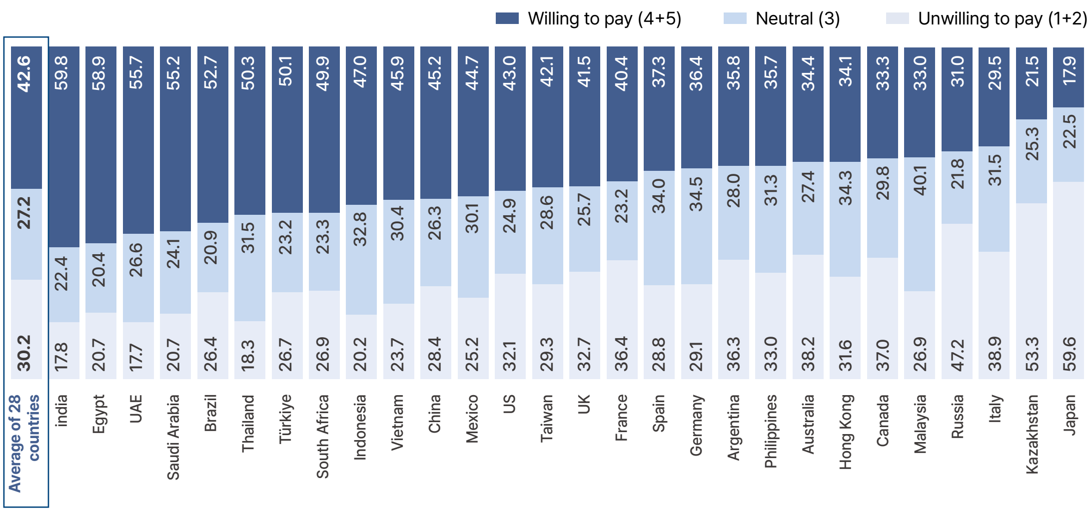


Figure 2-227 Comparison of the Willingness to pay for Korean Games by Country BASE: Total, Unit: %



09 Willingness to Recommend

Approximately 75.6% of respondents said that they were willing to recommend Korean games, up 5.5 percentage points from the previous year.

Willingness to recommend was higher among women, teens, and those in their 30s

Respondents in India, South Africa, and the Philippines actively recommend Korean games.

Among consumers who experienced Korean games, 75.6% responded that they were "willing to recommend" them to others, up 5.5 percentage points from 70.1% in 2023. The percentages of respondents selecting "neutral" (19.9%) and "not willing to recommend" (4.5%) declined compared to the previous year, indicating a more positive willingness to recommend Korean games overall.

While the experience rate of Korean games generally decreased across gender and most age groups compared to last year, willingness to recommend increased in all groups. The uptick was particularly notable among women (▲6.0 percentage points) as well as those in their 30s (▲7.4 percentage points) and teens (▲7.1 percentage points), indicating an increasingly positive perception of Korean games among these groups.

By country, the percentages for "willing to recommend"were high in India (85.2%), South Africa (85.1%), the Philippines (84.3%), and Saudi Arabia (84.1%). Conversely, Kazakhstan (16.1%), Japan (12.0%), and Germany (11.2%) showed relatively high proportions of respondents choosing "not willing to recommend." India, in particular, continued to show high engagement across multiple indicators for Korean games, including popularity, favorability, willingness to pay, and willingness to recommend.

Figure 2-228 Comparison of the Willingness to Recommend Korean Games Over the Last 2 Years by Year

BASE: Total, Unit: %

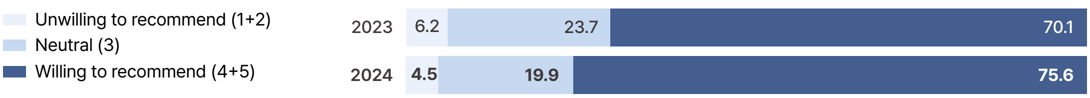


Figure 2-229 Comparison of Variation in the Willingness to Recommend Korean Games by Gender and age

BASE: Total, Unit: %p

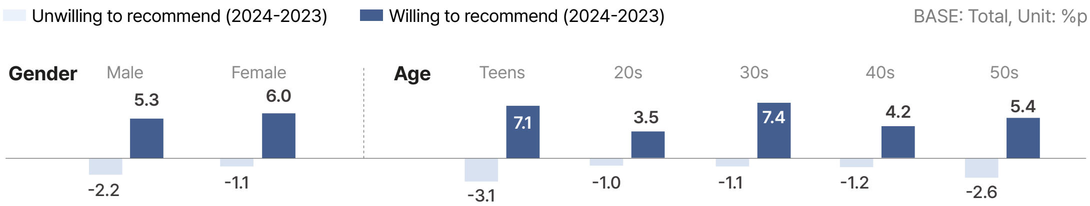
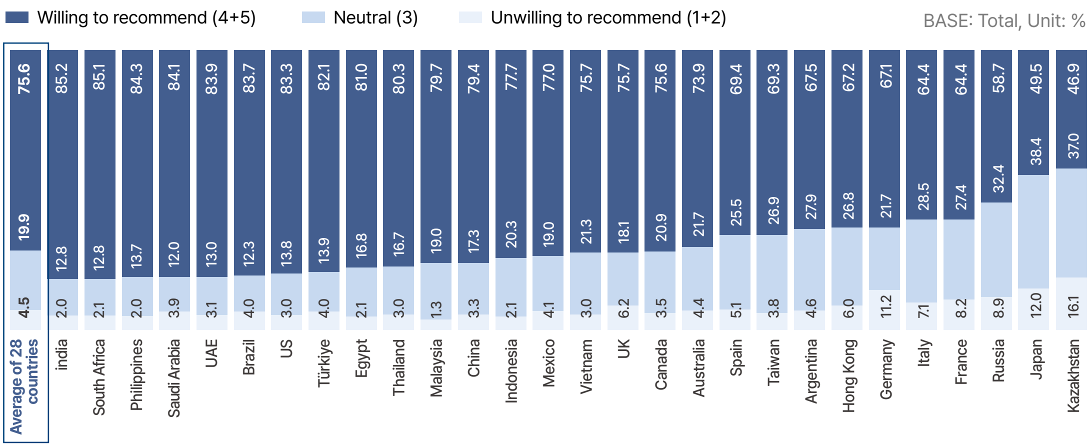


Figure 2- 230 Comparison of the Willingness to Recommend Korean Games by Country

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

BASE: Total, Unit: %



10 Ease of Use

Roughly 69.0% of respondents considered Korean games easy to use. Ease of use was particularly high in Southeast Asia and the Middle East.

Approximately 69.0% of respondents answered that Korean games are “easy to use,” while only 7.9% responded that they are “not easy to use.” Although the perception that Korean games are “easy to use” had been on a downward trend since 2021 when it scored 67.6%, it rebounded in 2024 approaching 70% once again. The proportions of respondents selecting “not easy to use” and “neutral” recorded the lowest levels in the past five years.
By country, India (79.9%), Türkiye (79.7%), the UAE (78.7%), China (78.7%), and Saudi Arabia (77.9%) reported particularly high rates of perceiving Korean games as “easy to use.” Conversely, Kazakhstan (21.2%), Russia (14.5%), and Argentina (13.9%) showed relatively high percentages for “not easy to use.” Countries where ease of use was rated high also tended to show higher willingness to pay and greater consumption volume, while countries that perceived Korean games as difficult to use tended to report lower willingness to consume and lower actual consumption levels.

Figure 2-231 Comparison of the Ease of Using Korean Games Over the Last 5 Years by Year

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

BASE: Consumers who experienced Korean games, Unit: %

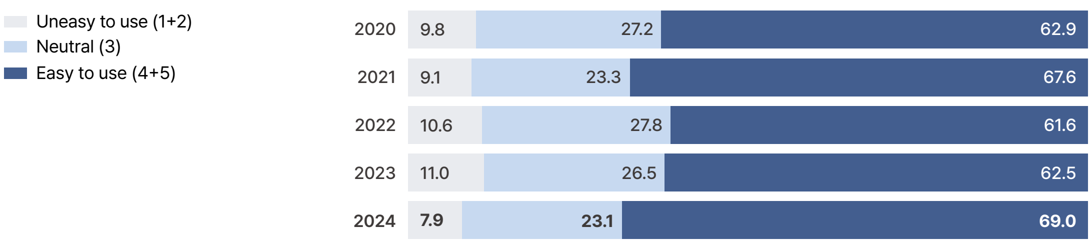
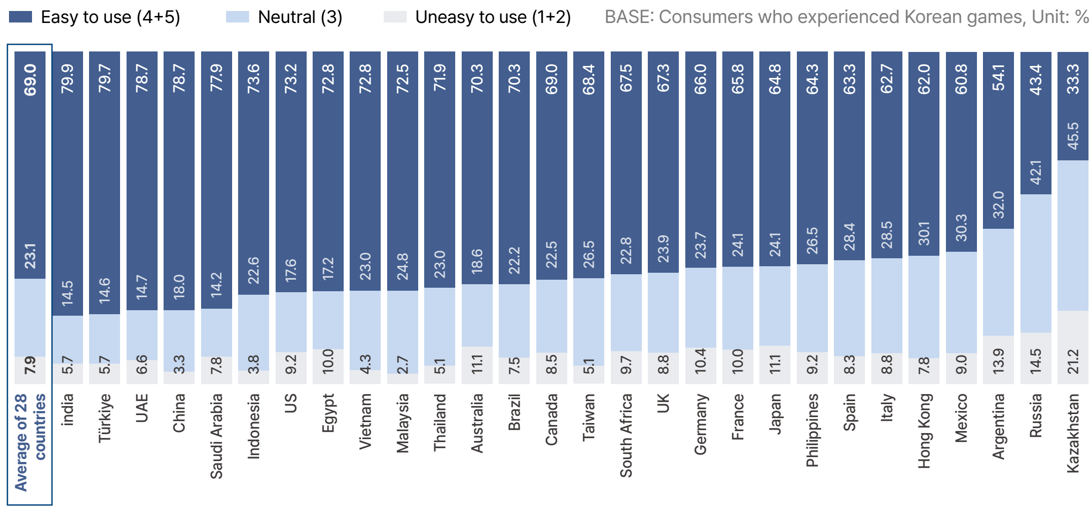


Figure 2-232 Comparison of the Ease of Using Korean Games by Country



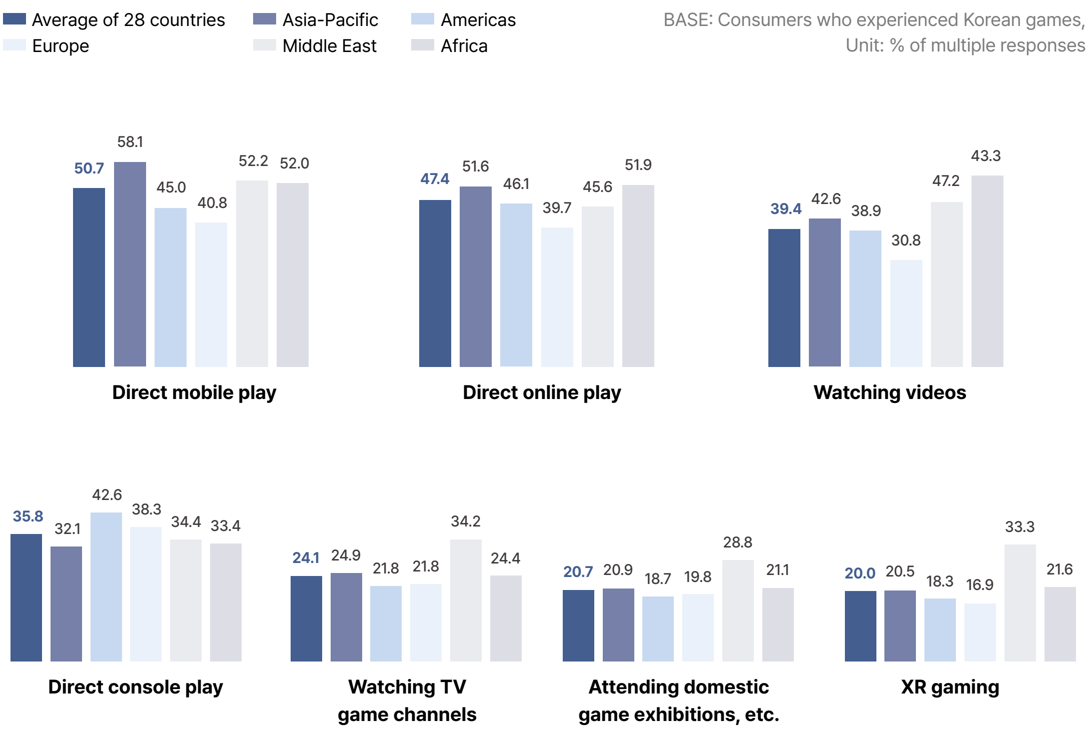
11 Channels of Exposure

Many respondents engaged in direct mobile and online play. Respondents in the Middle East and Africa actively used multiple channels.

In the 2024 survey, the newly added channels of exposure showed high usage rates, leading to changes in the rankings and respondent proportions of existing channels.
“Direct mobile play” (50.7%) ranked first, while “direct online play” (47.4%) dropped to second. “Watching videos” (39.4%) remained in third place and the newly added “direct console play” (35.8%) entered the ranks at fourth place, highlighting the rising popularity of console platforms.
By continent, Asia-Pacific recorded the highest usage rate for “direct mobile play” (58.1%).
In the Americas, high usage rates were reported for “direct online play” (46.1%) and “direct console play” (42.6%), reflecting the strong presence of console-based game consumption in the Americas. Although Europe recorded lower usage rates than the average of the 28 countries for most channels, that for “direct console play” (38.3%) was the second highest after the Americas (42.6%).
The Middle East and Africa recorded usage rates higher than the average of the 28 countries across most access channels, demonstrating a tendency to utilize diverse platforms.

Figure 2-233 Comparison of Korean Game Channels of Exposure by Continent

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



9

Fashion

FASHION

SUMMARY

The average experience rate of Korean fashion across the 28 countries was 57.4%. In particular, approximately 6 out of 10 women and respondents in their 20s and 30s reported having experienced Korean fashion. Awareness of Korean fashion was high, with 45.3% of respondents recognizing it as “widely popular,” especially in Asia.

Korea ranked first as the most popular source of foreign fashion. In the Asia-Pacific region, “Korea” held a clear lead over the second-ranked country, “the US.” Korean fashion consumption was found to be especially active in the Middle East, including Saudi Arabia and the UAE, with high levels recorded across all indicators, including real purchase experience rate within the past year, proportion of Korean fashion consumption, and expenditure on Korean fashion.

Favorability toward Korean fashion was high, with approximately 3 out of 4 respondents expressing a positive view. Key factors promoting favorability included “good designs/styles” and “excellent quality,” while “difficult to purchase” and “lack of diversity in sizes” ranked among the top three factors inhibiting favorability across all continents. Meanwhile, the ease of use of Korean fashion increased by 4.6 percentage points compared to the previous year, with ongoing efforts to address these issues alongside the expansion of Korean fashion into global markets.

01 Experience Rate

Approximately 57.4% of respondents had experienced Korean fashion. Experience rates were high in Asia, including Thailand, the Philippines, and Vietnam.

The average experience rate of Korean fashion across the 28 countries was 57.4%-more than half of the respondents had experienced Korean fashion. By country, high experience rates were recorded in Southeast Asia, including the newly included Philippines (80.4%), as well as Thailand (85.4%), Vietnam (79.2%), and Indonesia (78.5%). Conversely, Japan (35.1%) and European countries such as France (36.3%) and Italy (38.0%) showed relatively low experience rates.

By gender and age group, approximately 6 out of 10 female respondents (63.3%) and those in their 20s (61.0%) and 30s (60.4%) reported having experienced Korean fashion.

Figure 2-234 Comparison of Korean Fashion Experience Rates by Country BASE: Total, Unit: %

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

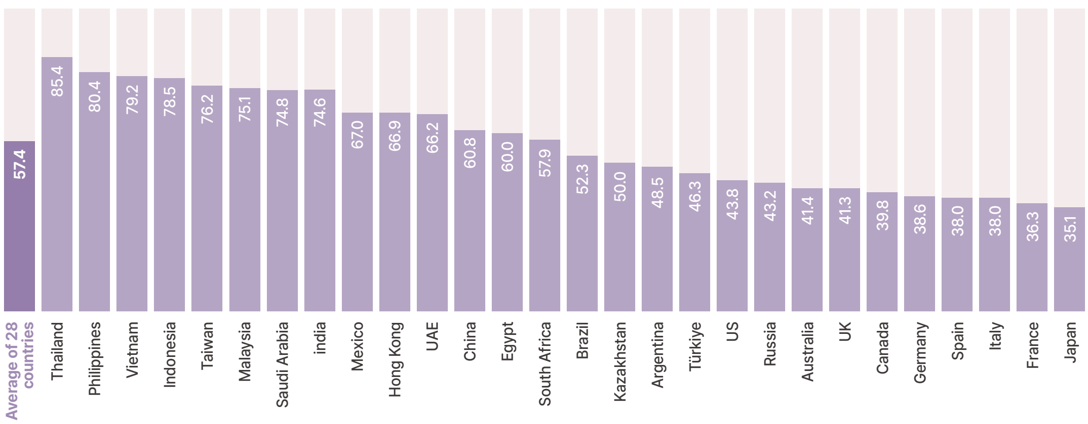
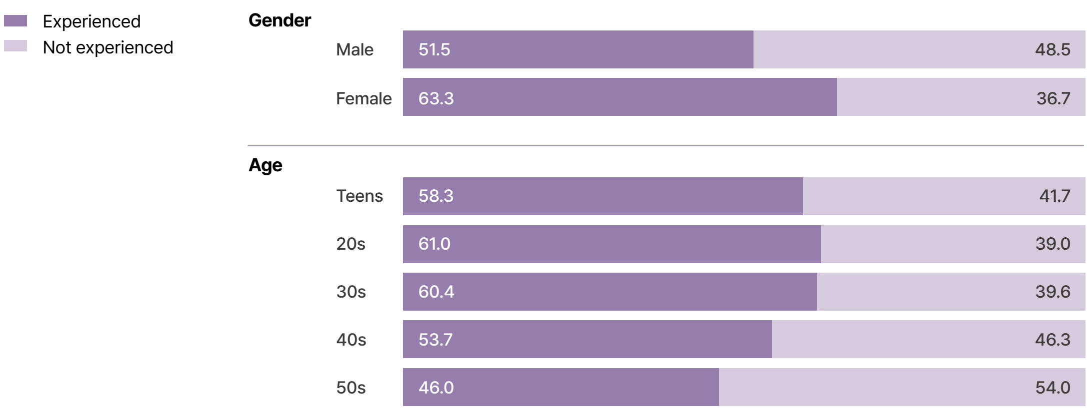


Figure 2-235 Comparison of Korean Fashion Experience Rates by Gender and age BASE: Total, Unit: %



02 Popularity

Approximately 45.3% of respondents perceived Korean fashion as "widely popular." Recognition of Korean fashion as "widely popular" was higher in Asia. Respondents in Europe and North America were "neutral" or perceived it as "popular among a niche audience."

Among consumers with Hallyu experience, 45.3% responded that Korean fashion is "widely known among the general public with related products being sold" or "widely popular among the general public with smooth sales of related products," corresponding to the "widely popular" level. Meanwhile, 27.5% of respondents selected "moderately popular," while 20.2% said that it was "popular among a niche audience."
Looking at the trends since 2020, the proportion of respondents selecting "hardly used" has tended to decline. Although the percentage of respondents recognizing Korean fashion as "widely popular" has fluctuated over the years, the increases have outweighed the decreases, indicating an overall upward trend in "widely popular" responses.

The country with the highest percentage for "widely popular" was the Philippines (71.0%), followed by Southeast Asian countries such as Malaysia (64.1%) and Vietnam (63.9%). Conversely, European countries (Italy at 25.6%, and Russia at 29.6%) and Anglosphere countries (Australia at 30.7%) showed relatively lower rates. Percentages of respondents indicating "widely popular" tend to be higher in countries where people have more opportunities to encounter Korean fashion through dramas, movies, and idol performances and where they show greater favorability toward it. According to local news, Korean fashion is becoming especially popular among younger age groups, and there is reportedly more interest in trendy, modern fashion than in traditional clothing like hanbok.

Figure 2-236 Comparison of the Popularity of Korean Fashion 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 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

BASE: Total, Unit: %

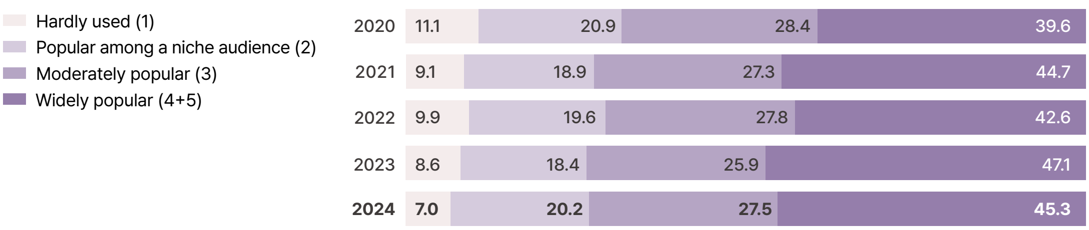
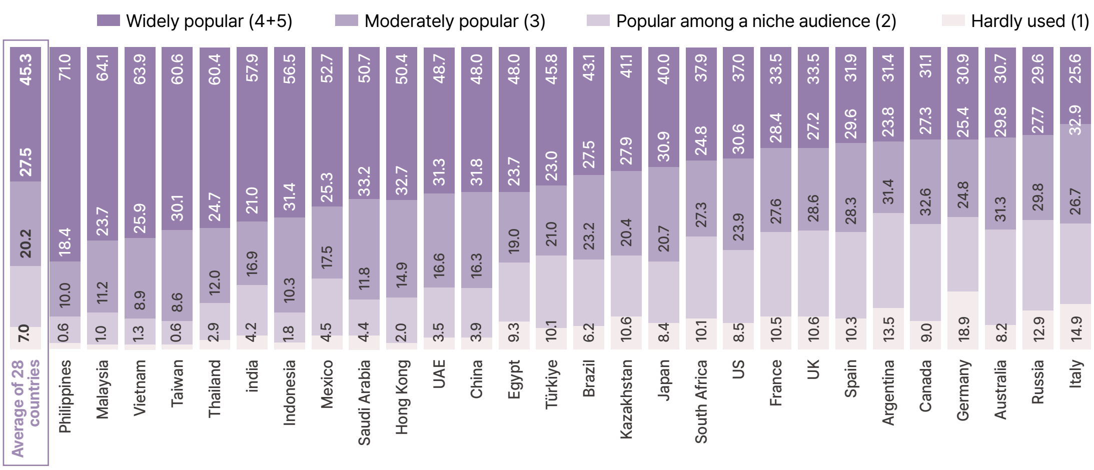


Figure 2-237 Comparison of the Popularity of Korean Fashion by Country

BASE: Total, Unit: %



Local News

"In the second half of 2024, MUSINSA participated in the 2024 K-Tourism Roadshow held in Taiwan and presented a MUSINSA Zone pop-up. I saw many people in their 20s and 30s in Taiwan showing interest. Personally, I remember being surprised when a friend of mine, who is a fashion model, showed considerable interest in MUSINSA's launch in Taiwan."

Taiwan KOFICE Taipei Overseas Correspondent

"K-fashion is considered a niche concept in Germany. Korean fashion is considerably different from local styles in Germany and does not appear to be very common in mainstream German culture. Fans of K-pop and K-dramas are often receptive to Korean fashion, but differences in sizing and overall style preferences make practical adaptation difficult."

Germany KOTRA Frankfurt Trade Officer

"Korean fashion is gaining popularity to the extent that stores with Korean signage can often be seen in local shopping malls. Owing to the high quality and trendy designs associated with 'Made in Korea,' consumer responses among Malaysians in their 20s and 30s are particularly positive. For example, the Korean fashion brand National Geographic can be easily found in major shopping malls in Malaysia."

Malaysia KOTRA Kuala Lumpur Trade Officer

"Costumes from dramas, movies, and idols seem to have sparked interest in Korean fashion among fans in Mexico."

Mexico KOFICE Mexico City Overseas Correspondent

"Korean celebrities continued to participate in various fashion events in New York this year, and many Korean brands, large and small, took part in B2B exhibitions."

U.S. KOFICE New York Overseas Correspondent

"Korean fashion worn by K-pop idols, such as bags, sunglasses, and shirts, appears to be trending."

KOCCA Indonesia Business Center Deputy General Manager

"Korean fashion stores such as NUGU in Shinjuku, A-LAND in Shibuya, and KIRSH in Harajuku can be seen throughout Tokyo. Korean fashion is available for purchase on various platforms, including online and international purchasing agencies. Pop-up stores for accessories, bags, and mobile products are also extremely popular."

Japan KOFICE Osaka Overseas Correspondent

"Members of Korean idol groups are active as ambassadors for famous global luxury brands, and media coverage of their activities has continued. In particular, fashion items from NewJeans and BLACKPINK members have caused a big sensation in Hong Kong, and fashion items such as G-Dragon's scarves and shoes also became hot topics."

Hong Kong KOFICE Overseas Correspondent

03 Popular Foreign Fashion

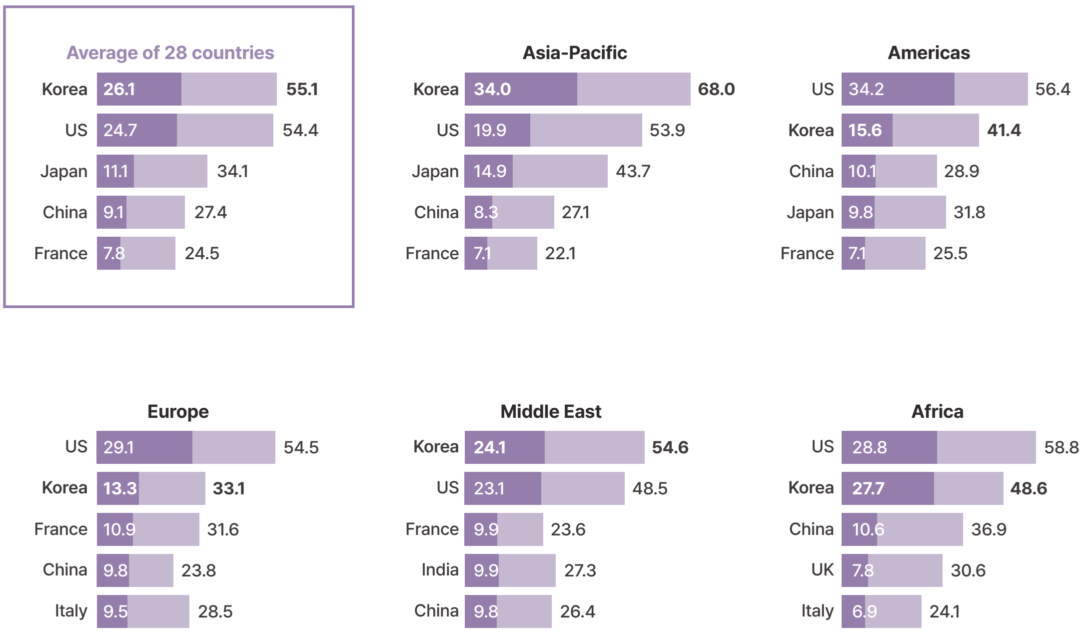
"Korea" ranked first in fashion.
Korean fashion was especially popular in Asia-Pacific and the Middle East.

Among consumers who have experienced Korean fashion, "Korea" (26.1%) ranked first as the most popular source of foreign fashion. "The US" (24.7%) ranked second with a difference of 1.4 percentage points, followed by "Japan" (11.1%) and "China" (9.1%). By continent, "Korea" (34.0%) was far ahead of "the US" (19.9%), claiming first place in Asia-Pacific. In the Middle East and Africa, "Korea" and "the US" were separated by a narrow gap, with "Korea" (24.1%) leading by just 1.0 percentage point in the Middle East. In the Americas and Europe, the respondent proportion was higher for "the US."
"Korea" appears to have surpassed "the US" in the Asia-Pacific and the Middle East as a result of the combined effects of the influence of Hallyu content, the expansion of online shopping, and relatively reasonable prices compared to fashion from the US. As global brands are well established in the Americas and Europe, the influence of "the US" remains strong.

Figure 2-238 Comparison of Popular Foreign Fashion by Continent

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).

1st choice   1st+2nd+3rd choices (multiple responses)   BASE: Consumers who experienced Korean fashion, Unit: %



04 Consumption Volume

Korean fashion consumption ranked high in the Middle East. High expenditure in China and Hong Kong.

When asked whether they had purchased Korean fashion products after watching Korean fashion videos or images, 66.2% of respondents confirmed that they had purchase experience. In particular, Indonesia (81.4%), Saudi Arabia (80.9%), and Thailand (80.1%) showed high rates of actual purchases following exposure to Korean fashion videos or images.
The average monthly expenditure per person was 31.2 USD, with China recording the highest at 67.0 USD. This was followed by the UAE (56.5 USD), Saudi Arabia (53.5 USD), and Hong Kong (52.3 USD).
Saudi Arabia and the UAE ranked high in terms of actual purchase experience rate within the past year, the proportion of Korean fashion consumption within overall fashion consumption, and expenditure on Korean fashion. As young countries[1], Saudi Arabia and the UAE exhibit growing shopping leisure cultures and increasing[2] female consumption, highlighting the market growth potential of Korean fashion.

Figure 2-239 Comparison of Korean Fashion Consumption Experience Rate by Country

Q. After watching any Korean fashion videos/images, have you ever purchased Korean fashion products online or at a physical store in the past year?

BASE: Consumers who experienced Korean fashion, Unit: %

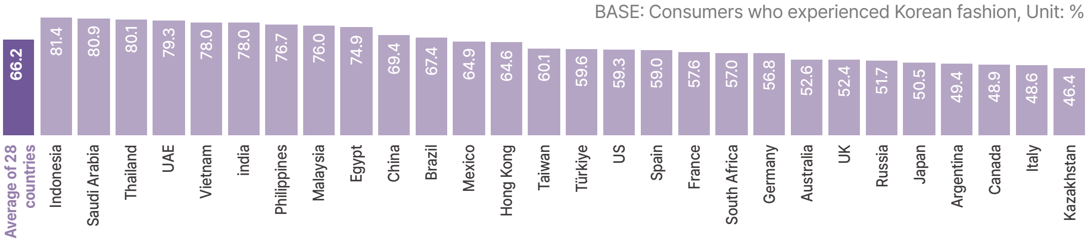


Figure 2-240 Comparison of the Proportion of Korean Fashion Consumption by Country

Q. What is your usual consumption volume (expenditure) and proportion of consumption for Korean fashion products?

BASE: Consumers who experienced Korean fashion, Unit: %

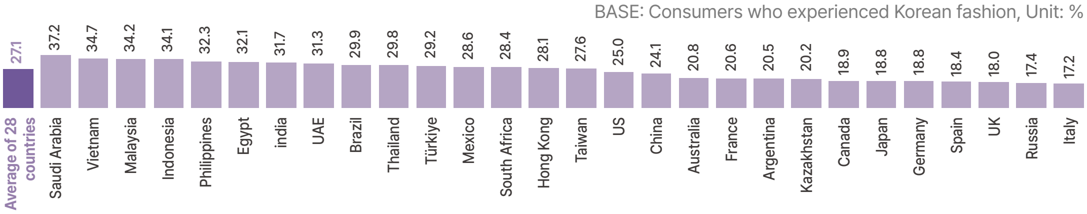
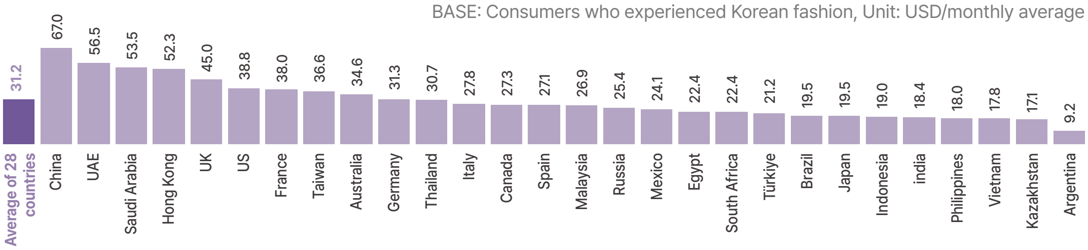


Figure 2-241 Comparison of Expenditure on Korean Fashion by Country

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



1 The median age is 33.5 years in the UAE and 31.6 years in Saudi Arabia.
Source: Korea Institute for International Economic Policy. (2024). UAE Economic and Industry Trends Report. KIEP. https://www.kiep.go.kr/aif/businessDetail.es?brdctsNo=355448&mid=a30400000000
Global Media Insight. (2020). Content on the UAE regarding population distribution by gender, age, and nationality.

2 KOTRA Overseas Market News—Country/Region Information—Saudi Arabia/UAE Market and Consumer Characteristics

05 Favorability

Some 75.4% of respondents said they like Korean fashion. High favorability was observed in India and the Philippines.

Among consumers who experienced Korean fashion, 75.4% responded that they “like” it. Looking at the trend in favorability over the past five years, the rate declined from 2021 to 2023 but rebounded to the 2020 level in 2024. Countries with the highest percentages for “like” included India (88.6%), the Philippines (86.4%), and Indonesia (85.8%), while the lowest rates were observed in Italy (54.2%), Kazakhstan (56.5%), and Russia (57.0%). Alongside the high favorability toward Korean fashion among overseas consumers, Korean fashion companies are actively expanding into global markets. According to the 2025 Fashion Forecast report by the Samsung Fashion Research Institute, interest in Korean fashion brands among overseas customers is growing. Consequently, the industry is actively pursuing expansion into overseas markets with a focus on leading brands, not only in Asian markets, such as Japan, China, and Southeast Asia, but also in diverse regions, including Europe, India, and the Middle East.

Figure 2-242 **Comparison of Favorability Toward Korean Fashion 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

BASE: Consumers who experienced Korean fashion, Unit: %

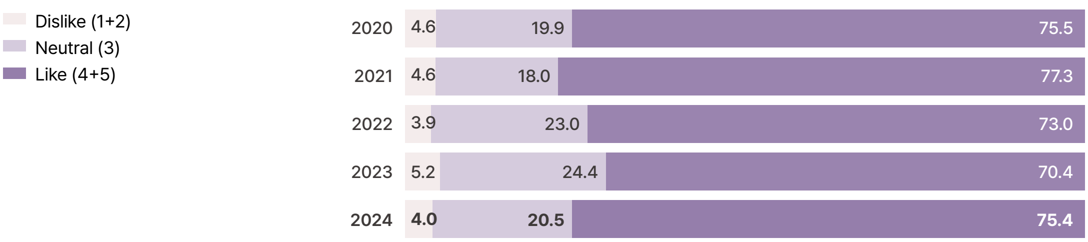
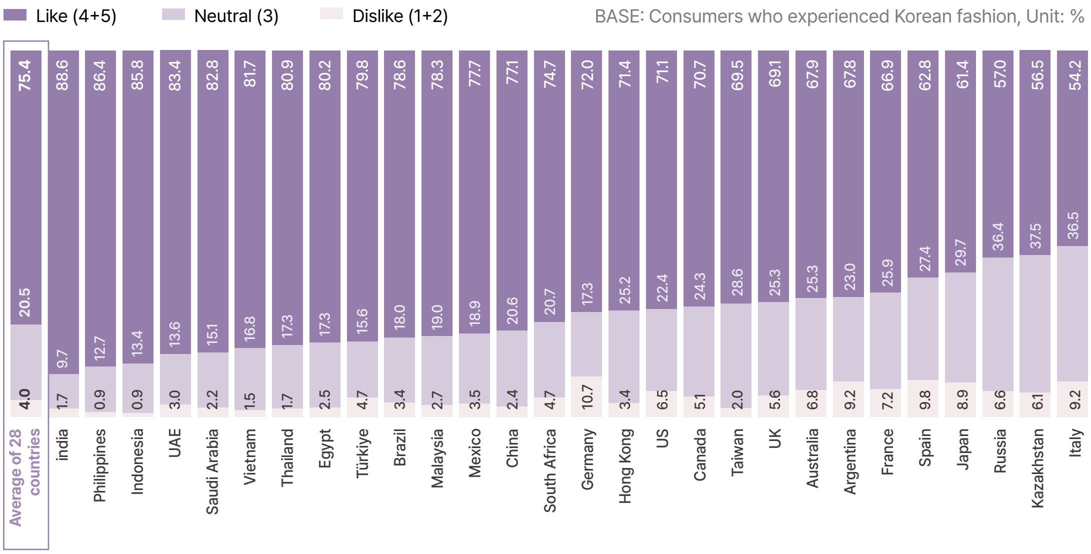


Figure 2-243 **Comparison of Favorability Toward Korean Fashion by Country**

BASE: Consumers who experienced Korean fashion, Unit: %



06 Factors Promoting and Inhibiting Favorability

“Designs/styles” and “excellent quality” were cited as key reasons for favorability.

The top reason why consumers liked Korean fashion (1st + 2nd choices) were “good designs/styles” (42.1%), followed by “excellent quality” (30.8%) and “variety in product types and styles” (26.0%). Although the percentages of respondents varied, the top two factors promoting favorability were the same across all five continents.

In the Asia-Pacific, Americas, and Europe, the percentage for “good designs/styles” was more than 10 percentage points higher than that for “excellent quality”-designs/styles significantly influence the preference for Korean fashion. Conversely, in the Middle East and Africa, “good designs/styles” and “excellent quality” were cited at similar rates.

“Purchase difficulty” and “limited sizes” were cited as factors inhibiting favorability.

Among Korean fashion users, the most frequently cited factor inhibiting favorability was “difficult to purchase” (29.9%), followed by “lack of diversity in sizes” (25.1%) and “expensive for the quality offered” (22.0%).

In the Middle East, “lack of diversity in sizes” was cited as the most significant inconvenience “difficult to purchase” was identified as the main inhibiting factor in the Asia-Pacific, Americas, and Europe. In Africa, “difficult to purchase” (29.6%) and “lack of diversity in sizes” (29.2%) were cited at nearly the same rate.

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Figure 2-244 Comparison of Factors Promoting and Inhibiting Favorability Toward Korean Fashion by Continent

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.

Note. Presented are the top 7 choices (options) ranked by the combined proportion of first- and second-choice responses.

BASE: Consumers who experienced Korean fashion, Unit: %

Average of 28 countries

Factors Promoting Favorability	1st+2nd choices	1st choice	1st choice	1st+2nd choices	Factors Inhibiting Favorability
Good designs/styles	42.1	24.6	18.7	29.9	Difficult to purchase
Excellent quality	30.8	15.2	14.6	25.1	Lack of diversity in sizes
Variety in product types and styles	26.0	13.1	12.0	22.0	Expensive for the quality offered
Used/promoted by favorite Hallyu stars	20.7	10.7	9.2	17.5	Lack of consideration for cultural diversity
Reasonable prices for the quality offered	20.4	10.6	8.2	15.0	Poor quality
Used/promoted by my favorite influencers	16.8	8.4	6.6	13.6	Lack of variety in product types and styles
Good brand image	16.0	8.8	5.9	11.0	Historical/diplomatic relations between Korea and country of residence

Asia-Pacific

Factors Promoting Favorability	1st+2nd choices	1st choice	1st choice	1st+2nd choices	Factors Inhibiting Favorability
Good designs/styles	44.6	25.9	17.6	29.0	Difficult to purchase
Excellent quality	31.6	14.9	14.0	25.2	Expensive for the quality offered
Variety in product types and styles	26.4	12.7	13.3	23.4	Lack of diversity in sizes
Used/promoted by favorite Hallyu stars	21.6	11.4	10.1	18.8	Lack of consideration for cultural diversity
Reasonable prices for the quality offered	20.1	10.5	7.9	14.1	Poor quality
Used/promoted by my favorite influencers	17.3	8.4	6.4	13.7	Lack of variety in product types and styles
Good reputation among people around me	14.8	8.0	6.2	11.3	Historical/diplomatic relations between Korea and country of residence

Americas

Factors Promoting Favorability	1st+2nd choices	1st choice	1st choice	1st+2nd choices	Factors Inhibiting Favorability
Good designs/styles	42.6	25.3	23.7	35.7	Difficult to purchase
Excellent quality	30.7	14.8	15.5	27.3	Lack of diversity in sizes
Variety in product types and styles	26.8	14.2	10.2	19.8	Expensive for the quality offered
Reasonable prices for the quality offered	18.7	10.3	8.1	14.9	Poor quality
Used/promoted by my favorite Hallyu stars	18.5	9.7	6.3	13.1	Lack of consideration for cultural diversity
Good brand image	18.2	10.2	5.6	12.3	Lack of variety in product types and styles
Used/promoted by favorite influencers	15.3	7.7	5.7	10.5	Historical/diplomatic relations between Korea and country of residence

Europe

Factors Promoting Favorability	1st+2nd choices	1st choice	1st choice	1st+2nd choices	Factors Inhibiting Favorability
Good designs/styles	37.5	21.5	19.7	29.7	Difficult to purchase
Excellent quality	25.9	14.6	14.8	24.5	Lack of diversity in sizes
Variety in product types and styles	25.9	14.2	10.3	18.8	Poor quality
Reasonable prices for the quality offered	22.1	11.2	9.1	17.6	Lack of consideration for cultural diversity
Used/promoted by my favorite Hallyu stars	19.6	10.3	9.6	17.2	Expensive for the quality offered
Good brand image	18.6	10.1	6.6	12.6	Lack of variety in product types and styles
Used/promoted by favorite influencers	15.5	8.2	6.4	12.2	Historical/diplomatic relations between Korea and country of residence

Middle East

Factors Promoting Favorability	1st+2nd choices	1st choice	1st choice	1st+2nd choices	Factors Inhibiting Favorability
Good designs/styles	36.8	21.7	19.0	31.0	Lack of diversity in sizes
Excellent quality	34.5	17.7	11.8	22.6	Difficult to purchase
Used/promoted by my favorite Hallyu stars	24.2	10.2	10.9	21.6	Expensive for the quality offered
Variety in product types and styles	22.4	11.0	10.8	19.3	Lack of consideration for cultural diversity
Reasonable prices for the quality offered	22.1	11.0	9.8	16.8	Lack of variety in product types and styles
Used/promoted by favorite influencers	20.7	11.3	6.4	14.7	Poor quality
Good reputation among people around me	15.0	8.5	4.9	11.3	Brand image is not good

Africa

Factors Promoting Favorability	1st+2nd choices	1st choice	1st choice	1st+2nd choices	Factors Inhibiting Favorability
Good designs/styles	38.8	23.1	17.9	29.6	Difficult to purchase
Excellent quality	34.6	17.1	17.8	29.2	Lack of diversity in sizes
Variety in product types and styles	24.7	12.0	8.1	16.7	Lack of consideration for cultural diversity
Reasonable prices for the quality offered	20.8	10.2	7.8	16.7	Lack of variety in product types and styles
Used/promoted by my favorite Hallyu stars	18.8	9.5	8.4	16.1	Expensive for the quality offered
Good brand image	18.5	10.0	5.7	11.7	Poor quality
Good reputation among people around me	17.5	9.4	6.5	11.0	Brand image is not good

07 Willingness to Pay

Approximately 1 in 2 respondents were willing to pay for Korean fashion. Willingness to pay was high in India, Indonesia, and the Philippines.

According to the survey on willingness to pay for Korean fashion, 52.9% of respondents said they were "willing to pay." Approximately 25.5% of respondents were "neutral," while 21.7% responded that they were "not willing to pay." Although the proportion of those "willing to pay" fluctuated significantly in 2021, the overall trend over the past five years has been in the upward direction.

Countries with high willingness to pay included India (74.2%), Indonesia (70.4%), and the Philippines (69.9%), with those in Asia, the Middle East, and South America generally ranking higher. Conversely, Japan (48.4%) and Italy (36.4%) had higher proportions of respondents indicating "not willing to pay" than for "willing to pay," indicating a relatively more negative perception toward willingness to pay for Korean fashion.

Figure 2-245 Comparison of the Willingness to pay for Korean Fashion Over the Last 5 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. The question about willingness to pay for Korean fashion was added in 2020.

BASE: Total, Unit: %

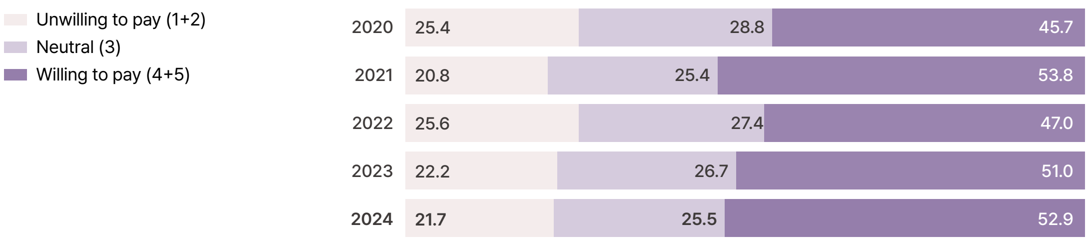
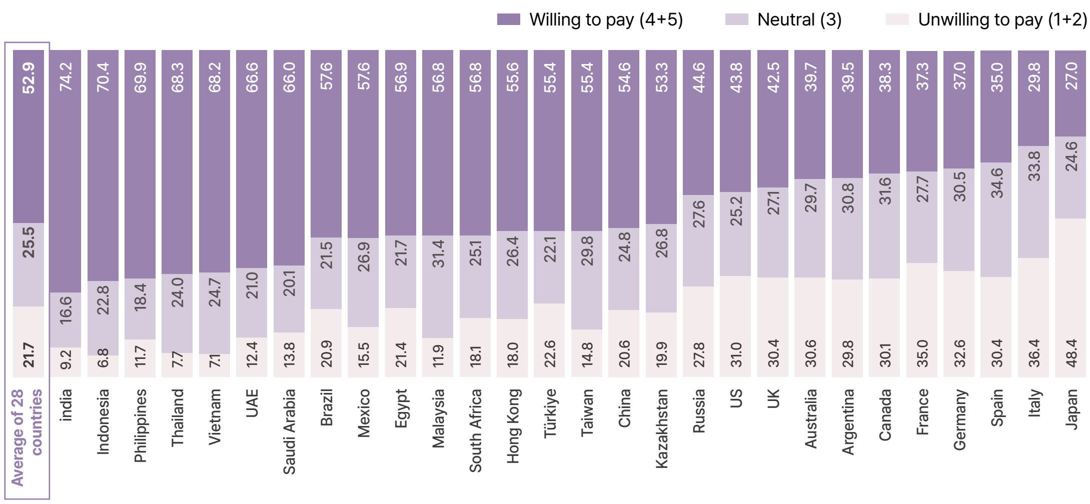


Figure 2-246 Comparison of the Willingness to pay for Korean Fashion by Country BASE: Total, Unit: %



08 Willingness to Recommend

Approximately 72.6% of respondents were willing to recommend Korean fashion. Willingness to recommend was particularly high in the Philippines.

Among consumers who experienced Korean fashion, 7 out of 10 (72.6%) responded that they were "willing to recommend" it to others. Approximately 22.5% of respondents were "neutral," while just 4.8% said that t hey were "not willing to recommend" Korean fashion. This figure marks an increase of 5.7 percentage points compared to the 2023 rate of willingness to recommend (66.9%). The proportions for willingness to recommend rose across all gender and age groups. This signifies the willingness to recommend Korean fashion is not limited to a specific target group but increasing across all groups in general. The percentage for "willing to recommend" was highest in the Philippines at 89.1%, followed by India (86.9%), Saudi Arabia (81.7%), and Vietnam (81.0%). Conversely, Japan (47.9%), Italy (52.6%), and Kazakhstan (58.5%) showed relatively lower levels of willingness to recommend. In particular, the Philippines demonstrated high favorability and willingness to recommend Korean fashion, indicating a considerably high level of satisfaction.

Figure 2-247 Comparison of the Willingness to Recommend Korean Fashion Over the Last 2 Years by Year

BASE: Total, Unit: %

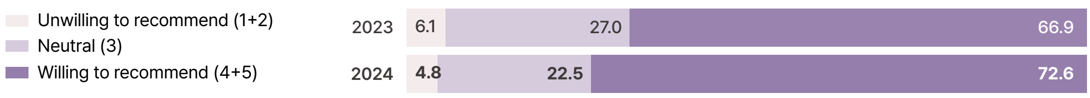


Figure 2-248 Comparison of Variation in the Willingness to Recommend Korean Fashion by Gender and age

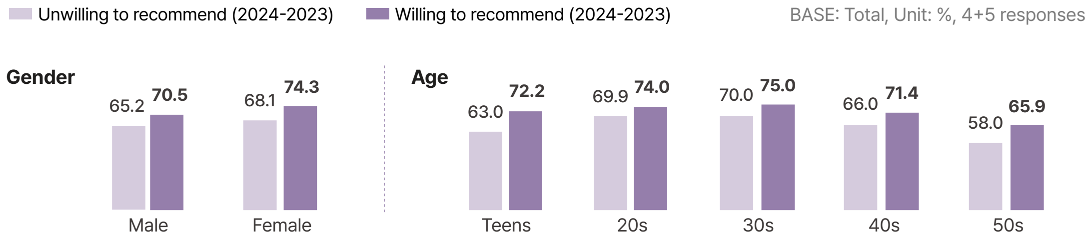
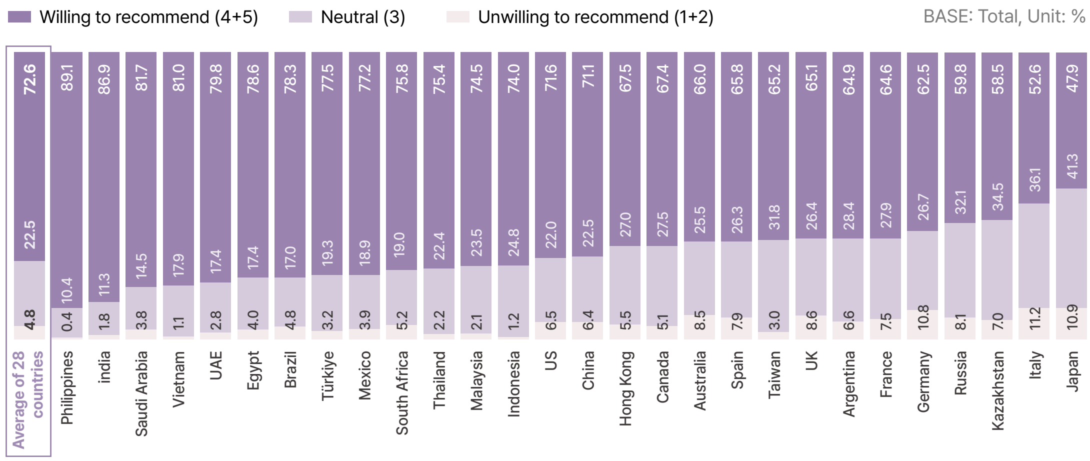


Figure 2-249 Comparison of the Willingness to Recommend Korean Fashion by Country

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



09 Ease of Use

Among respondents, 67.8% found Korean fashion "easy to consume."

Among consumers who experienced Korean fashion across the 28 countries, 67.8% responded that Korean fashion is "easy to consume," while 10.4% said it is "not easy to consume." Although the proportion of respondents selecting "easy to consume" gradually declining from 2020 to 2023, it saw a relatively significant increase this year.
This increase can be attributed to the improved accessibility to Korean fashion with the entry of Korean fashion brands onto local and global e-commerce platforms, as well as the active overseas expansion of domestic online e-commerce platforms and fashion brands. Countries with high percentages for "easy to consume" included the UAE (80.6%), Hong Kong (79.5%), India (78.9%), Indonesia (78.7%), and China (76.9%). However, the proportions of respondents choosing "not easy to consume" were relatively higher in Argentina (33.3%), South Africa (22.3%), and Italy (20.9%).

Figure 2-250 Comparison of the Ease of Consuming Korean Fashion 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

BASE: Consumers who experienced Korean fashion, Unit: %

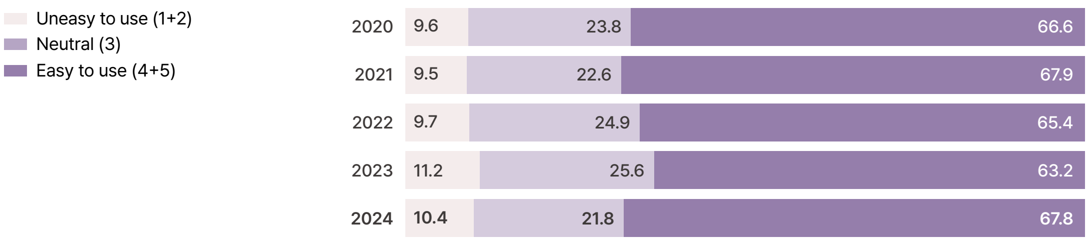
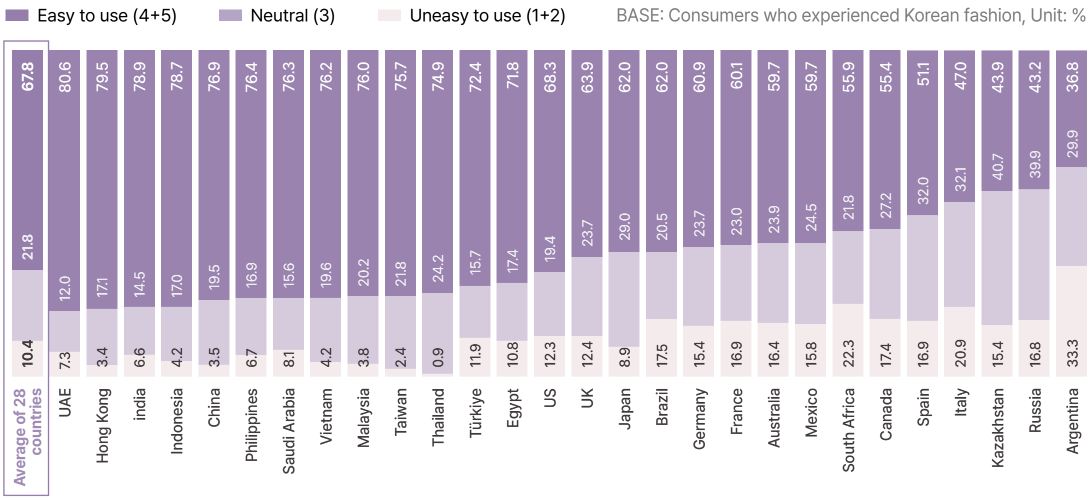


Figure 2-251 Comparison of the Ease of Consuming Korean Fashion by Country

BASE: Consumers who experienced Korean fashion, Unit: %



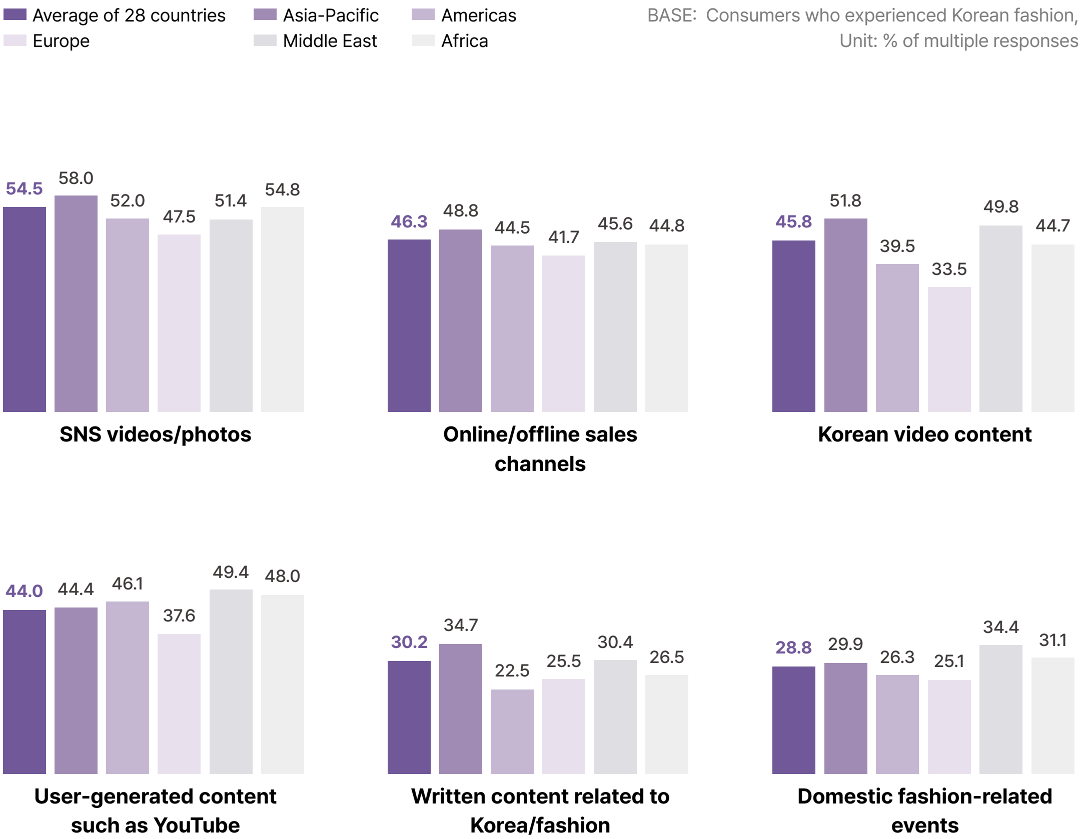
Channels of Exposure

High exposure to Korean fashion through “SNS videos/photos.” Active access through all channels in Asia-Pacific, but limited access in Europe.

The major channels of exposure to Korean fashion were “SNS videos/photos” (54.5%), “online/offline sales channels” (46.3%), “Korean video content” (45.8%), and “user-generated content such as YouTube” (44.0%).
Brands such as Matin Kim, Gentle Monster, Mardi Mercredi, and Marithé + François Girbaud appear to have had a strong impact, gaining popularity through social media and internet branding. By continent, exposure rates in the Asia-Pacific region were higher than the average of the 28 countries across all channels, whereas rates in Europe were below the overall average across all channels. In the Middle East and Africa, exposure to Korean fashion via “user-generated content such as YouTube” and “domestic fashion-related events” was high. Additionally, in the Middle East, exposure via “Korean video content” was above the overall average.

Figure 2-252 Comparison of Korean Fashion Access Channels by Continent

Q. Please select all of the channels through which you usually access Korean fashion products/styles or related videos/images.



11 Purchase Methods and Channels

Most respondents purchased Korean fashion online. Asia-Pacific reported high usage rates for "local offline stores."

The main purchase channels for Korean fashion products were "local websites/apps" (52.6%) and "global websites/apps" (50.5%), followed by "local offline stores" (41.0%), "Korean websites/apps" (29.7%), and "Korean offline stores" (18.0%). By continent, in the Asia-Pacific region, the use of "local websites/apps" (59.9%) and "local offline stores" (48.3%) exceeded the average of the 28 countries may reflect a strong preference for domestic platforms in the region or the seamless integration of Korean fashion into local platforms.
Conversely, "global websites/apps" were more widely used in the Americas (55.8%), the Middle East (64.2%), and Africa (59.6%).

The main purchase channels for Korean fashion products were "local websites/apps" (52.6%) and "global websites/apps" (50.5%), followed by "local offline stores" (41.0%), "Korean websites/apps" (29.7%), and "Korean offline stores" (18.0%). By continent, in the Asia-Pacific region the use of "local websites/apps" (59.9%) and "local offline stores" (48.3%) exceeded the average of the 28 countries. This may reflect a strong preference for domestic platforms in the region or the seamless integration of Korean fashion into local platforms.
Conversely, "global websites/apps" were more widely used in the Americas (55.8%), the Middle East (64.2%), and Africa (59.6%).

Figure 2-253 Comparison of Korean Fashion Purchase Channels by Continent

Q. Please select all of the channels through which you usually purchase Korean fashion products.

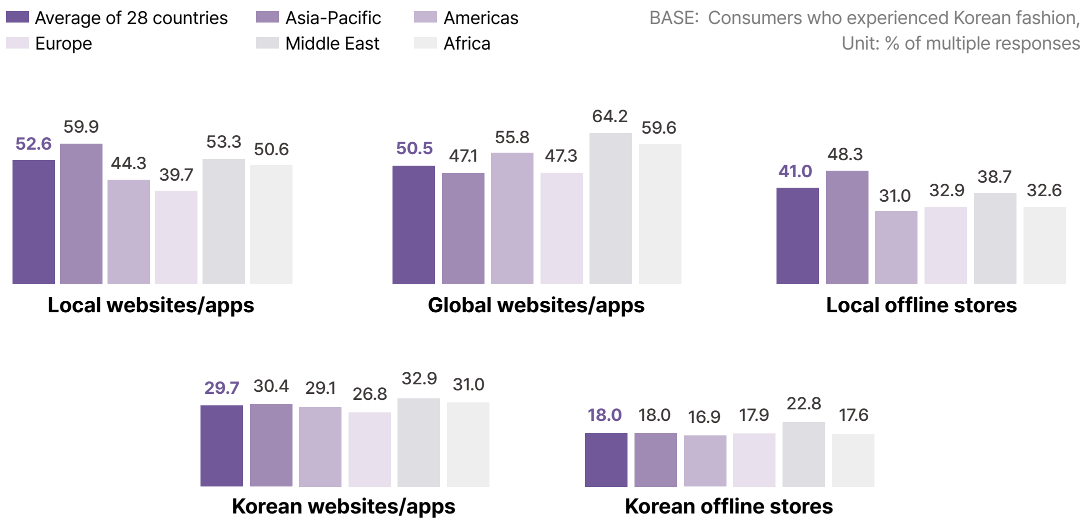
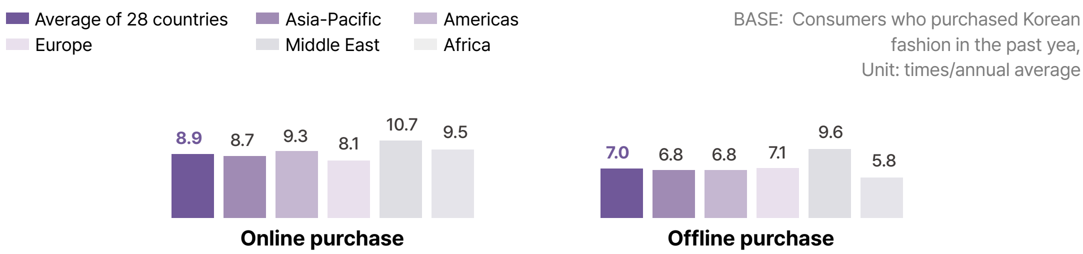


Figure 2-254 Comparison of Korean Fashion Purchase Frequency by Continent



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10

Beauty

BEAUTY

SUMMARY

The Korean beauty industry is expanding its presence in the global market, showing particularly strong growth in Southeast Asia and the Middle East. Korean beauty products enjoy high popularity and favorability in both of these regions, with consumers identifying effectiveness and quality as its greatest strengths. According to local news, trends emphasizing dewy and radiant skin are driving this popularity.

Among consumers with Hallyu experience, 58.6% reported having used Korean beauty products, with particularly high usage rates observed in Southeast Asia (Thailand, Indonesia, Malaysia, etc.). While women remain the primary user group, the growing male beauty market has led to an increase in male usage as well.

Approximately 50.8% of respondents perceived Korean beauty as “widely popular,” with Korean beauty ranking third among the surveyed Korean cultural content categories. “Korea” (31.0%) was chosen as the most popular country for foreign beauty products. In Asia-Pacific and the Middle East, respondent proportions for Korean beauty exceeded those of the second-ranked country in each continent by more than 10%, confirming its strong popularity. Overall, popularity and favorability were high in Asia (Thailand, Vietnam, and the Philippines) and the Middle East (UAE and Saudi Arabia), with a higher proportion of respondents willing to recommend Korean beauty to others compared to other countries.

Regarding factors promoting favorability toward Korean beauty products, the proportion of respondents selecting “effective and excellent quality” was by far the highest. The main factors inhibiting favorability included “expensive for the quality offered,” “product information labels are not detailed enough,” and “overly exaggerated promotion of the product.” While there are many positive perceptions toward the effectiveness and quality of Korean beauty products, there are also clear demands for improvements in pricing, product information, and promotional methods.

01 Experience Rate

Approximately 58.6% of respondents had experienced Korean beauty products. High experience rates were reported in Southeast Asia.

Among those who experienced Hallyu 58.6% reported having used Korean beauty products, with this category ranking fifth among Korean cultural content types. Particularly high experience rates were observed in Southeast Asian countries such as Thailand (83.6%), Indonesia (78.3%), and Malaysia (77.6%). Kazakhstan and Russia, where usage of Korean cultural content was relatively low, also ranked in the top 10 countries. Conversely, usage rates were relatively low in Japan (36.8%) and China (37.4%).

By gender, the usage rate of Korean beauty products was 69.9% among women, exceeding that among men (47.3%). Male usage has increased significantly since 2023, reflecting the recent growth trend[1] in the male beauty market. By age group, those in their 20s (61.5%) and 30s (62.0%) showed high usage rates above 60%, with increases also observed among those in their teens, 40s, and 50s. These results indicate that the user base of Korean beauty products is expanding beyond specific age groups to include a broader range of ages.

Figure 2-255 Comparison of Korean Beauty Experience Rates by Country

BASE: Total, Unit: %

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

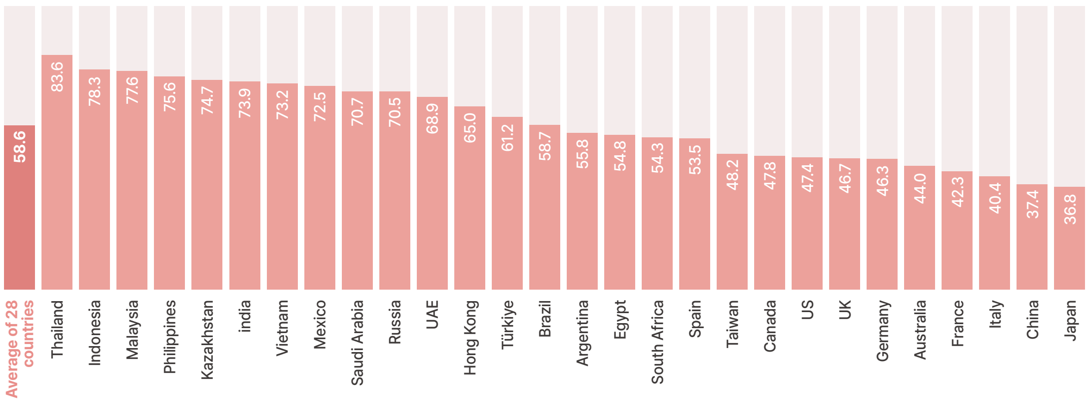
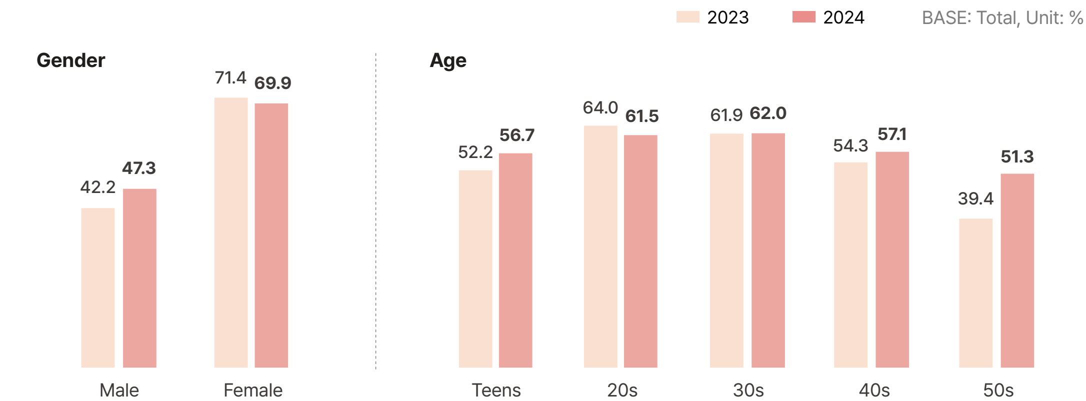


Figure 2-256 Comparison of Korean Beauty Experience Rates Over the Last 2 Years by Gender and age

BASE: Total, Unit: %



1 "The US Male Grooming Market to Watch," KOTRA Detroit Trade Officer, 2024.

02 Popularity

Of all, respondents, 50.8% perceived Korean beauty products as "widely popular."

For consumers with Hallyu experience 50.8% perceived Korean beauty products as "widely popular" in their country-ranking third after Korean food and Korean music. Meanwhile, 26.1% of respondents perceived Korean beauty products as "moderately popular," 16.9% saw them as "popular among a niche audience," and 6.1% said that they were "hardly used."
Over the past five years, the perception of Korean beauty as "widely popular" has consistently remained around 50% with 2024 recording the same rate of 50.8% as in 2023.

The perception of Korean beauty products as "widely popular" was high in Southeast Asia. Perceived popularity was lower in Europe and the Anglosphere.

The perception of Korean beauty products as "widely popular" was particularly high in Southeast Asian countries. The Philippines (72.4%) and Vietnam (70.3%) had "widely popular" rates exceeding 70%, while Malaysia (66.5%), Thailand (65.7%), and Indonesia (61.8%) also showed high proportions for "widely popular."
According to local news, the trend of dewy and radiant skin has taken hold in Southeast Asia, driving the popularity of Korean beauty products. It was also confirmed that various Korean beauty brands are easily accessible through offline stores such as Hasaki and Beauty Box in Vietnam, as well as online platforms such as Shopee.
Conversely, the proportion of respondents who perceived Korean beauty as "widely popular" was relatively low in Europe and the Anglosphere (Australia, the UK, Canada, etc.). Notably, countries such as Italy (15.7%), Germany (15.4%), and Argentina (10.9%) showed higher proportions of respondents choosing "hardly used" compared to other countries.

Figure 2-257 Comparison of the Popularity of Korean Beauty Products Over the Last 5 Years by Year

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

BASE: Total, Unit: %

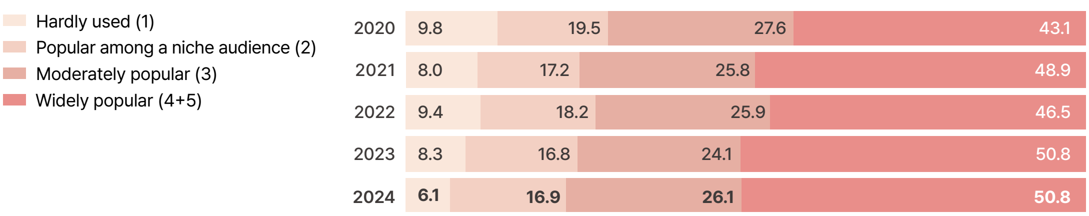
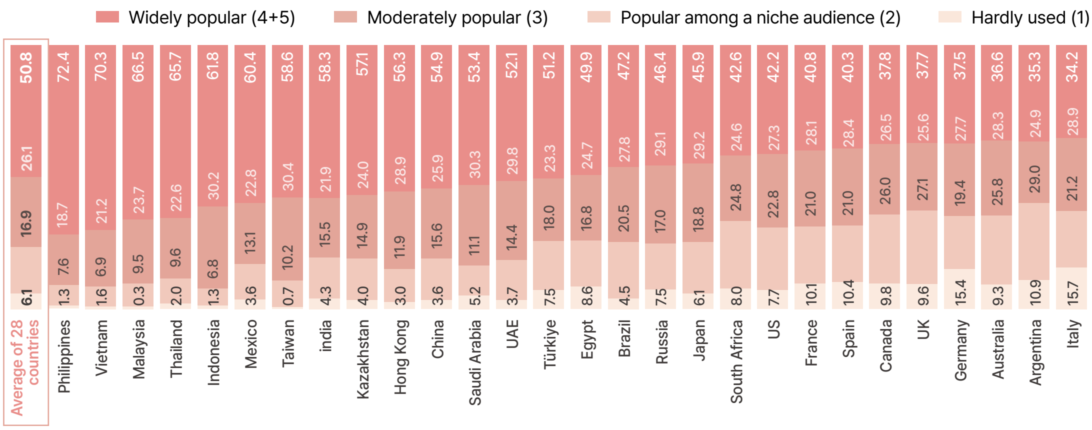


Figure 2-258 Comparison of the Popularity of Korean Beauty Products by Country BASE: Total, Unit: %



Local News

"K-beauty enjoys a positive reputation in Germany due to the influence of Hallyu and the emphasis on clean, high-quality ingredients unique to Korean beauty products. Many K-beauty products are promoted through social media."

Germany KOTRA Frankfurt Trade Officer

"Interest in Korean cosmetics is extremely high, especially among those in their 20s and 30s. Whenever I visit major cosmetics retail stores, I always see Korean cosmetics being sold."

Russia KOTRA St. Petersburg Trade Officer

"The Korean beauty craze continues unabated. While famous Korean beauty brands were popular abroad in the past, this year, various beauty brands have become available on e-commerce platforms such as Shopee or Lazada. Additionally, local drugstores now carry these brands for offline purchases, and promotions are actively held on-site with Malaysian influencers invited to participate."

Malaysia KOTRA Kuala Lumpur Trade Officer

"Many Korean beauty brands are increasingly establishing their presence and ranking highly on Amazon stores. Until now, Korean beauty brands have actively operated their own online shops, but their presence on major online platforms such as Amazon is gradually growing."

U.S. KOFICE New York Overseas Correspondent

"K-beauty and cosmetics are priced relatively high locally. Nevertheless, as the peso's value has increased, purchasing power for Korean cosmetics seems to have improved. However, with the rise of local cosmetics manufacturing in Argentina, future market strategies will be important."

Argentina KOFICE Buenos Aires Overseas Correspondent

"K-beauty is well known for natural makeup and skincare routines. Along with the 'glow skin' cosmetics trend, Korean skincare products—especially vegan and clean beauty products—are gaining more attention."

KOCCA Indonesia Business Center Assistant Manager

"Korean cosmetics are widely popular, especially in the skincare sector. Beauty brands featuring drama heroines and girl group members as models enjoyed even greater popularity. In particular, it seems there have been many purchases made for Amorepacific brands."

Japan KOFICE Tokyo Overseas Correspondent

"Mediheal's toner pads and Banobagi's sleeping masks won first place in their categories at the KONVY Best of Beauty Awards 2024, a drugstore chain in Thailand. Additionally, COSRX took first place in the best essence category, and Dr.G's Red Blemish Cream ranked first in the K-beauty category. K-beauty products are considered premium cosmetics, with skincare products showing particularly strong performance. Although prices are set higher than Thai brands, the quality is perceived as guaranteed."

Thailand KOFICE Bangkok Overseas Correspondent

"Hong Kong ranks among the top four countries by export volume of Korean cosmetics. Recently, Korean skincare products and cushion compacts have been gaining popularity."

Hong Kong KOFICE Overseas Correspondent

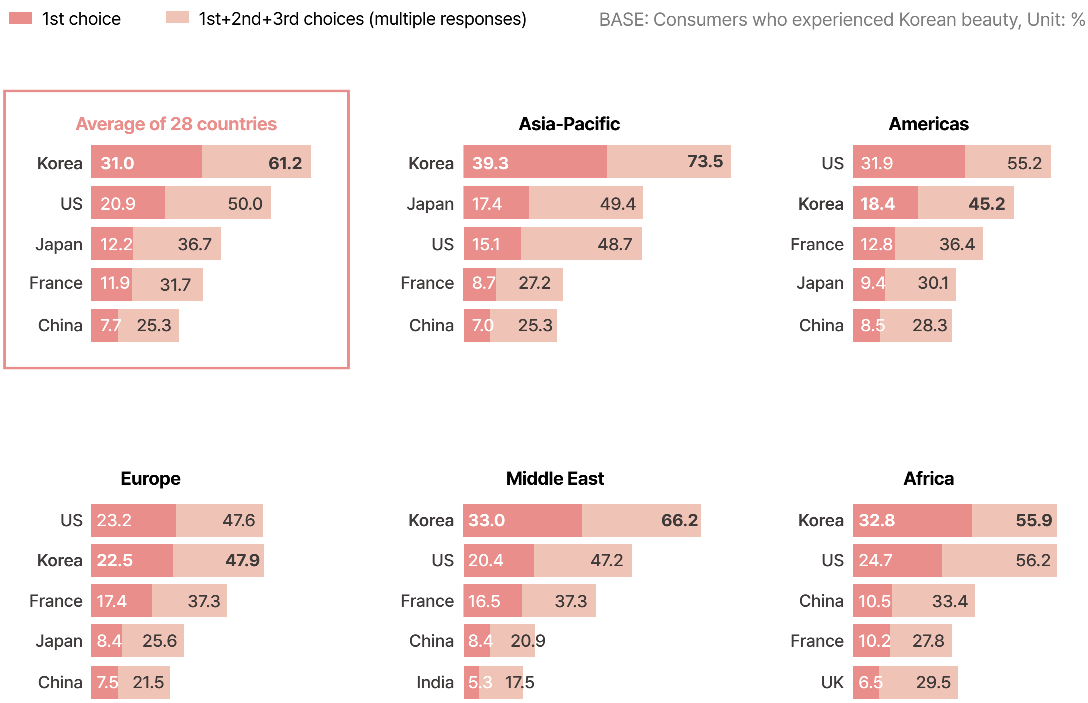
03 Popular Foreign Beauty

"Korea" ranked first as a source of popular foreign beauty products. The popularity of "Korea" as a source of beauty products was particularly strong in Asia-Pacific and the Middle East.

Among consumers who experienced Korean beauty "Korea" (31.0%) was chosen as the country for the most popular foreign beauty products, followed by the US (20.9%), Japan (12.2%), and France (11.9%). By continent, the proportion of respondents choosing "Korea" in Asia-Pacific and the Middle East exceeded that of the second-ranked country in each continent by more than 10%. In Africa, "Korea" (32.8%) and "the US" (24.7%) ranked in first and second, respectively, while in the Americas, "the US" (31.9%) ranked first. In Europe, "the US" (23.2%) took the lead over "Korea" (22.5%) by a narrow margin of 0.7 percentage points.

Figure 2-259 **Comparison of Popular Foreign Beauty by Continent**

BASE: Consumers who experienced Korean beauty, Unit: %



04 Consumption Volume

Approximately 68.0% of respondents purchased Korean beauty products after watching Korean beauty videos.

Consumption was high in Asia and the Middle East but low in Europe and the Americas.

Approximately 68.0% of respondents purchased Korean beauty products after watching Korean beauty videos in the past year. Purchase rates were particularly high in the Middle East and Asia, including Saudi Arabia (84.3%), Thailand (82.6%), Vietnam (82.0%), and the UAE (80.7%).
Per capita monthly beauty product consumption averaged at 28.0% across the 28 countries, with higher proportions in Vietnam (39.0%), Saudi Arabia (37.5%), the Philippines (34.9%), and Indonesia (34.6%). Countries in Europe and the Americas, such as Kazakhstan (18.2%), Argentina (18.2%), and Russia (18.4%), showed relatively lower proportions. In terms of per capita average monthly expenditure, China ranked highest at 60.9 USD, followed by the UAE (55.2 USD), Saudi Arabia (51.9 USD), and Hong Kong (51.5 USD), all of which spent over 50 USD on average. Argentina (9.6 USD), Indonesia (15.0 USD), and Japan (15.6 USD) recorded relatively low expenditures.

Figure 2-260 Comparison of Korean Beauty Consumption Experience Rate by Country

Q. After watching any Korean beauty videos, have you ever purchased Korean beauty products online or at a physical store in the past year?

BASE: Consumers who experienced Korean beauty, Unit: %

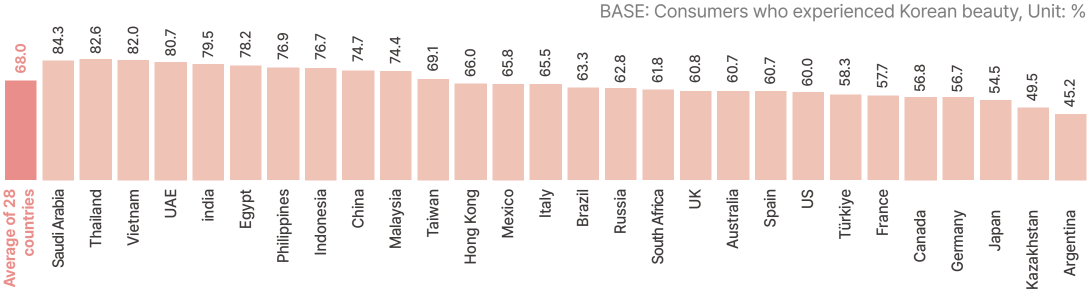


Figure 2-261 Comparison of the Proportion of Korean Beauty Consumption by Country

Q. What is your usual consumption volume (expenditure) and proportion of consumption of Korean beauty products?

BASE: Consumers who experienced Korean beauty, Unit: %

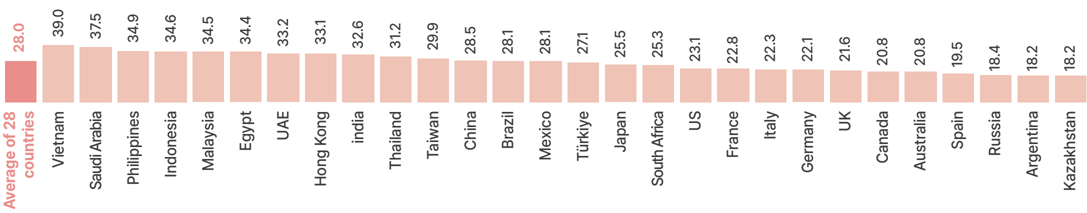
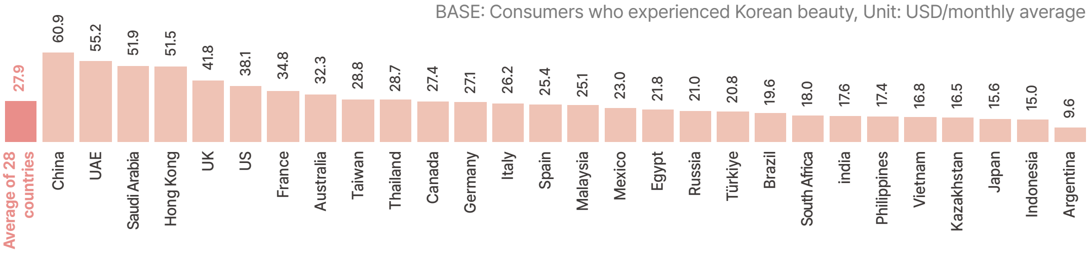


Figure 2-262 Comparison of Expenditure on Korean Beauty Products by Country

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



05 Favorability

8 out of 10 respondents like Korean beauty.
Second-highest favorability among content categories.

Among consumers who had experienced Korean beauty 77.2% responded that they "like" Korean beauty products. Since 2022, the proportion of "neutral" responses has decreased by approximately 2 percentage points annually, while the percentage for "like" has increased. In terms of favorability among Korean cultural content categories, beauty ranked second after Korean variety shows.

Countries with high proportions of respondents selecting "like" included Vietnam (87.4%), the Philippines (87.3%), Saudi Arabia (86.7%), China (86.2%), and India (86.1%), while Kazakhstan (59.9%), Russia (64.6%), and Japan (65.5%) showed relatively lower rates. Notably, the favorability rate in Saudi Arabia rose by 7.2 percentage points from the previous year, likely due to a growing local interest in skincare[2] and the positive reception of the ingredients and characteristics of Korean beauty.

Figure 2-263 Comparison of Favorability Toward Korean Beauty Products 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 it at all / 2. Don't like it / 3. Neutral / 4. Like it / 5. Like it very much

BASE: Consumers who experienced Korean beauty, Unit: %

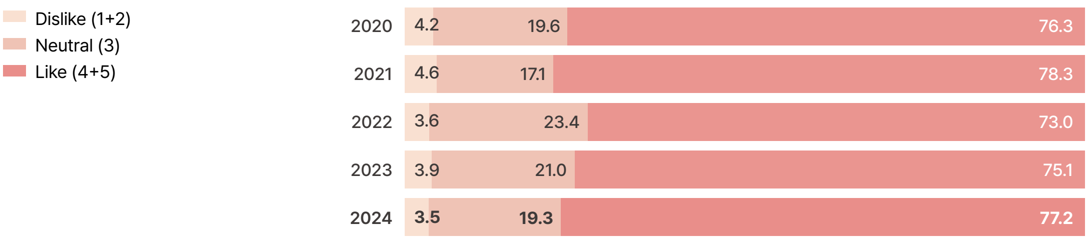
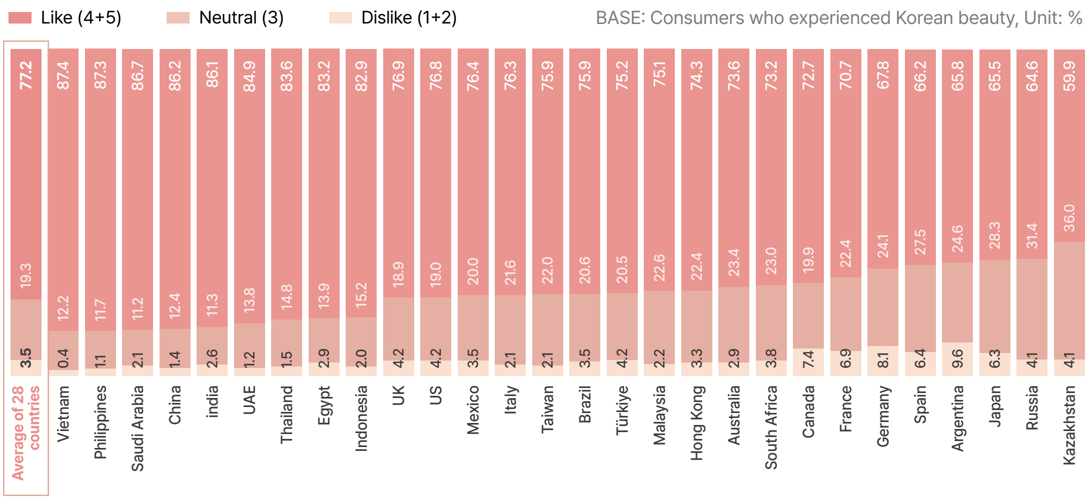


Figure 2-264 Comparison of Favorability Toward Korean Beauty Products by Country

BASE: Consumers who experienced Korean beauty, Unit: %



2 Euromonitor, Statista, Global Trade Atlas, ZATCA, individual company websites, KOTRA Riyadh Trade Officer data compilations. "Trends in the Skincare Market in Saudi Arabia."

06 Factors Promoting and Inhibiting Favorability

The key factor promoting favorability was “excellent effect and quality.” The second most cited factor was “reputation” in Asia-Pacific, Europe, and the Middle East, “various product types” in the Americas, and “eco-friendly ingredients” in Africa.

The most frequently cited reason for liking Korean beauty products (1st + 2nd choices) was “effective and excellent quality” (41.5%), followed by “variety in product types” (23.5%) and “good reputation among people around me” (22.7%).
By continent, “effective and excellent quality” was also the most frequently selected reason for liking Korean beauty products. In Asia-Pacific, Europe, and the Middle East, the second most cited reason was “good reputation among people around me.” In the Americas the second most popular answer was “variety in product types.” In Africa, “use of eco-friendly ingredients and materials” was cited more than it was in other continents, while “used/promoted by my favorite Hallyu stars” recorded a high proportion of respondents in the Middle East.

Expensive for the quality offered” was the primary factor inhibiting favorability. Inadequate information labels and exaggerated promotion were also cited as inhibiting favorability.

The key factors inhibiting favorability toward Korean beauty were “expensive for the quality offered” (19.1%), “product information labels are not detailed enough” (16.7%), and “overly exaggerated promotion of the product” (15.8%). By continent, “expensive for the quality offered” was identified as a major factor inhibiting favorability in Asia-Pacific (21.1%) and the Middle East (19.6%) “product information labels are not detailed enough” ranked high in Europe (17.7%) and Africa (17.9%). In the Americas, both of these factors recorded respondent proportions of 17.5%.
Overall, while satisfaction with the effectiveness and quality of Korean beauty products is high concerns remain regarding pricing, insufficient product information, and exaggerated promotion. Therefore, consumers appear to need thorough explanations of product prices and trustworthy promotional methods.

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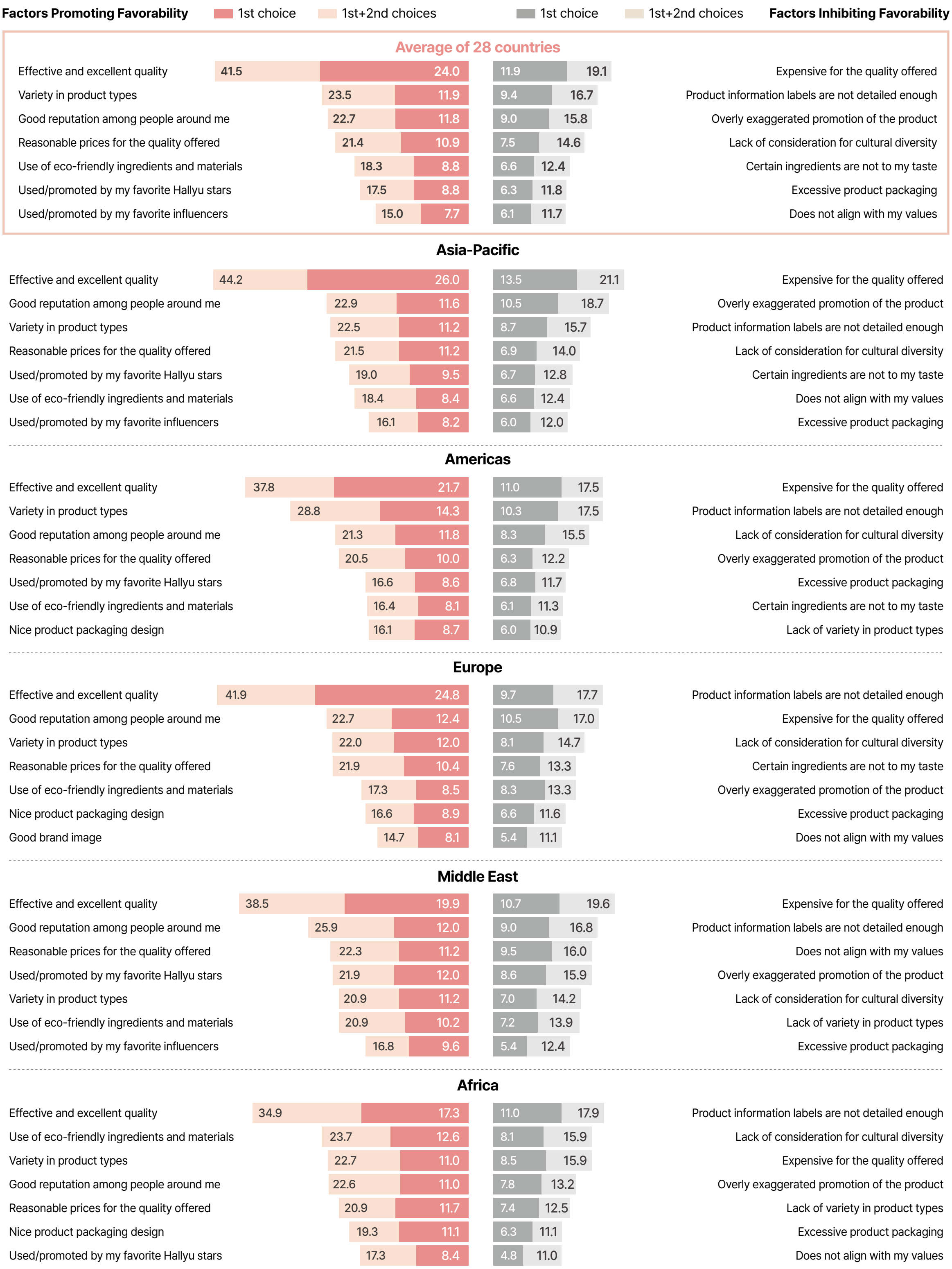
Figure 2-265 **Comparison of Factors Promoting and Inhibiting Favorability Toward Korean Beauty Products by Continent**

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.

Note. Presented are the top 7 choices (options) ranked by the combined proportion of first- and second-choice responses.

BASE: Consumers who experienced Korean beauty, Unit: %



07 Willingness to Pay

Approximately 56.2% of respondents were willing to pay for Korean beauty products. Willingness to pay was particularly high in Thailand.

Among consumers with Hallyu experience, 56.2% said they were "willing to pay" for Korean beauty products. Approximately 23.7% responded that they were "neutral," while 20.1% said that they were "not willing to pay." This year saw the highest proportion for "willing to pay" in the past five years. Countries with high "willing to pay" responses included Thailand, where 75.3% of respondents reported that they were willing to pay, followed by Indonesia (72.3%), India (72.2%), and Vietnam (71.6%). Conversely, Japan (willing: 29.6%, not willing: 44.2%) and Italy (willing: 34.4%, not willing: 35.0%) had higher proportions of respondents indicating "not willing to pay" than "willing to pay."

Figure 2-266 Comparison of the Willingness to pay for Korean Beauty Products Over the Last 5 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).

BASE: Total, Unit: %

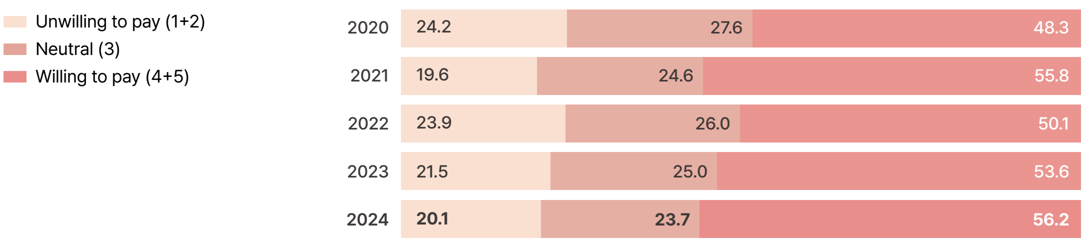
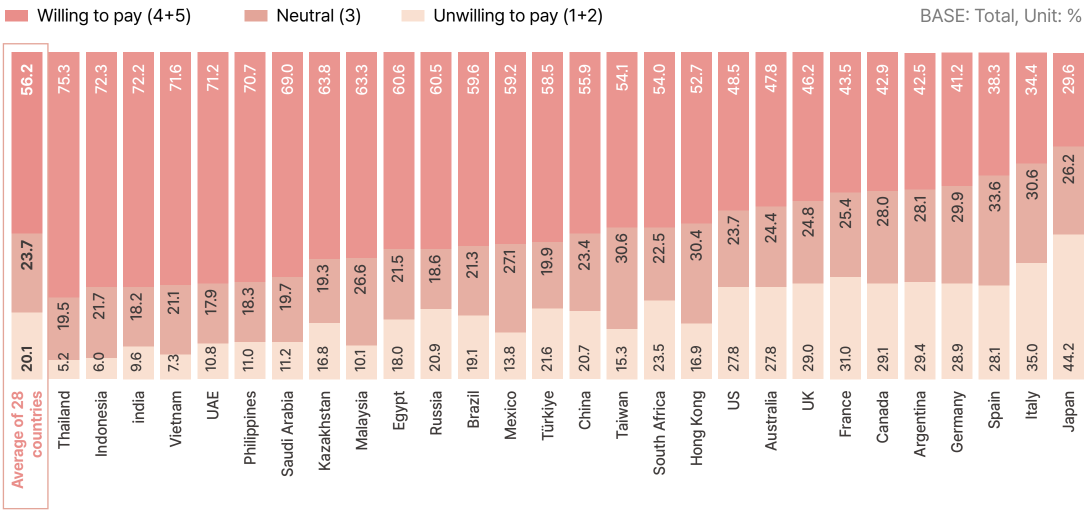


Figure 2-267 Comparison of the Willingness to pay for Korean Beauty Products by Country

BASE: Total, Unit: %



08 Willingness to Recommend

Of respondents, 75.4% were willing to recommend Korean beauty products.

Vietnam, Saudi Arabia, and the Philippines reported a high willingness to recommend.

Among consumers who experienced Korean beauty products 75.4% said they were "willing to recommend" the products to others, 20.5% answered "neutral," and just 4.1% said that they were "not willing to recommend." The proportion of respondents showing willingness to recommend was 3.2 percentage points higher than that in the 2023 survey (72.2%). By country, willingness to recommend was high in Vietnam (88.0%), Saudi Arabia (87.8%), and the Philippines (84.9%), while Japan (51.2%), Germany (61.4%), and Kazakhstan (61.8%) showed relatively lower rates. However, in all countries, the percentages for "willing to recommend" exceeded 50%, demonstrating competitiveness. The high willingness to recommend in Asia and the Middle East-where "good reputation among people around me" ranked second as a factor promoting favorability-can be interpreted as a positive sign.

Figure 2-268 Comparison of the Willingness to Recommend Korean Beauty Products Over the Last 2 Years by Year

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

BASE: Total, Unit: %

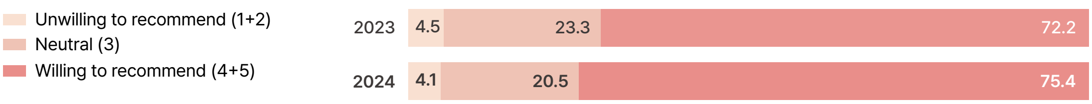
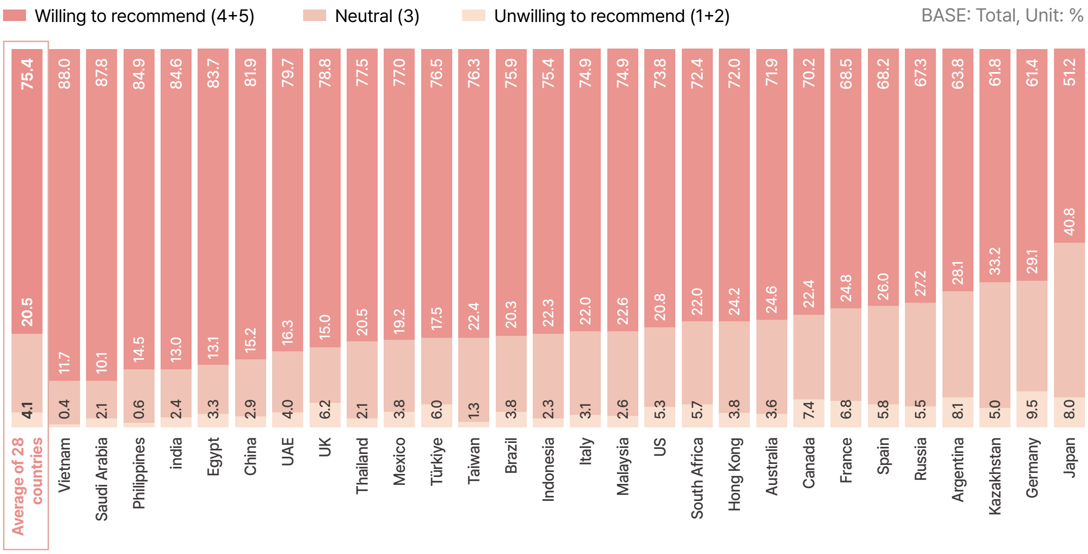


Figure 2-269 Comparison of the Willingness to Recommend Korean Beauty Products by Country

BASE: Total, Unit: %



09 Ease of Use

Approximately 70.3% of respondents found Korean beauty easy products to consume.
Respondents in Argentina found Korean beauty products difficult to consume.

For consumers who tried Korean beauty products, 70.3% answered that they were "easy to consume." Approximately 21.0% of respondents were "neutral," while 8.7% said Korean beauty products were "not easy to consume." While the proportion of respondents selecting "easy to consume" has fluctuated over the past five years (2020–2024), it has remained around 70%.
The country with the highest percentage of respondents choosing "easy to consume" was Hong Kong (84.6%), followed by China (83.4%) and Vietnam (82.2%), each recording a rate above 80%. Conversely, Argentina (38.0%), Russia (56.9%), South Africa (56.9%), and Kazakhstan (58.9%) showed relatively low rates. Argentina reported particular difficulty, with a "not easy to consume" rate (34.8%) approximately four times the average of the 28 countries (8.7%).

Figure 2-270 Comparison of the Ease of Consuming Korean Beauty Products Over the Last 5 Years by Year

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

BASE: Consumers who experienced Korean beauty, Unit: %

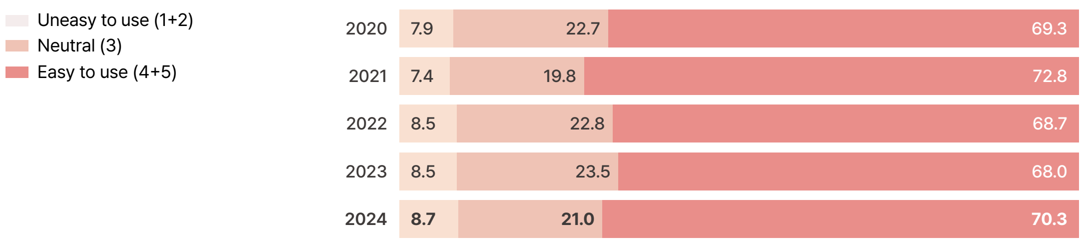
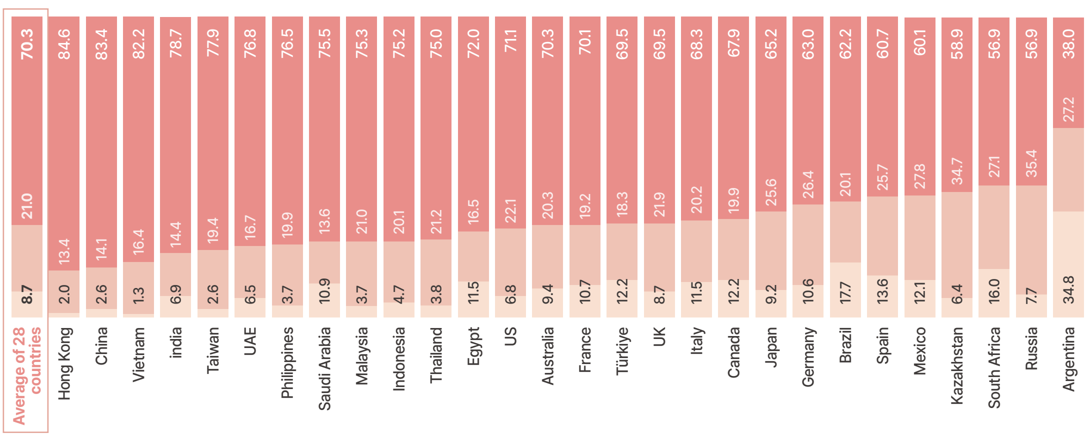


Figure 2-271 Comparison of the Ease of Consuming Korean Beauty Products by Country

BASE: Consumers who experienced Korean beauty, Unit: %



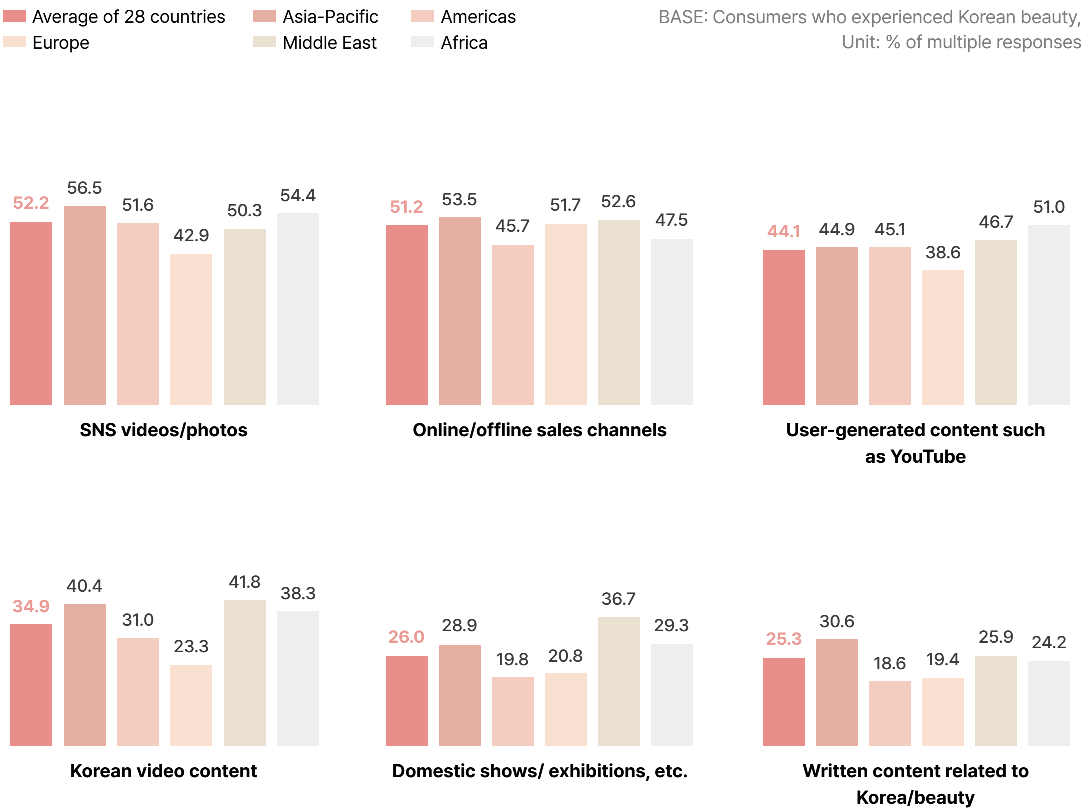
10 Channels of Exposure

The main access channels for Korean beauty were "SNS" (52.2%) and "online/offline sales channels" (51.2%).

When asked about channels of exposure for Korean beauty products and videos (multiple responses), “SNS videos/photos” (52.2%) and “online/offline sales channels” (51.2%) recorded the highest proportions, followed by “user-generated content such as YouTube” (44.1%) and “Korean video content” (34.9%).
In the Asia-Pacific region proportions of respondents were higher than the 28-country average across all channels-exposure to Korean beauty products typically occurs through various channels. In Europe exposure through “online/offline sales channels” (51.7%) stood out, while in the Americas access primarily occurred in online personal spaces, such as “SNS videos/photos” (51.6%) and “user-generated content such as YouTube” (45.1%). Meanwhile, compared to other regions the Middle East and Africa reported relatively high proportions for “Korean video content” and “domestic beauty-related events.”

Figure 2-272 Comparison of Korean Beauty Product Channels of Exposure by Continent

Q. Please select all of the channels through which you usually access Korean beauty products or videos.



11 Purchase Methods and Channels

Korean beauty products are typically purchased "online." Asia-Pacific and Middle East reported relatively high offline purchase rates.

Korean beauty products were predominantly purchased through online channels, such as "local websites/apps" (52.0%) and "global websites/apps" (47.4%). By continent, purchase channels with a higher proportion than the average of the 28 countries were as follows. Asia-Pacific reported high purchase rates via local infrastructure, such as "local websites/apps" (59.1%) and "local offline stores" (51.4%). In the Americas use of "global websites/apps" (52.6%) was relatively high. In the Middle East and Africa the proportion of purchases made via "global websites/apps," "Korean websites/apps," and "Korean offline stores" was relatively high.

Across the 28 countries respondents who had purchased Korean beauty products online or offline over the past year made 17 purchases on average. On average, respondents made an average of 9.4 "online purchases" and 7.6 "offline purchases"- online purchases were more frequent. By region, the Middle East (25.4 times) and the Americas (18.9 times) showed higher purchase frequency, and online purchases were more common across all continents.

Figure 2-273 Comparison of Korean Beauty Purchase Channels by Continent

Q. Please select all of the channels through which you usually purchase Korean beauty products.

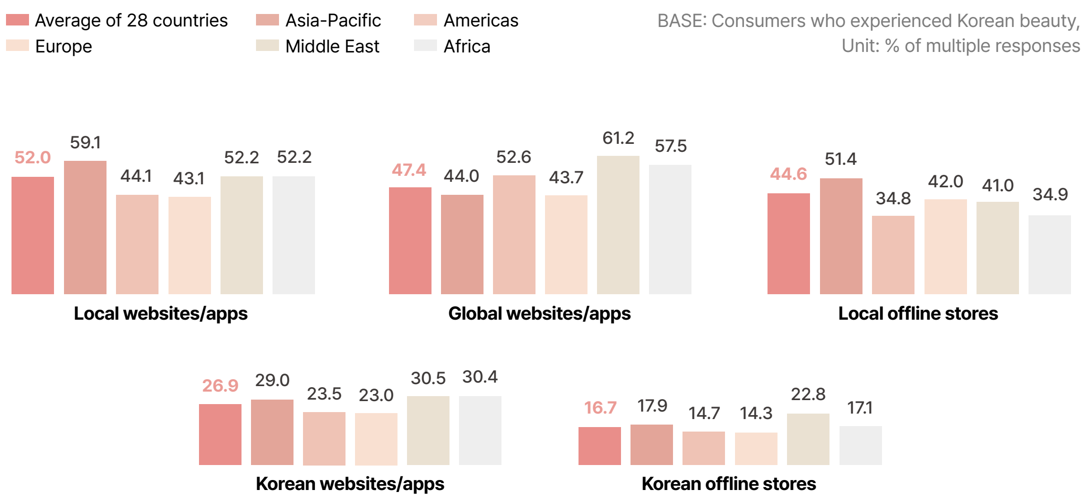
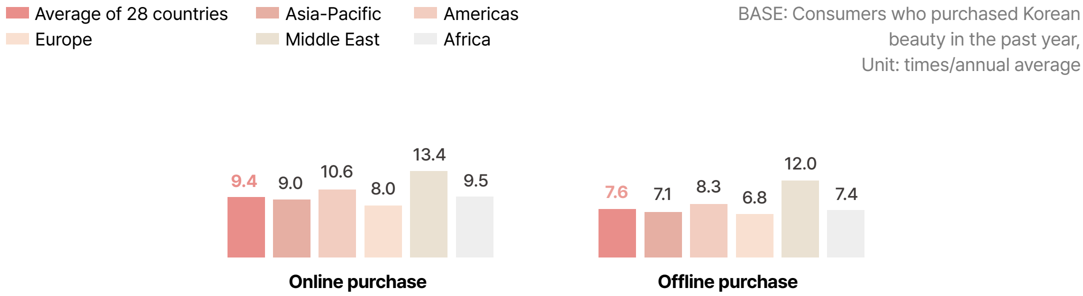


Figure 2-274 Comparison of Korean Beauty Purchase Frequency by Continent



11

Food

FOOD

SUMMARY

Korean food is the most widely disseminated type of Korean cultural content globally, transcending a passing trend to become a natural part of daily life. In Asia, Korean food has taken root as a popular cuisine, and the Korean food trend is also expanding in the US and Europe. Alongside the growing number of Korean restaurants, accessibility has improved to the point where Korean ingredients are readily available in local supermarkets. However, some people find Korean food somewhat challenging due to unfamiliar cooking methods, high prices, or difficulties using the eating utensils. Moreover, rather than being transmitted in its original form, Korean food is often consumed through collaborations with global brands or localized recipes. This suggests a need to closely observe how Korean food is spreading across the world in diverse forms.

The experience rate for Korean food was the highest among all Korean cultural content categories at 76.6%—it is the most popular type of Korean cultural content. The perception of it as "widely popular" was also the highest among all cultural content categories at 53.7%, with relatively high popularity and favorability in regions such as Asia (Philippines, Malaysia, and Vietnam). As for the most popular foreign food, "the US" (16.1%) and "Korea" (16.0%) competed for the top two spots.

Among the factors promoting favorability, "good taste" overwhelmingly accounted for the highest proportion, followed by "can experience the Korean food culture seen in video content" and "uses healthy ingredients or recipes." Nevertheless, "expensive prices," "do not know the ingredients/recipes," and "difficult to use the eating utensils" were pointed out as factors inhibiting favorability.

01 Experience Rate

Approximately 76.6% of respondents have experienced Korean food. Korean food showed the highest experience rate among all content categories.

The average experience rate for Korean food across all 28 countries was 76.6%-more than 7 out of 10 consumers with Hallyu experience have tried Korean food. This was the highest rate among all Korean cultural content categories surveyed-Korean food is the most widely disseminated category of Korean cultural content globally.

By country, Asian countries ranked highest, including Taiwan (92.5%), Malaysia (91.7%), the Philippines (91.3%), Thailand (90.5%), and Vietnam (90.2%). Even in countries where experience rates for other cultural content were relatively low-such as Kazakhstan (88.9%), Japan (88.8%), and Russia (88.3%)-8 to 9 out of 10 respondents reported having experienced Korean food. Conversely, some geographically distant countries in Latin America and Europe, such as Brazil (55.7%), Türkiye (58.3%), and Argentina (59.1%), showed relatively lower experience rates.

By gender and age, over 70% of respondents reported having tried Korean food, with relatively higher experience rates among women (78.2%) and those in their 30s (78.9%).

Figure 2-275 Comparison of Korean Food Experience Rates by Country BASE: Total, Unit: %

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

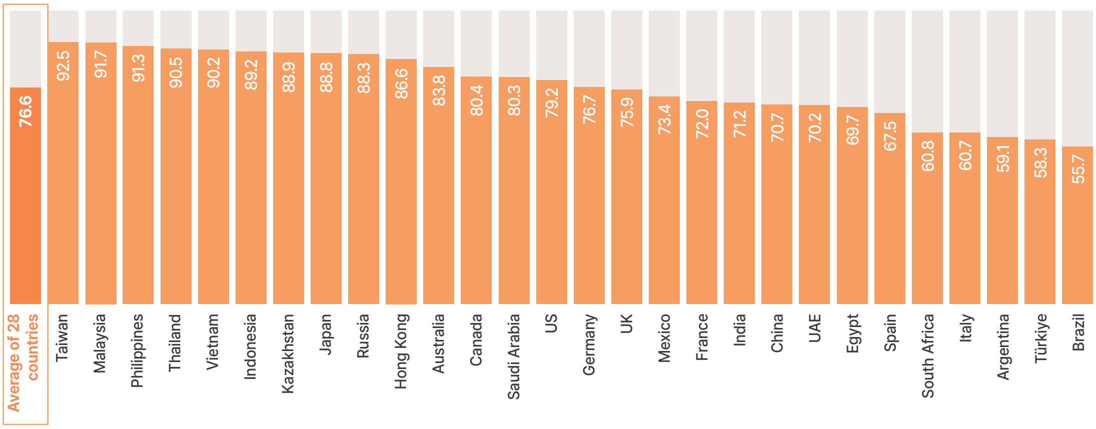
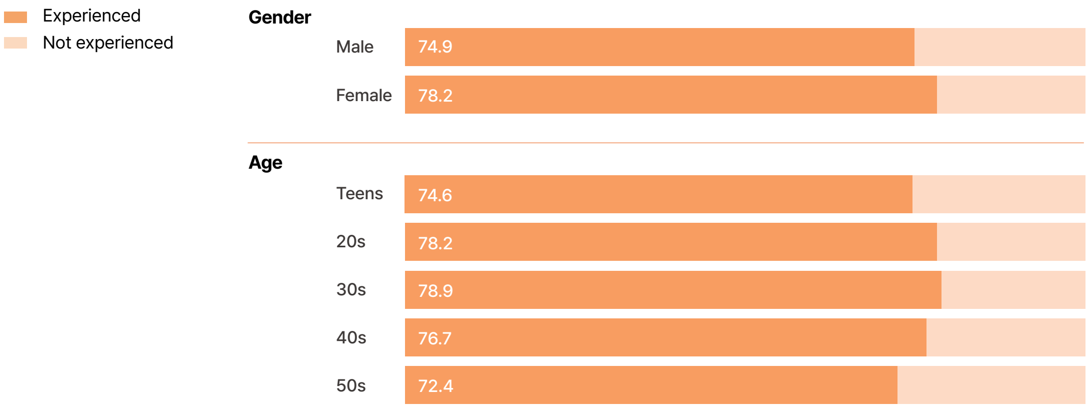


Figure 2-276 Comparison of Korean Food Experience Rates by Gender and age BASE: Total, Unit: %



02 Popularity

Approximately 53.7% of respondents perceived Korean food as "widely popular." Up 1.4 percentage points, Korean food maintains first place in popularity.

Among consumers with Hallyu experience, 53.7% rated Korean food as "widely popular," followed by 26.8% who saw it as "moderately popular" and 15.0% who deemed it "popular among a niche audience." Looking at the changes in respondent proportions over the past five years, the proportion of respondents choosing "hardly used" dropped to 4.4% this year, while that for "widely popular" has been steadily increasing. The "widely popular" proportion for Korean food has consistently been the highest among all Korean cultural content surveyed over the past 10 years. In this year's survey, it rose by another 1.4 percentage points compared to last year, once again securing the top position. Korean food has established itself as a widely embraced type of cultural content around the world, going beyond a passing trend to become naturally integrated into daily life even when compared to other Korean content, such as dramas, movies, music, and beauty.

Korean food was especially popular in the Philippines.

In the Philippines the proportion of respondents choosing "widely popular" was 80.1%, approximately 1.5 times higher than the average of the 28 countries (53.7%). High proportions were also observed in Malaysia (70.1%), Vietnam (68.8%), and Taiwan (68.2%), while lower rates were reported in Italy (36.2%), Argentina (36.3%), and South Africa (39.9%). In Japan, the "widely popular" percentage for Korean food was 65.3%, ranking high, unlike other Korean cultural content. According to local news, in many countries Korean ingredients and Korean food are now readily available in Korean marts and local supermarkets. While the preferred food varies by country, simple Korean dishes such as gimbap, bibimbap, chicken, ramen, and soju are gaining popularity.

Figure 2-277 Comparison of the Popularity of Korean Food 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

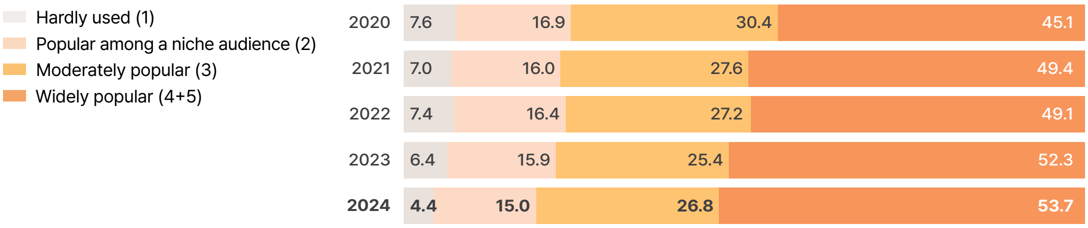
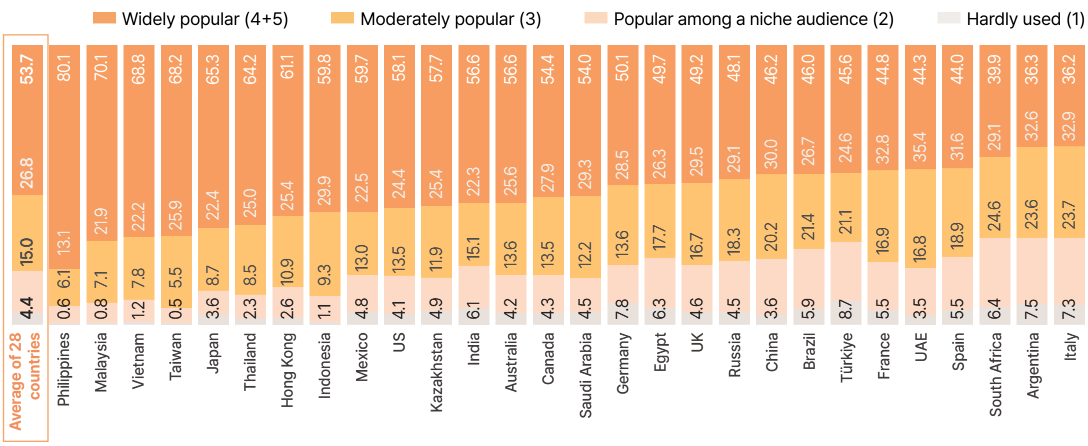


Figure 2-278 Comparison of the Popularity of Korean Food by Country BASE: Total, Unit: %



Local News

"In May 2024, the major Taiwanese supermarket Carrefour hosted the Korean Products Exhibition, which received extremely positive responses.

Taiwan KOTRA Taipei Trade Officer

"Korean cuisine is gaining attention in Germany, with new Korean restaurants opening across the country. There seems to be a particularly high interest in street food-style dishes such as tteok, gimbap, and fried chicken. Korean food programs, such as Netflix's *Culinary Class Wars*, as well as movies have helped boost the popularity of Korean cuisine among the younger generation, and Korean food is gradually becoming a trendy choice."

Germany KOTRA Frankfurt Trade Officer

"In Malaysia, where there are many spicy dishes, Korean food is one of the most popular menu types. As an Islamic country, chicken dishes are common, which is why Korean chicken is especially preferred. Korean-style franchises and Korean restaurants can also be found in local shopping malls."

Malaysia KOTRA Kuala Lumpur Trade Officer

"2024 saw a notable increase in Korean restaurants opening in New York that feature specific themes and a couple of limited menus, such as Okdongsik, which serves pork rice soup, Kisa Sikdang, a Korean-style drivers' restaurant, and the barbecue place Jeong Yuk Jeom. Simple Korean dishes such as gimbap, tteokbokki, and japchae also drew significant interest locally. Korean ingredients, including gochujang and bulgogi marinade, as well as Korean foods such as kimchi, became much more widely available at major local supermarkets like Trader Joe's and Whole Foods Market."

U.S. KOFICE New York Overseas Correspondent

"Among younger generations, consuming Korean food has become part of everyday culture, and since the establishment of the national Kimchi Day, there has been growing interest in Korean food, including kimchi, across all gender and age groups."

Argentina KOFICE Buenos Aires Overseas Correspondent

"Korean food has established itself as an everyday cuisine in Japan. Centered around Korean kimchi, ramen, soju, and makgeolli have recently been displayed in the most visible spots at convenience stores, including Seven Eleven. Especially CJ's 'Bibigo' frozen products are easy to find at almost any supermarket."

Japan KOFICE Tokyo Overseas Correspondent

"Korean restaurants and Korean food trucks are increasing in cities such as Toronto and Vancouver, and various Korean dishes like kimchi, bulgogi, and bibimbap are loved. Korean brands such as NeNe Chicken, Paris Baguette, and BHC Chicken are increasingly entering the Toronto market, attracting significant interest from Koreans and locals."

Canada KOTRA Toronto Trade Officer

Korean ramen is sold by the local supermarket Loblaws in Toronto, Canada.

Image source: Taiwan Carrefour

03 Popular Foreign Food

"The US" and "Korea" competed closely for first and second place with only a 0.1 percentage point difference.

Among consumers who have experienced Korean food, "the US" (16.1%) and "Korea" (16.0%) ranked first and second, respectively, as the most popular foreign foods, with only a slight difference between them. Across the 28 countries the gap between the first (16.1%) and fifth (13.8%) place averaged at 2.3 percentage points, which is not large.

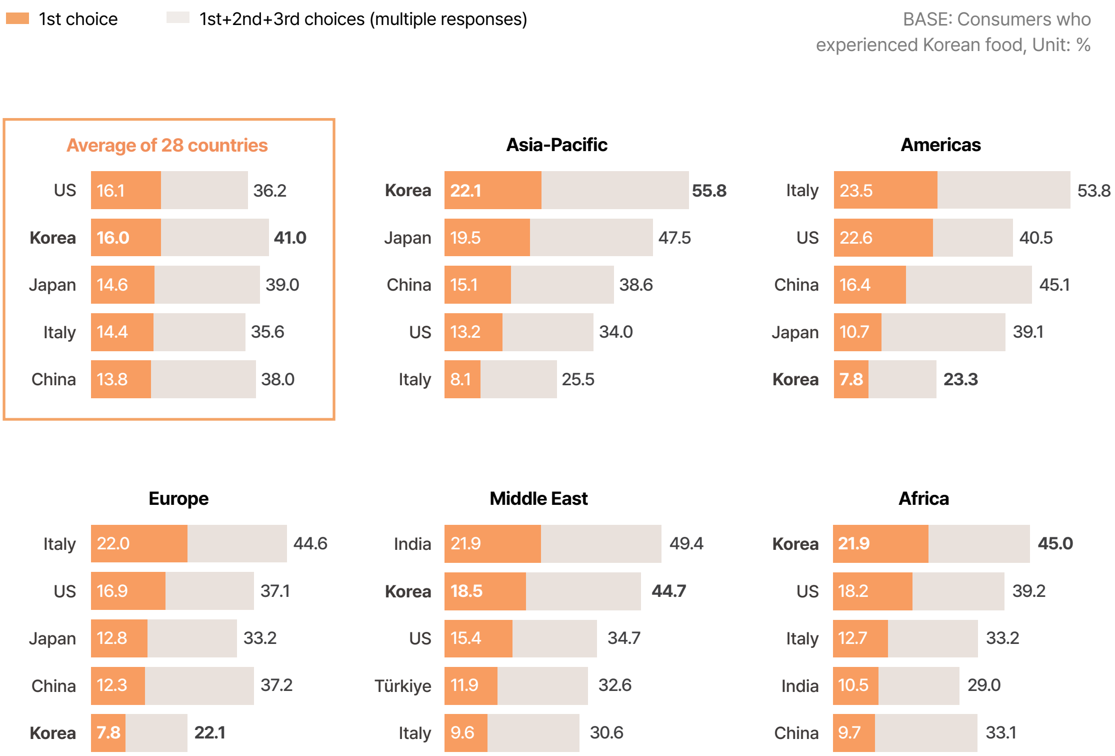
In the culturally close Asia-Pacific region "Korea" (22.1%) was the most preferred, followed by "Japan" (19.5%) and "China" (15.1%). In the Middle East "India" (21.9%) and "Korea" (18.5%) ranked first and second. In Africa "Korea" (21.9%) similarly received the highest preference rate, marking a notable result.

However, in the Americas and Europe "Italy" and "the US" ranked high, demonstrating the strength of Western foods that are geographically and culturally closer. Nevertheless, in view of the fact that the US food and beverage trend consulting firm Af&co and Dutch food industry consulting firm Food by Design selected Korean food as a noteworthy trend for 2024 Korean cuisine is expected to spread even further.

Figure 2-279 Comparison of Popular Foreign Food by Continent

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

Korean food accounted for approximately 19.0% of food consumption. Consumption was high in Southeast Asia and the Middle East but low in Europe.

Across the 28 surveyed countries an average of 65.4% of respondents reported having experienced Korean food within the past year after watching Korean food videos. Vietnam (84.3%), the UAE (80.8%), Indonesia (79.7%), and Thailand (79.6%) showed particularly high experience rates after watching Korean food videos, while Japan (45.1%), Australia (52.7%), and Russia (54.0%) recorded lower rates.
Korean food accounted for 19.0% of the average monthly per capita food consumption. Higher proportions were observed in the Philippines (28.4%), Saudi Arabia (28.3%), and Vietnam (28.2%), while lower rates were reported in Russia (9.2%) and Japan (10.4%). Across the 28 countries the average expenditure on Korean food was 23.2 USD, marking an increase compared to the rate in the previous year. The UAE (46.3 USD), Hong Kong (38.6 USD), and Saudi Arabia (37.9 USD) showed the highest expenditure.
Following last year's Gimbap craze, the rising popularity of "sweet and spicy (Swicy)" food has led to increased consumption of Tteokbokki, Gochujang, and Buldak sauce, among other related items. According to the market research firm Datassential, about 10% of US restaurant menus now feature "Swicy"-style food, marking a 1.8% increase over the past year. This figure is projected to grow by an additional 9.6% over the next four years.[2] Additionally, the trend of Korean food being consumed in a modified form-such as Shake Shack's "Korean Style Fried Chicken Sandwich"-highlights the way in which Korean cuisine is being reinterpreted through local cultural lenses, a notable phenomenon.

Figure 2-280 Comparison of Korean Food Consumption Experience Rate by Country

Q. After watching any Korean food videos, have you ever visited a Korean restaurant or personally cooked Korean food in the past year?

BASE: Consumers who experienced Korean food, Unit: %

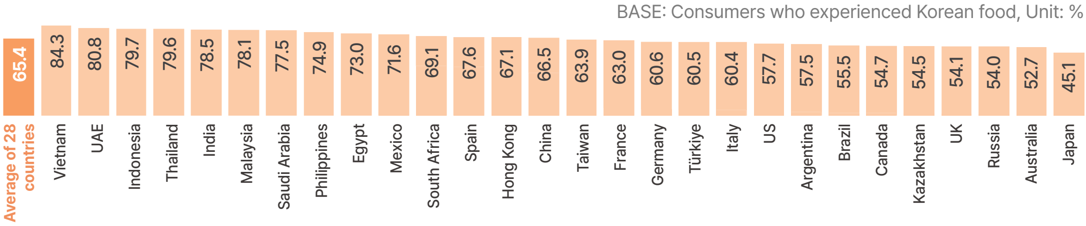


Figure 2-281 Comparison of the Proportion of Korean Food Consumption by Country

Q. What is your usual consumption volume (expenditure) and proportion of consumption for Korean food?

BASE: Consumers who experienced Korean food, Unit: %

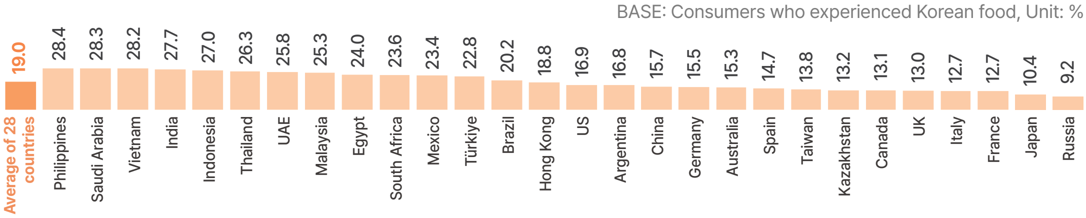
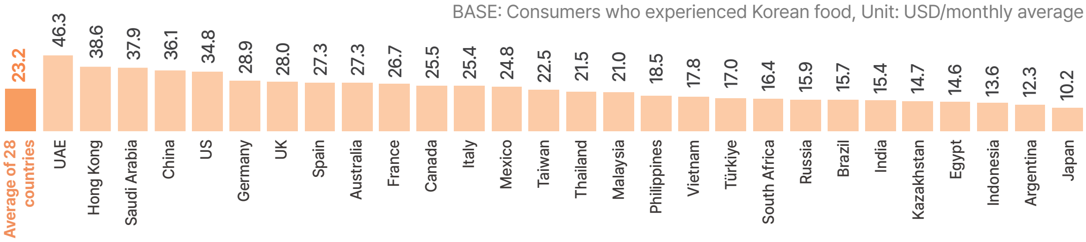


Figure 2-282 Comparison of Expenditure on Korean Food by Country

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



2 "'Spicy flavor' spotlighted by US media... The core of the craze is the spicy food boom," YTN, 2024.

05 Favorability

Approximately 7 out of 10 respondents said they like Korean food. Favorability was observed across multiple countries and not limited to a specific continent.

For those who have tried Korean food, 73.4% responded that they "like" it. Looking at the changes over the past five years, the proportion of respondents was highest in 2021. Although it has slightly declined since then, it remains in the 70% range.
Countries with high favorability rates included the Philippines (88.3%), India (83.2%), and Mexico (82.8%), while Russia (54.8%) and Kazakhstan (59.7%) showed relatively lower rates. In addition to Asian countries that previously showed a positive trend, high favorability (over 80%) was observed in countries such as Mexico in South America and South Africa in Africa. Conversely, Japan, which had a high experience rate and a high proportion for "widely popular," showed a relatively low favorability rate (62.2%). Favorability toward Korean food is not limited to a specific continent but is high across various countries-Korean food possesses broad appeal and competitiveness.

Figure 2-283 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

BASE: Consumers who experienced Korean food, Unit: %

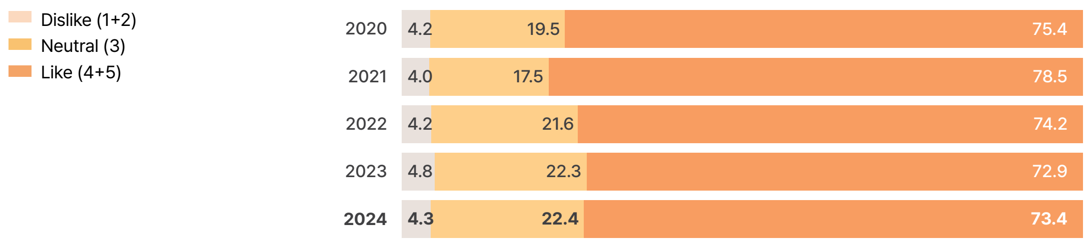
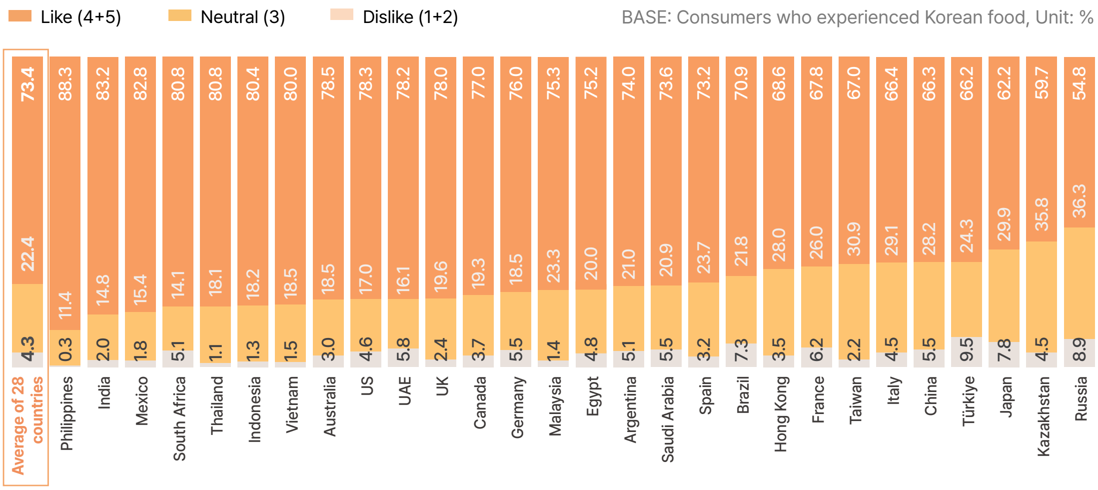


Figure 2-284 Comparison of Favorability Toward Korean Food by Country

BASE: Consumers who experienced Korean food, Unit: %



06 Factors Promoting and Inhibiting Favorability

The basic "taste" of Korean food is a key factor promoting favorability. "Celebrities" in the Middle East and "healthy ingredients" in Africa were also cited as major factors.

The most common reason for liking Korean food (1st +2nd choices) was "good taste" (57.2%), followed by "can experience the Korean food culture seen in movies, dramas, etc." (33.7%) and "uses healthy ingredients or recipes" (31.3%).
In all continents "good taste" ranked first, with particularly high proportions in Asia-Pacific (59.1%) and the Americas (59.2%). Compared to the average of the 28 countries Africa (38.0%) showed high favorability toward "uses healthy ingredients or recipes." In the Middle East, the influence of popular celebrities was frequently cited as a reason promoting favorability. Both "favorite Hallyu star" (25.0%) and "favorite influencer" (24.5%) were higher than the average of the 28 countries-the effect of celebrities or Hallyu content is stronger in this region than in others.

"Expensive prices," "unfamiliar ingredients/recipes," and "eating utensils" constituted key factors inhibiting favorability.

When asked about factors inhibiting favorability, the main reasons cited were "expensive prices" (26.0%), "do not know the ingredients/recipes" (22.6%), and "difficult to use the eating utensils" (19.6%).
By continent, "expensive prices" was the most frequently cited factor in Asia-Pacific (28.1%) and the Americas (28.0%). "Expensive prices" also ranked first in Europe, although "difficult to use the eating utensils" and "do not know the ingredients/recipes" had similarly high response. This indicated discomfort with all three factors.
In Africa, the proportions of respondents selecting "do not know the ingredients/recipes" (29.0%) and "difficult to use the eating utensils" (27.8%) were higher than that for "expensive prices" (22.0%). In the Middle East "lack of consideration for cultural diversity" (25.4%) was frequently cited-religious restrictions such as halal compliance, haram food limitations, and dietary changes during Ramadan make consuming Korean food inconvenient.

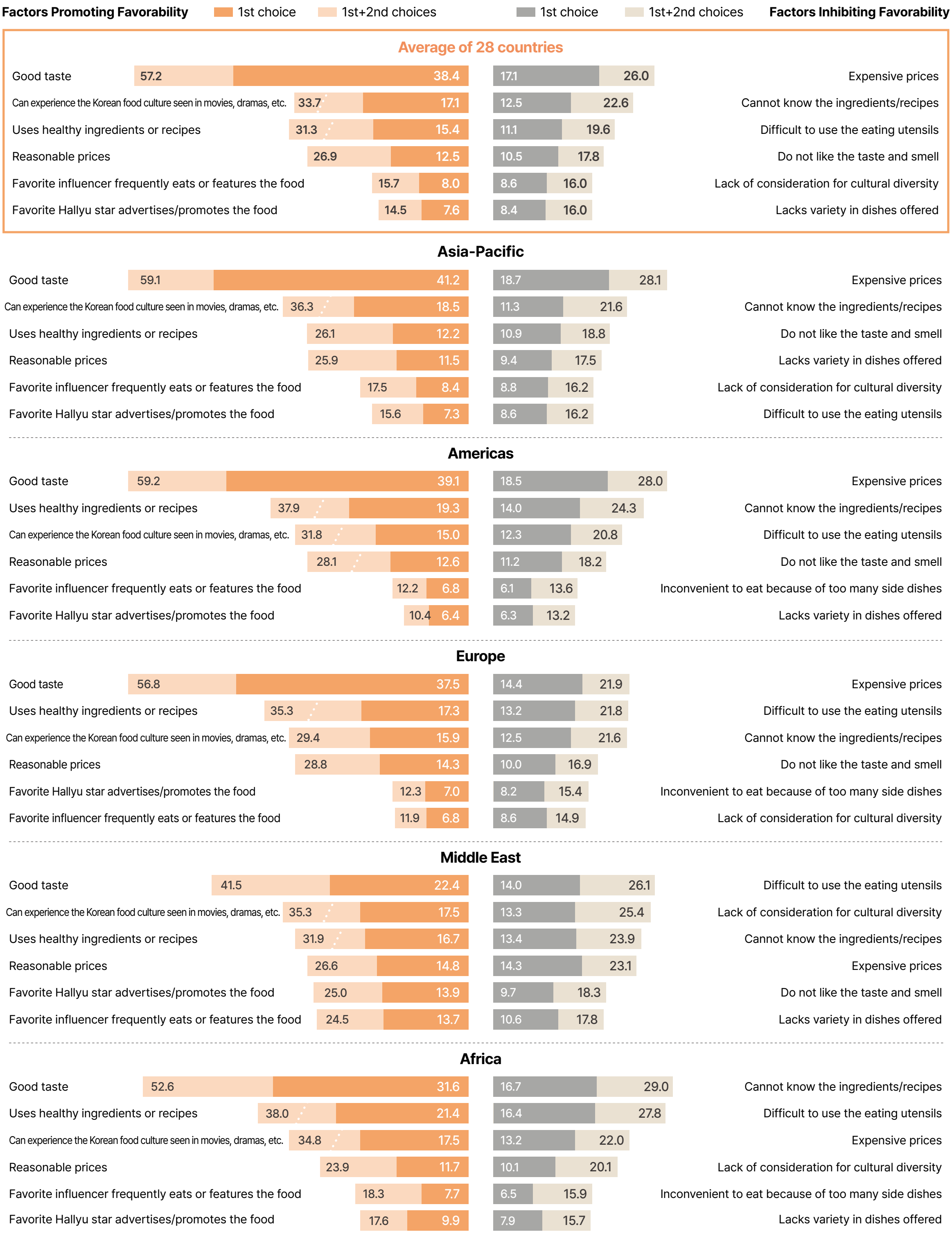
Figure 2-285 Comparison of Factors Promoting and Inhibiting Favorability Toward Korean Food by Continent

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.

Note. Presented are the top 7 choices (options) ranked by the combined proportion of first- and second-choice responses.

BASE: Consumers who experienced Korean food, Unit: %



07 Consumption Methods and Frequency

Approximately 6 out of 10 respondents consumed Korean food at least once per quarter.

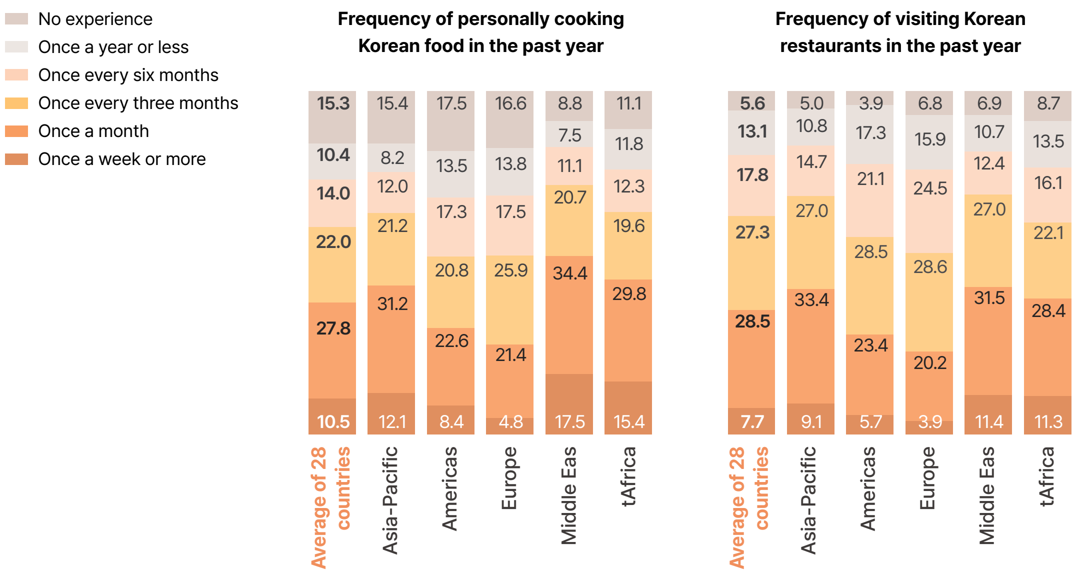
Frequency of Korean food consumption was high in Asia-Pacific and the Middle East.

Looking at experiences of either cooking Korean food at home or visiting Korean restaurants in the past year, 60.3% of respondents experienced Korean food at least once every three months for cooking purposes and 63.5% for restaurant visits. The percentage for Korean food consumption at least once every three months-including responses of "once a week or more," "about once a month," and "about once every three months"-was higher than the 28-country average in Asia-Pacific (cooking: 64.5%, restaurants: 69.5%) and the Middle East (cooking: 72.6%, restaurants: 69.9%).
In the Americas and Europe, respondents cooked Korean food or visited Korean restaurants about once every three months. In Africa and the Middle East, the frequency of cooking Korean food was generally higher than that of visiting Korean restaurants, which is presumed to be because of relatively fewer Korean restaurants in these continents compared to others. According to local news, various countries show high interest in Korean food through exposure to cultural content, such as the jjapaguri from *Parasite*, raw ramen from *Squid Game*, and other dishes from *Culinary Class Wars*. Korean food culture is further disseminated through SNS posts and reviews, and recently, new fusion Korean dishes created abroad-"honey rice cake cereal," "Gochujang butter," and "Banana milk coffee"-have become trendy.

Figure 2-286 Comparison of Korean Food Consumption Frequency by Continent

Q. How many times have you cooked Korean food personally or visited a Korean restaurant in the past year?
1. Never / 2. Once a year or less / 3. About once every 6 months / 4. About once every 3 months / 5. About once a month / 6. More than once a week

BASE: Consumers who consumed Korean food in the past year, Unit: %



08 Willingness to Pay

Approximately 65.7% of respondents were willing to pay for Korean food Italy and Japan showed low willingness to pay.

When asked about their willingness to pay for Korean food, 65.7% of consumers with Hallyu experience responded positively, 21.5% were "neutral," and 12.8% said that they were "not willing to pay."
While the "willing to pay" response has fluctuated around 60% over the past five years, it has been on the rise for two consecutive years, reaching the mid-60% range this year. This upward tick indicates that overseas consumers' interest in and demand for Korean food is continuing to grow at a steady pace.

By country, the highest "willing to pay" proportion of respondents selecting were found in the Philippines (84.3%), Indonesia (79.5%), and Thailand (77.9%), demonstrating the strong demand for Korean food in Southeast Asia. Conversely, Italy (38.3%), Japan (48.6%), and Spain (51.0%) showed relatively low rates. Notably, about a quarter of respondents in Japan (25.8%), Italy (25.4%), and Türkiye (24.0%) said that they were "not willing to pay," indicating a comparatively lower willingness to pay for Korean food in these countries.

Figure 2-287 Comparison of the Willingness to pay for Korean Food Over the Last 5 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

BASE: Total, Unit: %

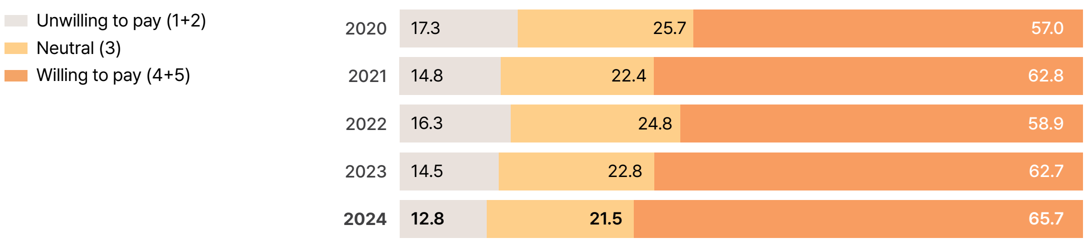
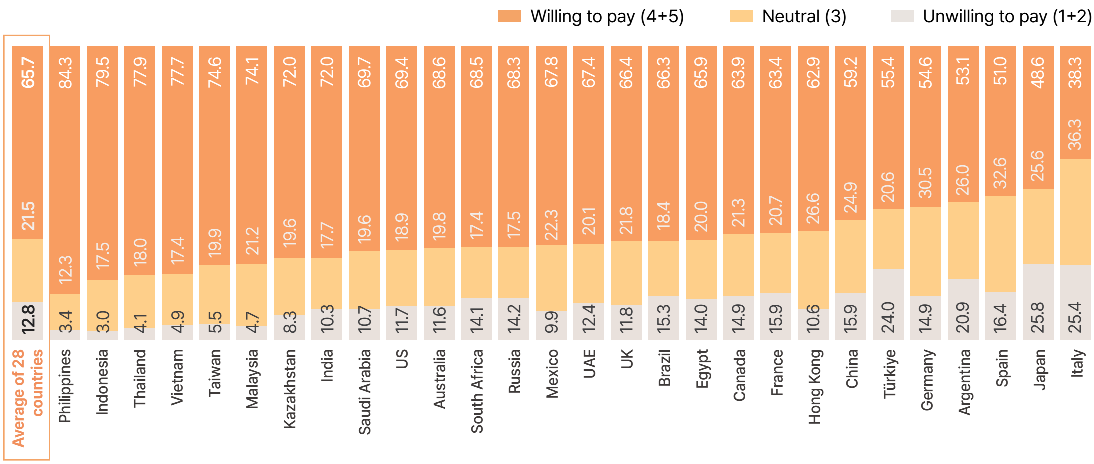


Figure 2- 288 Comparison of the Willingness to pay for Korean Food by Country

BASE: Total, Unit: %



09 Willingness to Recommend

Roughly 7 out of 10 respondents said that they were willing to recommend Korean food.

The Philippines, India, and Mexico showed strong willingness to recommend.

Approximately 70.5% of consumers who had experienced Korean food confirmed that they were "willing to recommend" it to others, 24.2% responded "neutral," and 5.2% said they were "not willing to recommend." Although this marks a drop of 1.3 percentage points in willingness to recommend compared to the 2023 survey (71.8%), the willingness to recommend Korean food remains high at approximately 7 out of 10 respondents.
Countries with high "willing to recommend" responses included the Philippines (88.9%), India (83.2%), and Mexico (82.3%), while Japan (38.4%), Russia (53.8%), and Taiwan (57.8%) reported lower rates. In Japan, the percentage of respondents choosing "neutral" (49.6%) was higher than that for "willing to recommend" (38.4%). Japan's "not willing to recommend" (12.0%) proportion was also the highest among all surveyed countries. China also showed a relatively higher "not willing to recommend" proportion of respondents selecting of 10.3% compared to other countries. In this respect, Korean food is classified as Asian cuisine alongside Japanese and Chinese cuisines, making them competitors.

Figure 2-289 Comparison of the Willingness to Recommend Korean Food Over the Last 2 Years by Year

BASE: Total, Unit: %

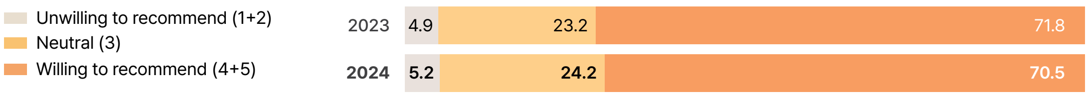
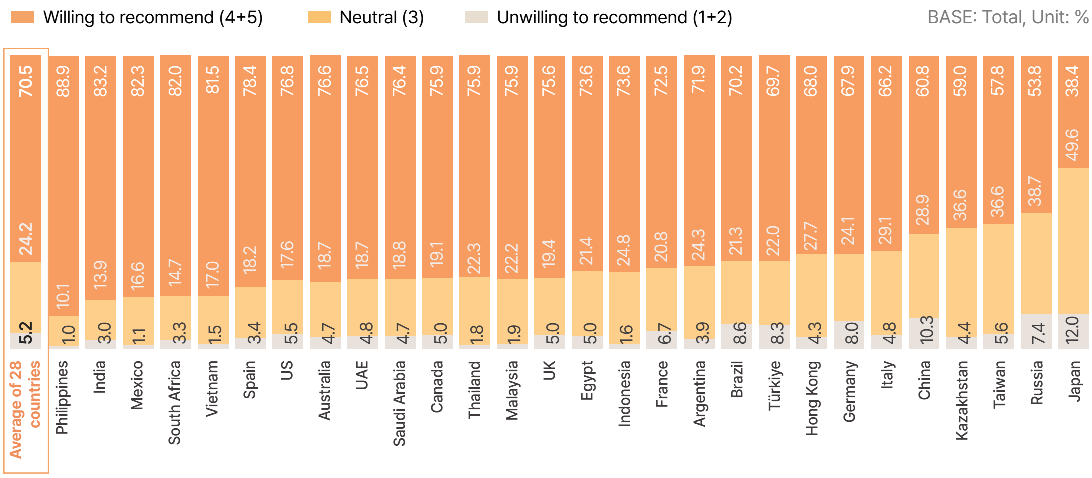


Figure 2-290 Comparison of the Willingness to Recommend Korean Food by Country

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

BASE: Total, Unit: %



10 Ease of Use

Among respondents, 64.0% considered Korean food easy to consume. Respondents in Asian countries such as Vietnam and China found it easy to consume Korean food, while those in Argentina found it difficult.

When asked whether consuming Korean food is easy, 64.0% of respondents who had consumed Korean food answered that it was "easy to consume," while 13.5% responded that it was "not easy to consume." The "easy to consume" percentage has remained in the 60% range over the past three years. Despite the growing number of Korean restaurants abroad and the greater availability of Korean ingredients in local supermarkets, perceptions of accessibility have not improved significantly. This suggests that it will take more time for Korean food to go beyond being a mere "trend" and become a part of "everyday consumption." While Korean restaurants and ingredients are easily available in major cities, access may be difficult in smaller cities or suburban areas. Even when Korean ingredients are available, unfamiliar seasonings (such as gochujang and doenjang) and cooking methods may give consumers the impression that Korean food is difficult to consume.

Countries with high proportions of respondents selecting "easy to consume" included Vietnam (81.1%), China (79.4%), and Thailand (77.9%), while Russia (44.9%), Argentina (45.5%), and Italy (47.9%) showed relatively low rates. Six countries-including Argentina (29.0%), Italy (24.1%), and South Africa (23.4%)-reported relatively high percentages of respondents indicating "not easy to consume," exceeding 20%.

Figure 2-291 Comparison of the Ease of Consuming Korean Food Over the Last 5 Years by Year

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

BASE: Consumers who experienced Korean food, Unit: %

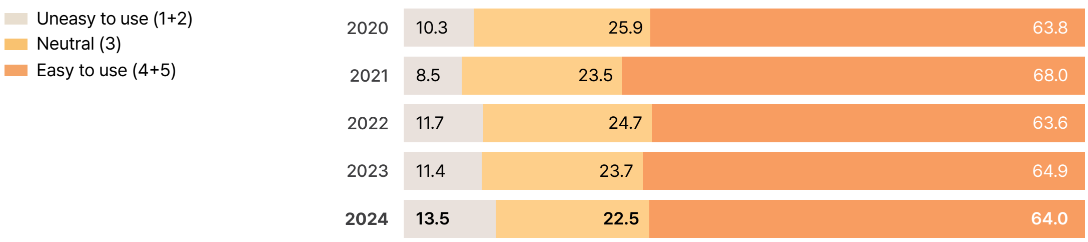
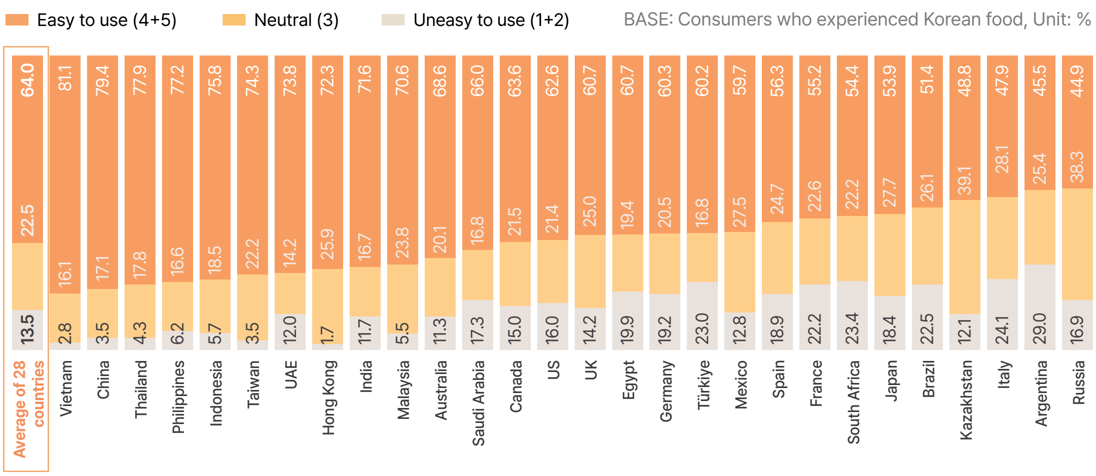


Figure 2-292 Comparison of the Ease of Consuming Korean Food by Country

BASE: Consumers who experienced Korean food, Unit: %



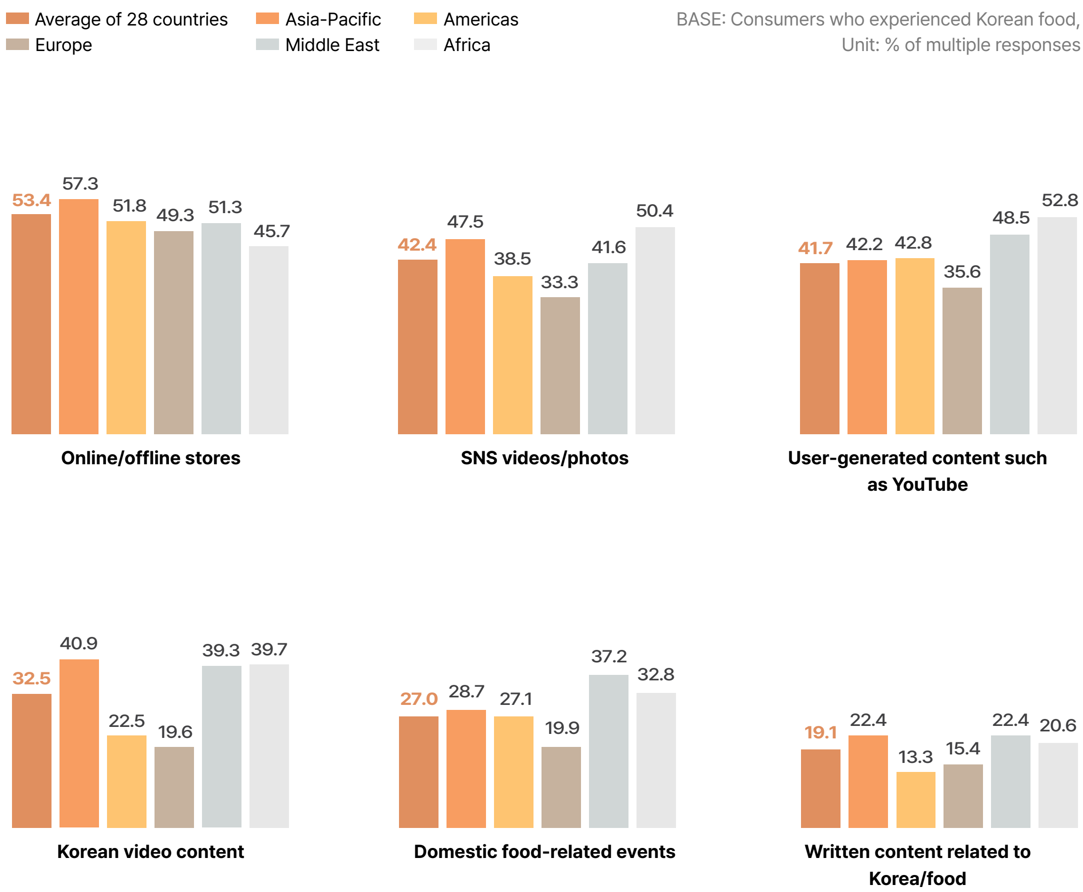
11 Channels of Exposure

Approximately 53.4% of respondents accessed Korean food through “online/offline stores.” Other major channels of exposure included “SNS” and “YouTube videos.”

Among the channels for obtaining Korean food or related information (multiple responses), “online/offline stores” ranked highest at 53.4%, followed by “SNS videos/photos” (42.4%) and “user-generated content such as YouTube” (41.7%).
In the Asia-Pacific region access rates were higher than the average of the 28 countries across all channels, particularly for “Korean video content” (40.9%). In Africa access was particularly active via “SNS videos/photos” (50.4%) and “user-generated content such as YouTube” (52.8%). Compared to other continents, the Middle East reported a higher percentage for “domestic food-related events” (37.2%).

Figure 2-293 Comparison of Korean Food Channels of Exposure by Continent

Q. Please select all of the channels through which you usually access Korean food or videos.



12 Purchase channel

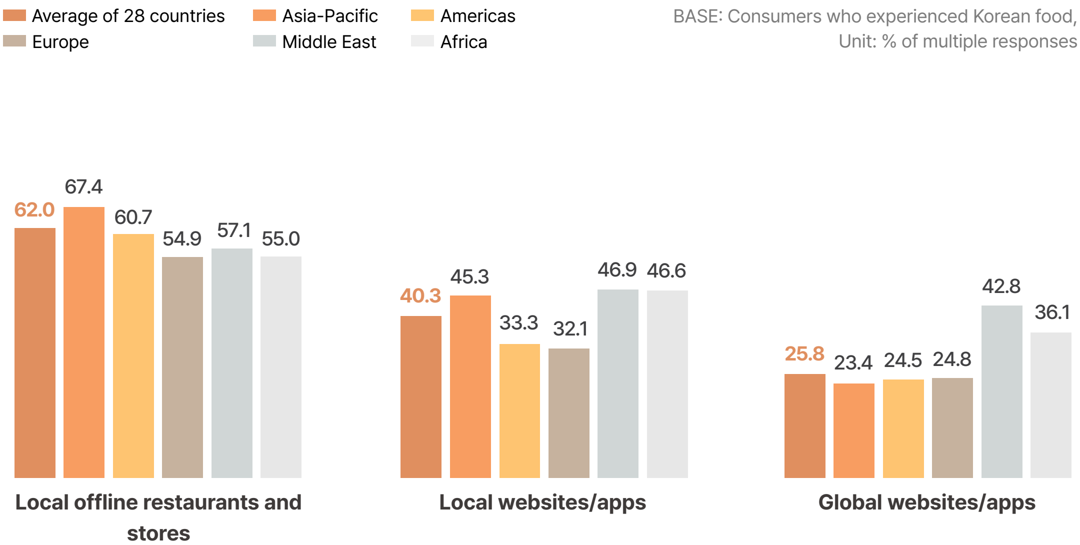
Approximately 62.0% of respondents purchased Korean food locally offline. Respondents in the Middle East and Africa typically used online channels for purchases.

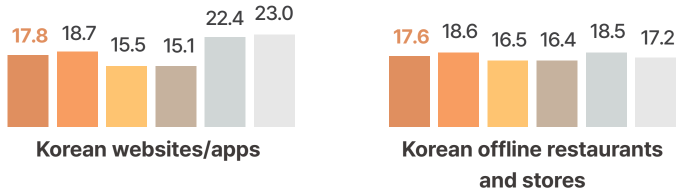
The main purchasing channel for Korean food was "local offline restaurants and stores" (62.0%), followed by online channels such as "local websites/apps" (40.3%), "global websites/apps" (25.8%), and "Korean websites/apps" (17.8%).
By continent, the Asia-Pacific where access to Korean food is relatively high, reported higher proportions of respondents than the average of the 28 countries for "local offline restaurants and stores" (67.4%) and "local websites/apps" (45.3%). In the Middle East and Africa, online purchasing channels such as "local websites/apps," "global websites/apps," and "Korean websites/apps" were used more frequently compared to other continents.

Figure 2-294 Comparison of Korean Food Purchase Channels by Continent

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

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





12

The Korean Language

THE KOREAN LANGUAGE

SUMMARY

One out of four consumers with Hallyu experience reported having studied the Korean language. The learning experience rate was particularly high in South Asia (Philippines, India, Indonesia, Malaysia, etc.).

Among those who had studied Korean, 75.4% responded that they “like” the method of learning Korean. The favorability rate toward the Korean language among all consumers with Hallyu experience was 48.4%. Notably, in the Middle East (the UAE and Saudi Arabia), favorability toward both the Korean language and its learning method was higher than the overall average. In Africa, favorability was high in Egypt.

The top factors promoting favorability toward the Korean language were aesthetic reasons such as “the sound of Korean is pleasant” and “Hangul, the Korean script, is beautiful.” The main factors inhibiting favorability included “Korean grammar is difficult” and “No schools or academies to learn Korean from.”

Regarding the purpose of learning Korean, the primary reasons were “interest in Korea and Korean culture” and “interest in the Korean language,” rather than practical reasons such as “working for or seeking employment at a Korean company,” “improving academic performance,” “studying abroad in Korea,” or “marriage.”

In terms of whether Korean is easier to learn compared with other languages, a greater number of respondents answered “not easy” than “easy.” In the Middle East (the UAE snd Saudi Arabia), Egypt, and India, a higher proportion of respondents perceived Korean as an easy language. In contrast, in Europe (Spain, Italy, etc.) and the Americas (Argentina, Canada, etc.), there was a tendency to perceive Korean as more difficult to learn compared with other languages.

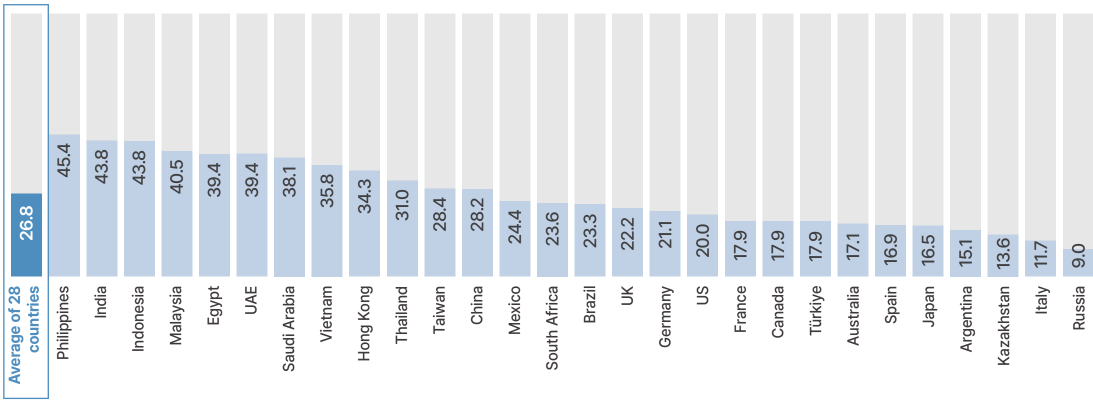
01 Experience Rate

Approximately 26.8% of consumers with Hallyu experience had studied Korean. High rates were observed in South Asian countries.

Some 26.8% of consumers with Hallyu experience reported having studied Korean. In the Philippines (45.4%), India (43.8%), Indonesia (43.8%), and Malaysia (40.5%), more than 4 out of 10 respondents had experience learning Korean. The rate was also high in the Middle East, namely the UAE (39.4%) and Saudi Arabia (38.1%). In contrast, countries such as Russia (9.0%) and Italy (11.7%) showed lower experience rates.

Figure 2-295 Comparison of Korean language Learning Experience Rates by Country BASE: Total, Unit: %

Q. Do you have experience with learning the Korean language?



Respondents who had no experience learning Korean cited reasons such as "not interested in Korea" (28.6%), "unfamiliar with access channels/methods for learning Korean" (17.3%), and "Korean language learning is paid/expensive" (16.5%). In Africa, namely South Africa and Egypt, the most frequently cited reason was "unfamiliar with access channels/methods for learning Korean" (27.8%). As for future willingness to learn Korean, 39.0% of consumers with no experience learning Korean expressed a willingness to do so, with particularly high rates observed in the Middle East (61.7%) and Africa (58.7%).

Figure 2-296 Comparison of the Willingness to Learn Korean language in the Future by Continent

Q. Are you willing to learn the Korean language in the future?
1. Not at all / 2. Not really / 3. Average / 4. Probably / 5. Certainly

BASE: Consumers with no experience learning Korean, Unit: %

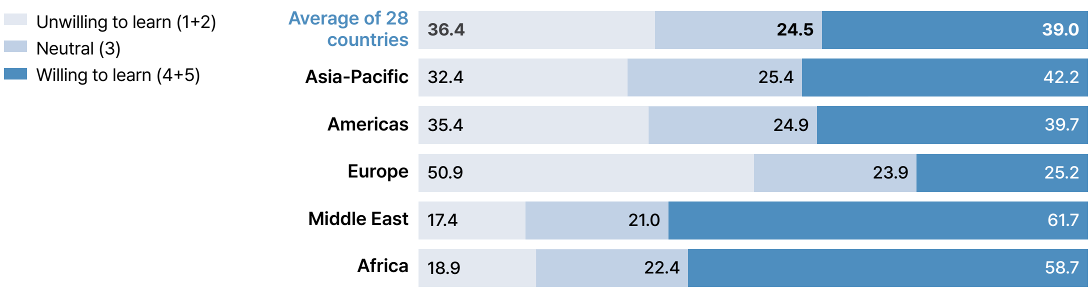
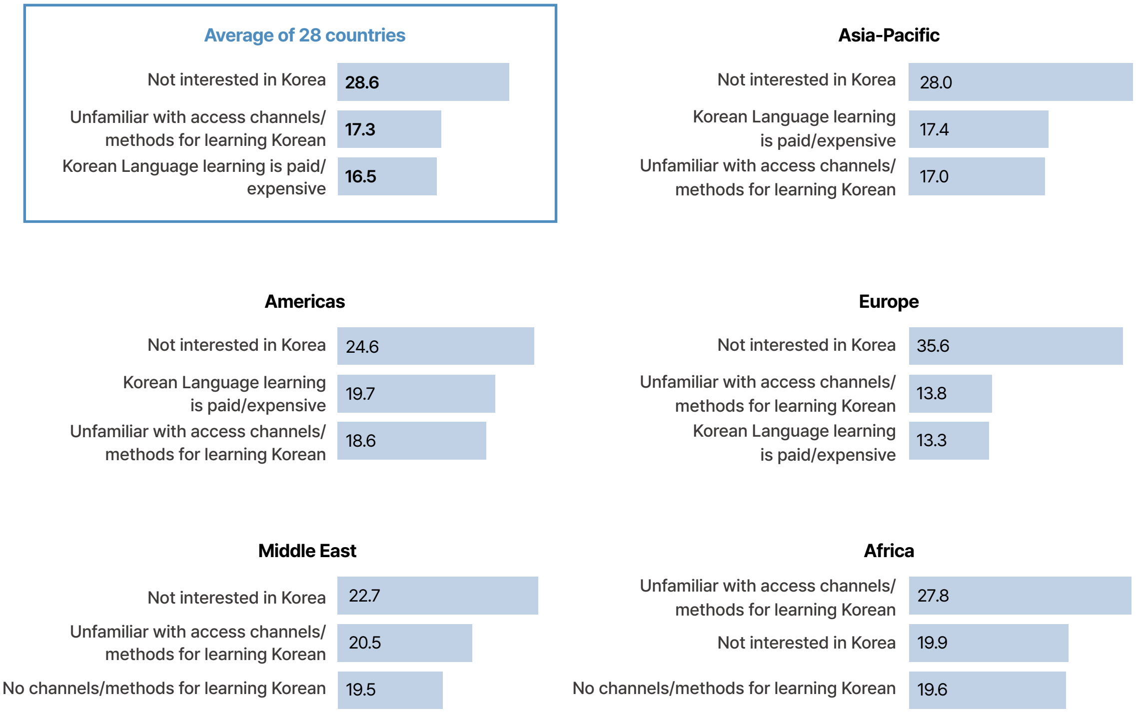


Figure 2-297 Comparison of the Reasons for not Having Learned Korean language by Continent

Q. Why do you not yet have experience learning Korean language?

BASE: Consumers with no experience learning Korean, Unit: %



Local News

"It seems that interest in learning Korean has steadily increased because of the influence of dramas and K-pop. Many Indonesians are enrolling in Korean language classes or trying to study on their own through online learning platforms, and the number of applicants for the Korean language proficiency test TOPIK has also increased."

KOCCA Indonesia Business Center Assistant Manager

* "In Indonesia, there has been a Korean language learning boom for over the past decade or so. Institutionally, the number of high schools offering Korean as a second foreign language has increased, and more universities have steadily introduced Korean language courses. But the more important thing is the expansion of private institutes offering Korean language education both online and offline. According to reports, there are said to be over a hundred Korean language institutes in Jakarta alone," said Professor Hyung Jun Kim of the Department of Cultural Anthropology at Kangwon National University in a column for AJP.

Source: https://www.ajunews.com/view/20241014083042023

02 Amount of Learning

Nearly half of the respondents in Malaysia had been learning Korean for over a year. The average monthly Korean Language learning time was 26.2 hours.

Among respondents with experience learning Korean, 36.6% reported having learned the language for "more than one year," while 63.4% had learned it for "less than one year." Notably, 51.2% of respondents in Malaysia had learned Korean for over a year, the highest among all countries.
The average monthly Korean language learning time per person was 26.2 hours. Countries with the longest learning hours were South Africa (41.4 hours), the Philippines (38.7 hours), Egypt (36.5 hours), the UAE (32.6 hours), and India (32.5). Respondents in these countries spend more than 30 hours per month studying the Korean language.
The average expenditure on Korean language learning across the 28 countries was 31.7 USD. Expenditure was highest in China (61.5 USD), Hong Kong (58.6 USD), and the UAE (54.4 USD), and relatively low in Argentina (11.7 USD), Japan (14.6 USD), and Kazakhstan (16.0 USD).

Figure 2-298 **Comparison of Korean language Learning Period by Country**

Q. How much time do you usually spend learning Korean language?

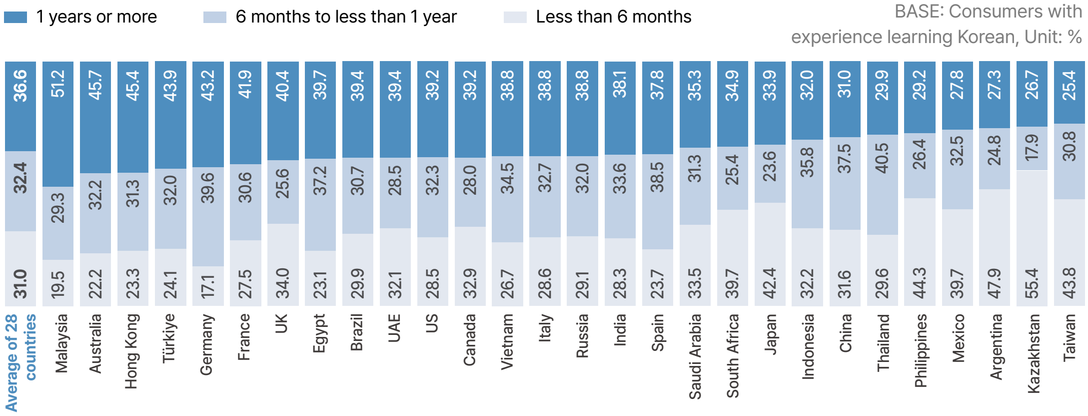


Figure 2-299 **Comparison of Korean language Learning Hours by Country**

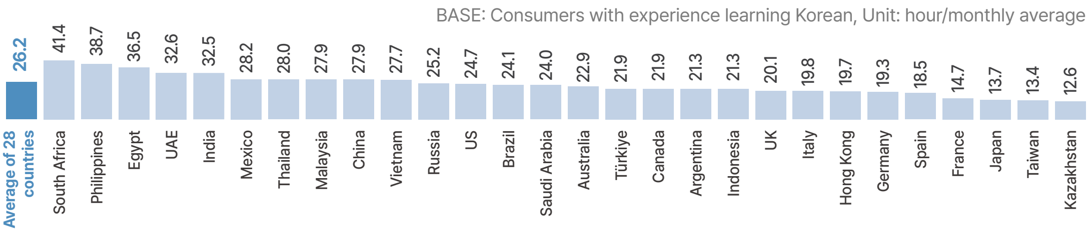
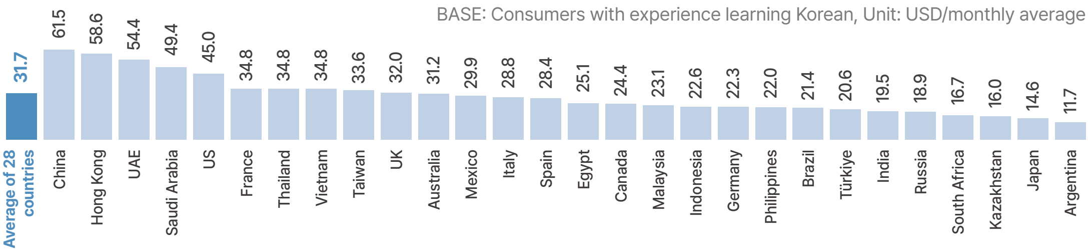


Figure 2-300 **Comparison of Expenditure on Korean language Learning by Country**

Q. How much money do you usually spend learning Korean language



03 Favorability

Among respondents, 75.4% were satisfied with Korean language learning methods.
Favorability toward the Korean Language was 48.4%.

Among consumers with experience learning Korean, 75.4% responded that they "like" the Korean language learning methods. Countries with high percentages of respondents indicating "like" included Egypt (88.3%), the UAE (87.3%), and Thailand (85.2%). In Japan, the "like" proportion was relatively low at 54.5%, while "neutral" stood out with a high rate of 42.4%.
Favorability toward the Korean language among consumers with Hallyu experience was 48.4%.

Countries with high "like" percentage for the Korean language included the UAE (73.3%), Vietnam (68.8%), and Thailand (67.8%), which also showed high favorability toward Korean language learning methods. Countries with low favorability toward the Korean language included Japan (27.1%), Australia (29.7%), and Canada (30.5%). The proportion of respondents indicating "neutral" was particularly high in Russia (59.4%) and Kazakhstan (56.5%).

Figure 2-301 Comparison of Favorability Toward Korean language Learning Methods by Country

Q. In general, how satisfied are you with the Korean learning method that you have used recently?

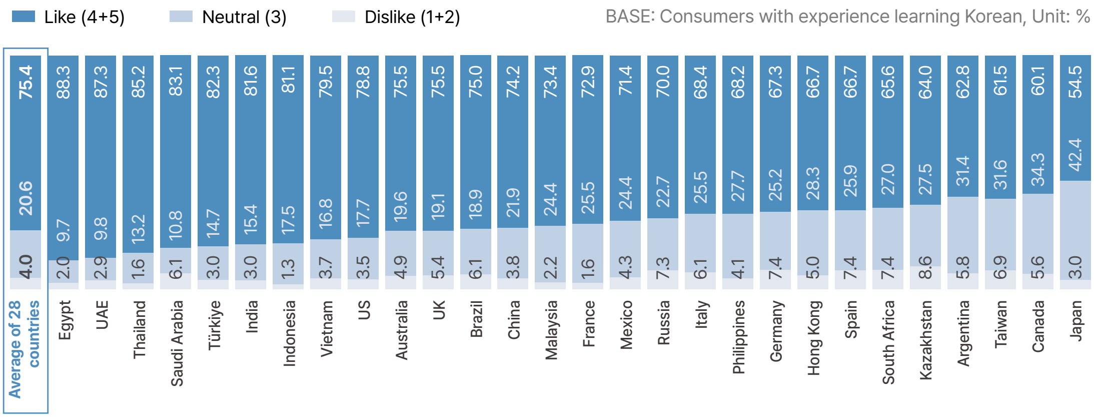
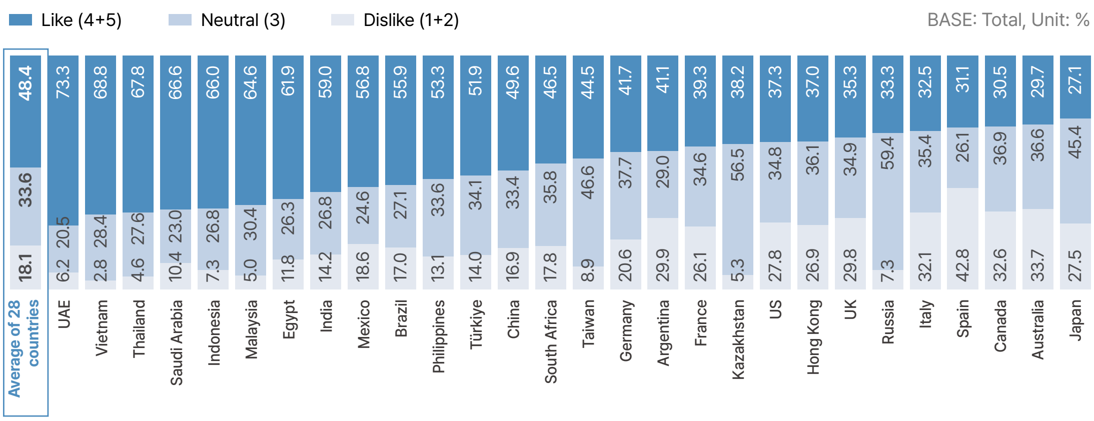


Figure 2-302 Comparison of Favorability Toward the Korean language by Country

Q. How fond are you of the Korean language?



04 Factors Promoting and Inhibiting Favorability

Factors promoting favorability toward the Korean Language included its “pleasant sound” and “beautiful script.”

The most frequently cited reasons for liking the Korean language (based on 1st and 2nd choices) were “the sound of Korean is pleasant” (52.8%) and “Hangul, the Korean script, is beautiful” (40.0%), indicating that aesthetic factors ranked highest.
By continent, the first and second most cited factors promoting favorability were consistent. Regarding the third most cited factor, respondents in the Asia-Pacific (31.2%), the Middle East (30.7%), and Africa (27.2%) tended to select “Hangul is easy to learn,” while those in the Americas (34.6%) and Europe (32.2%) selected “Can learn about the history of how Hangul was created.”

“Difficult grammar” and “lack of learning institutes” were cited as factors inhibiting favorability. “Lack of learning institutes” was the most cited barrier in four continents aside from the Asia-Pacific.

The key factors inhibiting Korean language learning were “Korean grammar is difficult” (43.9%) and “no schools or academies to learn Korean from” (43.0%). In the Asia-Pacific region (46.0%), “Korean grammar is difficult” was the most frequently cited factor, while the lack of learning institutes was the top inhibiting factor in the other four continents. This suggests that in countries where Korean learning is not yet widespread, respondents lack experience in Korean language learning and have limited access to learning institutes.

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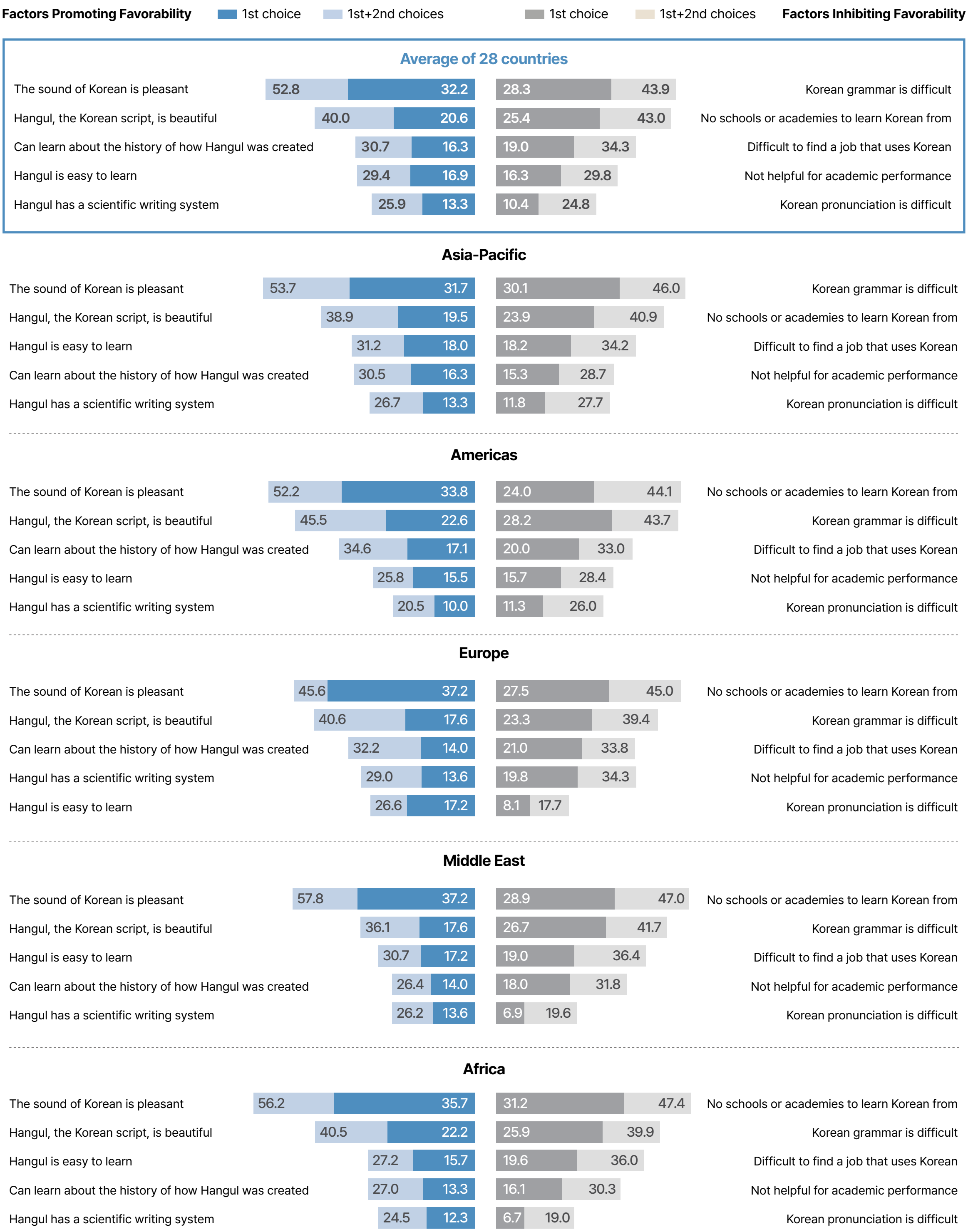
Figure 2-303 Comparison of Favorable and Inhibiting Factors in Learning the Korean language by Continent

Q. What do you think is the most appealing factor about the Korean language?

Q. What do you think are the most challenging factors in learning Korean language?

Note. Presented are the top 7 choices (options) ranked by the combined proportion of first- and second-choice responses.

BASE: Consumers with experience learning Korean, Unit: %



05 Reasons for Learning

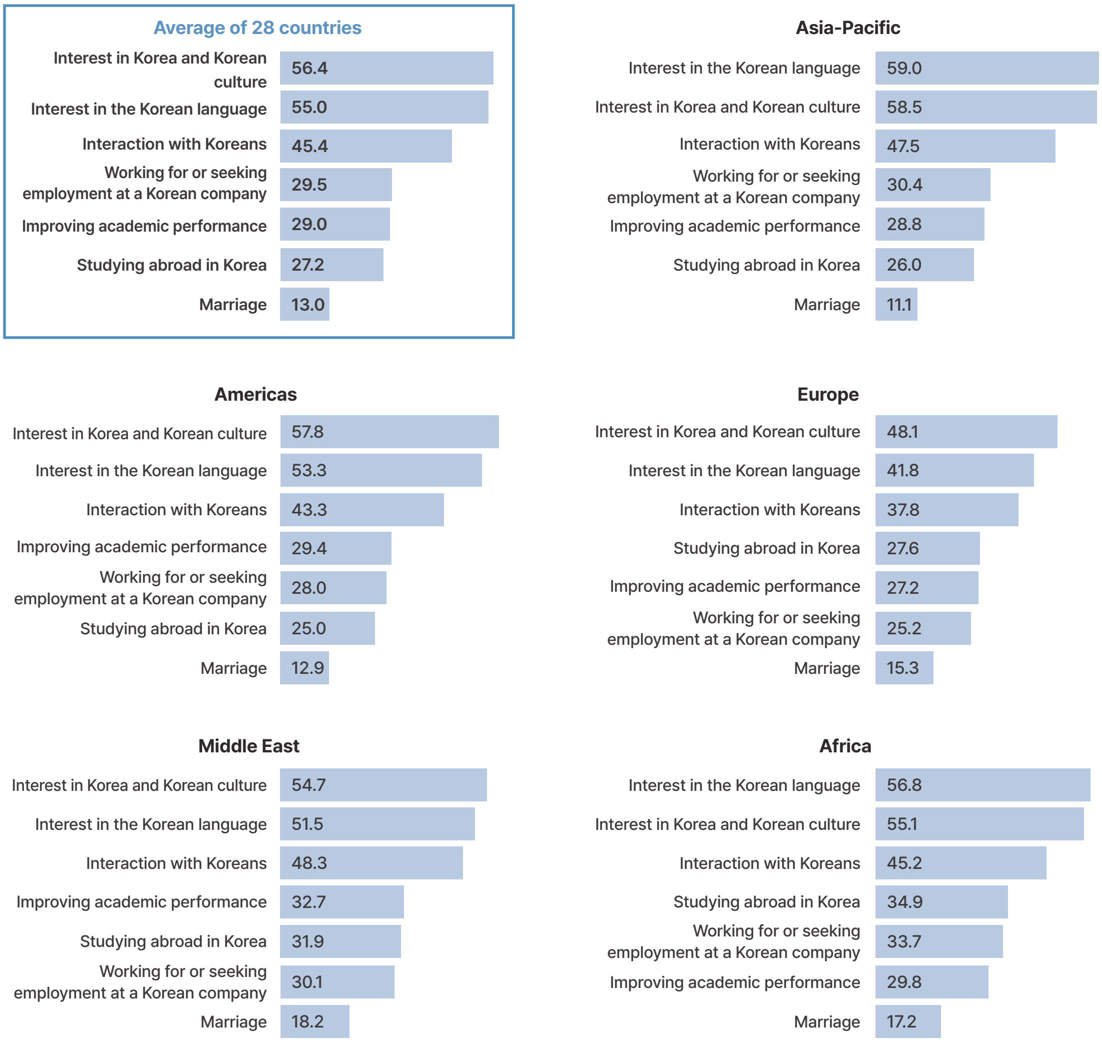
"Interest in Korea and Korean culture" and "interest in the Korean language" were cited as primary reasons for learning Korean.

Among respondents with experience learning Korean, the main reasons for learning the language were "interest in Korea and Korean culture" (56.4%) and "interest in the Korean language" (55.0%). Other responses included "interaction with Koreans" (45.4%), "working for or seeking employment at a Korean company" (29.5%), "improving academic performance" (29.0%), "studying abroad in Korea" (27.2%), and "marriage" (13.0%). While the top responses by continent showed similar trends, the proportion of "studying abroad in Korea" was particularly high in Africa (34.9%).
These results suggest that Korean language learning is often driven more by genuine interest in Korean culture and language than by practical benefits such as career or academic advancement.

Figure 2-304 Comparison of Korean language Learning Purpose by Continent

Q. Please select all the reasons for you to learn the Korean language.

BASE: Consumers with experience learning Korean, Unit: % of multiple responses



06 Learning Methods

“Online courses” and “self-study” were the most frequently used methods in Africa and the Asia-Pacific, respectively.

The most commonly used Korean learning methods were “online courses” (58.0%) and “self-study” (57.8%). In contrast, “offline classes” (35.9%) and “private tutoring” (31.0%) showed relatively lower usage rates.

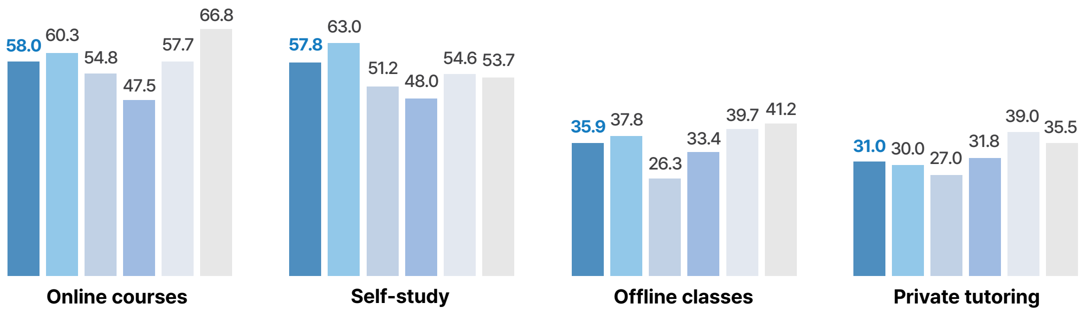
Africa showed a particularly high usage of “online courses” at 66.8%, while “self-study” was the most common method in the Asia-Pacific at 63.0%. In the Middle East, the usage rate of “private tutoring” was higher than the average of the 28 surveyed countries.

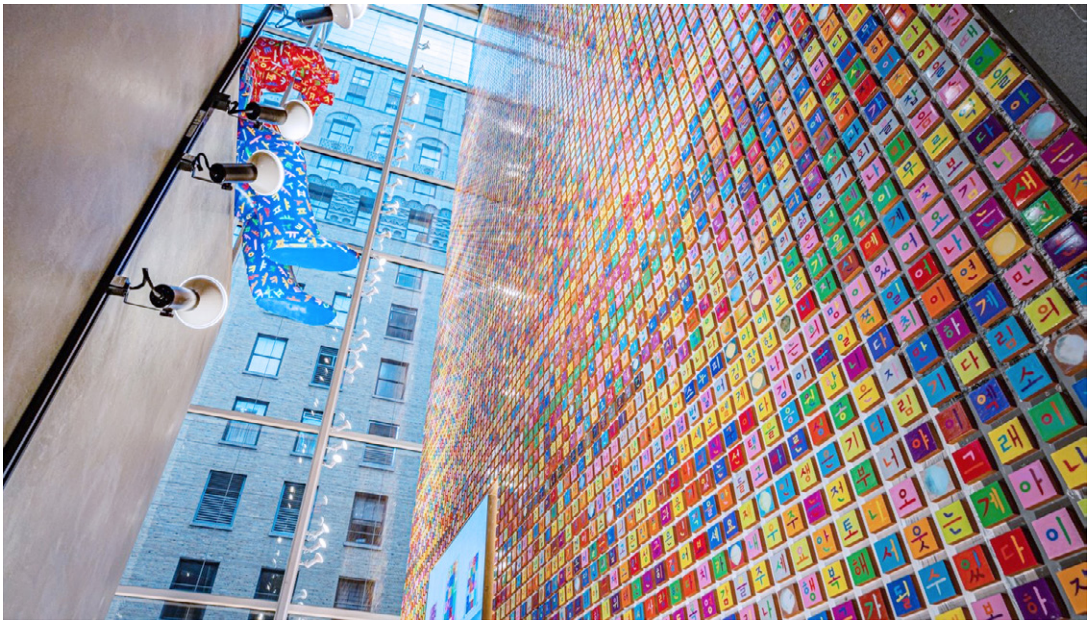
Figure 2-305 Comparison of Korean language Learning Method by Continent

Q. Please select all the methods taken when undergoing Korean lessons in.

Average of 28 countries, Asia-Pacific, Americas, Europe, Middle East, Africa

BASE: Consumers with experience learning Korean,
Unit: % of multiple responses





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07 Willingness to Recommend

Among respondents, 78.5% were willing to recommend learning Korean. Respondents in Egypt, India, and Thailand, as well as those in their 30s, were particularly willing to recommend learning Korean. Those in the UK, Japan, and Germany were less willing to recommend.

Among consumers with experience learning Korean, 78.5% responded that they were "willing to recommend" learning Korean. Meanwhile, "neutral" accounted for 17.1% of responses, while 4.4% said they were "not willing to recommend."
Countries with high willingness to recommend included Egypt (89.3%), India (86.7%), and Thailand (86.0%), whereas the UK (11.6%), Japan (10.9%), and Germany (9.8%) showed higher rates of "not willing to recommend" compared with other countries. By age group, those in their 30s showed relatively high willingness to recommend (82.5%).

Figure 2-306 **Comparison of the Willingness to Recommend Korean language Learning by Country**

Q. Would you recommend learning Korean to someone you know?

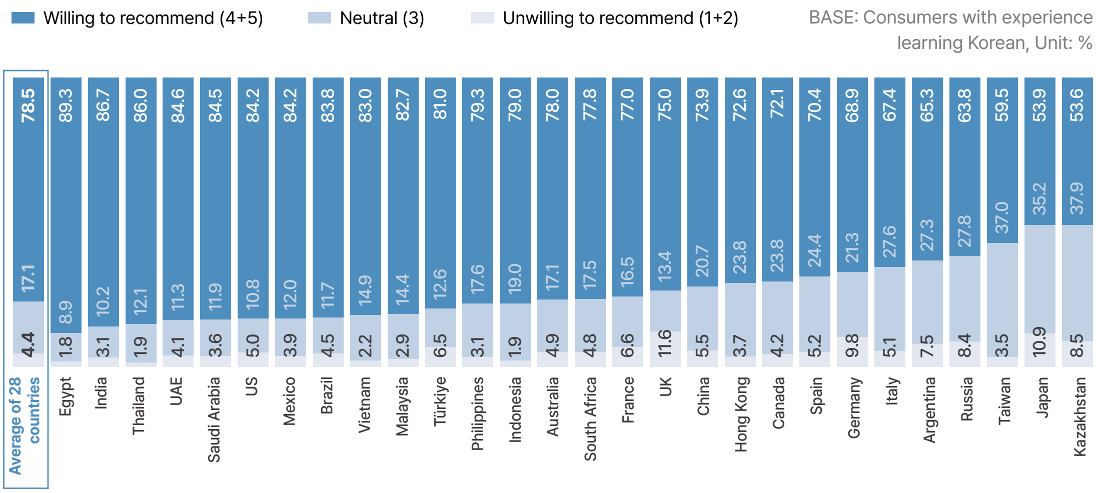
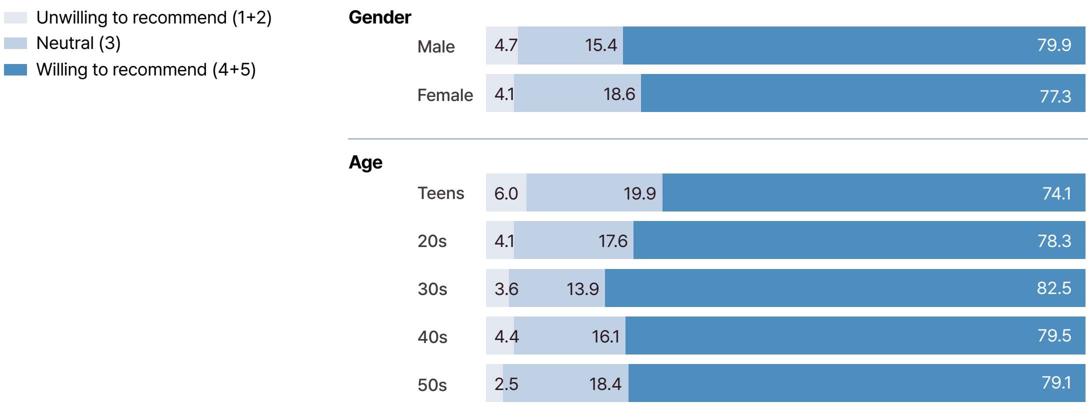


Figure 2-307 **Comparison of the Willingness to Recommend Korean language Learning by Gender and age**

BASE: Consumers with experience learning Korean, Unit: %



08 Ease of Learning

Approximately 64.5% of respondents found it easy to use learning services. Among respondents, 33.8% found Korean easy to learn compared with other languages.

Among consumers with experience learning Korean, 64.5% responded that Korean language-related education services are “easy to use,” while 10.0% reported that they were “not easy to use.”
By country, the perception of ease was high in Egypt (81.9%) and the UAE (81.4%), and lower in Kazakhstan (46.9%), Japan (47.9%), and Argentina (47.9%). In particular, Egypt was the first country in the Middle East and Africa to establish a university department for the Korean language. In the UAE, the increasing demand for Korean led to the opening of the King Sejong Institute Center Shㅈarjah in 2023.
Regarding whether Korean is easier to learn compared with other languages, 33.8% of consumers with Hallyu experience answered in the affirmative. The proportion of respondents indicating “not easy to use” was 39.5%, which was 5.7 percentage points higher than the percentage for “easy to use.”
Proportions of respondents selecting “easy to use” were high in the UAE (53.5%), India (52.6%), Malaysia (52.3%), and China (52.1%). In contrast, more than half of the respondents in Argentina (65.0%), Italy (64.5%), and Spain (64.4%) selected “not easy to use.” In Europe and the Americas, the Korean language was typically perceived as being more difficult to learn compared with other languages.

Figure 2-308 Comparison of the Ease of Using Korean language Learning Services by Country

Q. When you learn or want to learn Korean language, are you able to easily use Korean-related educational services?

Easy to use (4+5) Neutral (3) Uneasy to use (1+2) BASE: Consumers with experience learning Korean, Unit: %

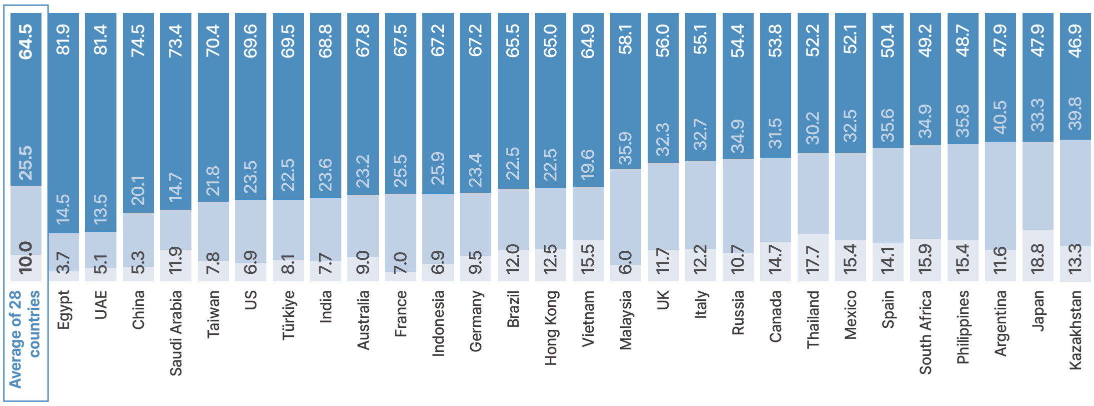
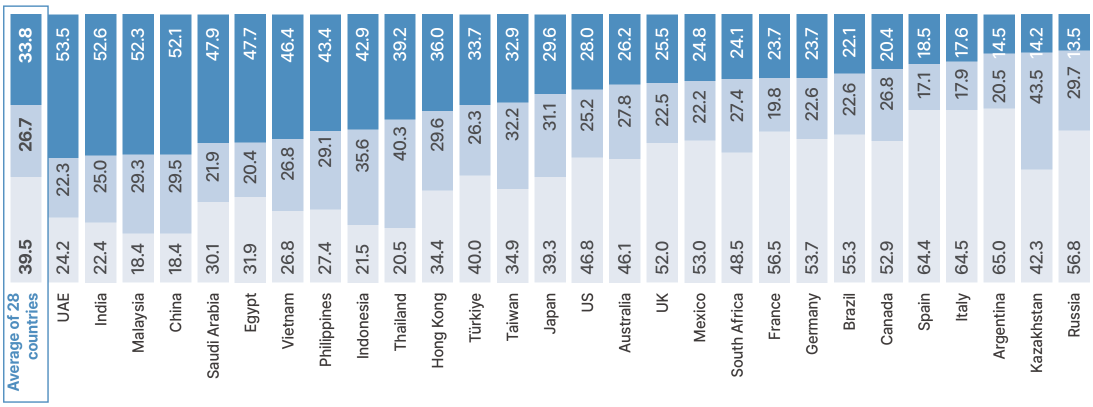


Figure 2-309 Comparison of the Ease of Learning the Korean language Compared With Other Languages by Country

BASE: Total, Unit: %

Easy to use (4+5) Neutral (3) Uneasy to use (1+2)



09 Channels of Exposure

Most accessed the Korean Language through "online platforms."

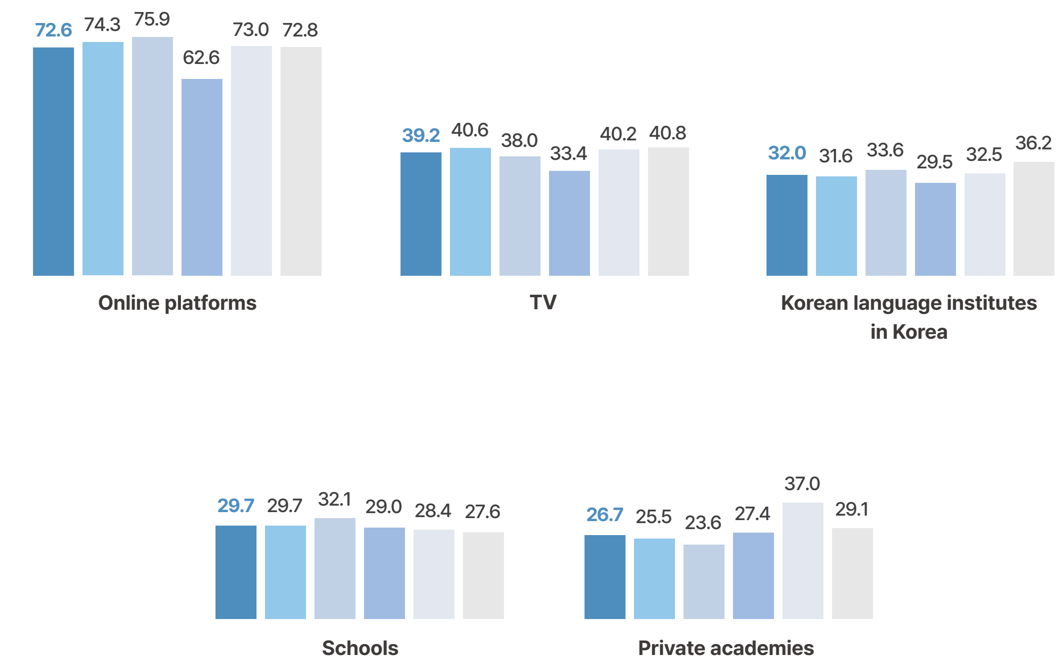
The primary channel of exposure for Korean was "online platforms" (72.6%), with the Americas (75.9%) showing the highest "online platform" usage rate among all continents. In the Asia-Pacific (40.6%), the Middle East (40.2%), and Africa (40.8%), exposure and access through "TV" was also observed to a certain extent. In the Middle East (37.0%), where interest in learning Korean is high, access via "private academies" was also relatively common.
Access rates in the Americas and Africa recorded were higher than the average of 28 countries across most channels. In contrast, rates in Europe were generally similar to or lower than the overall average across all channels.

Figure 2-310 Comparison of Korean language Channels of Exposure by Continent

Q. Please select all the channels that you usually use to encounter the Korean language.

Average of 28 countries | Asia-Pacific | Americas | Europe | Middle East | Africa

BASE: Consumers with experience learning Korean, Unit: % of multiple responses



10 Online/mobile Platforms

Most respondents used YouTube and Netflix.

Among those who accessed Korean primarily through online platforms, 57.9% used "YouTube" and 49.3% used "Netflix." Fewer respondents used "YouTube Premium" (34.5%), "Amazon Prime" (26.1%), and "Disney+" (25.1%).

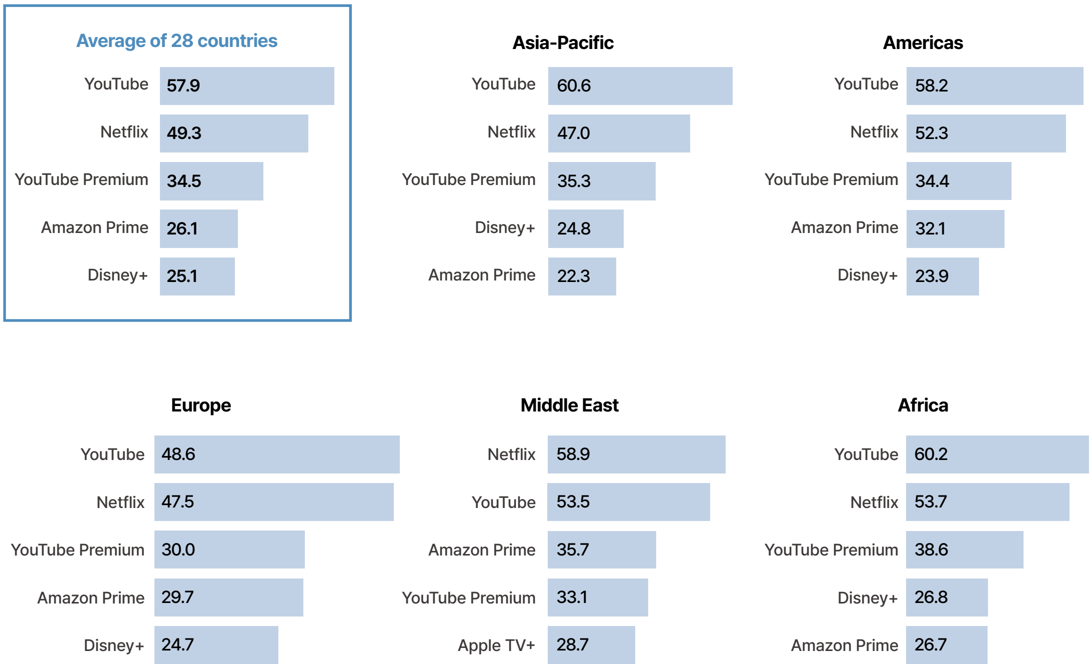
By continent, most regions showed higher usage of YouTube than Netflix, with the exception of the Middle East, where "Netflix" (58.9%) was used more than "YouTube" (53.5%). Additionally, in contrast to other continents, Apple TV+ (28.7%) ranked higher than Disney+ in the Middle East.

Figure 2-311 Comparison of Online/mobile Platforms for Korean Language Learning by Continent

Q. Please select the online/mobile platforms that you primarily use to learn Korean language (multiple responses allowed).

※ Edited short videos are excluded.

BASE: Consumers with experience learning Korean, Unit: % of multiple responses



PART 3

Summary and Implications

1 Matrix Analysis by Type of Hallyu

2 Overall Summary and Implications

3 Summary and Implications by Continent

Matrix Analysis by Type of Hallyu

01

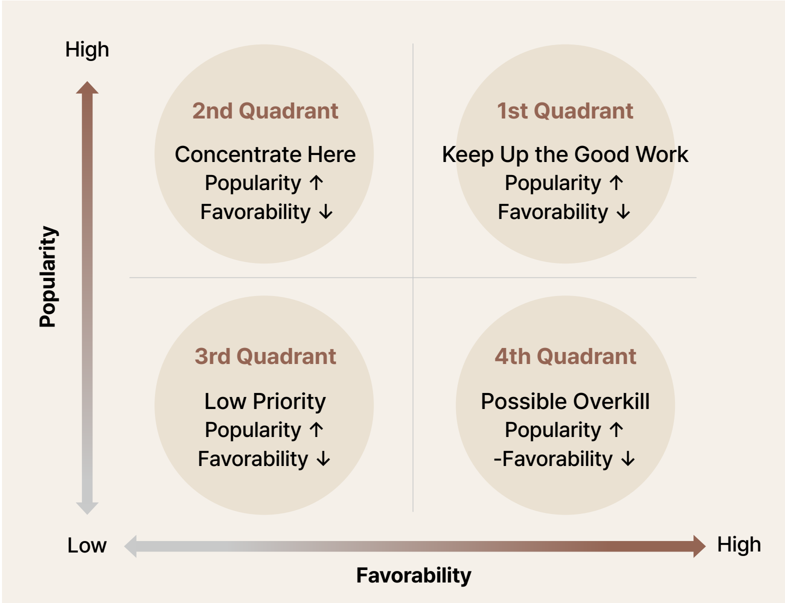
Analysis Method

This study conducted a matrix analysis by applying the Importance-Performance Analysis (IPA) technique to comprehensively analyze the characteristics of Korean cultural content by type and derived implications based on the analysis. Since its introduction by Martilla and James (1977), IPA has been used in various fields, including corporate strategy, consumer behavior research, and policy-making, providing valuable information for decision-making processes regarding the effective allocation of limited resources. This study applied the IPA framework to understand the acceptance patterns of Hallyu cultural content by country. "Popularity within the country" was set as the importance indicator, and "favorability" was set as the performance indicator. These indicators were then placed on the X and Y axes to visually map the position of Hallyu content in each country.

Attribute	Item	Scoringmethod
Favorability	The following question and response options were used to measure favorability in each category (e.g., Korean dramas and variety shows) among consumers who have experienced Korean cultural content by type	Scale mean (out of 5)
	Q Overall, how much do you like the Korean [cultural content] you have experienced? AQ4. Overall, how much do you like the Korean dramas that you have recently watched? BQ4. Overall, how much do you like the Korean variety shows that you have recently watched?	
	Response options: 1. Do not like at all 2. Do not like 3. Neutral 4. Like 5. Like very much	
Popularity	The following question and response options were used to measure popularity in each category (e.g., Korean dramas and variety shows) among all participants (consumers with Hallyu experience)	Scale mean (out of 5)
	Q XQ1. How popular do you think Hallyu is in your country?	
	Category: 1. Korean dramas 2. Korean variety shows 3. Korean movies 4. Korean music (K-pop) 5. Korean animation 6. Korean publications (books, e-books, etc.) 7. Korean webtoons 8. Korean games 9. Korean fashion 10. Korean beauty 11. Korean food Response options: 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 consistent sales of related products	

※ The "Korean language" category was not included in the popularity question items and is therefore excluded from this analysis

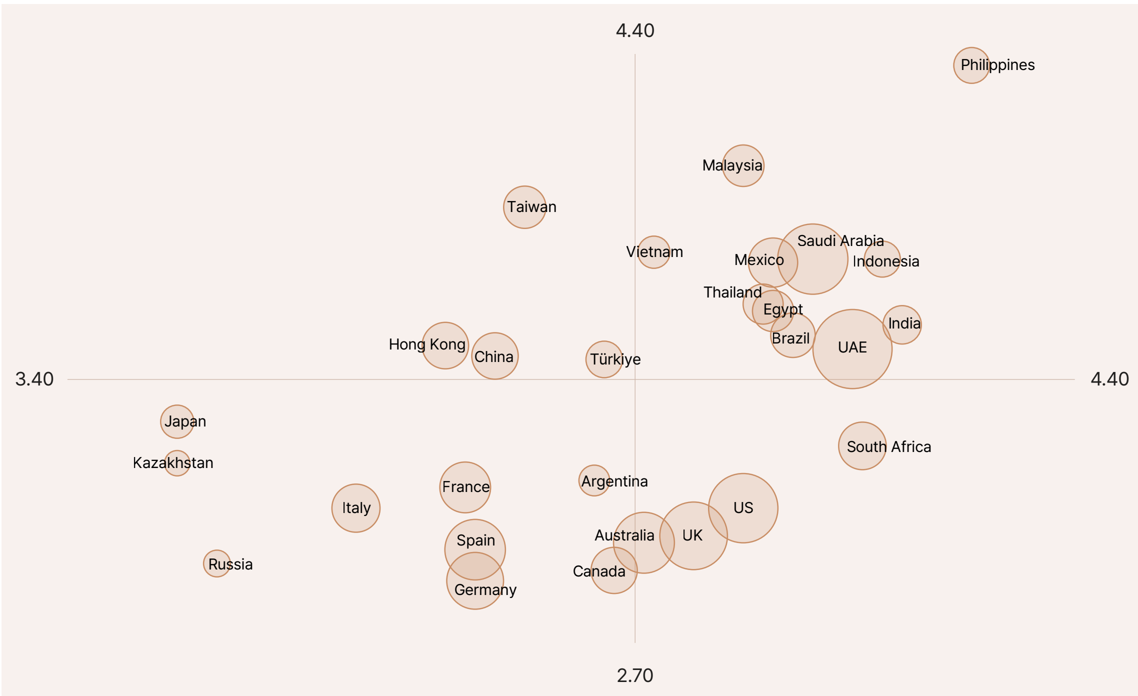
Matrix Visualization Method and the Meaning of Each Domain



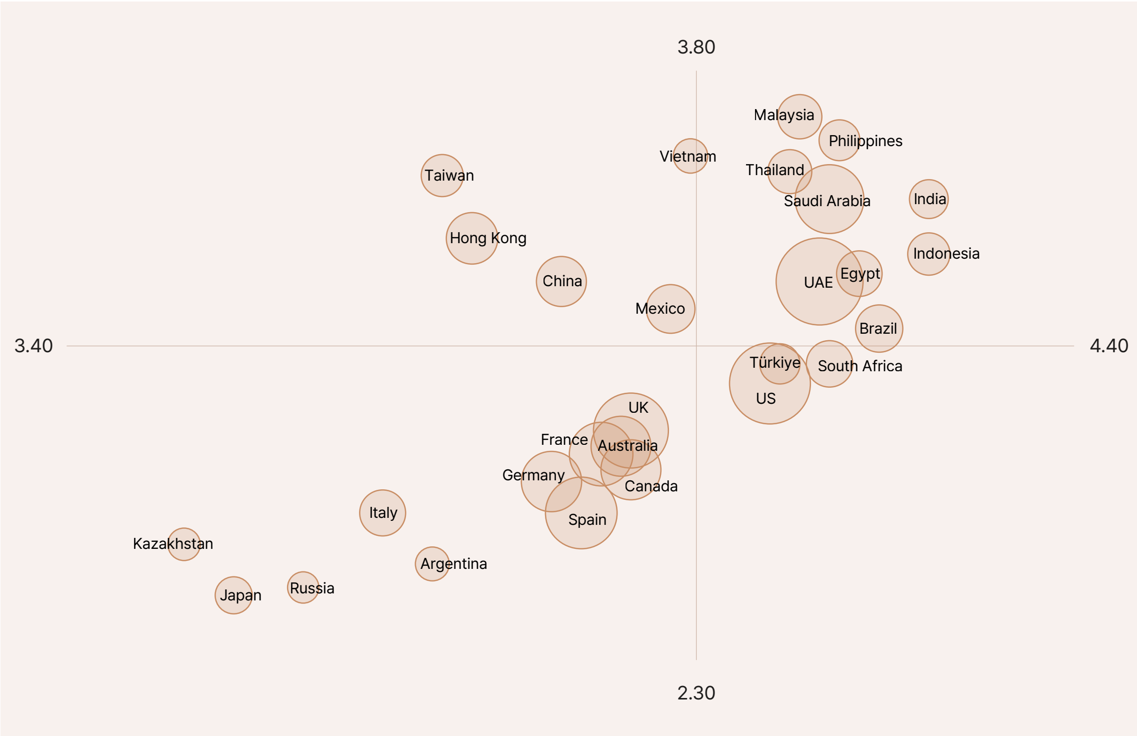
Analysis results: By Korean cultural content category

· X-axis: Favorability by category of recently experienced Korean cultural content
· Y-axis: Domestic popularity of Korean cultural content by type as perceived by consumers with Hallyu experience
· Circle size: Movies-expenditure in the past three months (USD/3 months); others-average monthly expenditure (USD/month)

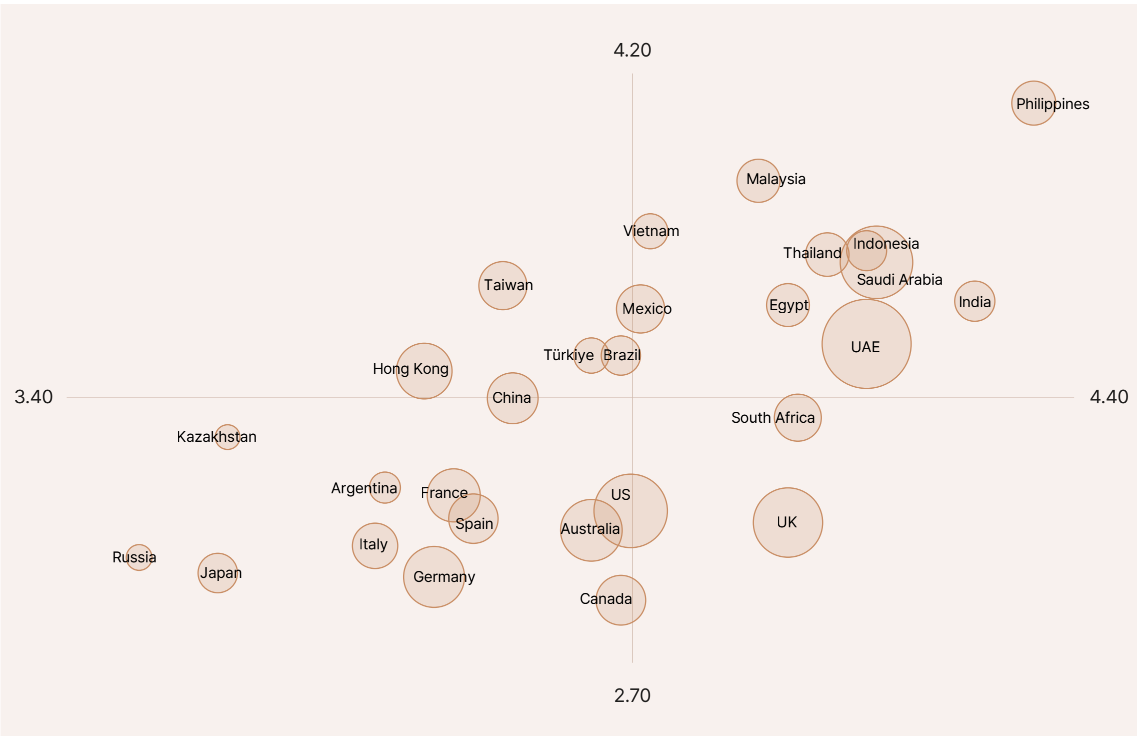
Dramas



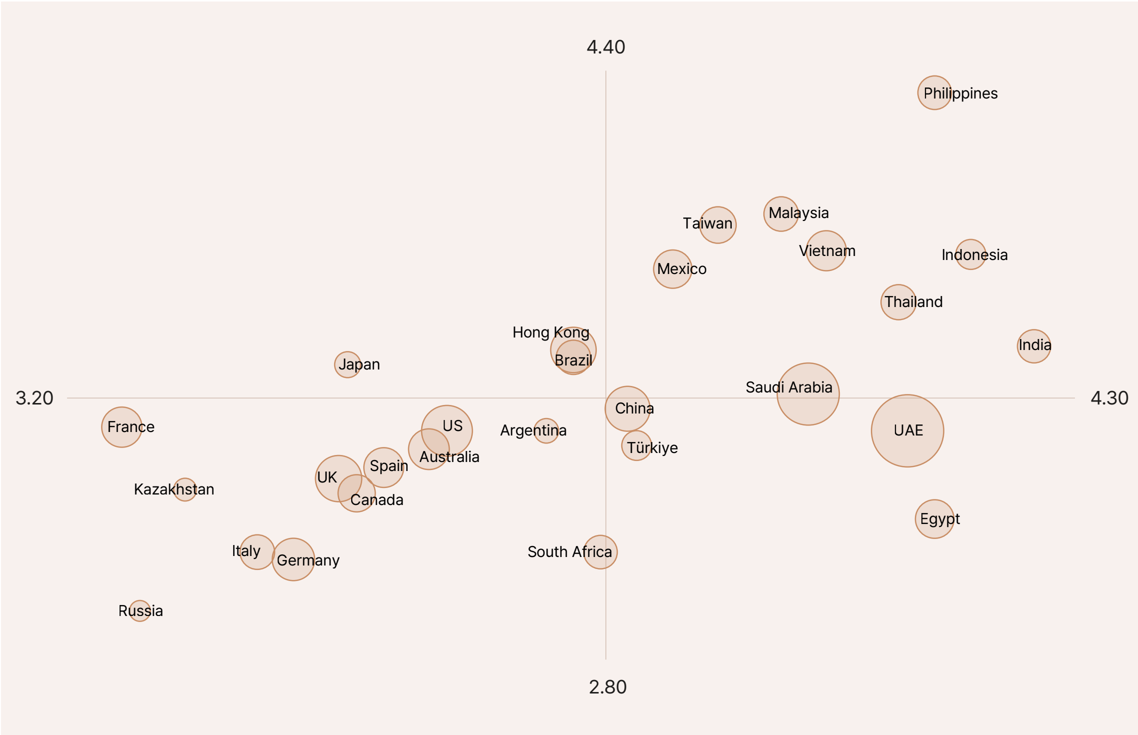
Variety shows



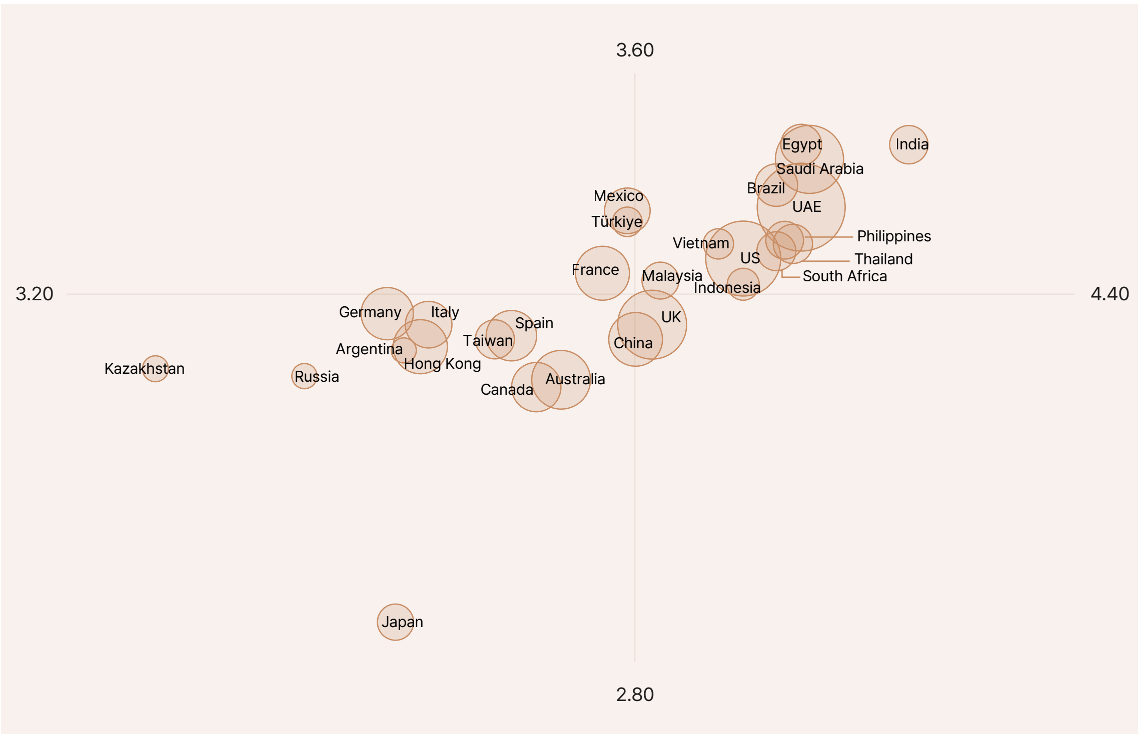
Movies



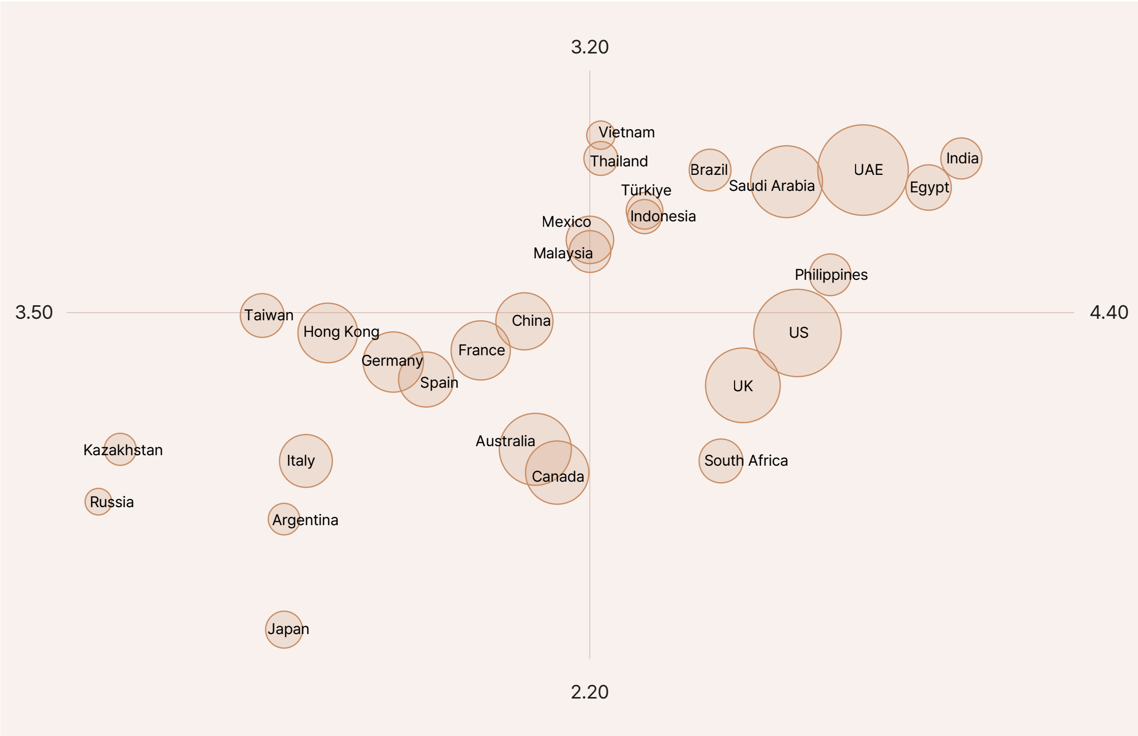
Music



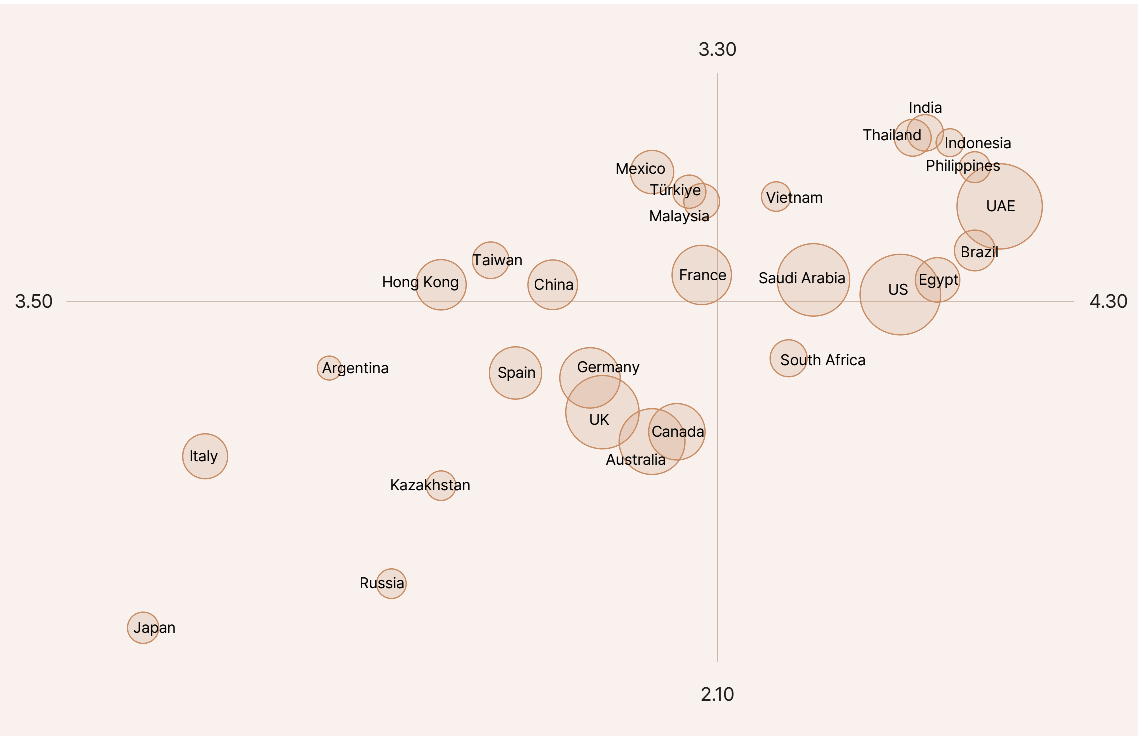
Animation



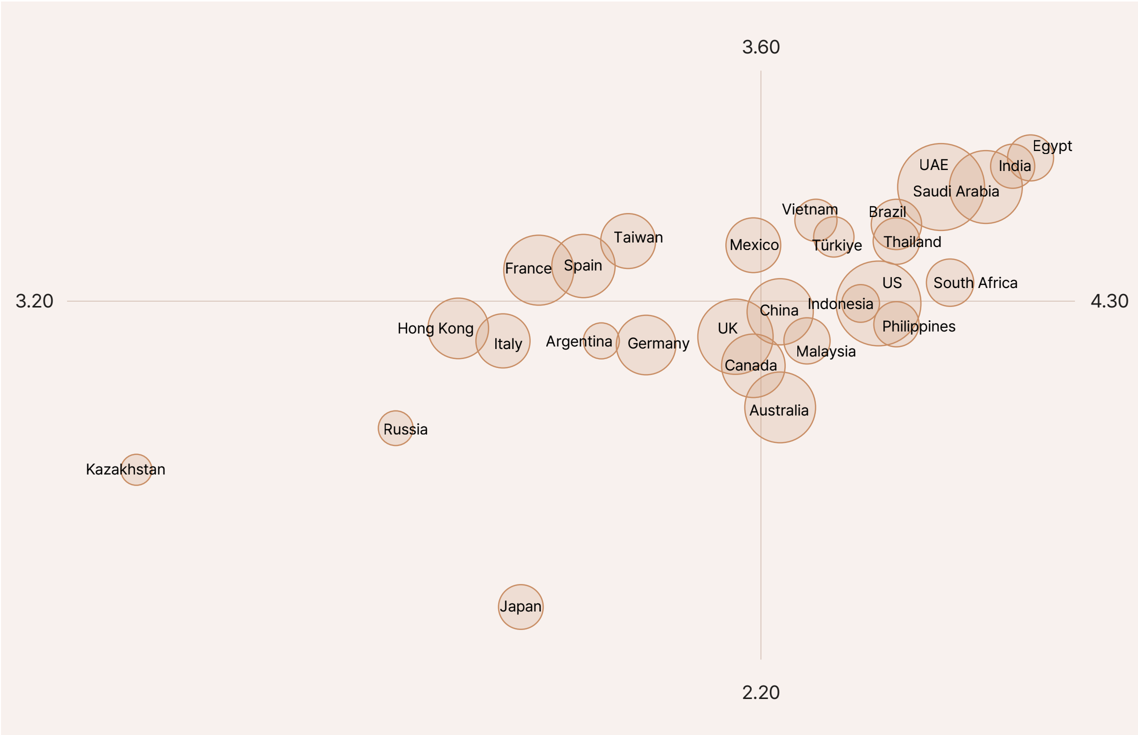
Publications



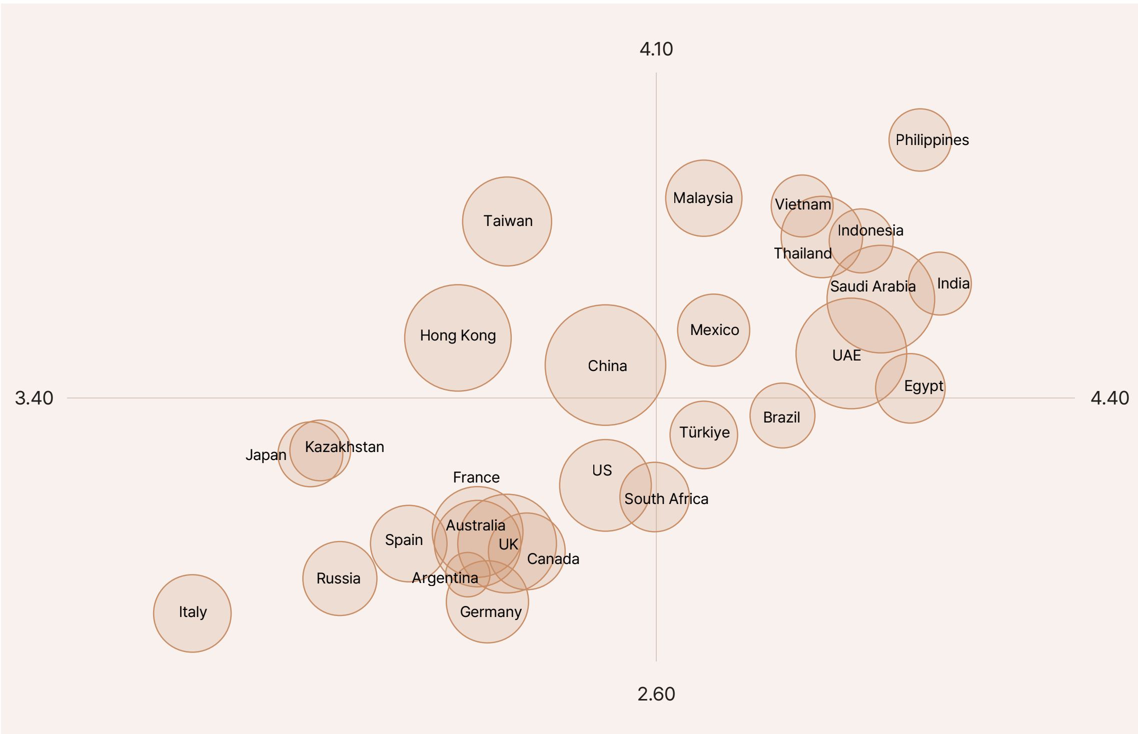
Webtoons



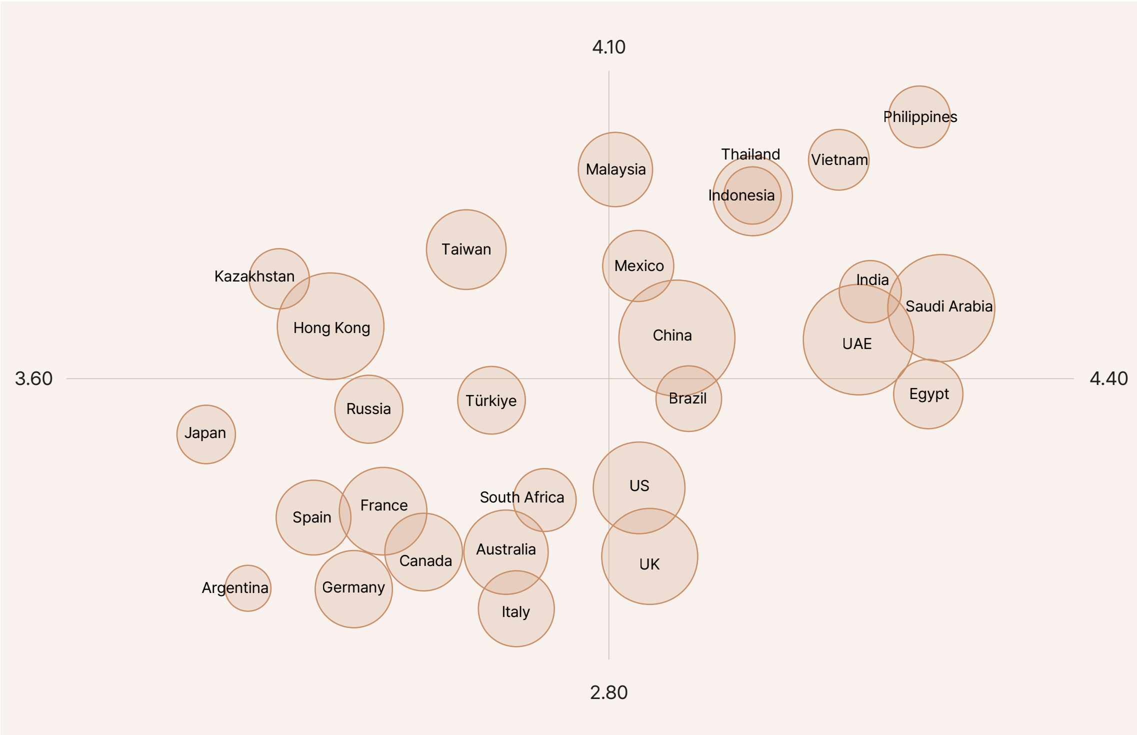
Games



Fashion

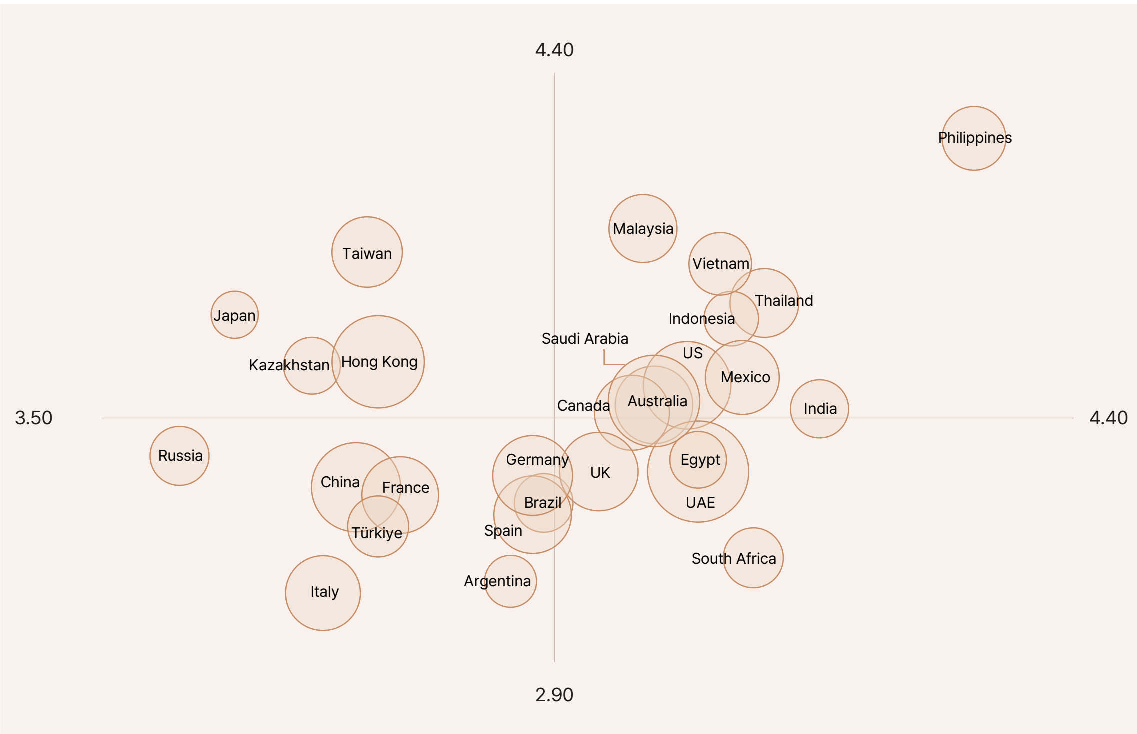


Beauty



4.10
3.60
4.40
2.80
Philippines
Thailand
Vietnam
Malaysia
Indonesia
Taiwan
Mexico
Kazakhstan
India
Saudi Arabia
Hong Kong
China
UAE
Brazil
Egypt
Russia
Türkiye
Japan
US
South Africa
France
Spain
Australia
Canada
UK
Argentina
Germany
Italy

Food



4.40
Philippines
Malaysia
Taiwan
Vietnam
Thailand
Japan
Indonesia
Saudi Arabia
US
Kazakhstan
Hong Kong
Mexico
Canada
Australia
India
3.50
4.40
Russia
Germany
Egypt
China
UK
France
Brazil
UAE
Türkiye
Spain
South Africa
Argentina
Italy
2.90

Overall Summary and Implications

02

1 Dramas and K-pop remain strong

Recent trends in Hallyu content consumption show that dramas, variety shows, and music still play a crucial role in the spread of Hallyu. Among consumers who have experienced Hallyu in the 28 surveyed countries, the average monthly time spent on Korean content reached 14.0 hours, an increase of 2.4 hours compared with 2023. In particular, dramas (17.5 hours) and variety shows (17.0 hours) recorded the longest time spent. These results suggest that there is still a high preference for video content over other formats. In addition, consumers who watched Korean dramas spent an average of 105.4 hours per month watching dramas. Although this figure marks a decrease of 3.7 hours compared with 2023, it still represents a dominant level of consumption compared with other types of content.

Further, when asked what first comes to mind when thinking of Korea, “K-pop” ranked first for the eighth consecutive year since 2017. “dramas” ranked third at 8.7%, staying in the upper ranks as in 2023. “Movies” (5.6%) entered the top 5 for the first time, indicating that the awareness of Korean video content remains firmly established.

In terms of the popularity of Korean cultural content within each country, the proportion of respondents indicating “widely popular” (i.e., widely popular among the general public with consistent sales of related products) was highest for “food” (53.7%), followed by “music” (51.2%), “beauty” (50.8%), and “dramas” (49.0%). When comparing the proportions of respondents over a five-year interval, the popularity of video content showed marked growth in 2024 compared with 2020, including “dramas” (17.9 percentage points), “movies” (13.0 percentage points), and “variety shows” (9.3 percentage points).

2 Hallyu content has expanded to beauty, games, and webtoons

In addition to dramas and music, which have traditionally driven Hallyu, Korean content has begun expanding into diverse categories such as games, webtoons, and beauty. Among consumers who have experienced Hallyu in the 28 countries, time spent on Korean content showed significant growth, with games (15.4 hours) and webtoons (14.5 hours) increasing by 2.9 and 2.1 hours, respectively, compared with 2023. In terms of favorability toward Korean cultural content, webtoons recorded the highest favorability (75.7%) since the survey began, indicating its growing presence in the global market. This rise appears to be driven by active content expansion, such as collaborations with platforms such as Netflix and various other OTT platforms to adapt webtoons into visual content.

The beauty category has also established itself as a key driver of the global expansion of Hallyu. In addition to the aforementioned popularity of beauty (50.8%, third among content categories), Korean beauty ranked first as the most popular foreign beauty content in many countries and second in overall favorability among Korean cultural content, confirming its popularity in several items. Notably, it accounted for the highest proportion of consumption among 11 content categories at 28.0% and showed a significant increase in expenditure compared with the previous year, standing out in terms of consumption volume. Korean beauty brands are expanding their presence in overseas markets through their active use of social media and global online shopping platforms, as well as their entry into local drugstores. These results indicate that consumption of Hallyu content is extending beyond video content and into lifestyle in general, suggesting strong potential for the further expansion of Korean content across various categories, including games, webtoons, and beauty.

3 *Squid Game*, *Parasite*, Lee Min-ho, and BTS remain the most popular, and the success of romance, webtoon-based dramas, and the occult movie *Exhuma* is particularly noteworthy

In 2024, the most preferred drama in Korean pop culture was *Squid Game* (9.7%), which has ranked first for four consecutive years, reaffirming its unwavering popularity. Among newly popular dramas, *Queen of Tears* (6.5%) stood out, ranking first in the Asia-Pacific region and second in the Americas, Europe, the Middle East, and Africa, demonstrating its strong global appeal. *Crash Landing on You* has maintained its top-tier position for five consecutive years. Webtoon-based dramas such as *True Beauty* and *Lovely Runner* also gained popularity, ranking fourth and fifth.

In the movie category, *Parasite* (8.3%) and *Train to Busan* (6.5%) held the first and second positions for the fifth consecutive year, and the 2024 occult film *Exhuma* (4.1%) gained notable attention. *Parasite*, which has received prestigious international awards, was particularly popular in the Americas (10.0%) and Europe (11.4%). *Train to Busan*, known for its uniquely Korean take on the zombie genre, performed strongly in the Asia-Pacific (8.6%). *Exhuma* was especially popular in Taiwan (12.1%), Hong Kong (10.3%), and Indonesia (9.7%), likely due to the familiarity of shamanistic themes within the occult genre among Asian audiences.

Among actors, Lee Min-ho (7.0%) maintained overwhelming popularity, ranking first for the 12th consecutive year. He was followed by Gong Yoo (2.4%) and Song Hye-kyo (2.4%). Meanwhile, Kim Soo-hyun (2.3%) returned to fourth place after 10 years, boosted by his appearance in *Queen of Tears*.

As for singers, BTS (24.6%) has remained first for seven consecutive years, followed by BLACKPINK (12.3%) in second place for the sixth year. IU (3.1%), PSY (2.2%), and TWICE (1.8%) also ranked high. BTS recorded the highest preference in the Americas (34.2%), while BLACKPINK was particularly popular in the Asia-Pacific (16.2%). LISA (2.6% in the Asia-Pacific) and ROSÉ (1.0% in the Middle East) of BLACKPINK, and Jung Kook (3.2% in the Middle East) and Jimin (1.3% in the Middle East) of BTS were also highly recognized as individual members.

Overall, romance remained the dominant genre in Korean dramas, while various genres such as occult and sci-fi gained popularity in movies. In the actor and singer categories, Lee Min-ho, BTS, and BLACKPINK continued to enjoy overwhelming popularity.

4 Negative perceptions are rising alongside positive effects, underscoring the need for a cautious approach

In this survey, 91.7% of consumers with Hallyu experience (53.2% "increased" + 38.5% "similar") reported that their interest in Korean cultural content had either increased or remained similar compared to a year earlier. These consumers tended to perceive that their compatriots' interest had increased even more than their own, a trend particularly notable in Western regions such as the Americas and Europe. This finding indicates that Hallyu is recognized not just as a matter of personal taste but also as a broader social and cultural phenomenon. It seems that in Western regions, people are experiencing the presence of Hallyu through their surroundings.

Moreover, the appearance of Hallyu content in movies or TV shows was found to have an impact on product purchase decisions. This phenomenon was especially apparent in the Middle East and Southeast Asia, including Thailand (33.1%), India (31.1%), and the UAE (27.5%). The proportion of respondents who said that Hallyu had influenced their purchase of Korean products and services reached 63.8%, confirming the positive impact on consumption.

However, negative perceptions have increased alongside these positive aspects. Some 37.5% of respondents expressed agreement with negative perceptions toward Hallyu. While there have been fluctuations each year, the overall trend has been in the upward direction. Notably, the rate of agreement with negative perceptions was high among those in their 20s (42.6%) and 30s (39.9%), and in some countries such as India, the UAE, and Hong Kong, over 50% of respondents agreed with negative perceptions. The key factors included "too commercial" (15.0%), "North–South division/international threat of North Korea" (13.2%), and "need to protect the domestic content industry" (11.8%).

Countries with higher interest in and more active consumption of Hallyu content also showed a greater tendency to agree with negative perceptions. This suggests that the more frequently people are exposed to Hallyu, the more likely they are to recognize both its positive and negative aspects. In this respect, Korean cultural content has an effect in promoting consumption as its appearance in movies and TV shows can lead to positive image shifts and increased purchases. However, negative perceptions are growing at the same time, suggesting that perceptions toward Hallyu are becoming increasingly multifaceted. At this point, a careful and well-considered approach is necessary to ensure the positive spread of Hallyu.

5 The preference for Hallyu in Southeast Asia and its market potential in the Middle East have been confirmed

This survey once again confirmed the high preference for Hallyu in Southeast Asian countries and identified the growth potential of the Middle Eastern market. Both regions perceive Korea as an advanced country in various fields such as technology and culture, and showed high favorability toward Korean cultural content.

Among consumers with Hallyu experience in the 28 surveyed countries, 68.2% expressed a willingness to recommend Korean cultural content, with particularly high willingness observed in the Philippines (88.1%), India (83.0%), and Vietnam (80.8%). In terms of favorability toward Korean cultural content, the Philippines (88.9%) showed the highest level of favorability, followed by Indonesia (86.5%), India (84.5%), and Thailand (82.7%).

Positive attitudes were found not only in favorability toward Korean cultural content but also in the perception of Korea. By country, the UAE (88.4%), the Philippines (87.1%), Saudi Arabia (86.4%), Indonesia (85.7%), and Egypt (85.7%) recorded high rates of positive perception. In terms of positive perceptions, Middle Eastern countries stood out alongside those of Southeast Asia. Southeast Asia (Indonesia, the Philippines, and Vietnam) and the Middle East (the UAE and Saudi Arabia) consistently ranked among the top in agreement rates for specific items evaluating Korea, such as "economically advanced country," "likable country," "friendly toward us," and "cultural powerhouse."

Asia and the Middle East also stood out in terms of consumption volume. The Philippines (24.0 hours per month) spent the longest time on Korean cultural content, followed by Thailand (20.1 hours), the UAE (19.2 hours), India (18.9 hours), and Indonesia (18.8 hours). Indonesia (34.7%), the Philippines (34.0%), and Malaysia (33.0%) also led the proportion of consumption, indicating that Korean content accounted for a significant share of total media consumption. Middle Eastern countries also ranked high in expenditure, suggesting strong market potential.

Results reaffirmed the preference for Korean cultural content in Southeast Asian countries. To ensure this preference leads to usage and purchases, Korean cultural content is being localized as it expands into Southeast Asia. According to local news, Korean cultural content is being offered not only on global platforms such as Netflix and YouTube but also on Rakuten Viki and Viu. Additionally, Korean fashion, beauty, and food are gaining popularity as they are stocked by major local online and offline sales channels such as Shopee, Tokopedia, and TikTok Shop.

6 Diversification of channels of exposure from Online/mobile platforms to offline channels

With respect to the access of audiovisual content, such as Korean dramas, variety shows, movies, and music, the usage rate of online/mobile platforms was found to be between 79.8% and 86.4%, establishing these platforms as the main channels of exposure to Hallyu content. On the other hand, TV viewership has continued to decline. Notably, the decrease in TV usage exceeds the increase in Online/mobile platform usage, highlighting a pronounced shift in consumption trends

toward digital platforms. Considering that the primary age group consuming Hallyu content are those in their 30s or younger, this change aligns with the spirit of the times. According to the PwC Global Standard OTT/broadcast Market Size, OTT platforms are continuing to grow.
SNS videos/photos (42.4–54.5%) emerged as the primary channel of exposure for lifestyle content such as fashion, beauty, and food, while the use of online/offline sales channels increased from the 30% range in 2023 to 46.3–53.4% this year. Along with market expansion strategies such as entering local sales channels, Korean music is frequently used as background music on platforms such as TikTok or heard offline at fan meetings and pop-up events, as reported by KOFICE overseas correspondents and KOTRA trade officers. There is also active exposure to Korean food through programs such as Netflix's *Culinary Class Wars* and short-form content on social media, with accessibility continuing to expand through activities such as the opening of a Korean-style casual diner in New York and the rising popularity of convenience foods such as Gimbap and Ramen.

7 The Korean language has drawn attention for its cultural appeal but is considered difficult to learn

About half (51.4%) of the consumers with Hallyu experience perceived the Korean language as possessing unique features that distinguish it from other languages, and 49.9% believed that learning Korean is necessary to better understand Korean cultural content. However, only 33.5% of respondents felt that there were many Korean learners around them or that Korean language institutes are easily accessible in real life, with a higher proportion (41.4%) responding otherwise. This suggests that, unlike the high level of interest in the Korean language, the environment to support actual learning remains insufficient.
The experience rate for Korean language learning (average of 28 countries: 26.8%) was relatively higher in Asia and the Middle East, including the Philippines (45.4%), India, and Indonesia (each 43.8%), and lower in Europe and the Americas. The fact that the main reasons for learning Korean were "interest in Korea and Korean culture" and "interest in the Korean language itself," rather than "employment" or "academic performance," suggests that interest in the Korean language is due to its cultural appeal and not its function as a practical language. Similarly, aesthetic elements such as "the sound of Korean is pleasant" and "Hangul, the Korean script, is beautiful" were emphasized as factors promoting favorability toward the Korean language. Meanwhile, "Korean grammar is difficult" and "lack of learning institutes" were cited as factors inhibiting favorability. Respondents tended to believed that grammar, rather than pronunciation, consitituted the main difficulty of learning Korean, and there appears to be an insufficient number of educational institutions to address this. While Korean may be relatively familiar and approachable in some cultural regions, grammatical differences and lack of educational infrastructure likely lower its accessibility in Western regions.
Therefore, although the Korean language is emerging as a subject of cultural interest along with the spread of Hallyu, the current learning environment remains insufficient, limiting its ability to become a popular language.

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