

How K-Content is Shaping Global Perceptions of Korea

Report Background

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Background and Methodology

K-Content takes the world by storm

K-Content mesmerizes global audience

60% of Netflix's 280M users have viewed K-Content.



Over 80% of our members around the world watch K-content

At least one Korean title has featured on our Non-English TV or Film lists every week since we started publishing Top 10 lists in 2021.



The Netflix Effect

32% of the 867K Netflix K-Content-related mentions (Aug '23 to Oct'24) were about culture/tourism: food, music, travel, language, and fashion.



Most K-Content Mentions From U.S (24%) and Asia (22%)

“Netflix is basically K-Drama paradise. Gorgeous actors, time travel, afterlife, crime, horror, and comedy. It’s got everything, and all with top-tier production!”
- X (Twitter), Nov 3

“Korea is ahead of its time. The entire world is watching *Parasite* on Netflix, and obsessed with their pop culture, music, and idols... Korea might be the new cultural powerhouse.”
- X (Twitter), Oct 22

“Korean culture seems like a part of our daily lives now. Korean restaurants are opening up in Toronto, K-Pop is playing in Dubai, and K-Dramas are streaming on Netflix. K-Culture has gone global.”
- X (Twitter), Feb 6

“I went to a Korean event with my girlfriend today, and I don’t think the organizers were aware of how influential Korean culture has become ever since Netflix invested in K-Dramas. It was insane.”
-X (Twitter), Dec 10

“Forget the recipe, I desperately need a bite of that! I subscribed to Netflix for the K-Dramas, and now I really want to try ramyeon with kimchi.”
- X (Twitter), Oct 28

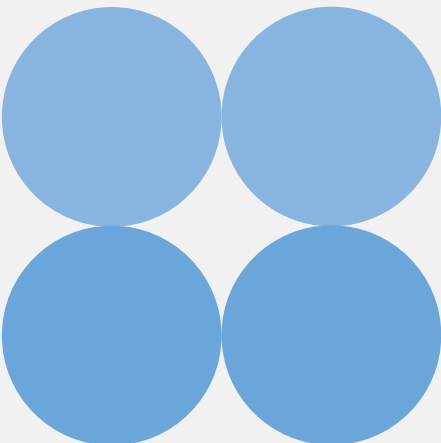
“I fell in love with Korean culture back in 2004 after watching *What Happened in Bali*. Just imagine streaming *Winter Sonata* on a modem and finding subtitles on Soompi forums to add to your video files. Netflix is such a lifesaver.”
- X (Twitter), Jan 2

Where we started

Content plays a powerful role in building cultural affinity. We conducted a survey among K-Content viewers to understand how content has impacted their perceptions of South Korea.

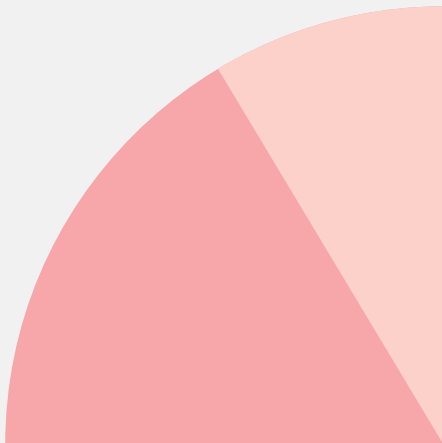
Methodology

Netflix partnered with 2CV to conduct a 15-minute quantitative survey across 8 markets where K-Content has successfully traveled.



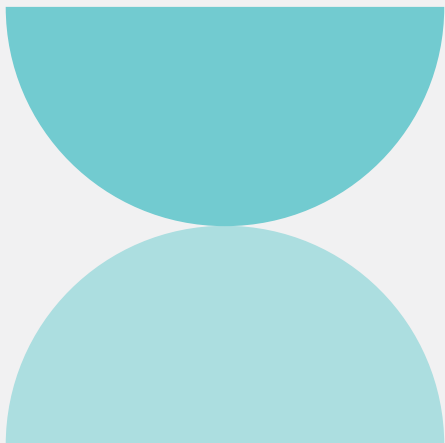
Qualifications

- Ages 18-64
- Non-Korean Markets
 - n=1,000 K-Content viewers in the past 12 months (excluding Korea)
 - K-Content non-viewers in the past 12 months (excluding Korea)
- South Korea n=1,000
- Regular streaming service users

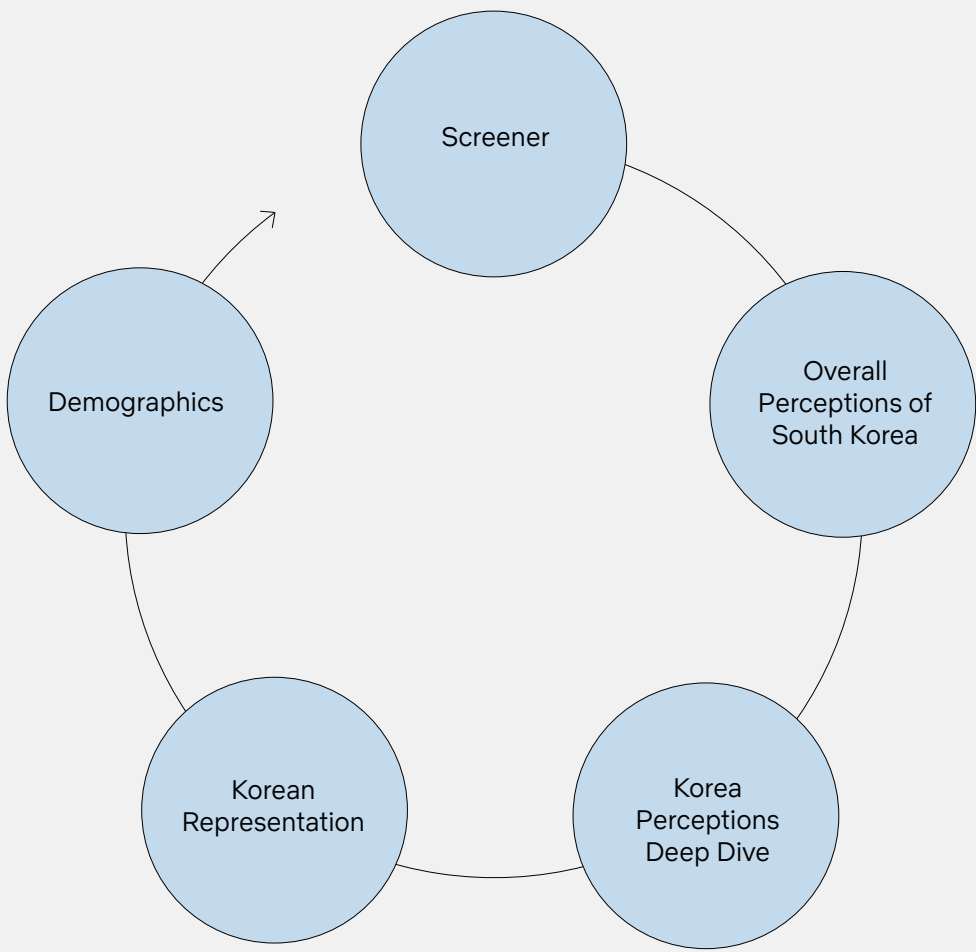


Scope & Sample

- Total N=11,511
- US n=1,500
- South Korea n=1,004
- Brazil n=1,501
- France n=1,501
- Japan n=1,502
- Thailand n=1,501
- India n=1,500
- Indonesia n=1,502



Survey Flow



Screener

- Age
- Gender
- Language
- Streaming Service Awareness
- Streaming Service Usage
- Origin of Content watched

Overall Perceptions of South Korea

(Non-Korean Respondents)

- Travel Experience
- General Opinion on Korea
- General Opinion on K-Culture
- K-TV/Film Overview
 - Genres watched
 - Netflix titles watched
 - Streaming service used

Korea Perceptions Deep Dive

(Non-Korean Respondents)

- Interest/Appeal
 - Food
 - Language
 - Fashion
 - Products (Skincare, beauty, technology)
 - History
 - Music

Korean Representation

(Non-Korean Respondents)

- Satisfaction with global representation
- Netflix-specific representation
- General opinions on Korean representation
- Benefits of K-Content popularity

Demographics

- Employment
- Children/Household Composition
- Watch Time
- Subscription Type
- Nationality (where applicable)

Key Findings

What we learned

1

K-Content Viewers Show Long-term Loyalty

Most K-Content viewers in the U.S., Japan, India, France, and Brazil have been watching for 2+ years.

2

Netflix Users Seek Out K-Content

Netflix users are twice as likely to show interest in watching K-Content in the future than non-users.

3

Netflix Users Appreciate Korean Culture

Netflix users are significantly more positive about South Korea than non-users.

4

Netflix Users Show Deeper Curiosity For Korean Culture

Netflix users show higher interest in all aspects of Korean culture than non-users.

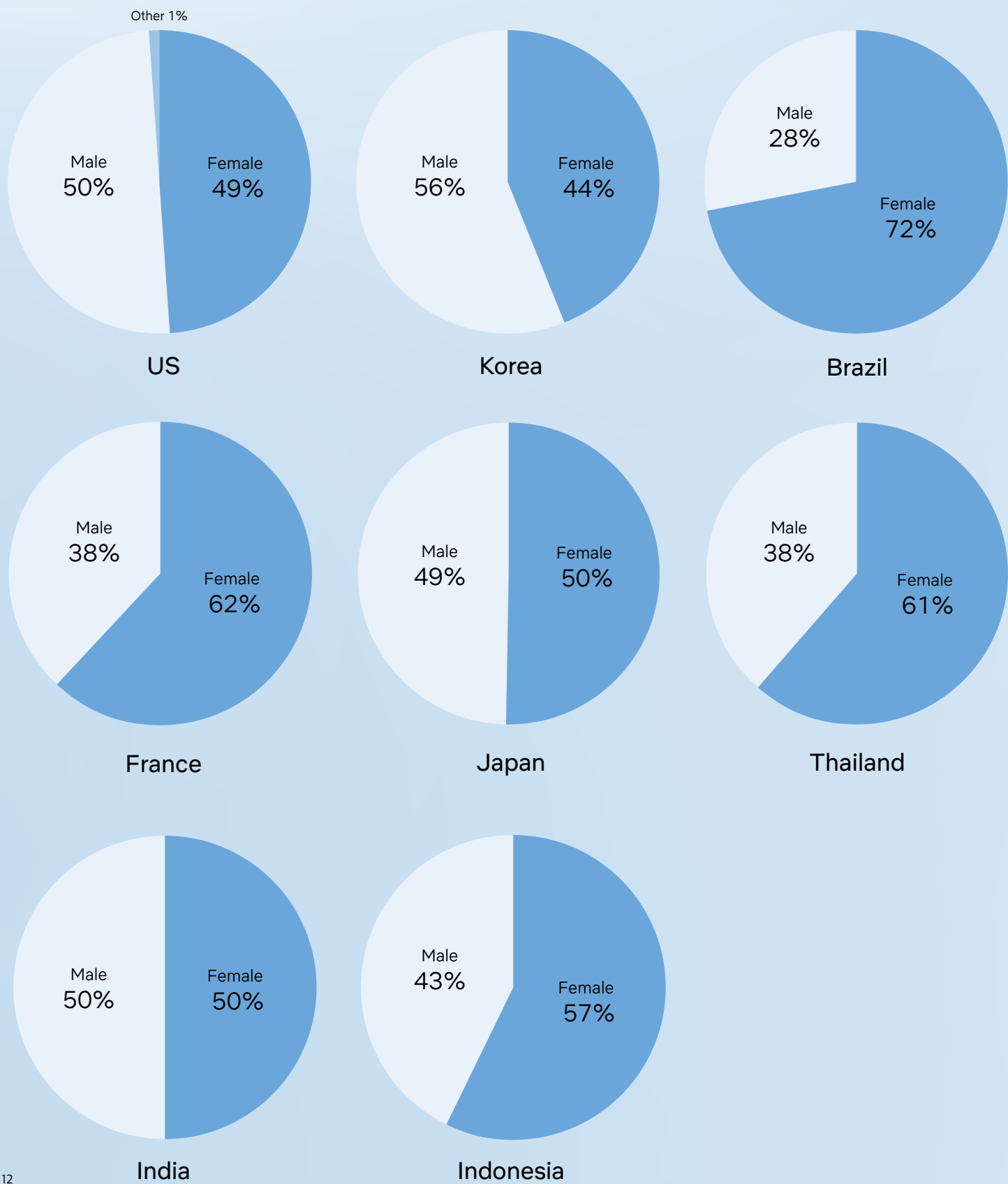
5

Netflix Users Actively Engage With All Aspects of Korean Culture

Netflix users show active interest in various aspects of Korean culture such as travel, cuisine, music, and language.

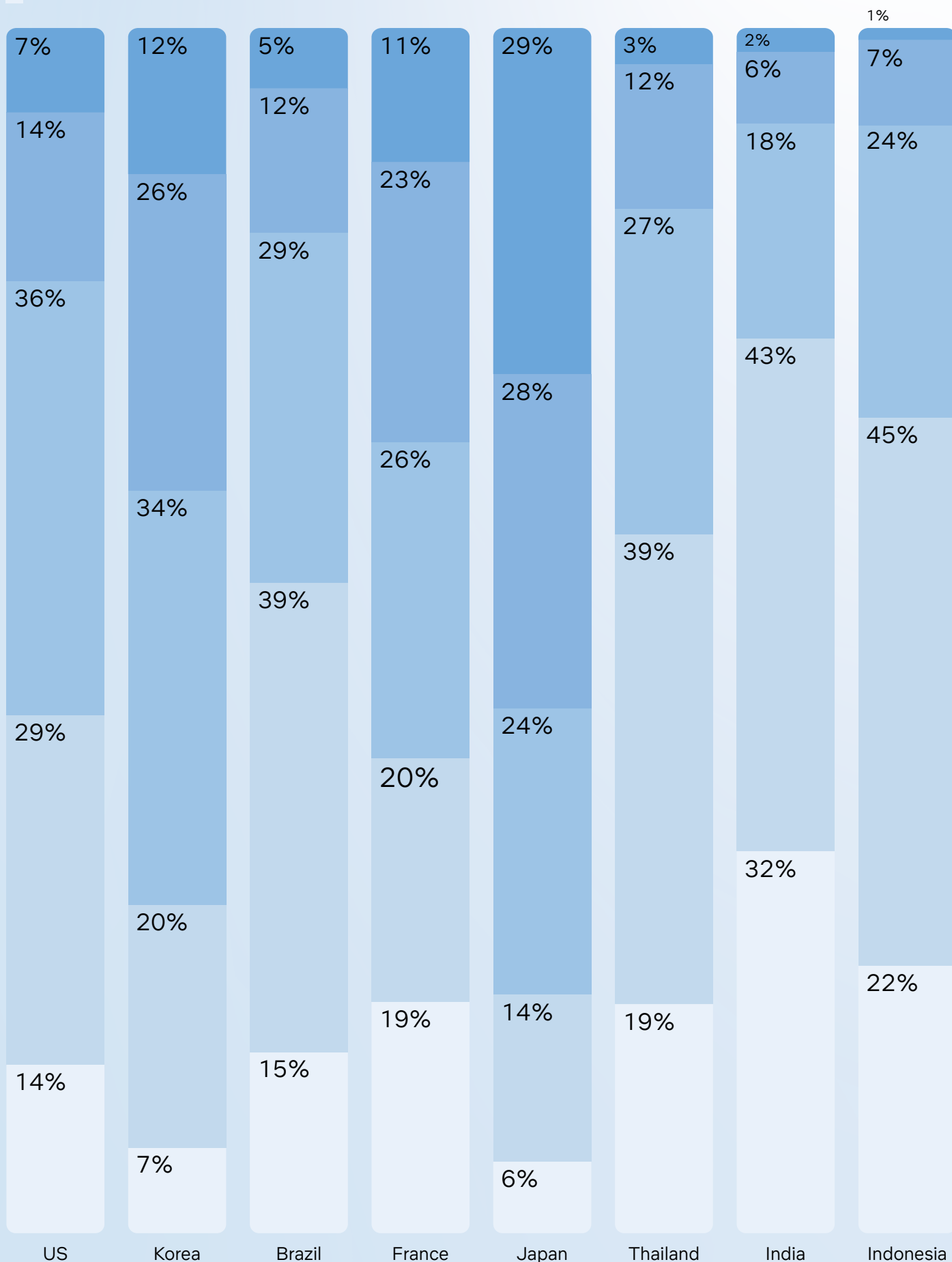
K-Content Audience Overview

Female-Dominated
Audiences in BR & FR & TH
Older Audience in JP & FR



56 - 64
46 - 55
36 - 45
26 - 35
18 - 25

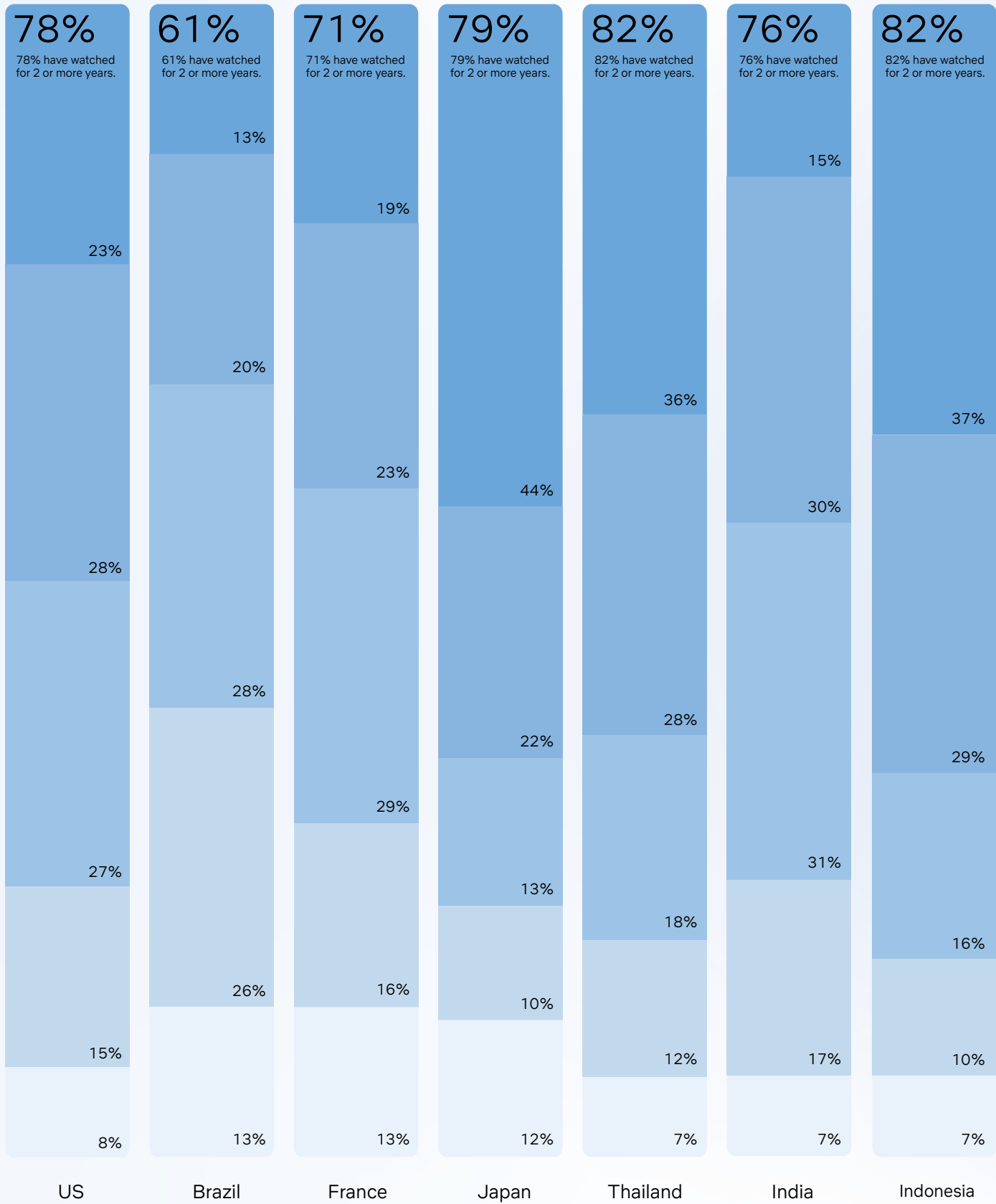
S2. Are you?
S3. What is your age?
Base: K-Content Viewers: US (n=1000), Korea (n=967), Brazil (n=1001), France (n=1001), Japan (n=1002), Thailand (n=1000), India (n=1000), Indonesia (n=1002)



K-Content viewers show long-term loyalty

A1. How long have you been watching K-Content (TV/Movies etc.)?
Base: K-Content Viewers: US(n=1000), Brazil (n=1001), France (n=1001), Japan (n=1002), India (n=1000)

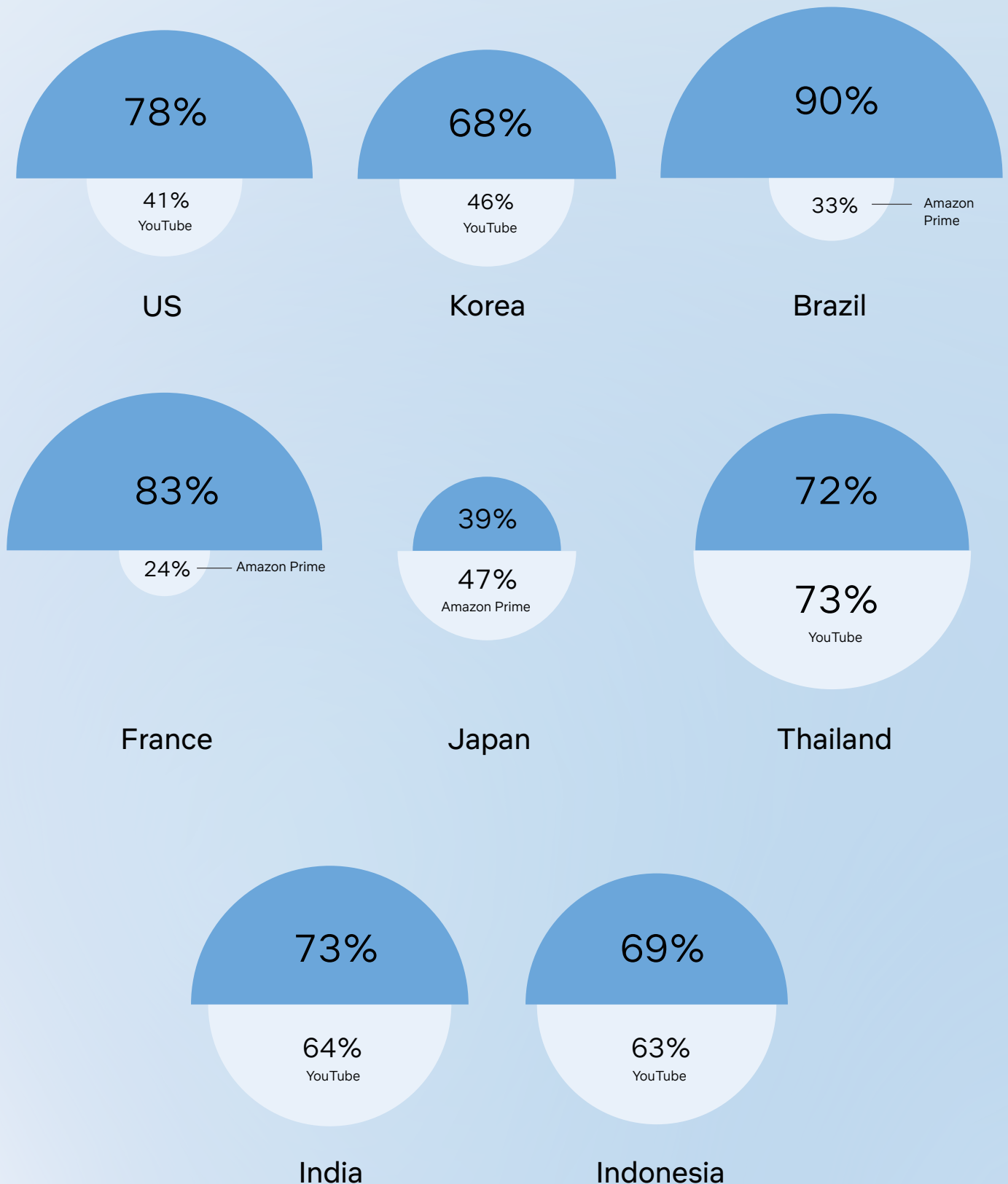
- Over 5 years
- Around 3-5 years
- Around 2 years
- Around 1 year
- Last few months



Netflix, the Core Platform for K-Content

F2. What is your primary platform for watching K-Content?
Base: US respondents (n=1000), South Korea respondents (n=967), Brazil respondents (n=1001), France respondents (n=1001), Japan respondents (n=1002), Thailand respondents (n=1000), India respondents (n=1000), Indonesia respondents (n=1002)

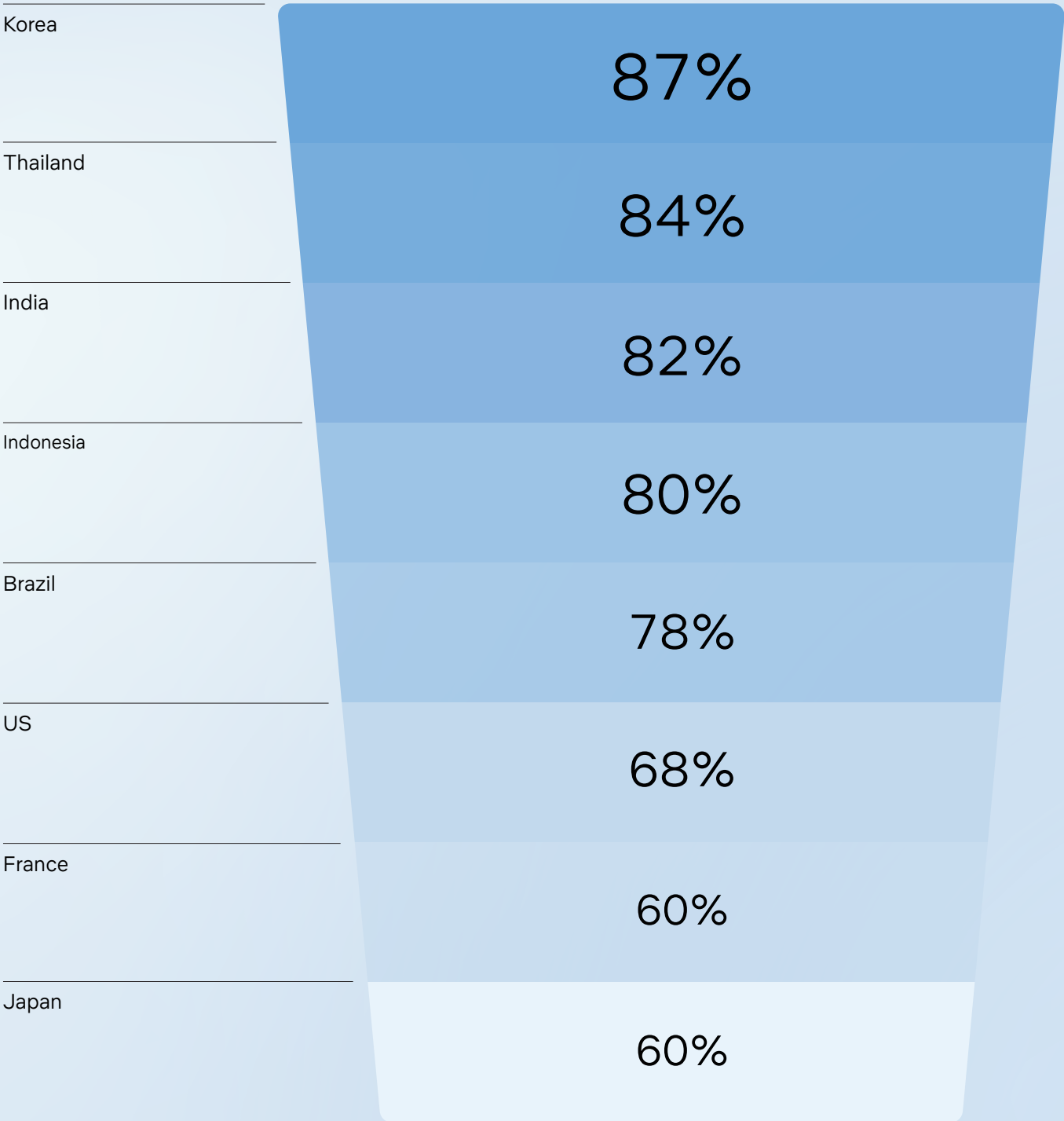
■ Netflix
■ Highest performing competitor



K-Content viewers enjoy* stories set in Korea

* Top-2 Box % ('I love watching TV shows/movies set in South Korea' + 'I enjoy watching TV shows/movies set in South Korea')

G1. Which of the following best describes how you feel about TV shows or movies set in South Korea?
Base: US respondents (n=1500), South Korea respondents (n=1004), Brazil respondents (n=1501), France respondents (n=1501), Japan respondents (n=1502), Thailand respondents (n=1501), India respondents (n=1500), Indonesia respondents (n=1502)



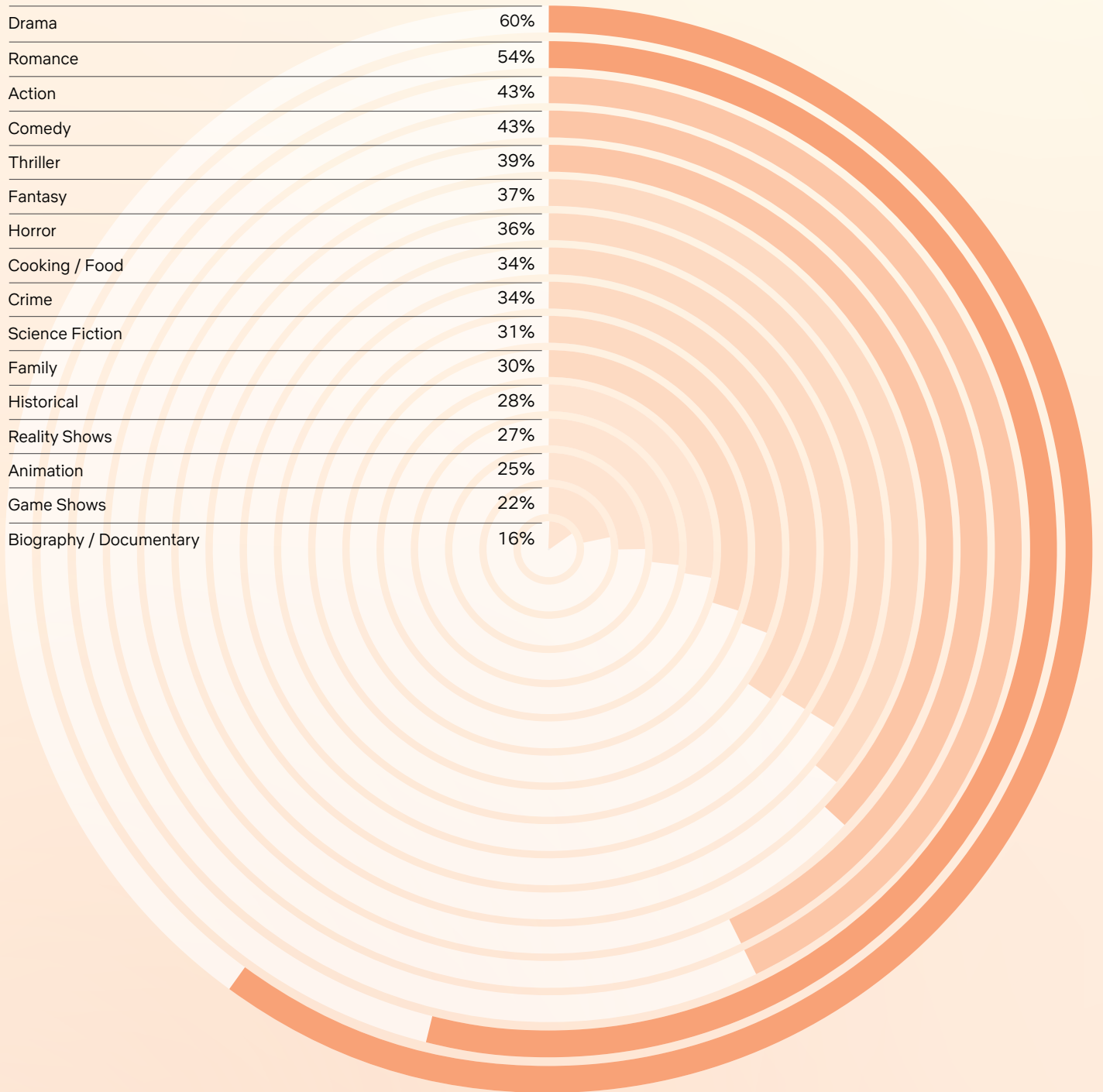
K-Content Perceptions

Netflix users are **twice** as likely to show interest in watching K-Content in the future.

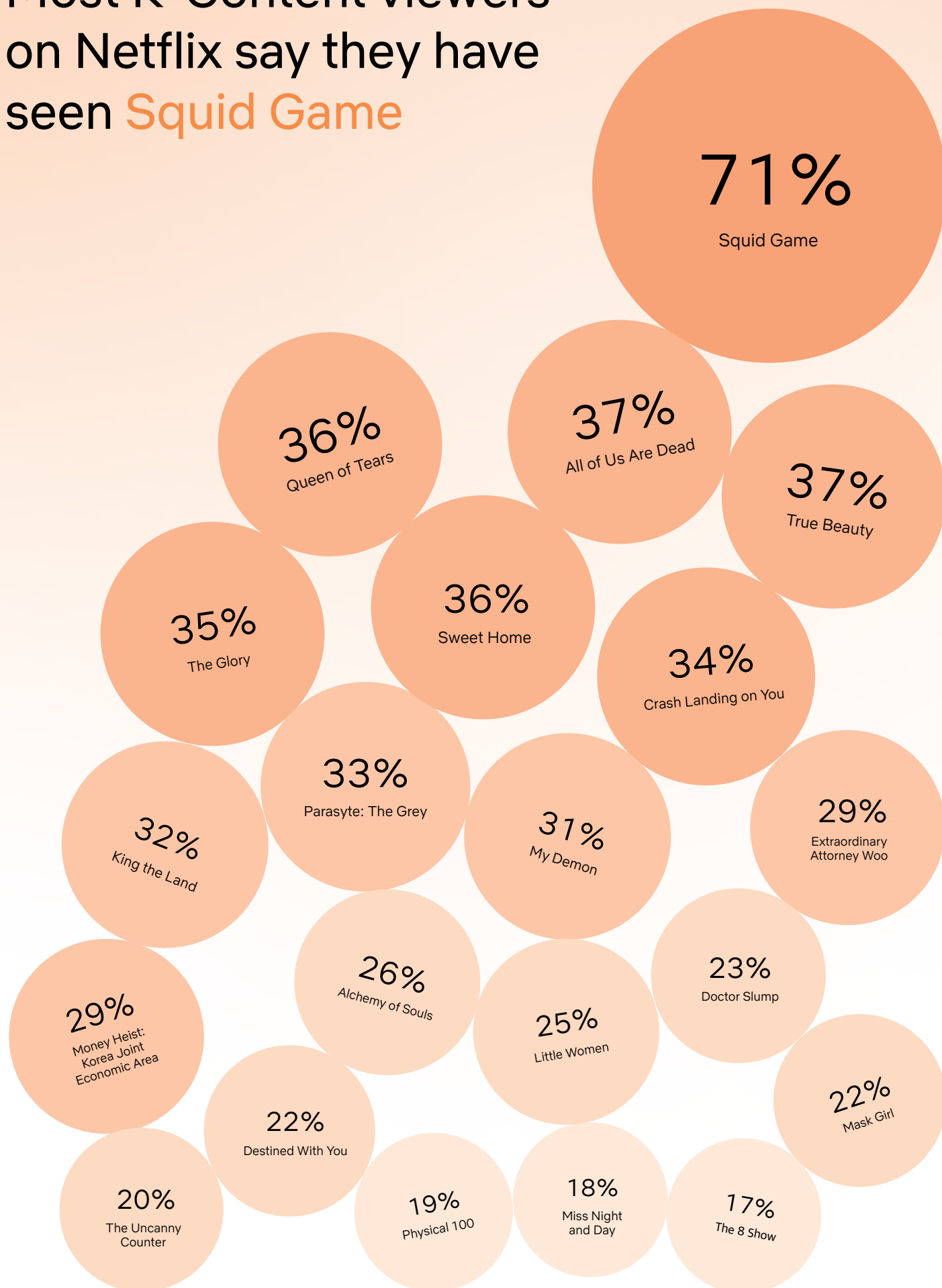


Top Genres: Drama & Romance

| | |
|-------------------------|-----|
| Drama | 60% |
| Romance | 54% |
| Action | 43% |
| Comedy | 43% |
| Thriller | 39% |
| Fantasy | 37% |
| Horror | 36% |
| Cooking / Food | 34% |
| Crime | 34% |
| Science Fiction | 31% |
| Family | 30% |
| Historical | 28% |
| Reality Shows | 27% |
| Animation | 25% |
| Game Shows | 22% |
| Biography / Documentary | 16% |



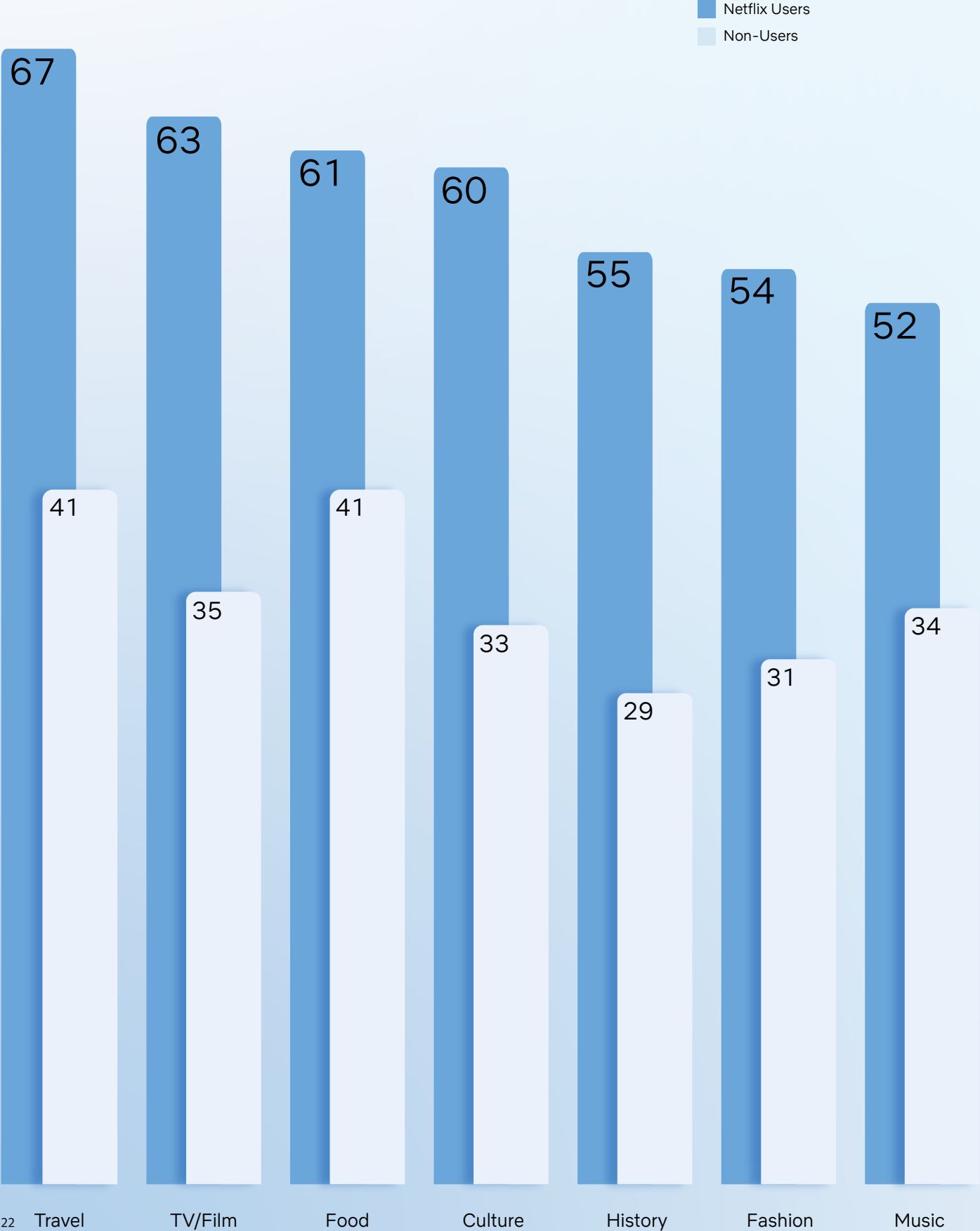
Most K-Content viewers on Netflix say they have seen **Squid Game**



Netflix Contribution To: Perceptions of Culture

Across all cultural aspects, Netflix users demonstrate stronger interest.

A1b. How interested are you in watching Korean content in the future?
A3. How appealing do you find Korean food?
A6. How appealing do you find Korean fashion?
A9. How interested are you in learning and experiencing Korean history?
A11. How appealing do you find Korean music (e.g., K-Pop)?
C4. And how appealing do you find Korean culture?
T3. If taking time off work was not a problem and money was no issue either, how interested are you in visiting South Korea in the future?



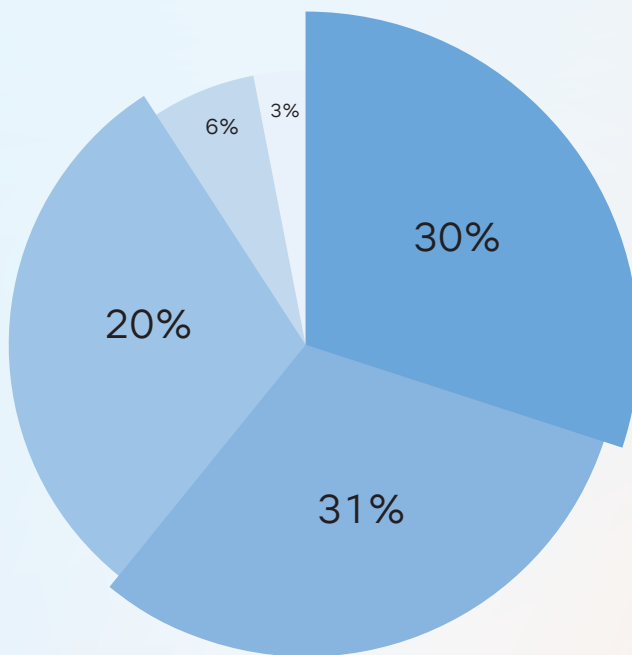
Netflix users are more positive* about South Korea

* Top-2 Box %
(‘much more positive’ + ‘a little more positive’)

C6. And would you say that your opinion of South Korea has changed over the last few years?
Base: Netflix users excluding South Korea (n=7586), Non-users (n=2921)

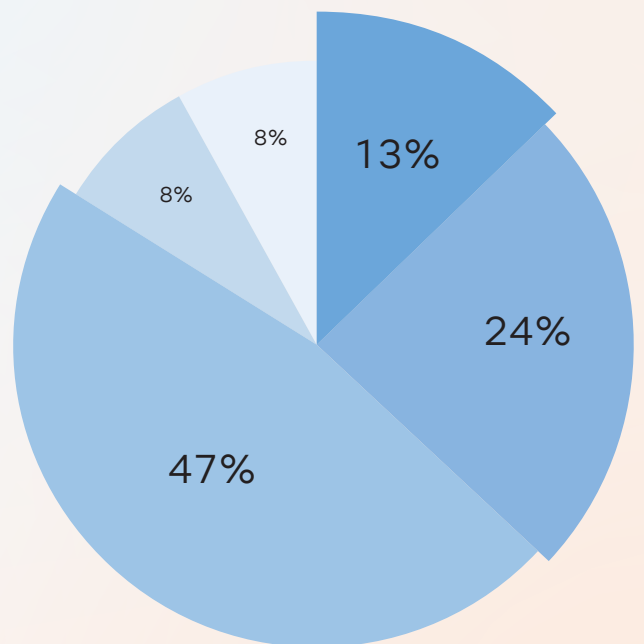
- I have become much more positive towards SK
- I have become a little more positive towards SK
- My opinion towards SK has not changed
- I have become a little more negative towards SK
- I have become much more negative towards SK

Positive: 61%



Netflix-Users

Positive: 37%



Non-Users

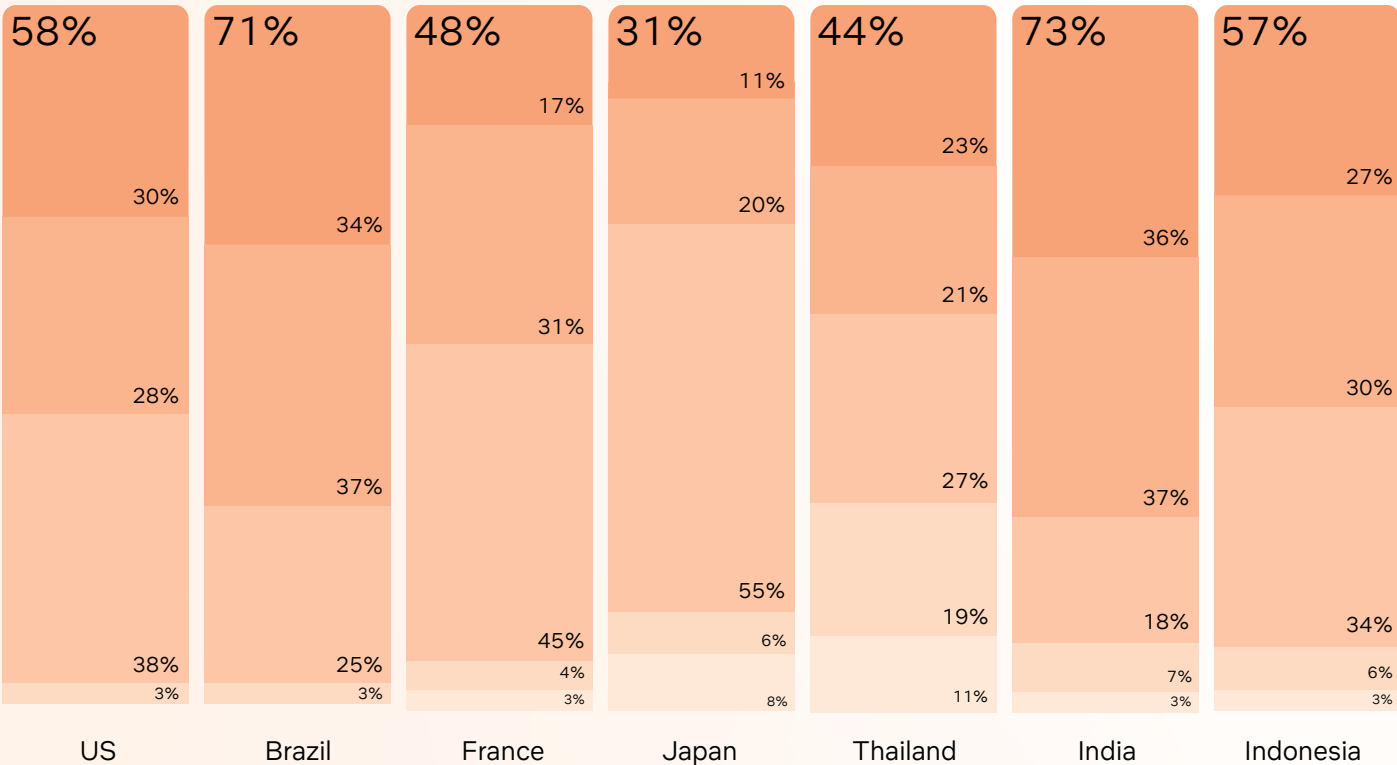
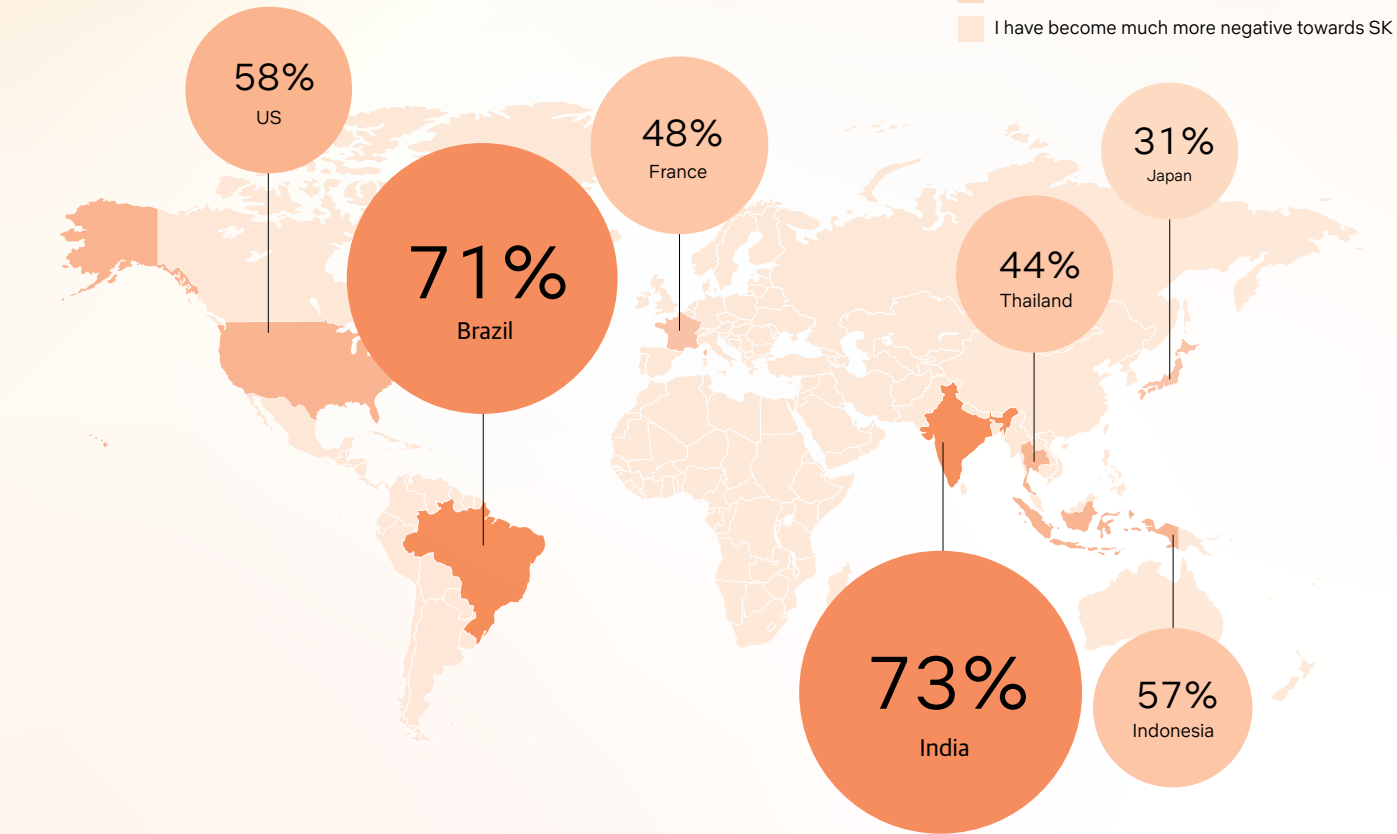
Perception of Korean Culture (By Country)

Most Positive*
Perception:
Brazil & India

* Top-2 Box %
(‘much more positive’ + ‘a little more positive’)

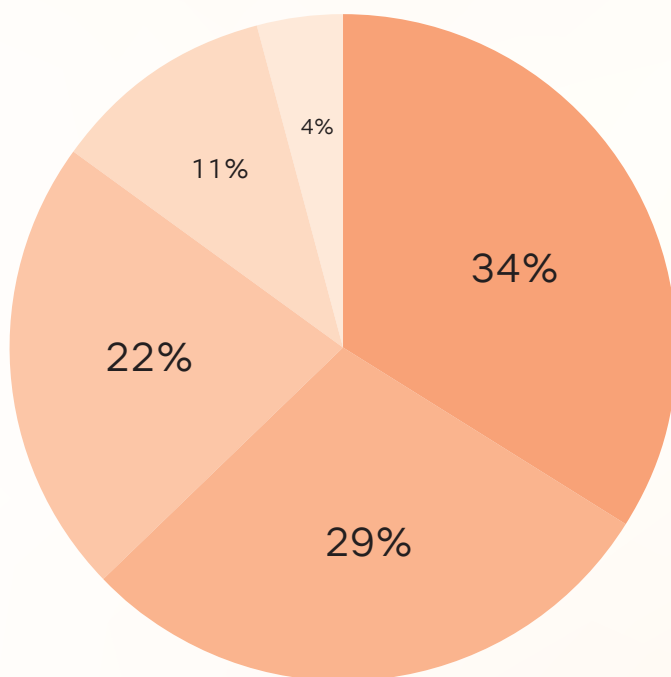
C6. And would you say that your opinion of South Korea has changed over the last few years?
Base: US respondents (n=1500), Brazil respondents (n=1501), France respondents (n=1501), Japan respondents (n=1502), Thailand respondents (n=1501), India respondents (n=1500), Indonesia respondents (n=1502)

- I have become much more positive towards SK
- I have become a little more positive towards SK
- My opinion towards SK has not changed
- I have become a little more negative towards SK
- I have become much more negative towards SK



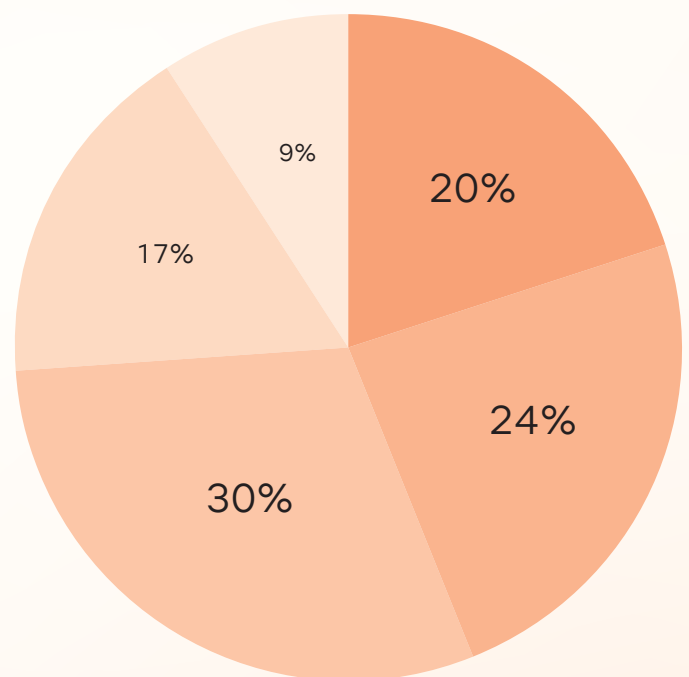
Many Netflix users acknowledged that K-Content influenced* their interest in Korean culture

Influenced: 64%



Netflix-Users

Influenced: 44%



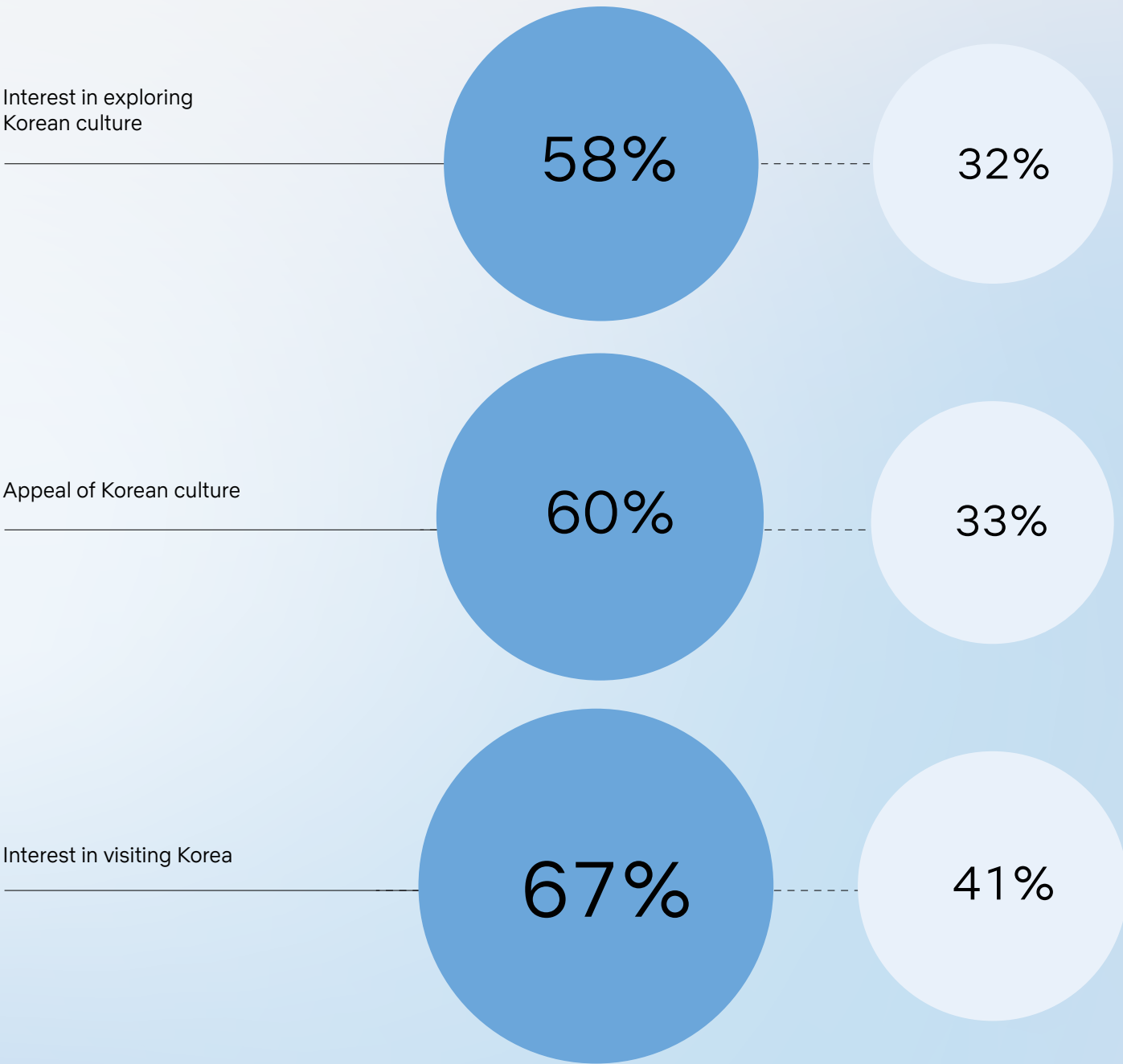
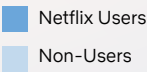
Non-Users

■ A lot ■ Moderately ■ Somewhat ■ A little ■ Not at all

Netflix users show 2X greater interest* in Korean culture

* Top-2 Box %
('Extremely interested' + 'Very interested',
'Extremely appealing' + 'Very appealing')

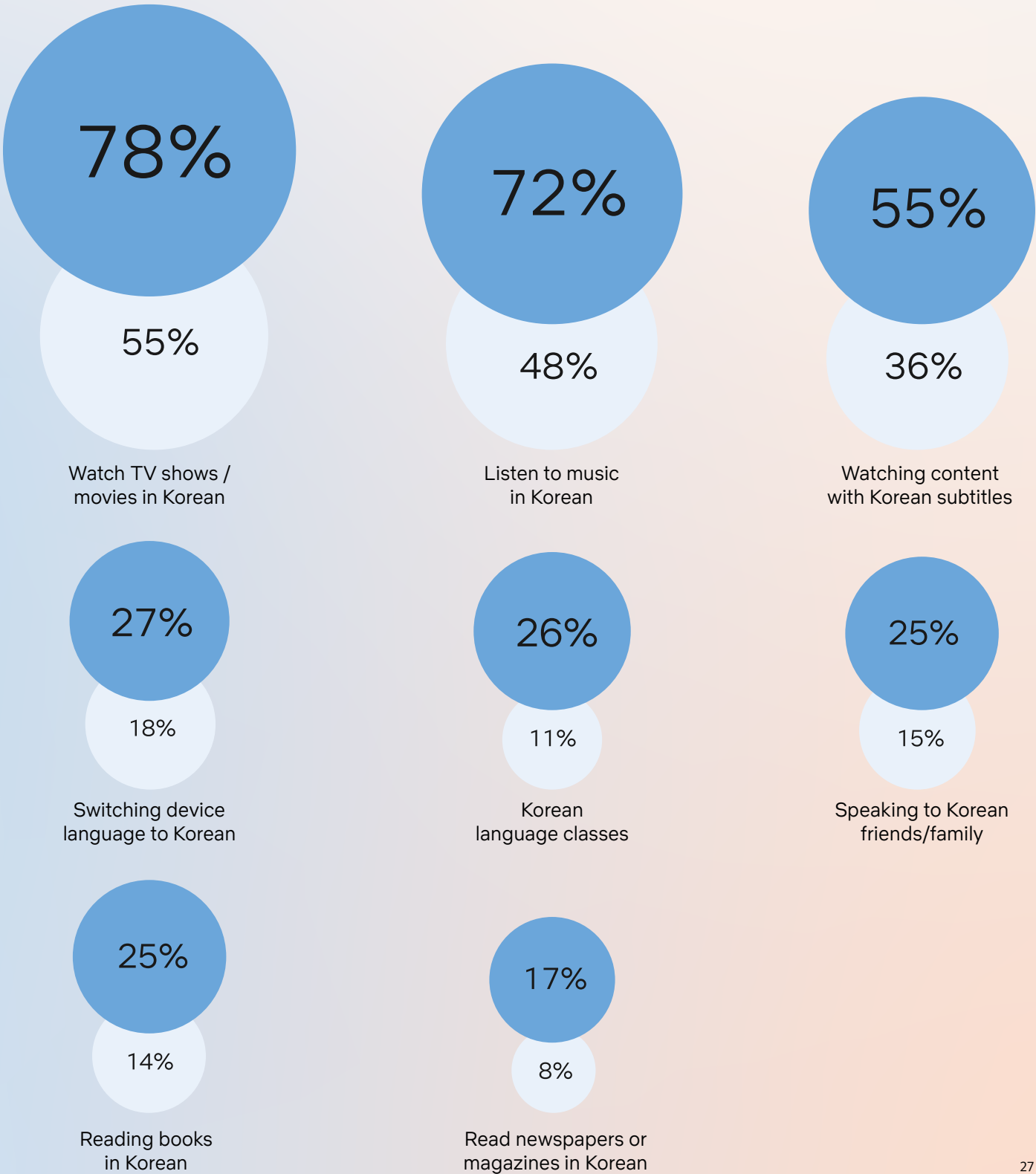
T3. If taking time off work was not a
problem and money was no issue either,
how interested are you in visiting South
Korea in the future?"
Base: Excluding South Korea: Netflix
users (n=7586), Netflix non-users
(n=2921)



Netflix users explore various methods to improve Korean language skills

S4c. Do you currently do any of the following to help improve your Korean language skills?
Base: Those that speak some Korean but not fluently excluding South Korea: Netflix users (n=2049), Non-Users (n=670)

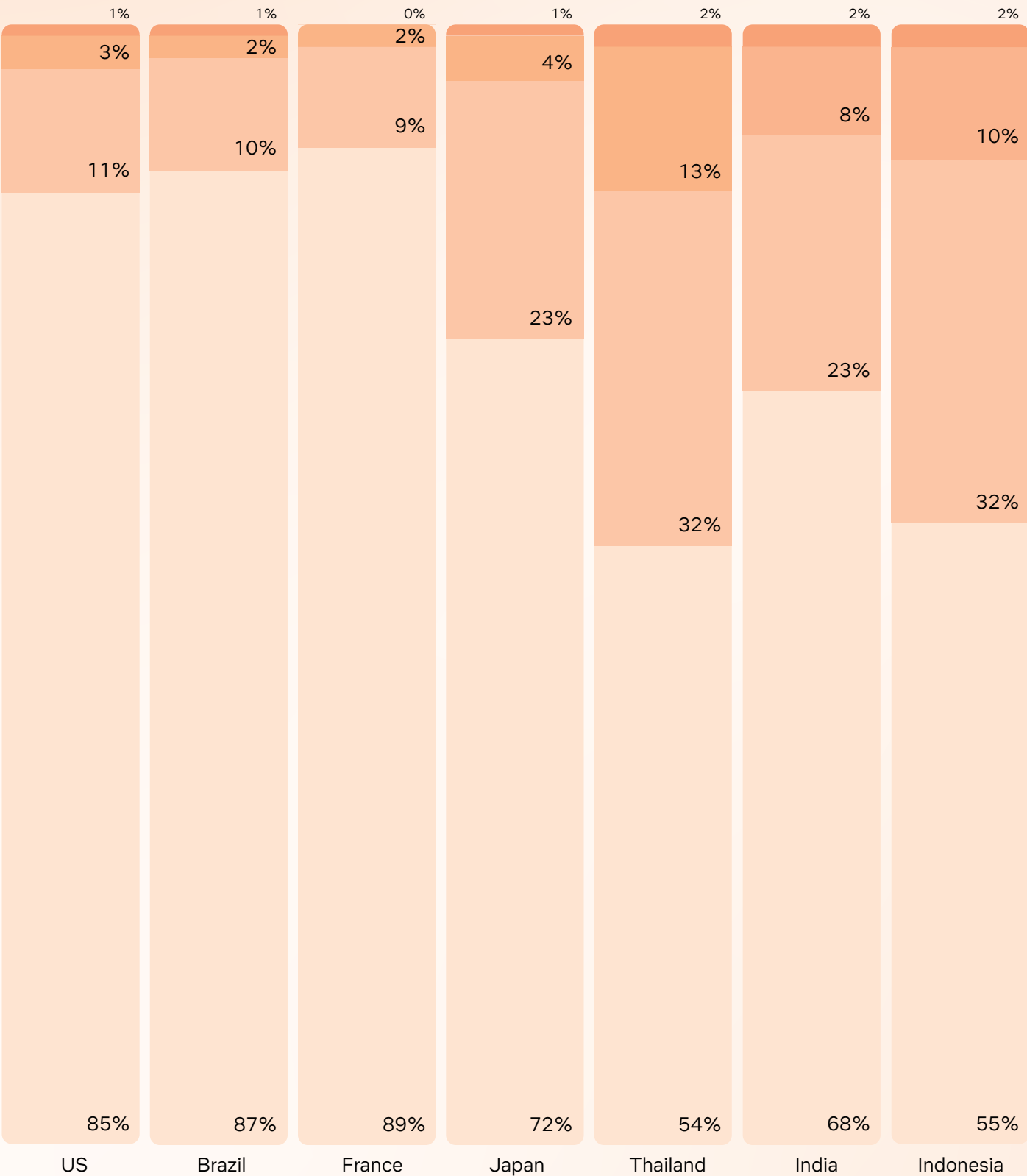
Netflix Users
Non-Users



Higher Korean Proficiency in Asia, Likely Geographical

S4b. And do you speak any other languages (either at a basic, conversational or fluent level)?
Base: Non-native Korean speakers:
US(n=1491), Brazil (n=1501),
France(n=1501), Japan (n=1501),
Thailand(n=1501), India(n=1498),
Indonesia(n=1500)

- Yes, I speak it fluently
- Yes, I can handle basic communication/phrases
- Yes, I know basic words/phrases but cannot have a conversation
- No, not at all



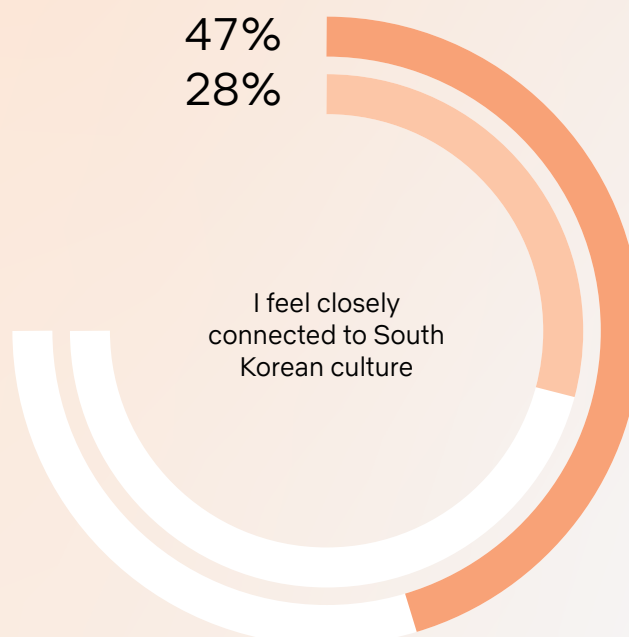
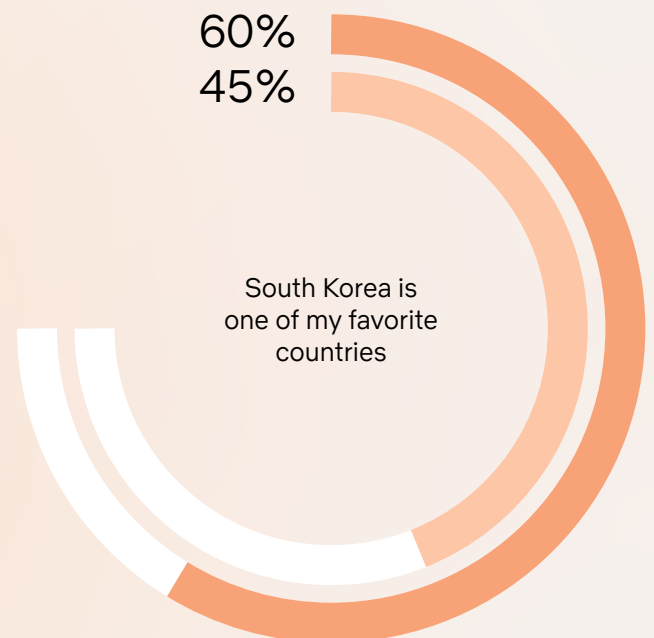
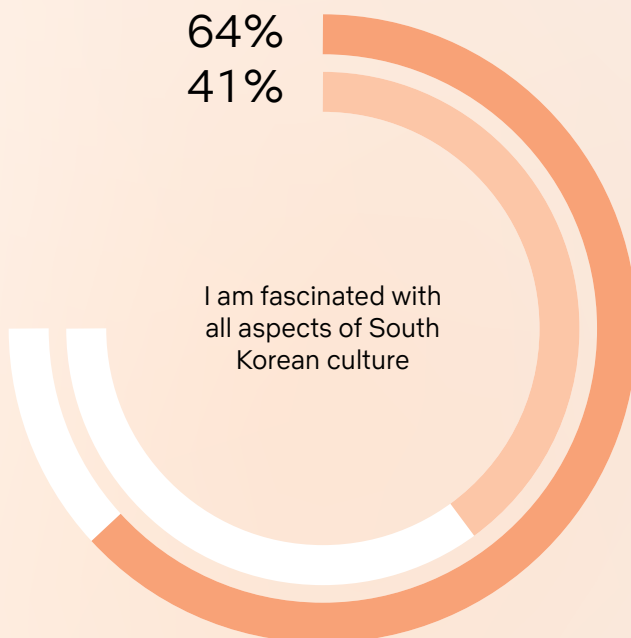
Netflix users are drawn to Korean Culture, and name Korea as their favorite*

* Total Agreement %
('Strongly agree' + 'Somewhat agree')

C5. Below is a series of statements that other people have made about South Korea. To what extent do you agree with each of these statements?

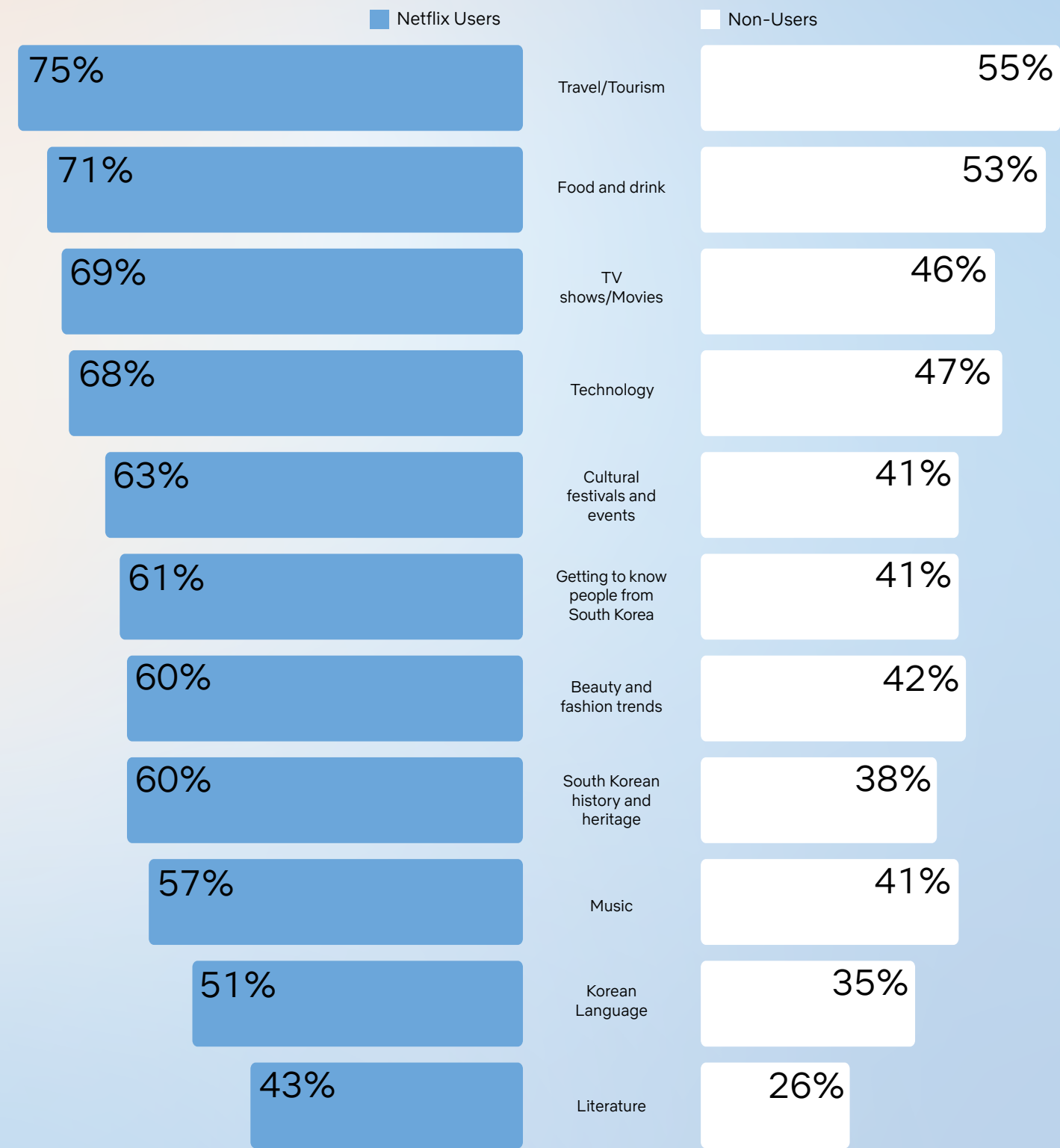
Base: Netflix users excluding South Korea (n=7586), Non-Users (n=2921)

Netflix Users
Non-Users



Netflix users show higher interest* in all aspects of Korean culture

* Top-2 Box %
('Extremely interested' + 'Very interested')
C7. How interested are you in each of the following elements of South Korean culture?
Base: Netflix users excluding South Korea(n=7586), Non-Users (n=2921)



Netflix Contribution To: Travel/Tourism

Netflix users show more travel experience and interest* in South Korea

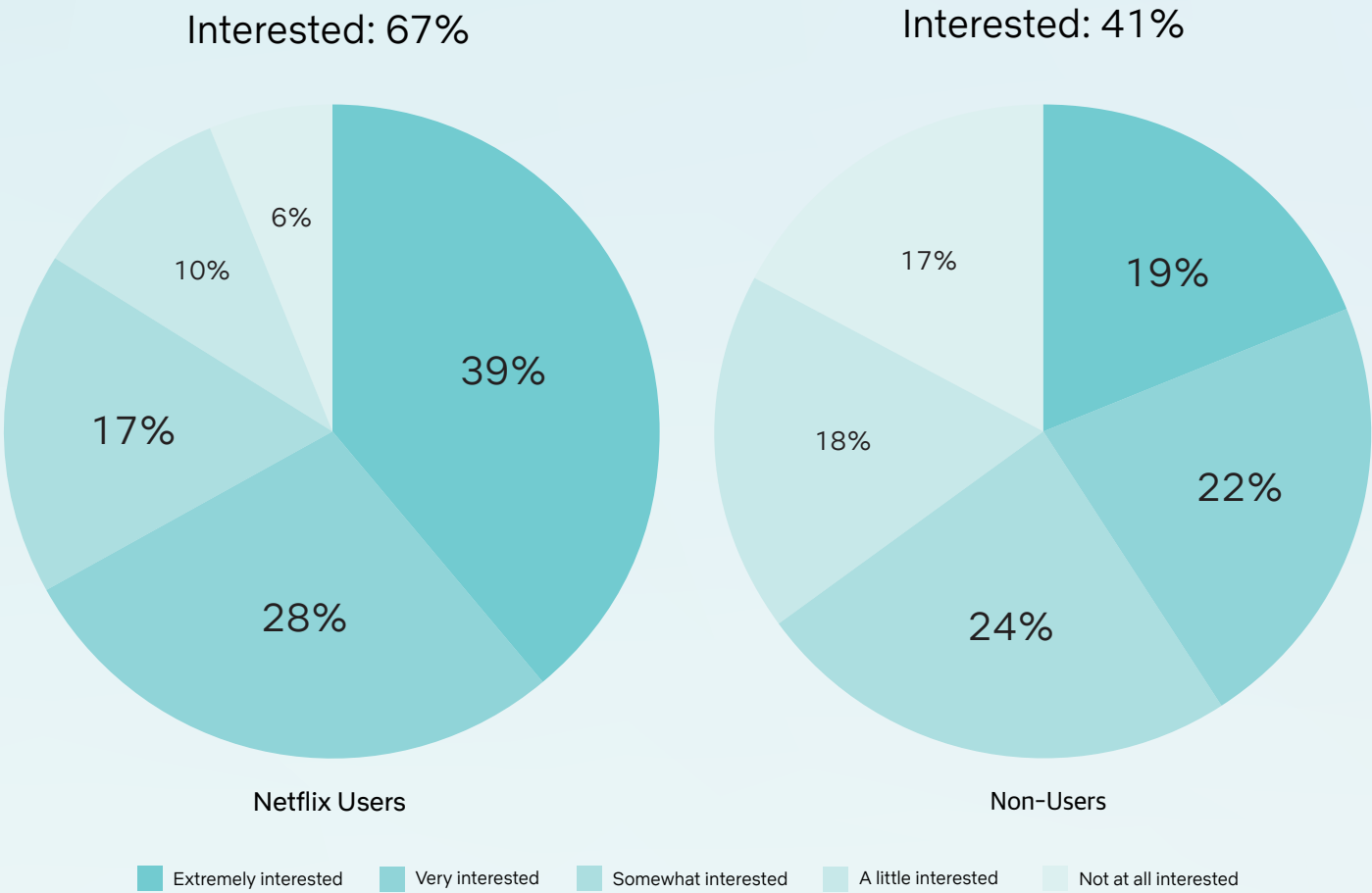
* Top-2 Box %
('Extremely interested' + 'Very interested')

T1. Have you ever visited any of the following countries for business or leisure?

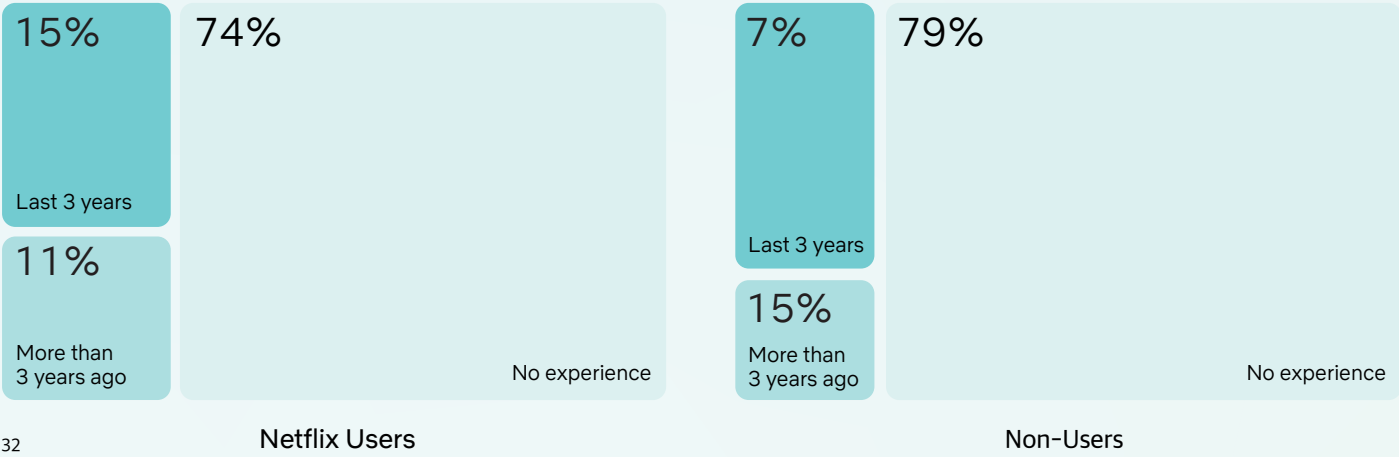
T3. If taking time off work was not a problem and money was no issue either, how interested are you in visiting South Korea in the future?

Base: Netflix users excluding South Korea(n=7586), Non-Users (n=2921)

South Korea Travel Interest



Travel to South Korea

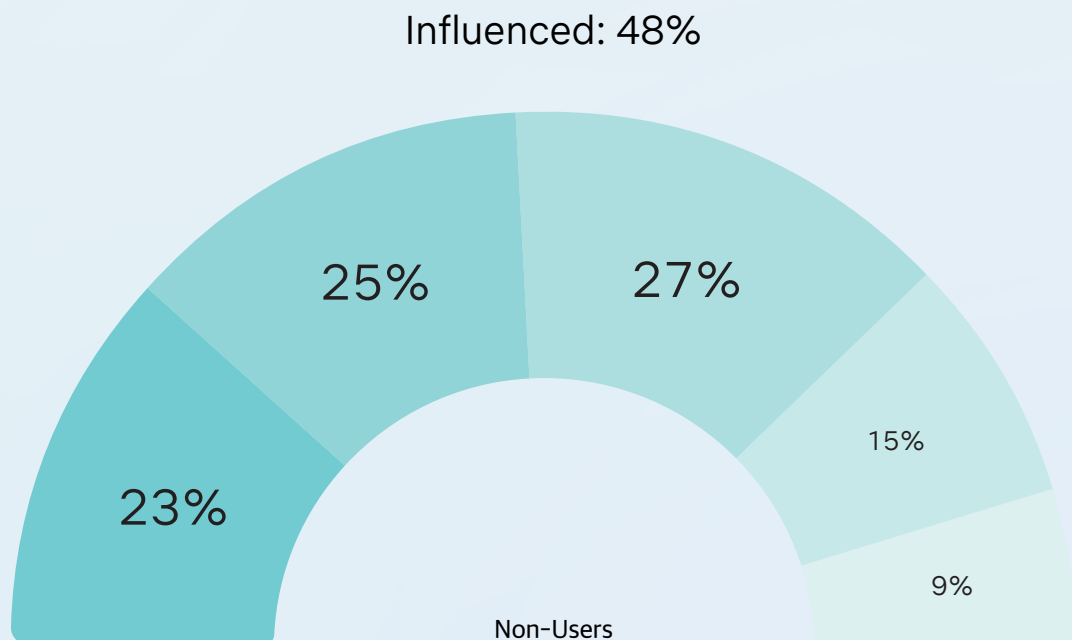
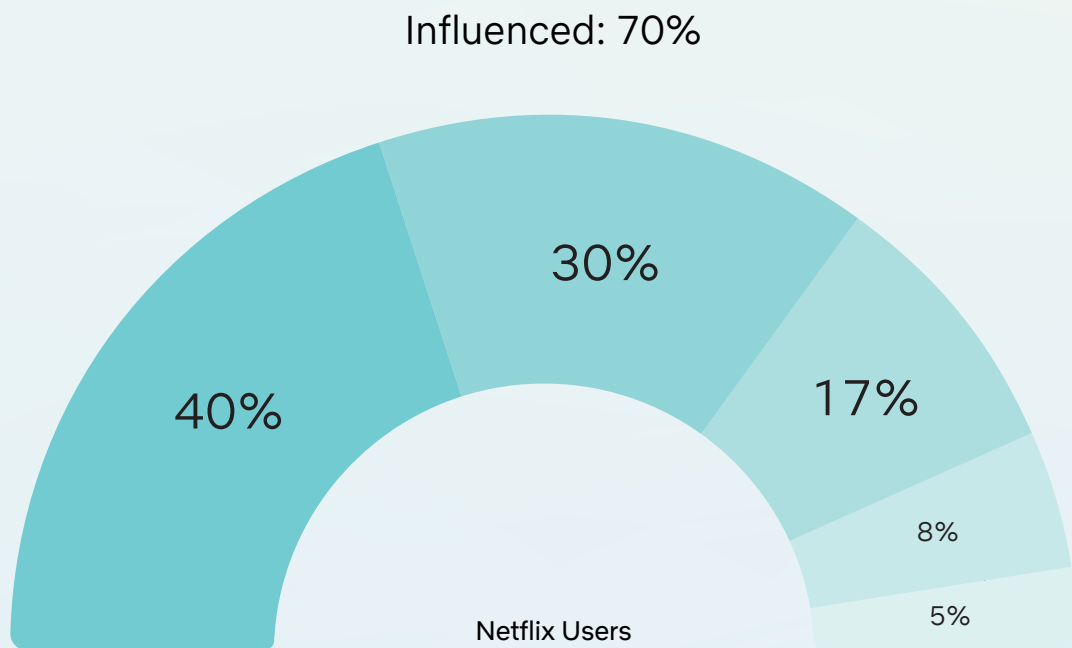


Netflix users acknowledged K-Content influence* on South Korea travel interest

* Top-2 Box % ('A lot' + 'Moderately')

A10. How much do you think watching Korean content has influenced your interest in traveling to South Korea?

Base: K-Content viewers excluding South Korea: Netflix users (n=5571), Non-Users (n=1435)



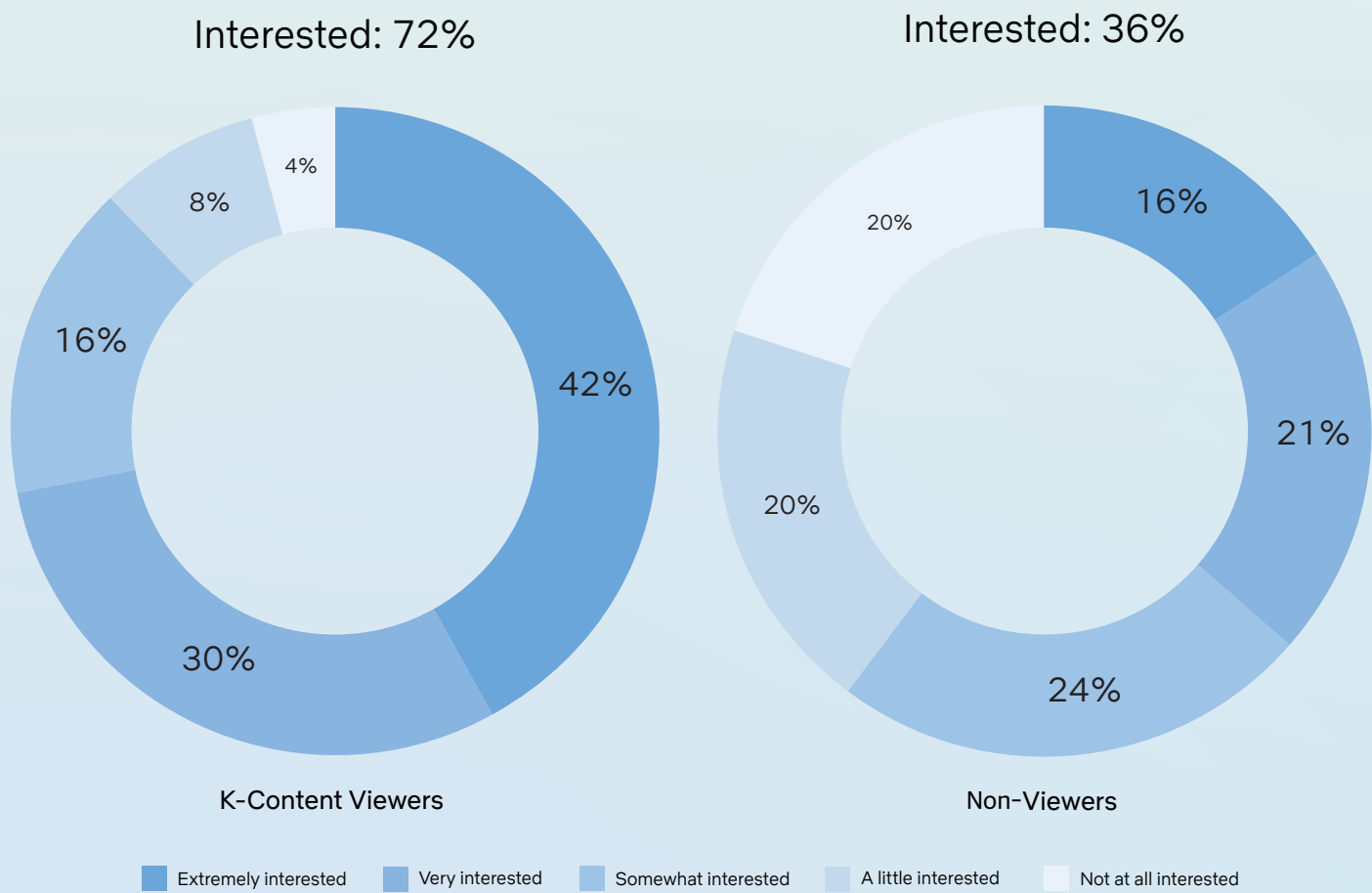
K-Content viewers show 2X interest* in visiting Korea

* Top-2 Box %
('Extremely interested' + 'Very interested')

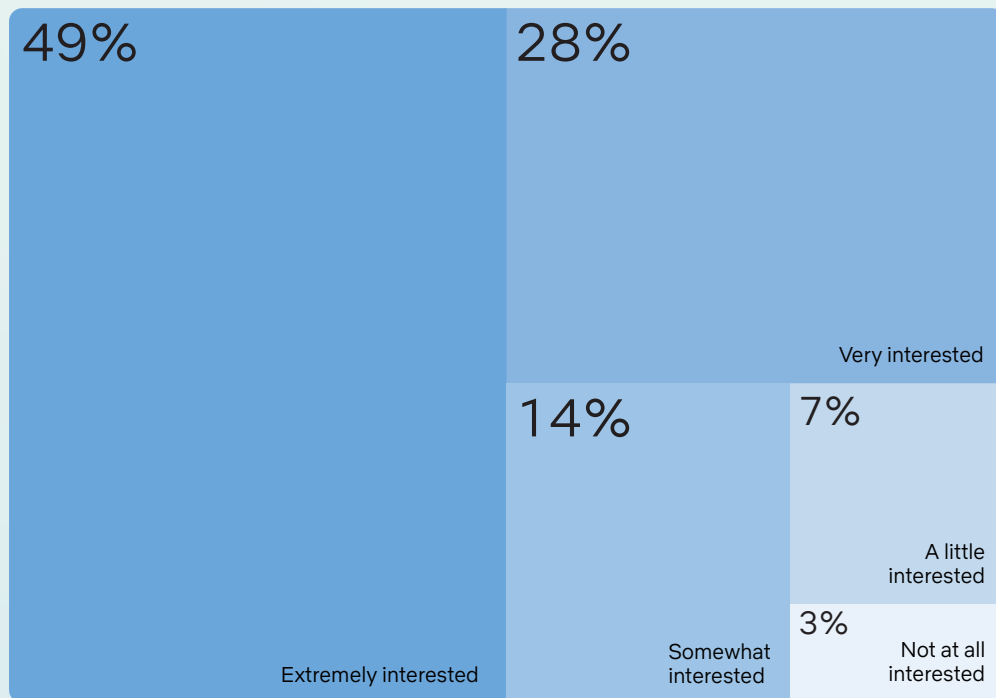
T1. Have you ever visited any of the following countries for business or leisure?
T3. If taking time off work was not a problem and money was no issue either, how interested are you in visiting South Korea in the future?

Base: K-Content viewers excluding South Korea (n=7006), Non-viewers (n=3501); Visitors (n=2604), Non-visitors (n=7903)

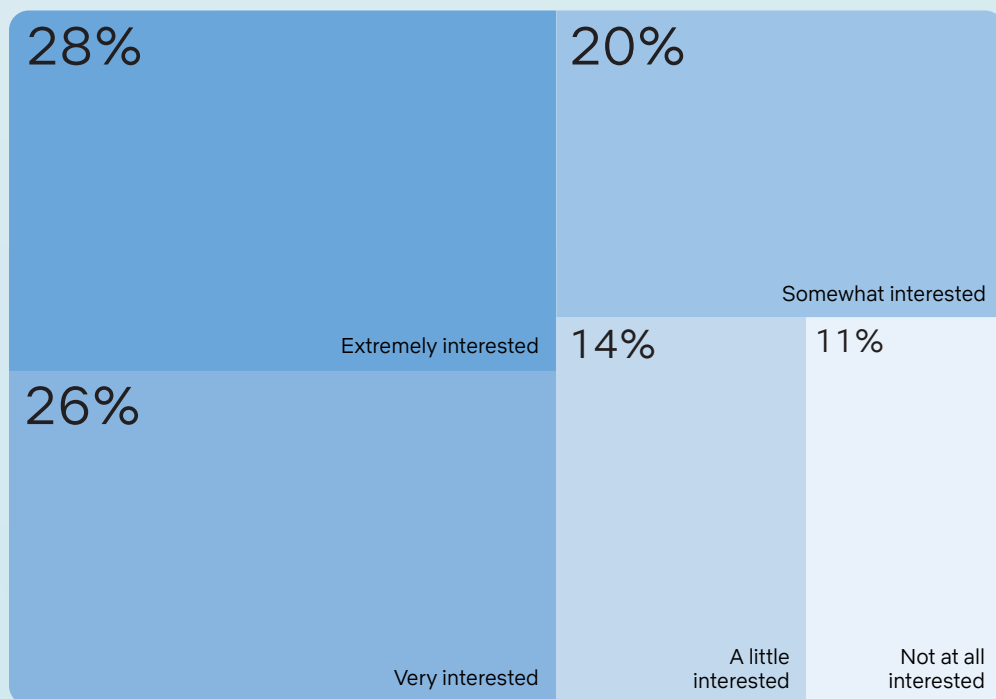
K-Content Viewers / Non-Viewers



Visitors / Non-Visitors



Visitors

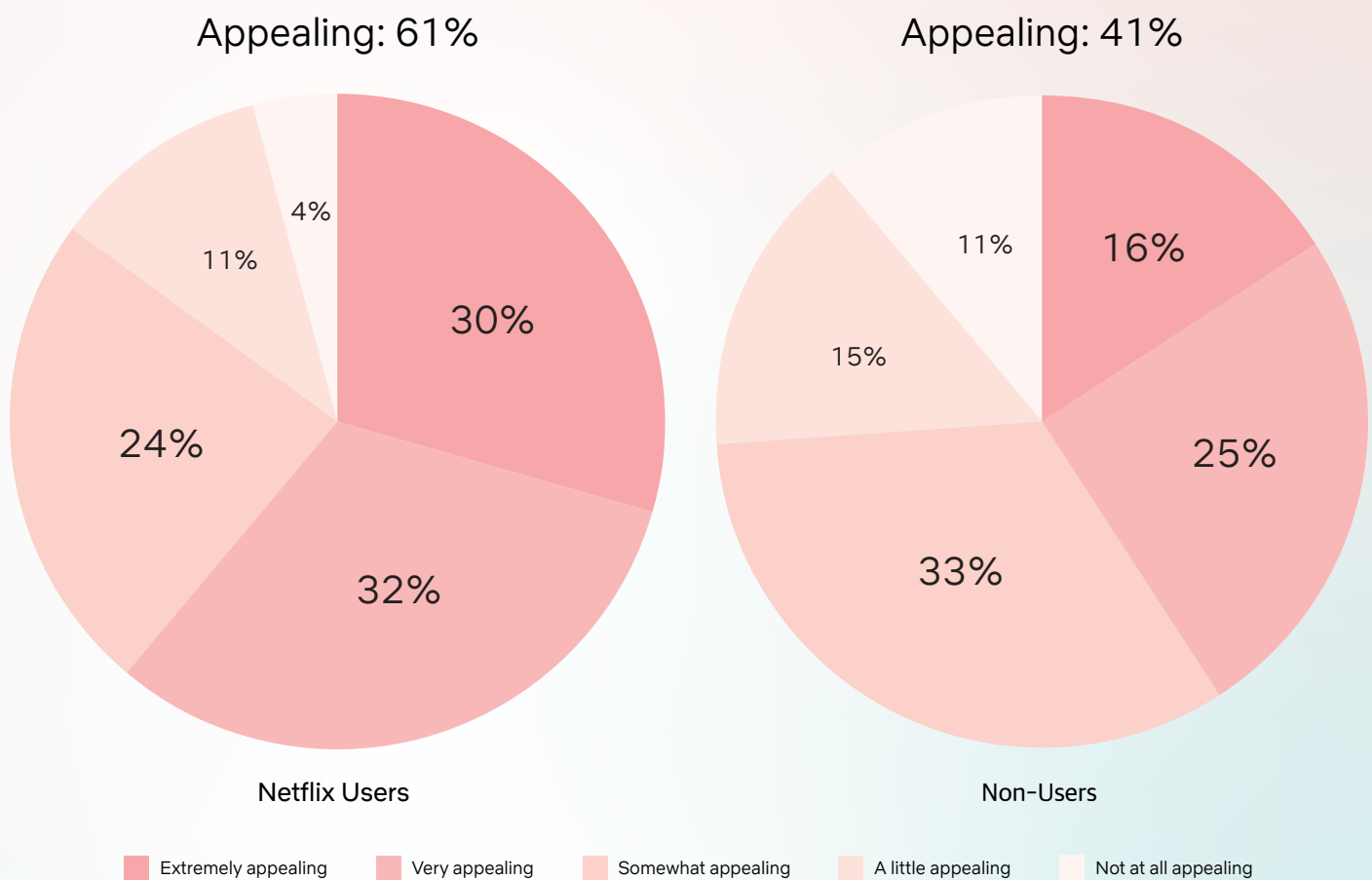


Non-visitors

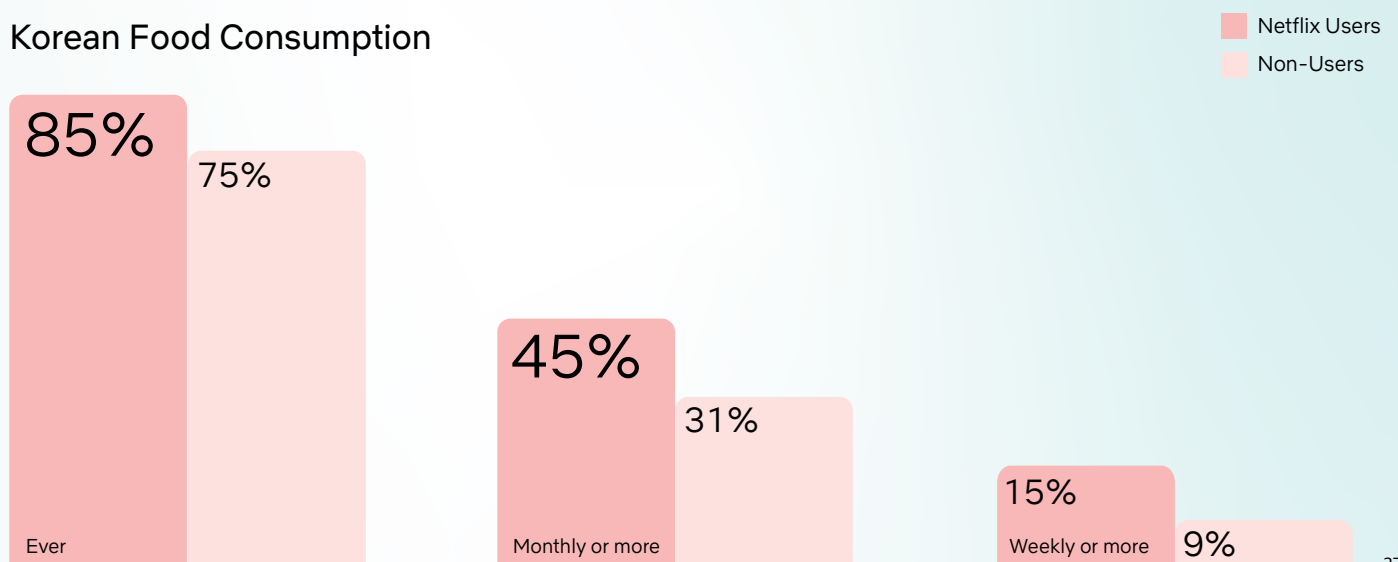
Netflix Contribution To: Food

Netflix users find greater appeal* in Korean cuisine and consume more of it

Korean Food Appeal



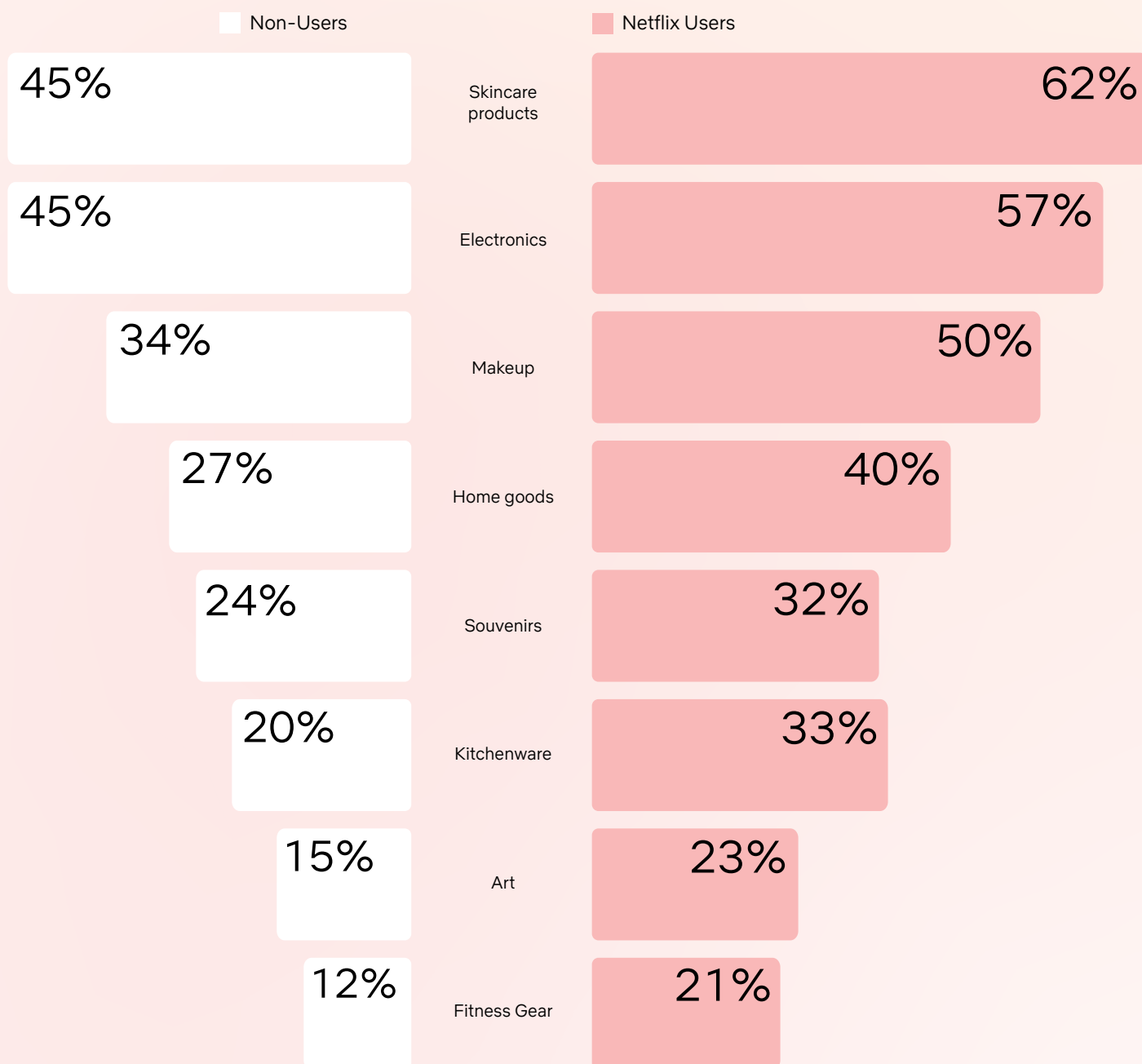
Korean Food Consumption



Netflix Contribution To: Products/Fashion

Netflix users express greater interest in purchasing Korean products

A8b. And what Korean products are you interested in purchasing?
Base: Those likely to purchase Korean products, Netflix users excluding South Korea(n=6609), Non-Users (n=2025)



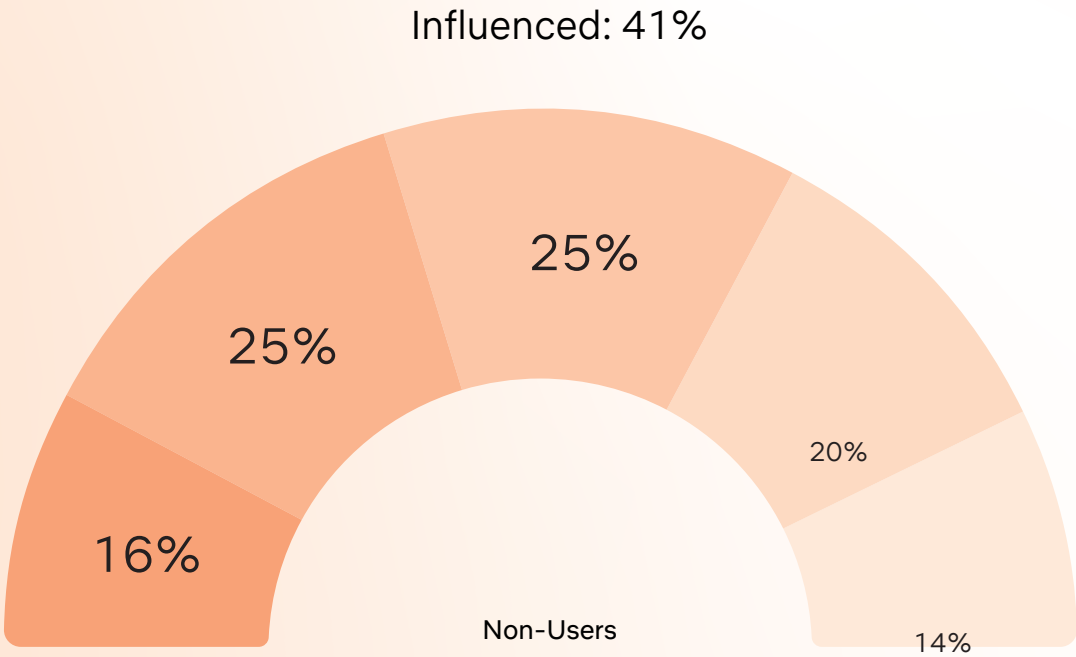
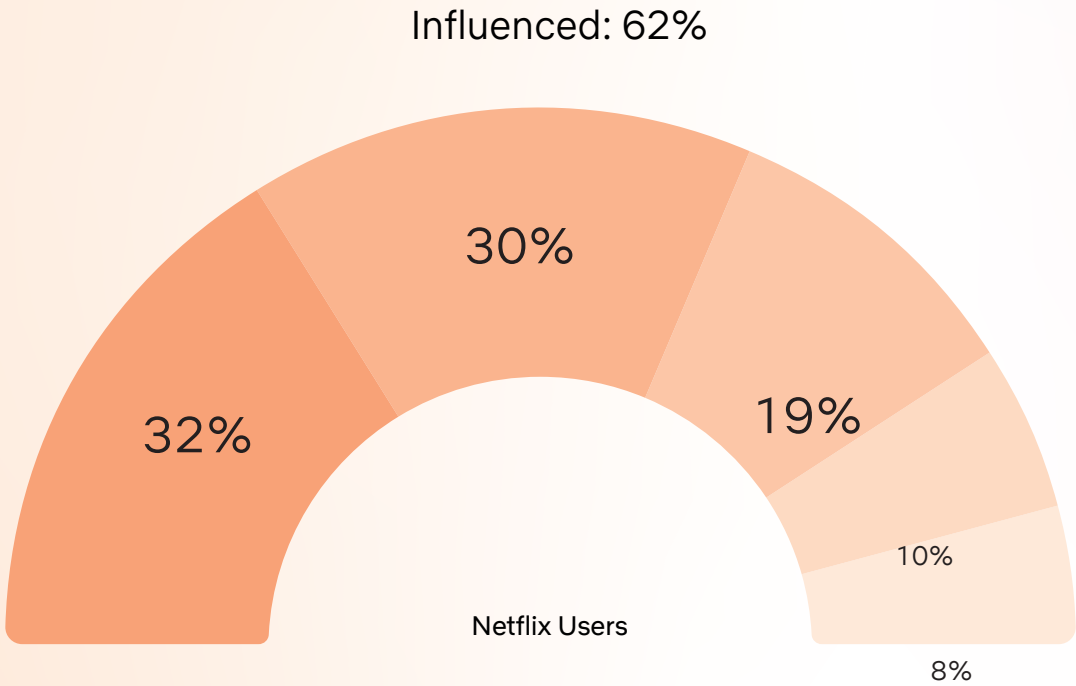
Netflix users credit K-Content for influencing* their interest in buying Korean products

* Top-2 Box % ('A lot' + 'Moderately')

A8c. How much do you think watching Korean content has influenced your interest in buying Korean products or clothing?

Base: Those likely to purchase Korean products, Netflix users excluding South Korea(n=5571), Non-Users (n=1435)

- A lot
- Moderately
- Somewhat
- A little
- Not at all



Korean Fashion Appeal and Purchase Potential

Netflix users find **greater appeal*** in Korean fashion and **are more likely to purchase it**

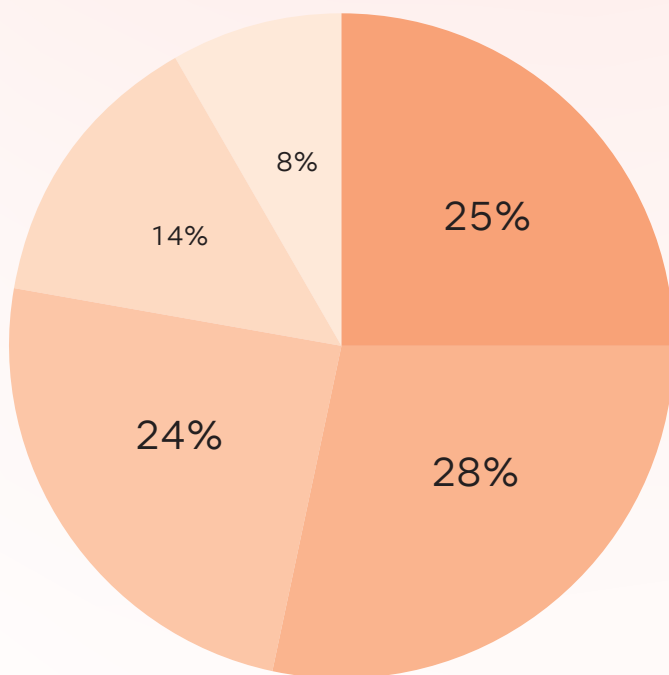
* Top-2 Box %
(‘Extremely appealing’ + ‘Very appealing’)

A6. How appealing do you find Korean fashion?
A7. How likely are you to purchase Korean clothing brands?

Base: Netflix users excluding South Korea (n=7586), Non-Users (n=2921)

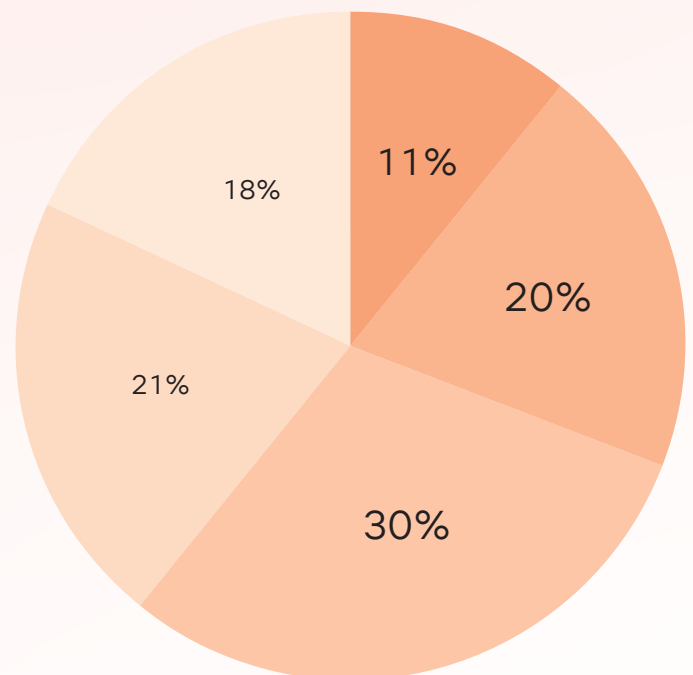
Korean Fashion Appeal

Appealing: 72%



Netflix Users

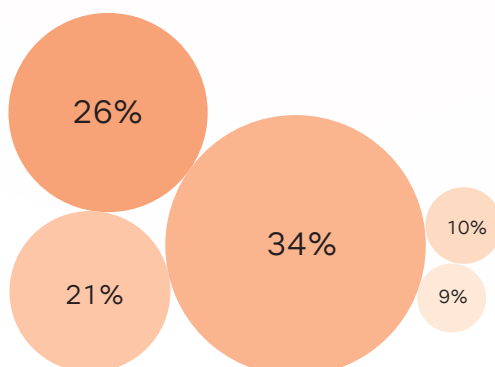
Appealing: 36%



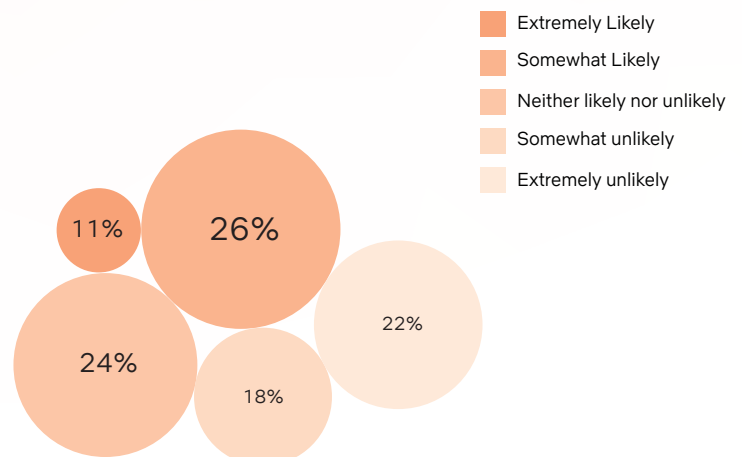
Non-Users

Extremely appealing Very appealing Somewhat appealing A little appealing Not at all appealing

Korean Fashion Purchase Potential



Netflix Users



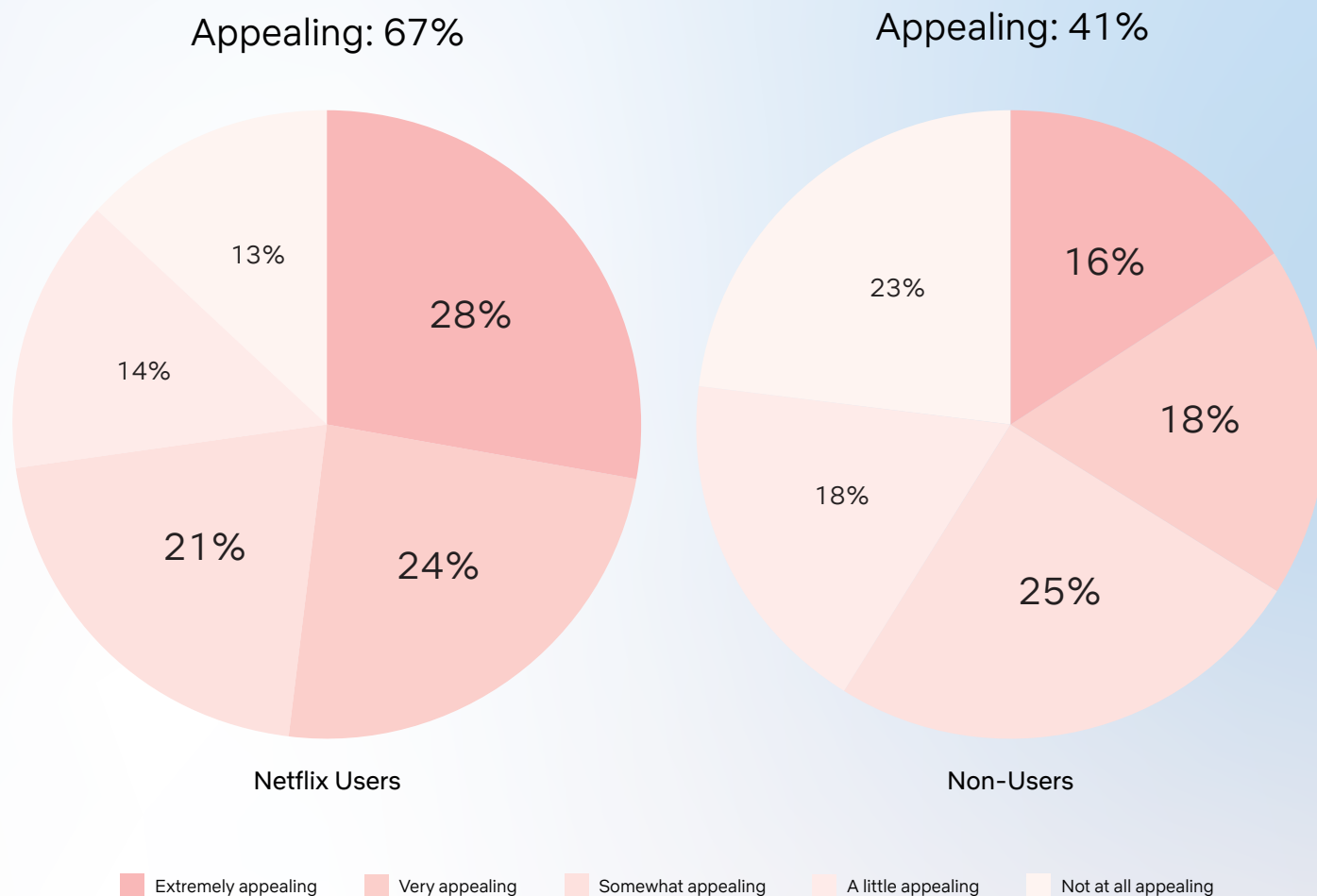
Non-Users

Extremely Likely Somewhat Likely Neither likely nor unlikely Somewhat unlikely Extremely unlikely

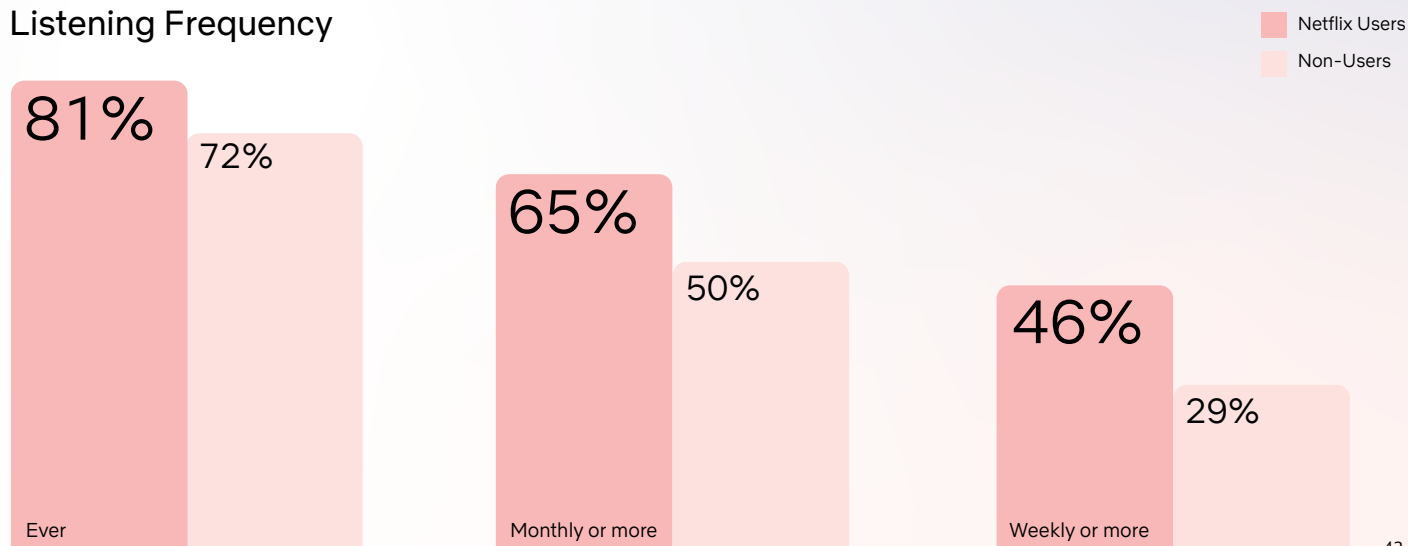
Netflix Contribution To: Music

Netflix users find Korean music **more appealing*** and listen to it **often**

Korean Music Appeal

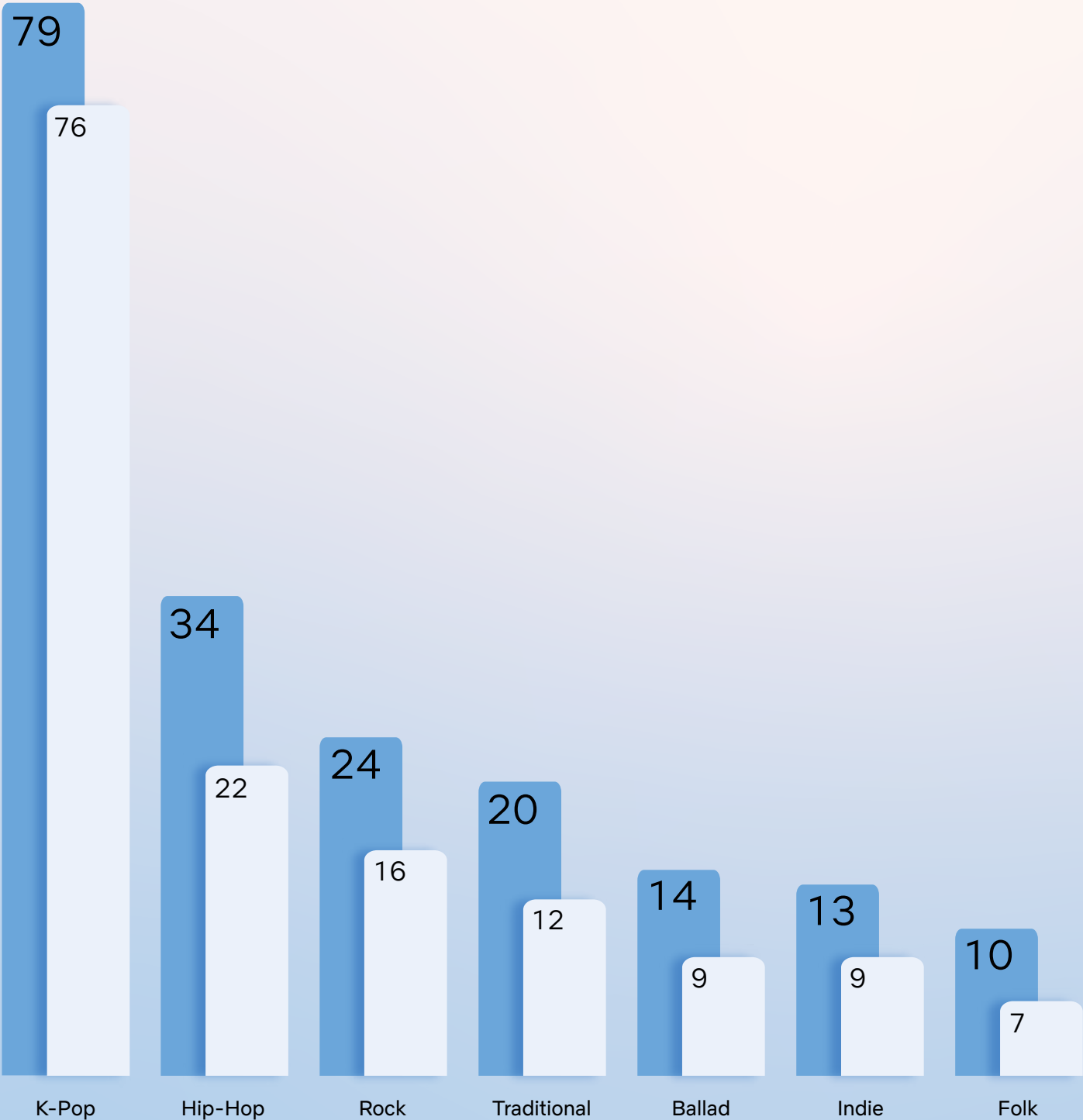


Listening Frequency



Netflix users explore various Korean music genres with K-Pop being the favorite

Netflix Users
Non-Users

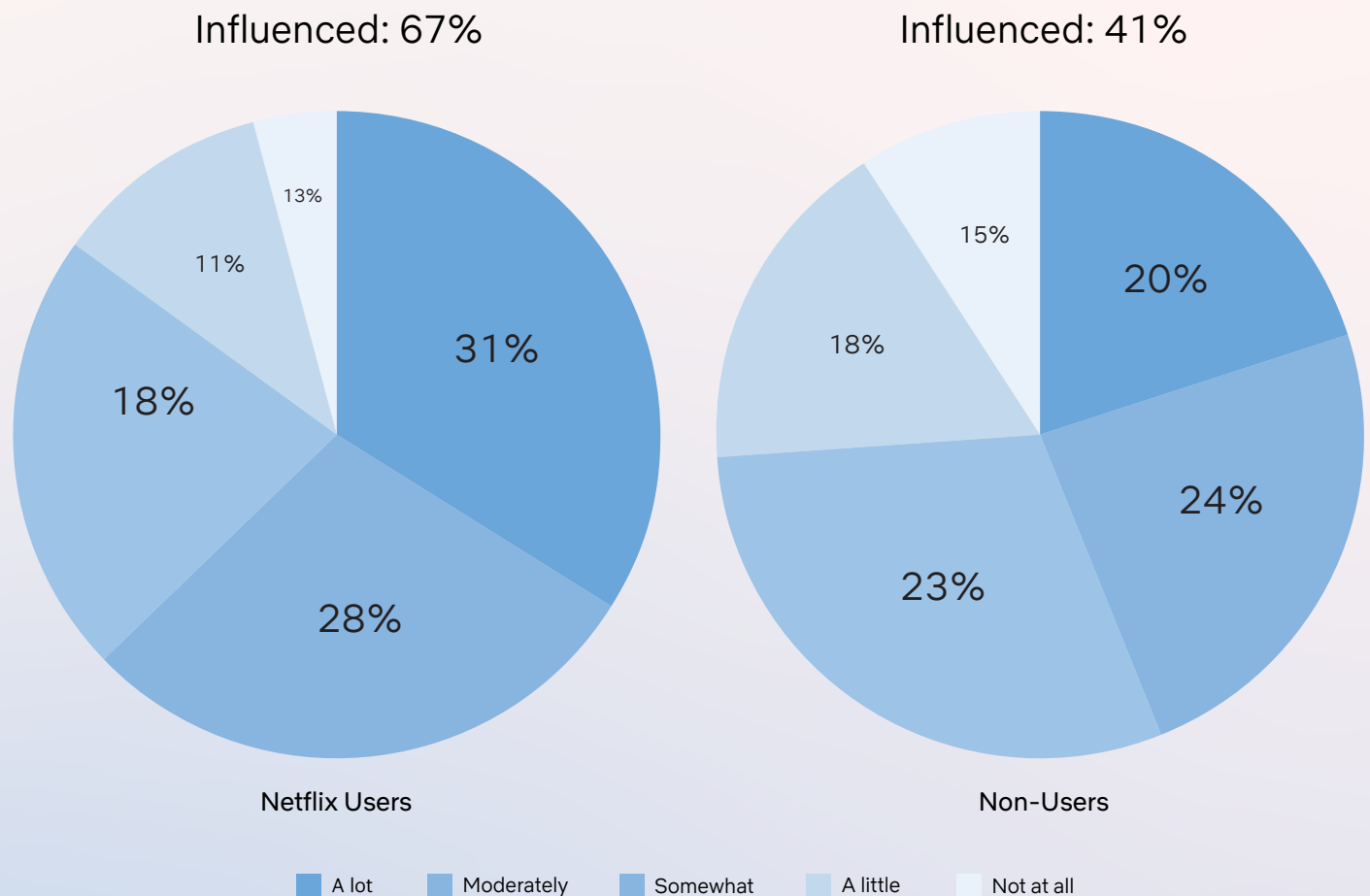


Netflix users credit K-Content with influencing* their interest in and discovery of Korean music

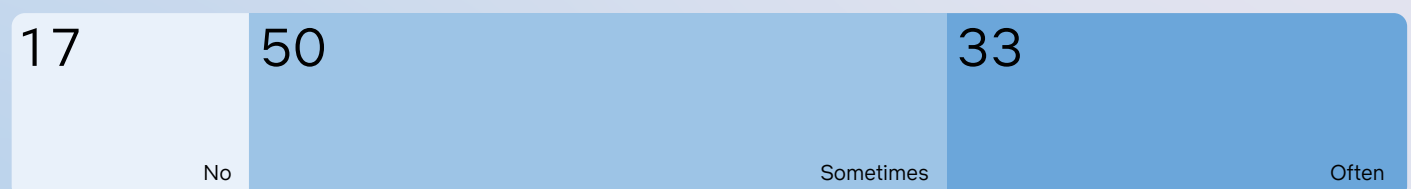
* Top-2 Box % ('A lot' + 'Moderately')

A11d. How much do you think watching Korean content has influenced your interest in Korean music?
A11e. Have you ever discovered new Korean music by watching Korean content on Netflix?
Base: K-Content viewers excluding South Korea: Netflix-users (n=5571), Non-Users (n=1435); Netflix K-Content viewers excluding Korea (n=5040)

K-Content Influence on Music Interest

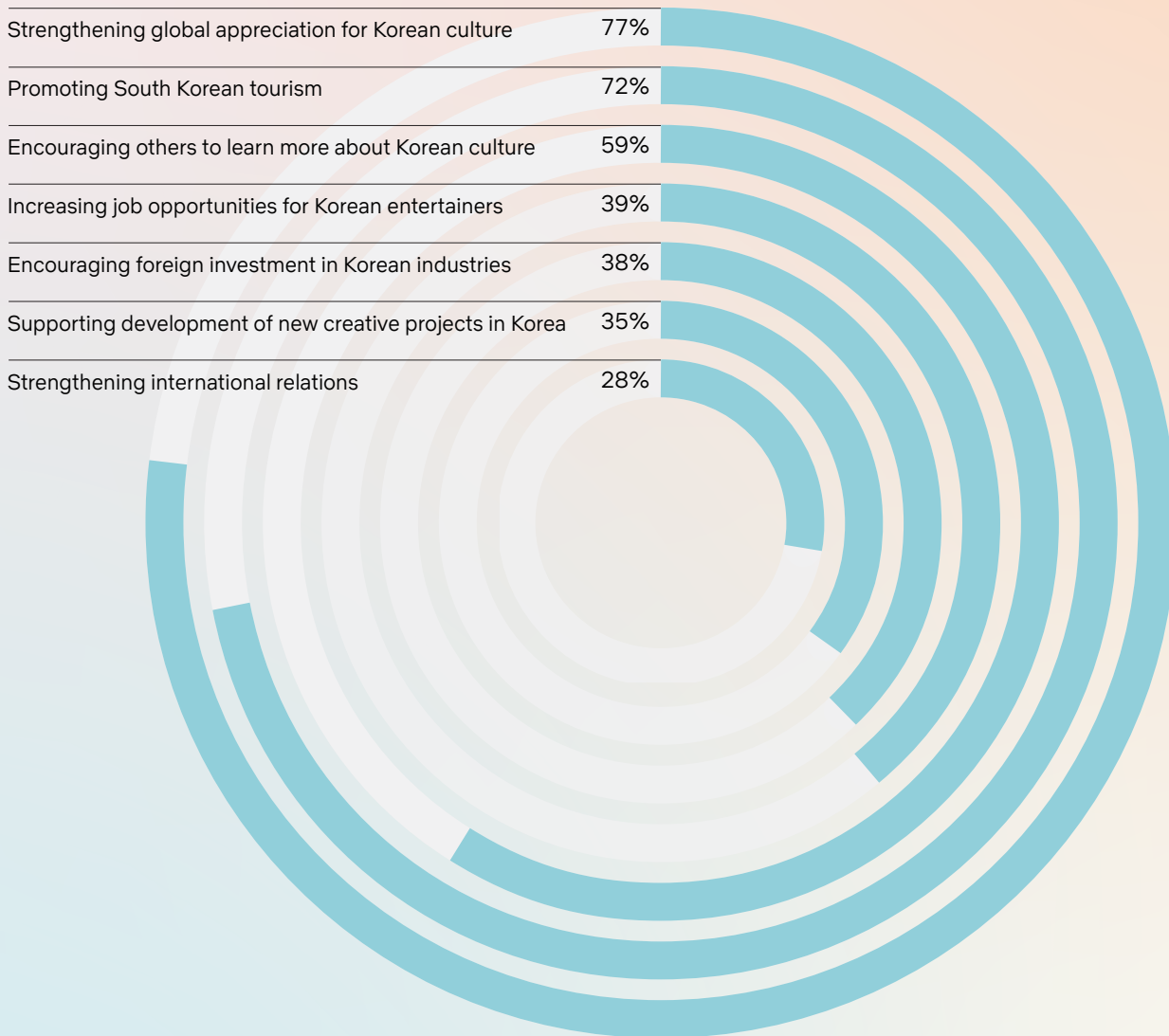


New Music Discovery Through Netflix K-Content



Korean Perceptions of K-Content & Netflix

Most Koreans acknowledge K-Content's impact on Korea's image and tourism



Netflix users recognize
K-Content's benefits to Korea

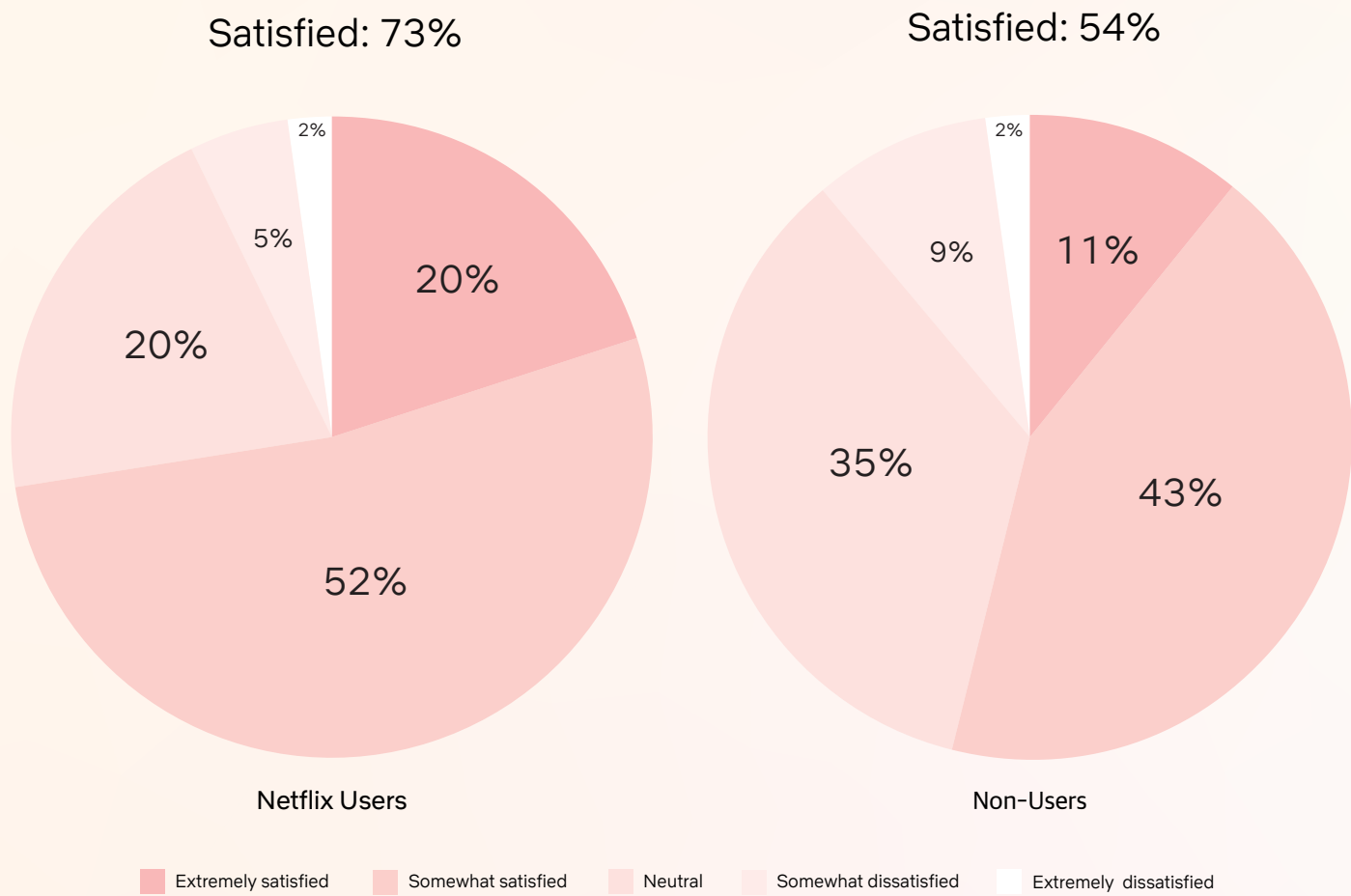
Netflix users are significantly more likely to agree that it: (Users vs Non-users)

- Provides a strengthening global appreciation for Korean culture (79% vs. 72%)
- Promotes tourism (74% vs. 65%)
- Supports development of new creative projects in Korea (38% vs. 28%)

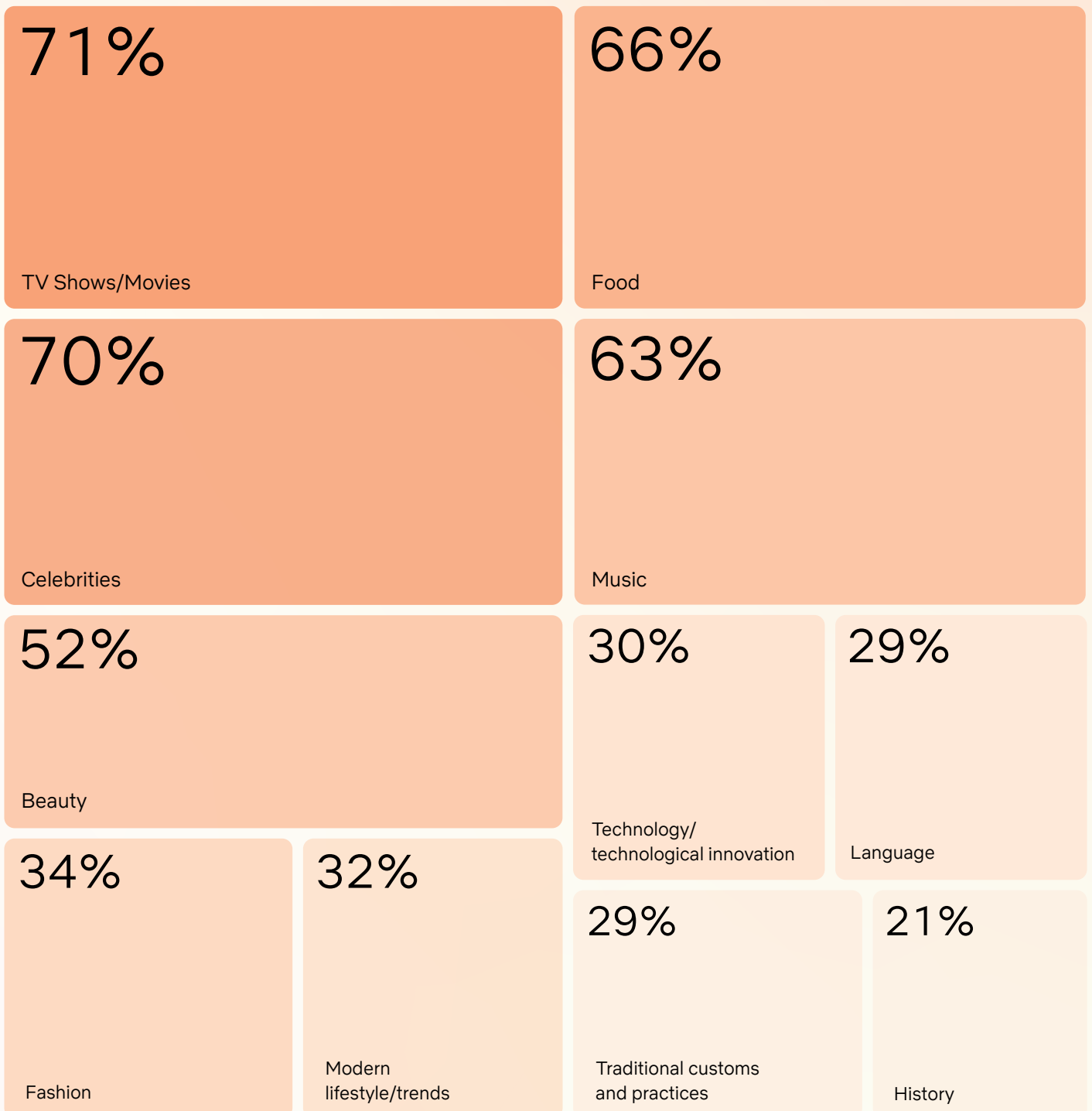
Satisfaction of Korean Representation in Media

Netflix users are **2X** more likely to be **Extremely Satisfied*** with Korean representation in global media

* Top-2 Box %
('Extremely satisfied'+ 'Somewhat satisfied')
B1. How satisfied are you with the way Korean culture is represented in international media?
Base: Korea respondents: Netflix users(n=761), Non-Users (n=243)



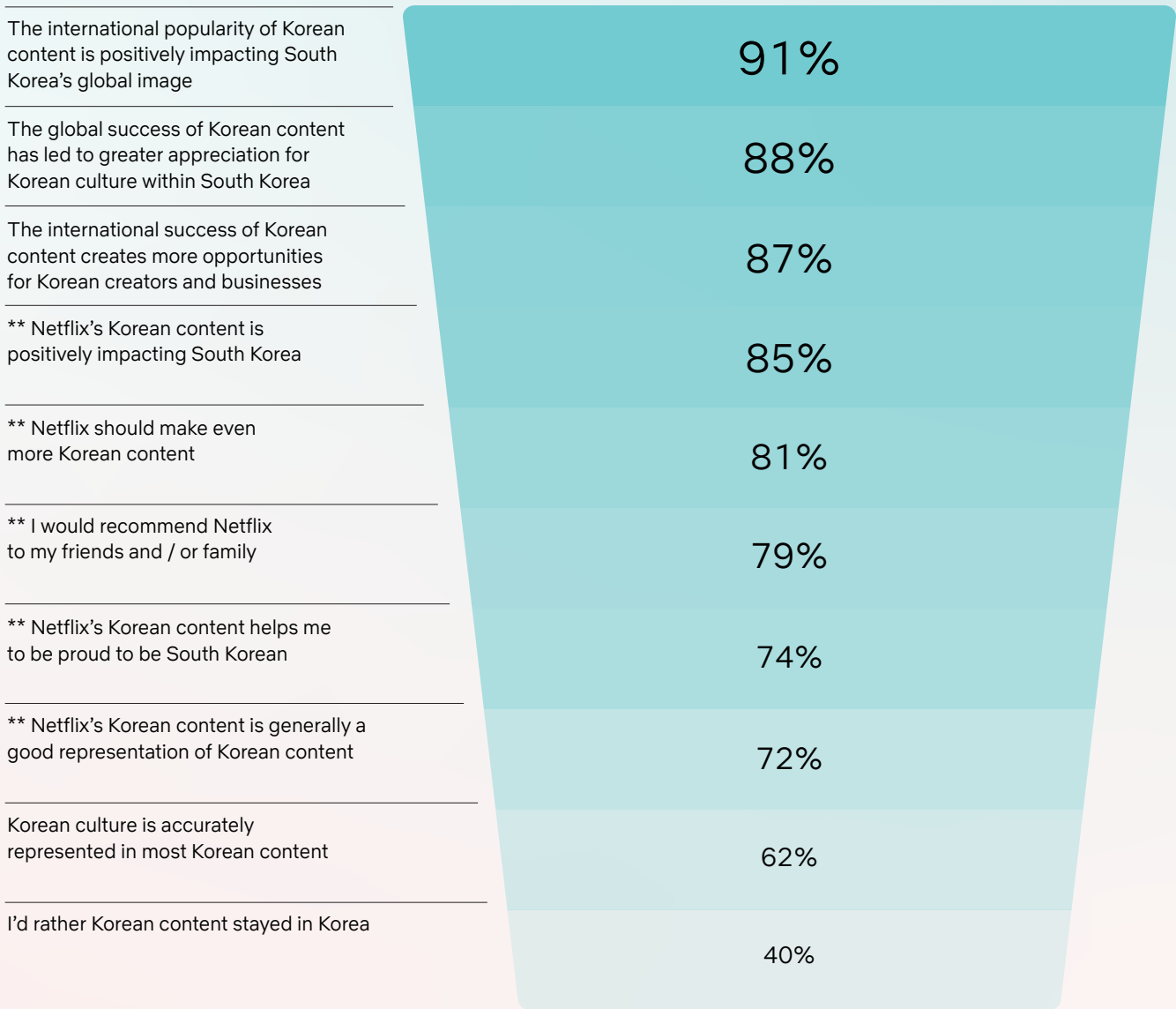
TV Shows/Movies and Celebrities were chosen as the most positively highlighted aspects in global media



Koreans appreciate the positive impact of Netflix K-Content and anticipate more

* Total Agreement %
('Strongly agree' + 'Somewhat agree')
** Asked to those aware of Netflix

B3. Please select how much you agree or disagree with the following statements.
Base: Korean respondents : Total (n=1004),
Netflix users (n=761), Non-Users (n=243)

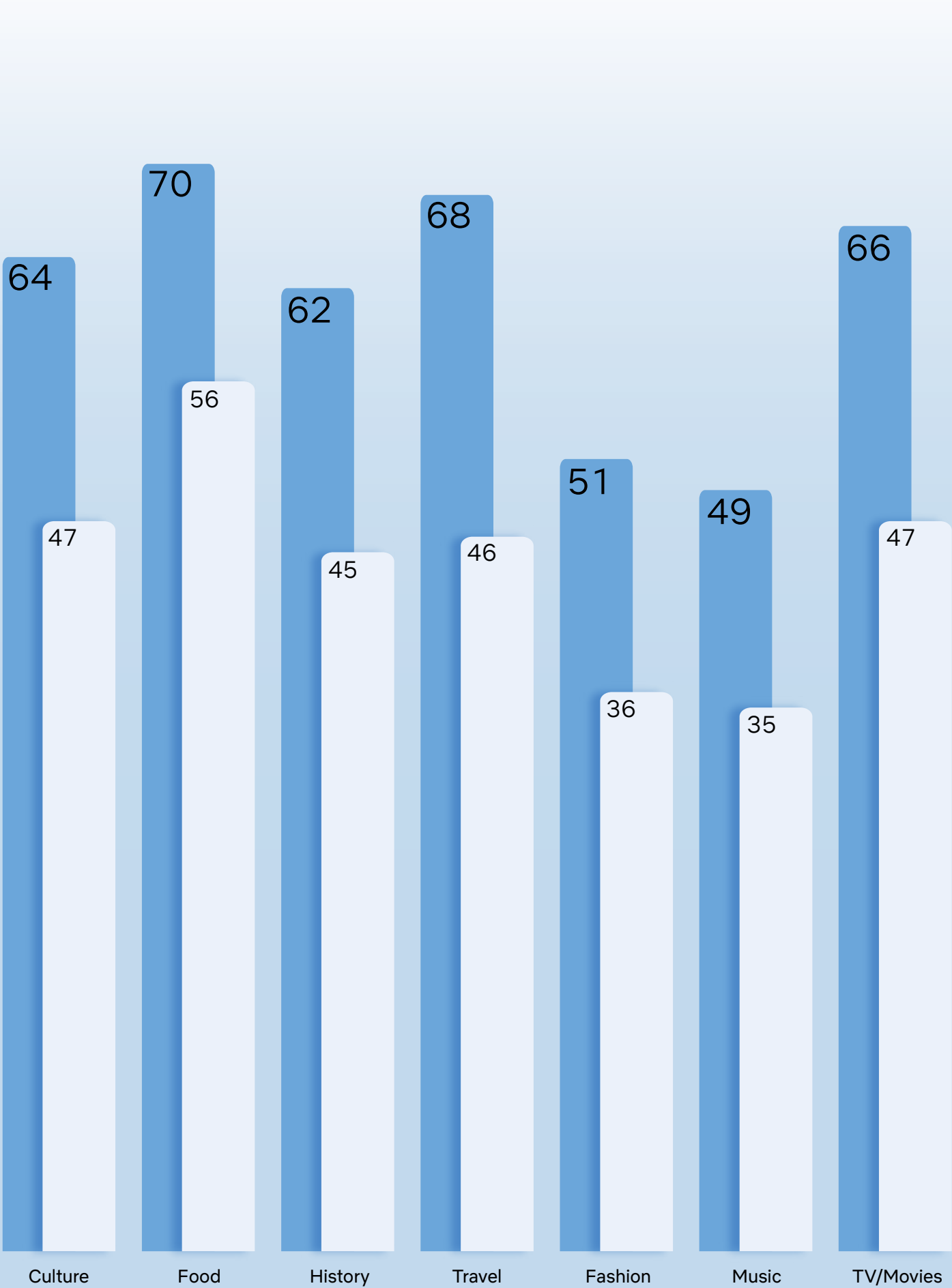


Netflix users are significantly more likely to agree that it:
(Users vs Non-users)

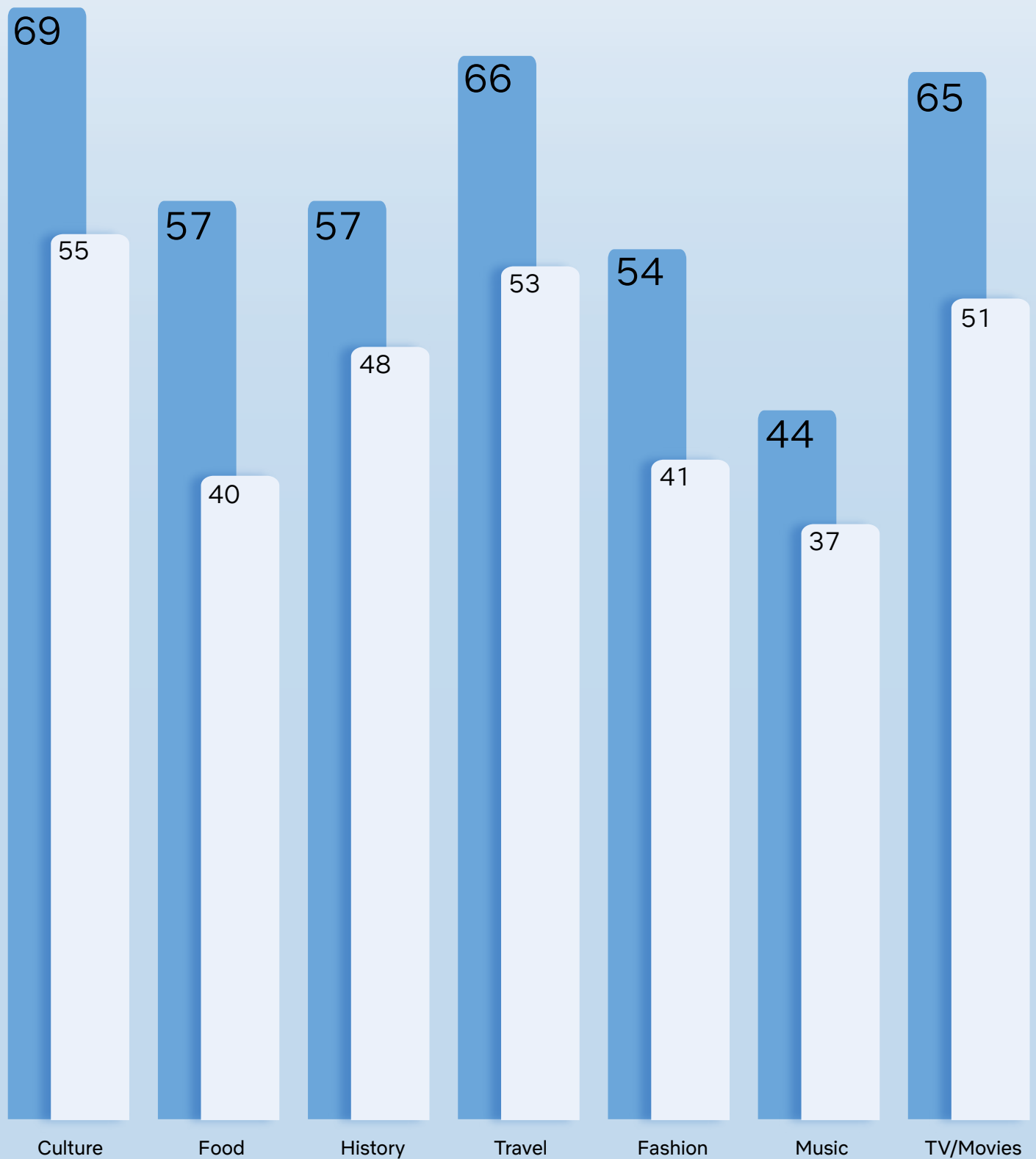
- Global success of Korean content has led to greater appreciation of Korean culture (89% vs 83%)
- Korean culture is accurately represented in most Korean content (65% vs 53%)

Market Scorecards

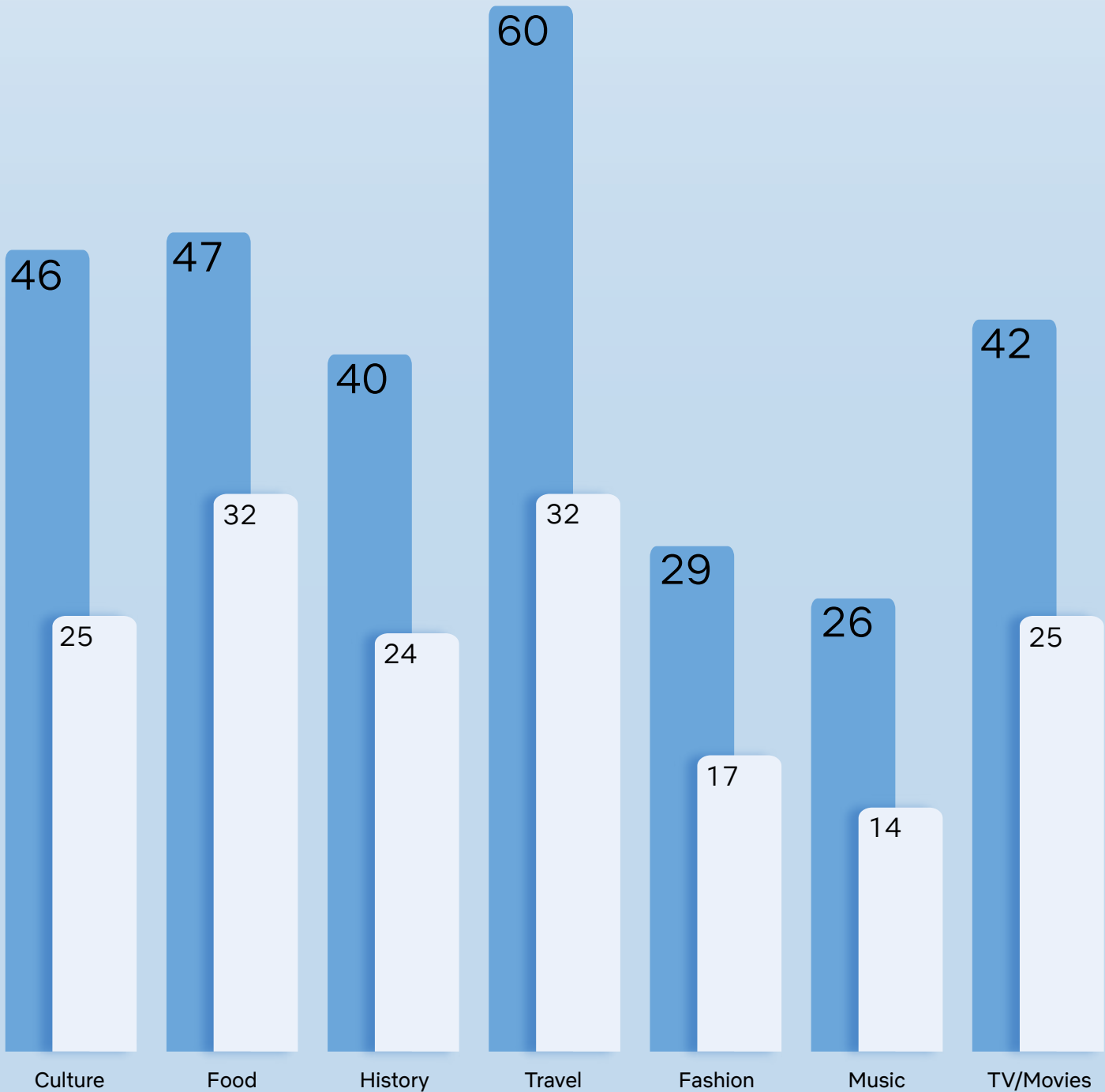
US



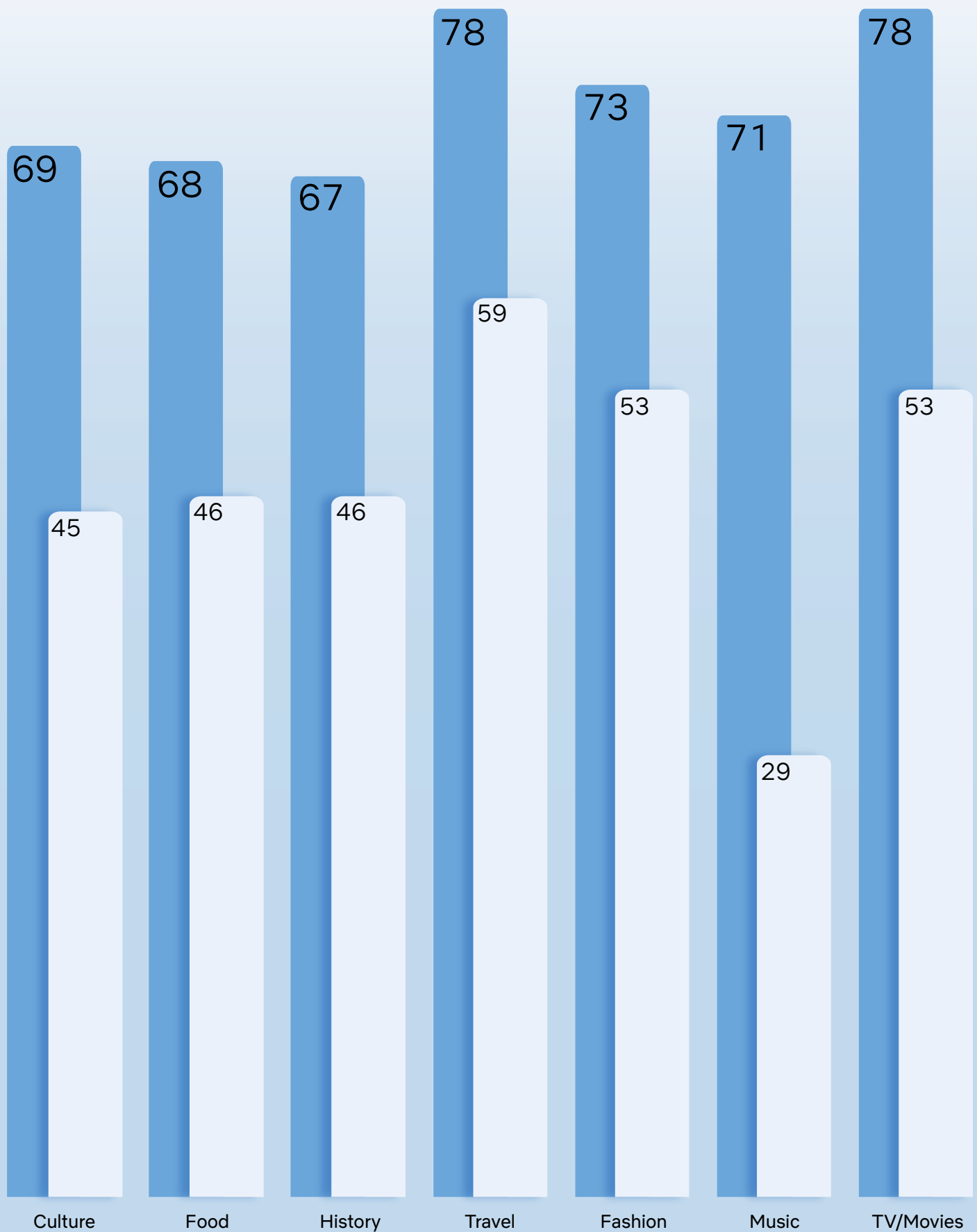
Brazil



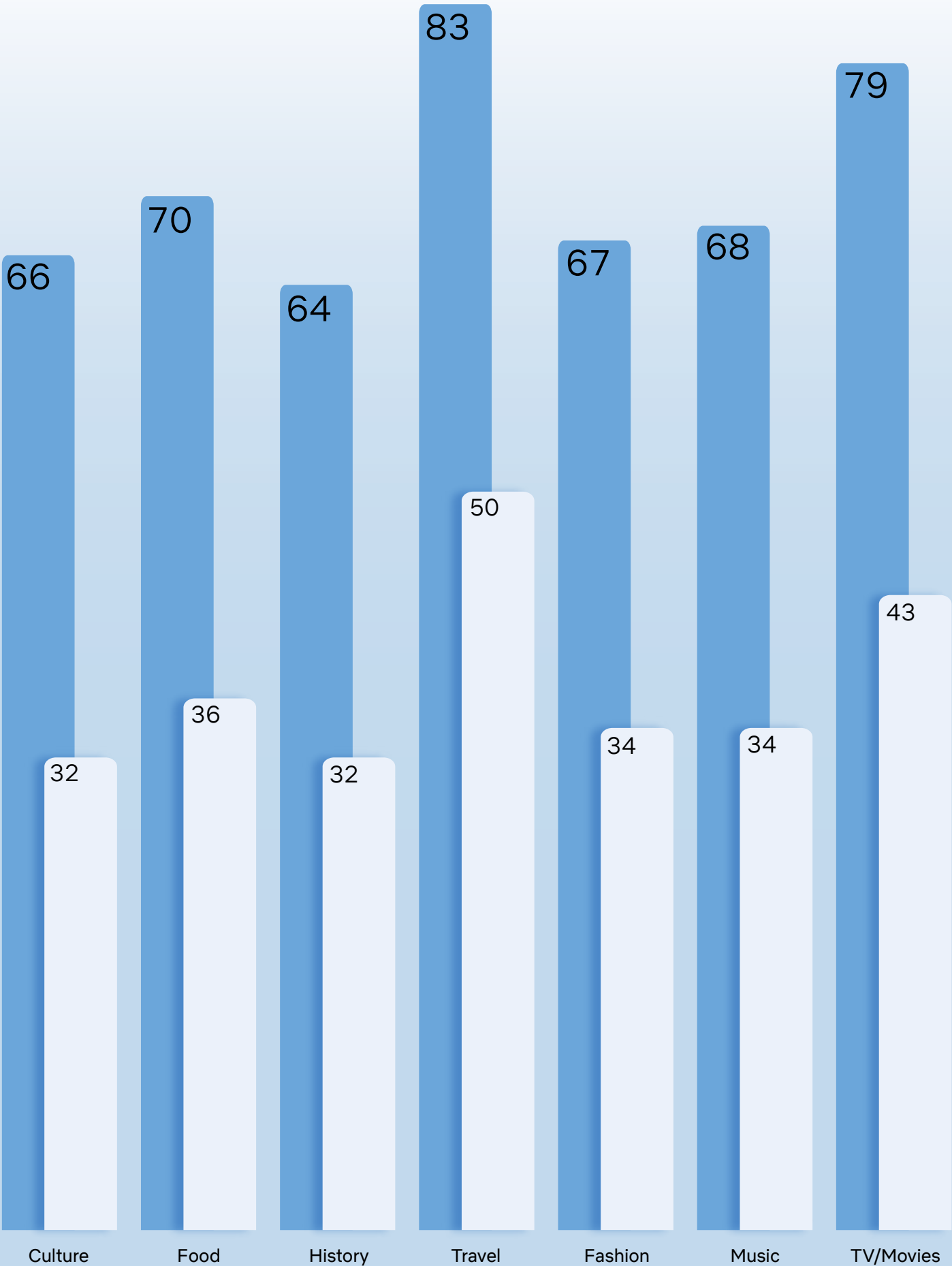
France



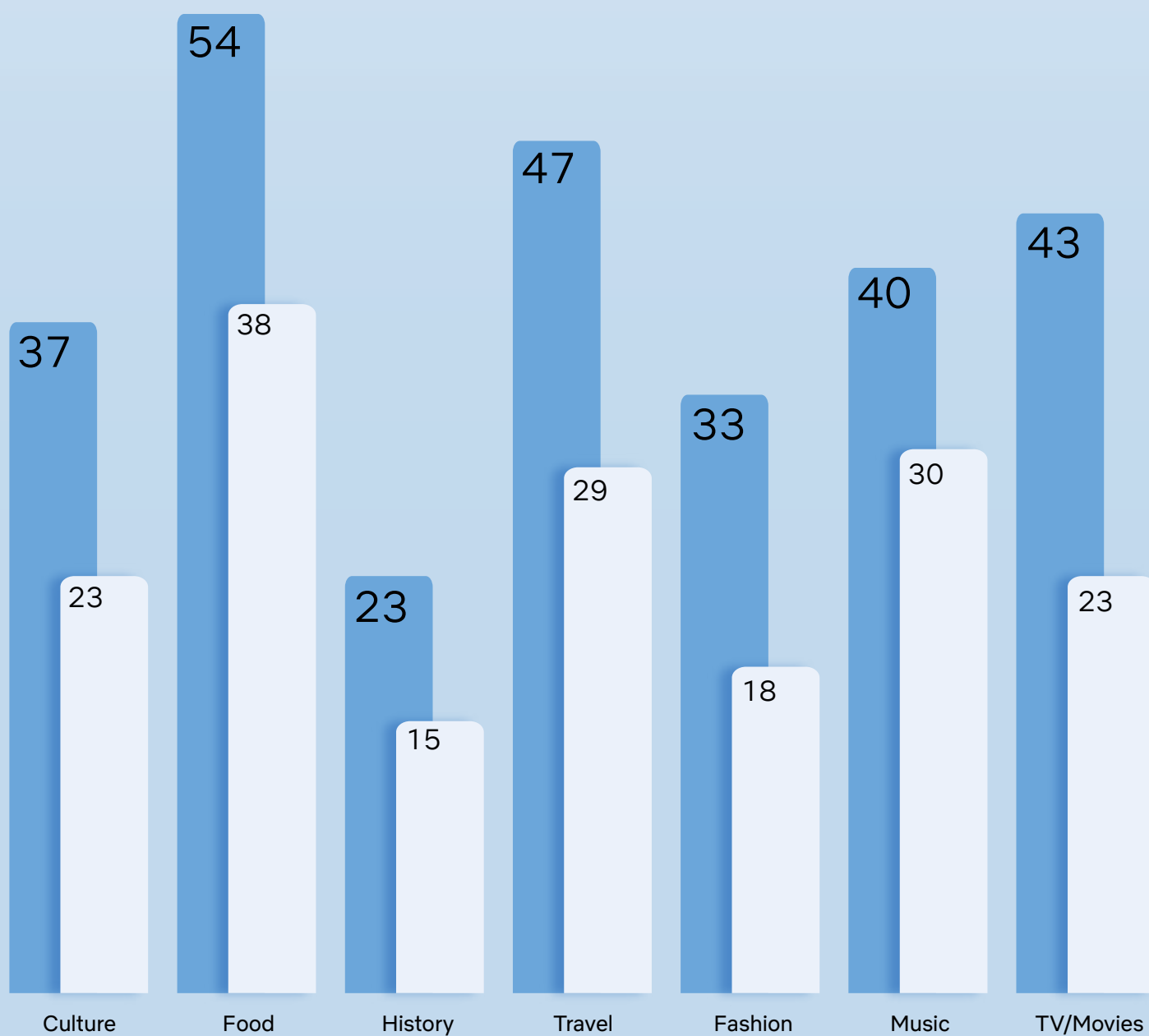
India



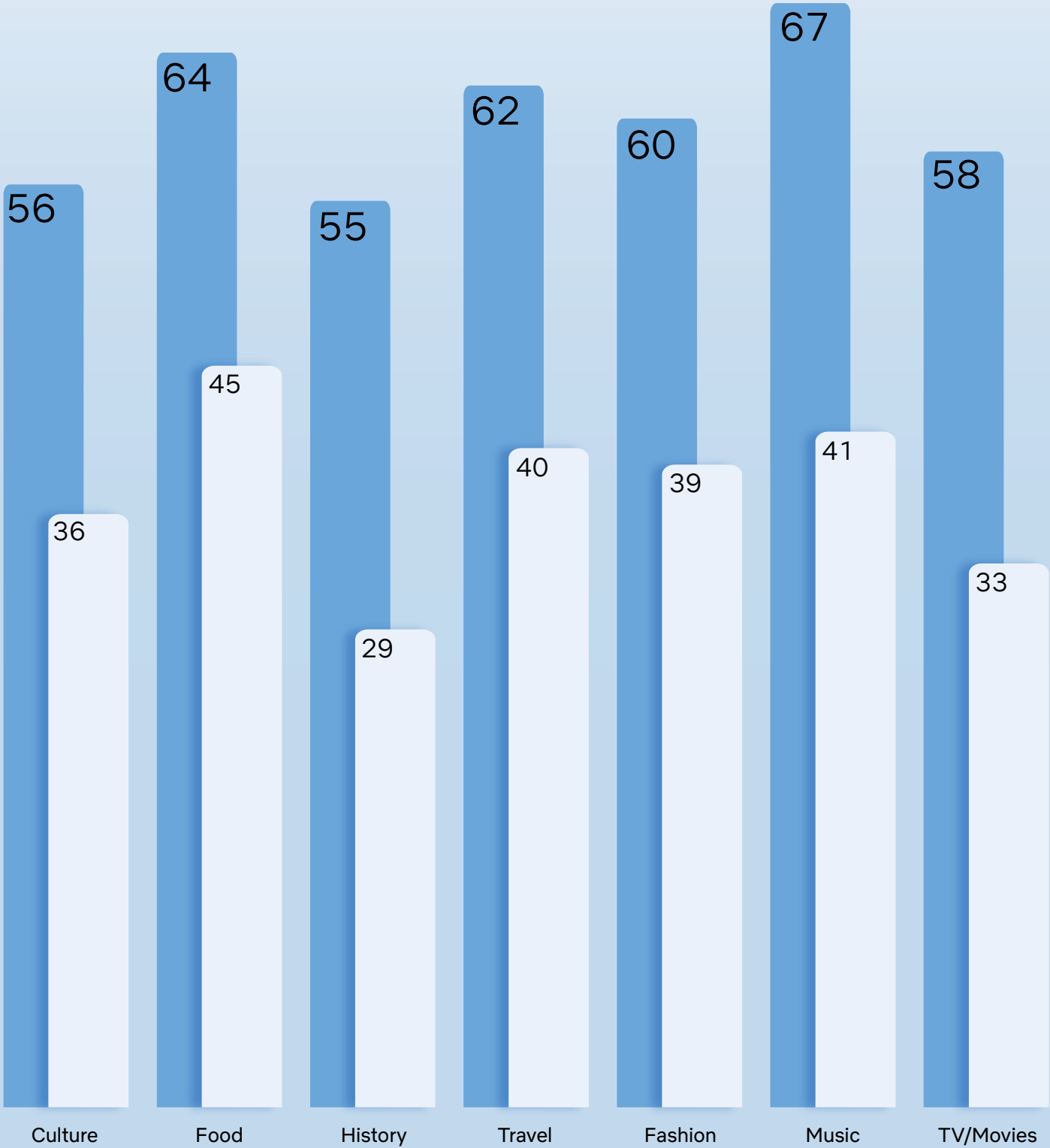
Indonesia



Japan



Thailand



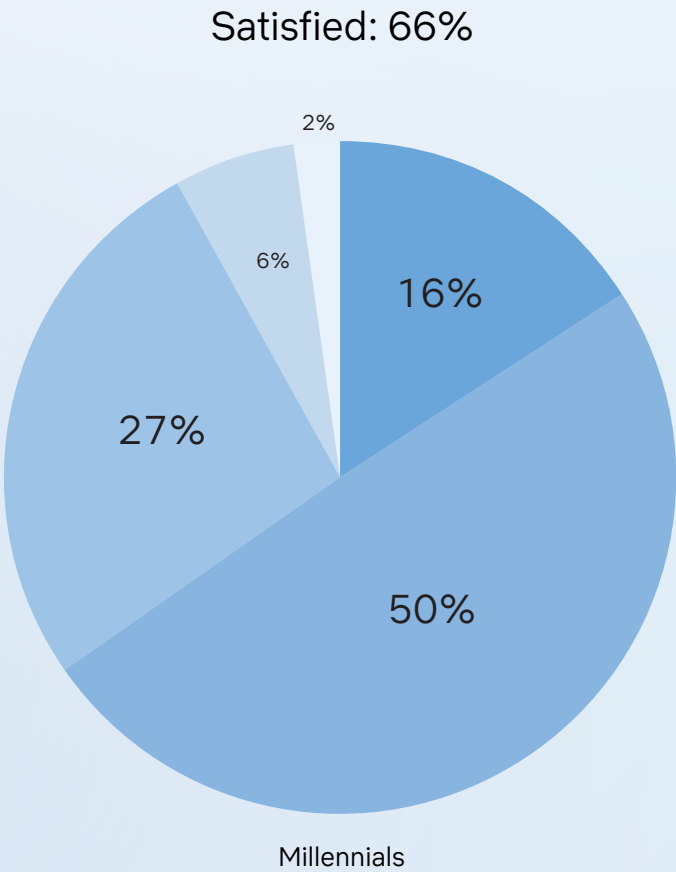
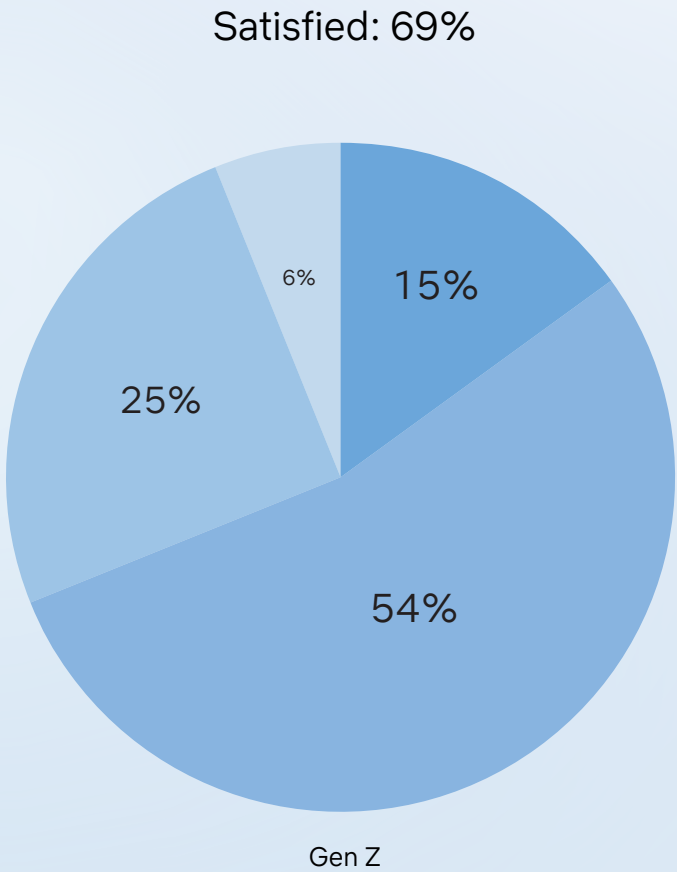
Appendix

Audiences of **all generations** feel satisfied* with Korean representation in media

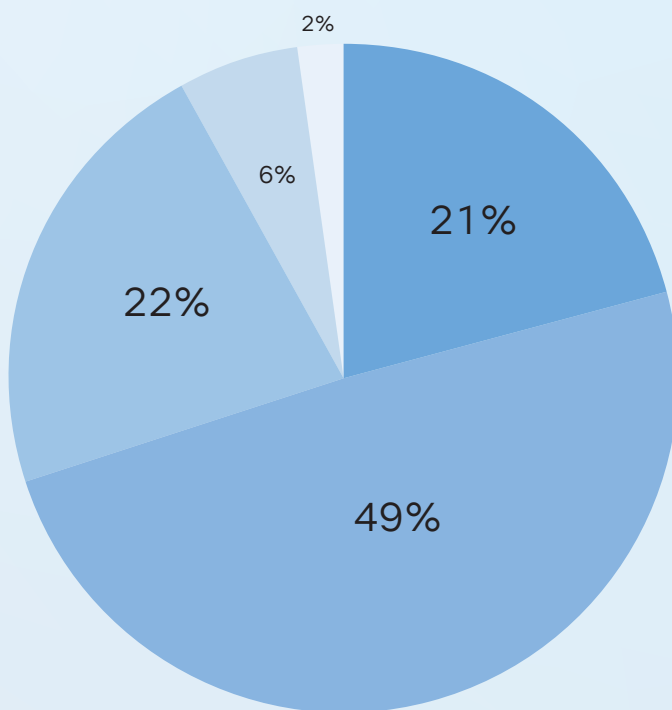
* Top-2 Box %
('Extremely satisfied' + 'Somewhat satisfied')
** Limited sample size (N<100)

B1. How satisfied are you with the way Korean culture is represented in international media?
Base: Korea respondents: GenZ (n=93), Millennials (n=445), Gen X (n=417), Baby Boomers (n=49)

- Extremely satisfied
- Somewhat satisfied
- Neutral
- Somewhat dissatisfied
- Extremely dissatisfied

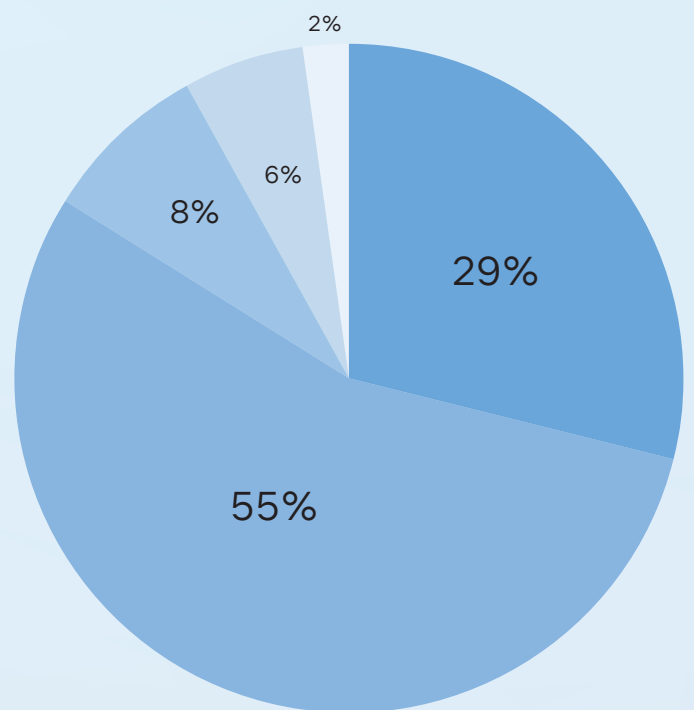


Satisfied: 70%



Gen X

Satisfied: 84%



Baby Boomers

