

The Politics of Diversity: Netflix and the Transformation of Korean Drama Production in the Streaming Era

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This study examines the impact of Netflix on the diversity of Korean drama production in the global streaming era. Drawing on Napoli's framework, it analyzes changes in source diversity (production companies) and content diversity (genres) across three distribution systems: terrestrial broadcasters, capital-intensive general programming and cable channels, and Netflix originals. Combining interviews with industry insiders and quantitative concentration measures of Korean dramas released between 2021 and 2023 ($N = 200$), this study identifies a paradoxical pattern in which Netflix expands genre diversity while also reinforcing existing patterns of capital concentration in Korean drama production. These findings suggest Korean cultural production is increasingly integrated into global value chains and reoriented toward global markets, raising critical questions about the qualitative dimensions of diversity.

Keywords: Netflix, diversity, Korean drama, streaming television, drama production

Cultural exchange across borders has historically been theorized through the competing frameworks of cultural imperialism and cultural globalization. Early scholarship interpreted such exchanges through the lens of cultural imperialism (Boyd-Barrett, 1977; Schiller, 1976), emphasizing Western—particularly American—dominance over peripheral nations. As U.S.-based transnational media corporations expanded alongside rapid developments in information and communication technologies, cultural imperialism theories gained considerable explanatory power by highlighting the movement of media content from core to periphery. However, as the global mediascape diversified, the rise of non-Western production hubs in Brazil, India, and South Korea (hereafter Korea) began to challenge this center–periphery binary and its underlying assumption of unidirectional cultural flow (Thussu, 2007; Tunstall, 2008). These developments suggest that global cultural exchange is more complex and multidirectional than earlier frameworks had assumed.

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The Korean Wave, which refers to the global spread of Korean culture, has been commonly cited as a prime example of counterflow to the unidirectional model of cultural imperialism. However, global streaming platforms have introduced new technological transformations that complicate this counterflow narrative, reshaping the dynamics of cultural exchange. As global streaming giants like Netflix have increasingly dominated cultural production and distribution worldwide, scholars have identified a new form of American dominance operating not through content alone, but through the infrastructural power of digital platforms, which Jin (2015) terms "platform imperialism." Unlike earlier theories of cultural imperialism, which focused on the global circulation of Western media content and asymmetrical media flows, platform imperialism foregrounds the infrastructural power of U.S.-based platform companies and their control over intellectual property in shaping global cultural production and circulation.

Within this broader shift toward platform-based cultural distribution, Netflix has transformed television norms and practices through its significant global reach and innovative business models (Asmar et al., 2023). The entry of such over-the-top (OTT) platforms into the Korean market has profoundly disrupted the media landscape, reshaping the Korean drama industry and raising concerns about both the structural subordination of the Korean audiovisual sector and the weakening of local content diversity (Lee, 2025). These concerns are particularly acute given Korea's historical emphasis on cultural sovereignty and its status as a notable non-Western success in global cultural markets (Lee, 2019). Such concerns reflect broader scholarly debates about whether global streaming platforms enhance or constrain cultural diversity. Some research suggests that Netflix's global libraries complicate older models of one-way U.S. media dominance by including content from a wider range of countries than other U.S.-based streaming services (Lotz et al., 2022), while other studies highlight the persistent dominance of U.S.-origin content in Netflix catalogs, pointing to deeply unbalanced audiovisual flows that raise questions about whose content and whose cultural values circulate globally (Albornoz & García Leiva, 2021).

To navigate this debate, it is essential to examine how the shift from territorially confined linear broadcasting to library-based global streaming models has restructured media ecosystems. As Lobato (2018) notes, it is crucial to examine the extent to which streaming platforms replicate earlier patterns of American dominance and one-way cultural flows. Such an examination must consider how industrial change is connected to textual content, particularly in relation to the national origin of programming and the dynamics between global and local forces. Within this global context, Korea provides a compelling case for exploring these dynamics, as the arrival of Netflix has substantially disrupted Korean drama production, altering industry standards and organizational structures (Jin, 2023). To analyze these changes from a diversity perspective, this study applies Napoli's (1999) taxonomy of media diversity, drawing on interviews with nine drama production professionals and quantitative analysis of source diversity (production companies) and content diversity (genres). The analysis covers 200 dramas released between 2021 and 2023 across three distribution systems, examining differences in production structures and genre distribution, with specific attention to Netflix as the dominant global streaming platform in the Korean drama industry.

Cultural Diversity in Transnational Media Contexts

Diversity has long been a key policy objective in many countries, yet its multidimensional nature makes it difficult to operationalize and assess in empirical terms (Napoli, 1999; van Cuilenburg, 1999).

Broadly, cultural diversity encompasses “the manifold ways in which the cultures of groups and societies find expression,” while cultural content refers to “the symbolic meaning, artistic dimension, and cultural values that originate from or express cultural identities” (United Nations Educational, Scientific and Cultural Organization [UNESCO], 2005, p. 7). UNESCO’s framework recognizes the right of states to safeguard cultural diversity and promote equitable cultural exchange, yet translating these principles into measurable empirical terms remains challenging in practice.

Within policy frameworks, much of the debate has focused on the presumed relationship between source diversity and content diversity (Napoli, 1999). Market-oriented accounts suggest that competition may expand diversity by encouraging greater investment, innovation, and differentiated offerings. However, media diversity scholarship has long cautioned this relationship is conditional rather than automatic: While moderate competition may enhance diversity, fierce competition can encourage risk-avoiding behavior and excessive sameness (van Cuilenburg, 1999). Napoli (1999) further notes that regulators often treat ownership diversity as a proxy for content diversity, although the empirical basis for this causal relationship remains contested. To address this conceptual complexity, he distinguishes three dimensions of diversity: source diversity (ownership, programming, and workforce); content diversity (formats, demographic representation, and viewpoints); and exposure diversity (the degree to which audiences actually consume a diversity of sources and content, assessed in terms of horizontal and vertical exposure). Napoli’s (1999) taxonomy highlights the multidimensional nature of diversity, illustrating that it cannot be inferred solely from the number of media outlets.

These analytical challenges have intensified with the rise of global streaming platforms, whose operational logic departs significantly from legacy industry practices, thereby reconfiguring both the distribution and production of screen content. Unlike traditional broadcasters, which were embedded in nation-based business structures that prioritized cultivating domestic viewership for advertisers, streaming platforms adopt a direct-to-consumer model that enables them to engage audiences across borders without such constraints (Lotz & Eklund, 2024). These disruptions have profound implications not only for content distribution but also for content production itself, with platforms such as Netflix increasingly investing in “globalized” content creation.

As U.S.-based streaming platforms integrate local cultural industries into global value chains, concerns about their implications for cultural diversity have intensified. A UNESCO (2022) report frames culture as a global public good and warns that accelerating personalization in online media environments challenges regulatory frameworks historically designed to protect diversity. In this context, platform power concentrated among a small number of corporations, combined with business models favoring commercially proven content, poses a structural threat to cultural diversity and reveals the limits of broadcast-era regulatory frameworks. Although global streaming platforms may expand the number of content commissioners and the volume of available content, whether this growth produces meaningful diversity remains an open question, particularly given the asymmetrical power relations between global platforms and local cultural industries.

Global Streaming as Platform Imperialism and Its Implications for Diversity

The question of diversity remains central amid the global domination of U.S.-based transnational media corporations. Market-oriented accounts often argue that large media firms, by exploiting economies of scale and scope, are better positioned to absorb the financial risks of developing new products and expand the range of media output (Doyle, 2002; Murdoch, 2005). By contrast, critical political economy scholars contend that ownership concentration diminishes diversity by fostering the standardization of cultural products and narrowing the range of voices, sources, and representations available to the public (Hardy, 2014; Herman & McChesney, 1997). However, both perspectives were largely developed in relation to legacy media industries and therefore require further refinement to explain how digital platforms reconfigure the conditions of cultural production, distribution, and visibility.

Because of the prevailing influence of digital platforms on contemporary cultural production, diversity can no longer be understood solely in terms of content variety or traditional ownership structures. Instead, it must also consider how production practices are reconfigured under the logic of transnational platform capital. As Jin's (2015) framework of platform imperialism suggests, the asymmetrical power relations embedded in digital distribution infrastructures fundamentally shape the conditions under which cultural goods are produced and consumed. Recent scholarship has examined this dynamic both in the Korean context (Park et al., 2023) and in broader analyses of platform-driven media restructuring (Davis, 2023). Under these structural conditions, questions of diversity are increasingly reframed around how the platformization of media industries, driven by global capital, reshapes local cultural production.

In this context, Netflix provides an illustrative case for examining these tensions. Its business model embodies both global and local forces, operating as an assemblage of country-specific services unified by shared infrastructure (Lobato, 2019). This structural configuration has broader implications for content production, as digital platforms have accelerated cycles of production, distribution, and consumption while progressively dissolving traditional genre boundaries (Colombo, 2018). Within this transformed landscape, perspectives diverge on how transnational platforms reshape cultural diversity. Netflix contends that its business model promotes content diversity by introducing diverse stories from different countries (Netflix, 2018), positioning diversity as central to its transnational appeal and competitive advantage (Asmar et al., 2023).

However, Albornoz and García Leiva (2021) show that Spanish-produced Netflix originals increased only from four to eight titles even as the Netflix originals category in Spain expanded from 511 to 542 titles between 2018 and 2019. Such figures point to a broader pattern: Across Europe, U.S. films accounted for more than two-thirds of titles in Netflix's 28 markets, while EU-produced films represented only 12%–21% of the catalog (Lobato, 2018, p. 247), underscoring the persistence of U.S. cultural dominance despite the platform's apparent embrace of local content. Such evidence points to persistent concerns about unidirectional content flows on largely unregulated, U.S.-based platforms (Lobato, 2019, p. 144), calling for a more multidimensional understanding of diversity that extends beyond mere content volume. Within this asymmetrical power relationship, Korean drama producers have come to regard Netflix simultaneously as a constrainer and an enabler (Kim, 2022), suggesting that the global–local

dynamic cannot be adequately captured through a simple binary opposition. A more nuanced understanding is therefore needed to account for the complex interplay between global platform power and local production agency.

The Development of the Korean Drama Industry and the Arrival of Netflix

Historically, Korea's drama industry was dominated by terrestrial broadcasters and heavily dependent on domestic advertising revenues. Major networks such as KBS, MBC, and SBS filled most drama slots through in-house production, maintaining oligopolistic control through vertically integrated planning, production, scheduling, and broadcasting (Roh, 2015). From the 1990s, the Korean government sought to weaken this oligopoly and expand the media market by promoting independent production companies and introducing new distribution systems, including cable television in 1995, satellite television in 2002, and IPTV in 2008, yet these systems largely served as secondary windows for terrestrial broadcasters, whose dominance persisted until the 2008–2009 revisions to the Broadcasting Act relaxed ownership restrictions. By raising the asset threshold for large business groups restricted from owning broadcasting businesses from 3 trillion to 10 trillion KRW (approximately US\$2.2 billion to US\$7.4 billion), the reforms lowered entry barriers for conglomerates and enabled the rise of well-capitalized general programming channels (Korea Policy Briefing, 2008).

In the wake of these regulatory changes, CJ Media, which had launched tvN in 2006, was consolidated into CJ E&M in 2011, creating an integrated media company spanning broadcasting, film, music, and live performance. The establishment of Studio Dragon in 2016 further institutionalized this shift and marked the emergence of a Korean studio system (CJ ENM, 2025). Within this reconfigured landscape, JTBC, launched in 2011 by the JoongAng media group, emerged as a major competitor in the drama market by attracting prominent directors and producers from terrestrial broadcasters. Together with tvN, which expanded its drama slate under CJ ENM, JTBC increased investment in production, enabling higher-budget series and more experimental genres. Intensifying competition for creative talent among a growing number of industry players has raised fees for writers, directors, and lead actors, pushing production costs beyond the limits of the traditional advertising-based revenue model.

Within this broader transition, the entry of global streaming platforms, most notably Netflix, has profoundly reshaped Korean drama production. Leveraging revenues from its global distribution networks, Netflix has become a major commissioner of Korean dramas, offering production budgets that local competitors struggle to match. Amid declining domestic advertising revenues and reduced local drama output, this financial capacity has enabled the platform to attract top-tier actors, writers, and directors. At the same time, well-capitalized non-terrestrial media companies, including CJ ENM and JTBC, have expanded their business models through partnerships with Netflix, which provide stable revenue streams and enable them to expand their market presence through strategies distinct from those of traditional broadcasters.

This global–local dynamic has further reshaped Korean drama production. As production costs have risen beyond what the small domestic market can sustain, Korean producers have faced growing pressure to secure global revenue streams. Netflix, in turn, has leveraged Korea as a production hub, supported by its strong market position in the country and its broader expansion strategy in Asia, a key region for its

growth (Zhao & Shaw, 2022). This intertwining of local producers' need for external capital and global platforms' regional industrial strategies has gradually restructured the terrain of Korean drama production. In Korea's cultural landscape, concerns about cultural sovereignty in the film and drama industries have long accompanied the inflow of large-scale U.S. capital. Consequently, scholarly attention has increasingly focused on global platforms not merely as distribution channels, but as actors that fundamentally reconfigure the structures of media production and distribution (Jin, 2023; Park et al., 2023).

Netflix's Rise as a Dominant Platform in Korea

Founded in California in 1997 by Marc Randolph and Reed Hastings, Netflix first gained popularity through mail-order DVD rentals before launching its streaming service in 2007. It defines itself as a "global Internet TV network" (Lobato, 2019, p. 20) and has expanded through regional launches, often partnering with local telecom and Internet providers and acquiring locally relevant content. Since 2013, Netflix has invested heavily in original programming alongside licensed film and television IP, combining geographic expansion with localization strategies tailored to regional markets (Lobato, 2019). Rather than segmenting audiences by traditional demographics, Netflix organizes users around viewing preferences, using algorithmic recommendations and localized production to cultivate globally marketable niche content (Neira et al., 2023). As of 2021, Netflix had produced original content in 40 countries and offered subtitles and dubbing in dozens of languages (Avila, 2021).

When Netflix entered the Korean market in 2016, its initial performance was modest. By November 2016, the platform had acquired only approximately 130,000 subscribers, substantially trailing domestic competitors such as Oksusu (9.5 million subscribers), Pooq (1.3 million), and TVING (600,000; Lee, 2017). This underperformance was largely attributed to Netflix's catalog deficiency in locally produced content, particularly major Korean films and terrestrial television programming. To address this limitation, Netflix began investing in local original content, partnering with prominent screenwriter Kim Eun-hee, whose portfolio includes commercially and critically acclaimed series such as *Phantom* (Kim & Park, 2012) and *Signal* (Kim, 2016). This collaboration resulted in *Kingdom* (S. Kim, 2019), Netflix's inaugural Korean original series, signaling the platform's transition toward a comprehensive localization strategy in the Korean market (J. Kim, 2019). In 2019, Netflix entered into a three-year agreement with CJ ENM and Studio Dragon, Korea's leading drama production studio, to produce more than 21 original titles for global distribution starting in 2020 (MacDonald, 2019; Ryu, 2019). Netflix's commitment to Korean content was further demonstrated by major licensing agreements, including a 600-hour content supply deal with JTBC (Ko, 2019). In 2023, Netflix announced a four-year investment of US\$2.5 billion in Korean content production as part of its market expansion strategy (Kim, 2023).

Netflix's investment strategy has fundamentally reshaped the Korean drama production ecosystem. By offering budgets far beyond those of domestic competitors, Netflix has enabled large-scale productions in previously underexplored genres, including *Kingdom* (S. Kim, 2019), *The Glory* (Ahn, 2022–2023), and *Squid Game* (Hwang, 2021), which achieved unprecedented global commercial success. Sales to global platforms have helped Korean producers recoup rising production costs beyond the domestic market, but they have also raised questions about dependency, as global circulation increasingly relies on U.S.-based platform infrastructure. By 2023, Netflix dominated Korea's streaming market with a 42% share, well ahead

of TVING (18.8%), Coupang Play (15.7%), Wavve (14.3%), and Disney+ (6.6%; Lee, 2023). Although local broadcasters and conglomerates have launched affiliated OTT services, they remain constrained by the small domestic market and substantial operating losses, while Netflix was reportedly the only major streaming platform operating profitably in Korea. Critics therefore warn that Netflix's dominance may homogenize Korean content and undermine its creative vitality (Lee, 2025).

Methods

Research Design

In this study, the term "platform" is used in a functional sense. As Gillespie (2010) notes, technology companies strategically deploy or resist the label of platform in regulatory and political contexts. Services such as Netflix differ structurally from open digital platforms in that they neither host user-generated content nor operate as multisided marketplaces; rather, they function as curated subscription services for professionally produced content (Lobato, 2019). In the broader literature on platform capitalism, Srnicek (2017) classifies platforms according to their business models and modes of data extraction. Netflix most closely resembles what Srnicek terms the product platform, exemplified in his framework by Spotify, which generates revenue by transforming goods into services through subscription or rental fees, although Netflix's content ownership, algorithmic curation, and gatekeeping power, compounded by its more recent incorporation of advertising-supported tiers, render it a more complex case than Srnicek's framework readily accommodates.

Because this study's central concern is the asymmetric power relations through which transnational platforms reshape local cultural production, it followed Jin's (2015) framework of platform imperialism, which foregrounds structural inequalities embedded in digital distribution infrastructures. Davis (2023) further characterizes Netflix's expansion as a hybrid form of media and platform imperialism driven by vertical integration, transnational scaling, and regulatory avoidance. These dynamics are particularly salient in Korea, where platformization is reshaping the industrial logics and working conditions of the domestic drama industry (Park et al., 2023).

To analyze these changes, this study combined quantitative metrics with qualitative interviews, drawing on Napoli's (1999) framework of source and content diversity to examine how Netflix has reshaped Korean drama production structures and genre patterns. In this study, source diversity was operationalized as production company concentration and content diversity as genre diversity, focusing on the relationship between the two within the Korean drama industry.

The analysis compared production companies and genres across three historically and institutionally distinct segments of Korean television: terrestrial broadcasters (KBS, MBC, and SBS), which formed the foundation of Korean drama production; general programming and cable channels (JTBC and tvN), representing domestic conglomerate capital; and Netflix originals, reflecting the growing influence of transnational platform capital. The comparison did not aim to contrast equivalent numbers of operators, but to examine three distinct production regimes that emerged at different historical junctures in the Korean drama industry. This comparative framework drew on prior scholarship on diversity across terrestrial and

general programming channels (Pyo & Yu, 2016) and research on Netflix's influence on local production ecologies (Jin, 2023). Accordingly, Netflix is treated not merely as an individual firm, but as the principal representative of global streaming capital entering Korean drama production, given its dominant market position and disproportionate influence on the production ecosystem.

Analytical Framework and Data Collection

To operationalize diversity, this study measured source diversity using concentration ratios (CR3 and CR5) based on the distribution of production companies. Content diversity was assessed using CR3 and CR5, with the Herfindahl-Hirschman Index (HHI) additionally calculated, as the predefined genre categories allowed the calculation of full distributional concentration. For ease of interpretation, a diversity index ($DI = 10,000 - HHI$) was calculated, as diversity represents the inverse of concentration. Source diversity examined whether the rise of transnational platforms increased concentration among production companies, while content diversity examined shifts in genre patterns across three distribution systems.

The analysis covered dramas released between 2021 and 2023, following the global success of *Squid Game* (Hwang, 2021) and Netflix's growing prominence in Korean drama production. The data set included 200 dramas: terrestrial broadcasters (KBS, MBC, SBS; $n = 71$), general programming and cable channels (JTBC and tvN; $n = 97$), and Netflix originals ($n = 32$). Although Netflix distributes Korean content through multiple arrangements, this study focused on Netflix originals, as they were most directly indicative of the platform's strategic production priorities and offered a more clearly delineated analytical category for comparative analysis. To ensure comparability across the three distribution systems, the analysis was limited to series-format dramas with 8–20 episodes. Korean television dramas traditionally followed a roughly 16-episode miniseries format (Jin, 2023), while the rise of Netflix has introduced greater flexibility, including somewhat shorter series formats. Terrestrial dramas exceeding 20 episodes, which range from 32 to 150 episodes, were excluded because their extended runs reflect fundamentally different narrative and production structures that are not comparable to standard series formats. Single-episode dramas were also excluded, as they do not constitute a common or comparable production form in the Korean drama market.

Two methodological challenges required particular attention: coproduction credits and genre hybridization. For coproductions, each participating company received a proportional credit ($1/n$, where n is the number of coproducers), preventing inflation of participation counts and providing a more accurate measure of production involvement. Given the absence of contract-level data, robustness checks were conducted to assess whether the results remained stable under alternative weighting assumptions (Aguilera et al., 2006). Two alternative approaches were used: full counting (assigning each company a weight of 1) and first-listed producer coding.

Genre classification also posed a challenge, as contemporary dramas increasingly resist single-genre categorization. For instance, *Crash Course in Romance* (Yu, 2023), while grounded in romance, also contained strong thriller and suspense elements. To address this hybridity, this study drew on IMDb's tagging system, which prior research has used as a useful classificatory resource (Ouyang, 2023), as it reflects a hybrid classificatory logic shaped by both managerial control and audience participation. Rather

than treating genre as a fixed, discrete attribute of individual productions, this study aimed to capture aggregate genre trends across the data set as a whole. Hence, the first three genre tags for each drama were collected and converted into proportional data for the analysis of aggregate genre patterns. This approach ensured analytical consistency across all three platform segments by avoiding platform-specific biases that might arise from differences in internal genre taxonomies and marketing-driven tagging practices. The drama list itself was compiled from Naver, Korea's dominant web portal, through a keyword search for "completed Korean drama" in its drama title archive. To complement the quantitative analysis, this study conducted in-depth interviews with nine media professionals in drama production between August 2024 and May 2025, using snowball sampling. All interviewees are core figures in the mainstream drama industry, with careers spanning 15–30 years (see Table 1).

Table 1. Interviewee Information.

Interviewee	Occupation
A	Production company CEO
B	Executive manager at an Internet Protocol Television (IPTV) company
C	Former director of drama department for a major terrestrial network
D	Business manager for a major Program Provider (PP)
E	Business manager for a major terrestrial network
F	Drama director
G	Drama director
H	Drama director
I	Drama casting director

Findings

Source Diversity: Changes in the Diversity of Production Companies

Production company concentration varies markedly across the three institutional segments. Terrestrial broadcasters exhibit relatively low levels of concentration, whereas the general programming and cable channel segment shows substantially higher concentration. Netflix originals appear relatively dispersed at the level of individual production labels, but concentration rises sharply once companies affiliated with the two dominant studio groups are aggregated (see Table 2 and Figure 1).

When Studio Dragon and SLL are aggregated under their respective conglomerates, CR3 rises markedly, especially across the general programming/cable (JTBC and tvN) and Netflix segments, where it falls broadly within the 40%–60% range across several counting methods. This suggests that production concentration is increasingly organized around a small number of large studio groups. In terms of the number of titles, productions involving companies affiliated with these two studio groups account for 20 of the 32 Netflix originals (62.5%).

Table 2. Concentration Indices Across Distribution Systems.

Media Type	<i>n</i>	Method	CR3	CR5
Terrestrial	71	Fractional counting (1/ <i>n</i>) (main)	24.41% (24.88%)	32.39% (34.74%)
		Full counting	21.67% (23.33%)	28.33% (31.67%)
		First-listed producer	30.99% (30.99%)	39.44% (39.44%)
General and Cable	97	Fractional counting (1/ <i>n</i>) (main)	37.80% (53.61%)	43.81% (58.25%)
		Full counting	39.46% (48.48%)	44.86% (52.12%)
		First-listed producer	48.45% (63.92%)	54.64% (68.04%)
Netflix Originals	32	Fractional counting (1/ <i>n</i>) (main)	21.88% (40.10%)	30.73% (47.40%)
		Full counting	25.00% (45.31%)	34.38% (54.69%)
		First-listed producer	31.25% (53.13%)	40.63% (59.38%)

Note. Percentages in parentheses aggregate production companies affiliated with the two dominant studio groups (CJ ENM/Studio Dragon and SLL). Fractional counting (1/*n*) is the baseline; full counting and first-listed producer coding are reported as robustness checks.²

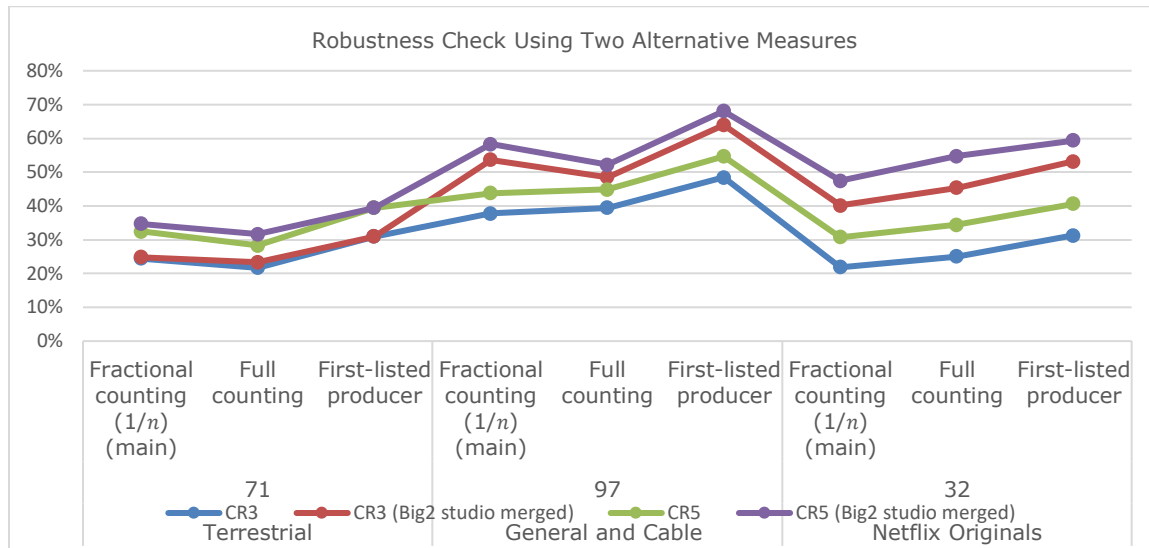


Figure 1. Robustness checks of production company concentration using two alternative measures.

² SLL group: Film Monster, BA Entertainment, Perfect Storm, Studio Bird, Drama House Studio, Anthology Studio, Studio Phoenix, Climax Studio, Production H, HighZium Studio, About Pictures, Studio Slam, Npio Entertainment, How Pictures, and Betty & Creators; CJ ENM / Studio Dragon group: Egg Is Coming, Bon Factory, JK Film, Moho Film, Dragon Pictures (Yong Film), Blaad Studio, M Makers, Manhwa Family, Hwa&Dam Pictures, MoonHwa ChangGo, KPJ, GTist, Gill Pictures, CJ ENM Studios, Fifth Season, Million Volt, and JS Pictures (PwC Samil, 2024).

These patterns suggest Netflix does not simply broaden production opportunities across the market. Instead, it appears to reinforce an existing industry trend by relying heavily on scalable studio networks capable of producing capital-intensive, high-budget dramas for global distribution. This concentration reflects a broader process of capital intensification in drama production, which does not necessarily expand opportunities for smaller or independent production companies. As one CEO interviewed explained:

These days, making a tentpole drama can cost over 30 billion won (over US\$22 million). Honestly, that's a heavy burden even for the companies producing them. There's always this worry at the back of our minds about how sustainable this market really is because the profits don't flow back to the production companies. (Interviewee A)

This account highlights how the financial risk is compounded by the contraction of the advertising market and intensifying competition among production companies. Production companies find themselves with fewer alternatives for releasing their content, while the costs of meeting global streaming standards continue to escalate. In particular, one of the major changes since the arrival of Netflix has been the decline of terrestrial drama production. With declining advertising revenues and the rise of a fragmented media landscape, drama production has become an increasingly risky sector, and terrestrial broadcasters have been steadily reducing their drama slots. Beyond mere reduction, they have fundamentally restructured their production strategies. As one manager at a major terrestrial broadcaster explained:

We have classified our dramas into three categories, each with a distinct strategy: tentpole, overseas business-oriented, and domestic channel competitiveness-oriented dramas. Tentpole dramas require both high viewership ratings among the 20–49 demographic and strong international distribution revenue to justify their large production budgets. Overseas business-oriented dramas focus on maximizing revenue from global distribution, making genre selection and casting critical factors in their production strategy. Lastly, channel competitiveness-oriented dramas prioritize artistic quality and mass appeal to strengthen the network's overall competitiveness, even if their genre and casting are less suited for international sales. (Interviewee C, a former director of a drama department)

This strategic differentiation reflects a broader industry shift toward selective investment, as terrestrial broadcasters increasingly concentrate resources on fewer, but higher-budget, productions to mitigate the financial risks associated with high production costs and market uncertainty. The impact of Netflix on the drama production landscape should therefore be understood not merely through surface-level indicators, but in relation to these structural transformations in production practices and corporate business strategies. In the mid-2010s, when JTBC and tvN emerged as dominant forces in drama production, the terrestrial-centered production labor market began to loosen, as directors and writers increasingly moved to these new channels in search of better incentives (Roh, 2015). Leveraging the substantial financial resources of their parent conglomerates, these channels have become part of vertically integrated studio systems designed to diversify revenue streams as the media environment has transformed with the rise of multichannel distribution and OTT streaming services.

Netflix has further accelerated this shift as competition for its commissions drives up production budgets and reshapes the priorities of major studios and independent production companies alike. Amid this transition, major studios have adopted new business strategies—acquiring production companies, recruiting star writers and directors, and making substantial capital investments in drama production. At the center of this process, Netflix has leveraged its considerable financial resources to secure Korea’s most sought-after creators, fundamentally reshaping the drama production ecosystem. As one casting director described the situation:

At first, Netflix told us not to worry about the budget and just bring in good actors, but as the competition intensified, actor fees rose to over 300 million KRW (about US\$214,000) and even reached 1 billion won (about US\$714,000) per episode. This created a system where the financial burden shifted heavily onto production companies. As a result, production companies started focusing more on projects that were guaranteed to sell globally. (Interviewee I, casting director)

The interviewees consistently highlighted how production companies have gravitated toward Netflix’s substantial financial resources amid a contracting drama production market. This shift is further evidenced by quantitative analysis, which reveals divergent concentration patterns across distribution systems. Drama production by terrestrial broadcasters exhibits a relatively low concentration, suggesting lower barriers to entry and continued openness to a diverse range of producers. By contrast, as capital-backed media outlets, Netflix, tvN, and JTBC exhibit higher concentration, with content increasingly supplied by production companies operating under the umbrella of the two major studios. Another interviewee explained this pattern:

In the past, most independent production companies were quite small, but recently, big corporations have started to absorb and reorganize them. JTBC Studios, for example, evolved into SLL, and this is similar to what Studio Dragon did, bringing multiple drama and film production labels together under one roof. So, now, the outsourcing production market has become much more capitalized and industrialized, with big studios like Studio Dragon, SLL, and Kakao Entertainment pulling smaller companies into these label-based systems. (Interviewee B, IPTV executive manager)

Content Diversity: Changes in the Diversity of Genres

The analysis reveals distinct patterns of genre concentration across the three distribution segments (see Table 3). Terrestrial broadcasters display the highest level of genre concentration, followed by cable and general programming channels, while Netflix exhibits the lowest concentration and, correspondingly, the highest HHI-based diversity index. These findings indicate that Netflix offers the greatest degree of genre diversity among the three segments.

Table 3. Genre Concentration of Three Media Types.

Media	CR3	CR5	HHI	Diversity Index
Terrestrial 2021–2023	62.83%	76.44%	1,653.19	8,347

General and Cable 2021–2023	56.80%	74.80%	1,571.20	8,429
Netflix Originals 2021–2023	52.33%	68.60%	1,400.76	8,599

More specifically, the genre breakdown (see Table 4 and Figure 2) shows that Netflix originals are distributed more evenly across genres. The three traditionally dominant genres (drama, romance, and comedy) account for only 43% of Netflix originals, compared with approximately 63% for terrestrial broadcasters and 56.8% for general programming and cable channels. Netflix shows notably higher proportions of action (12.8%), thriller (8.1%), and crime (10.5%), and it has also ventured into genres previously underexplored in Korean television, such as science fiction (3.5%). While global streaming platforms can broaden opportunities for creative expression, market pressures often steer production toward genres with global market appeal.

Table 4. Genre Comparison, 2021–2023.

Genre	Terrestrial (8–20 episodes) (<i>n</i> = 71, genre tag = 191)		General and Cable (<i>n</i> = 97, genre tag = 250)		Netflix Originals (<i>n</i> = 32, genre tag = 86)	
	Count (%)	per 100	Count (%)	per 100	Count (%)	per 100
Drama	58 (81.7%)	30.4	75 (77.3%)	30.0	25 (78.1%)	29.1
Action	13 (18.3%)	6.8	21 (21.6%)	8.4	11 (34.4%)	12.8
Crime	13 (18.3%)	6.8	11 (11.3%)	4.4	9 (28.1%)	10.5
Comedy	31 (43.7%)	16.2	34 (35.1%)	13.6	7 (21.9%)	8.1
Thriller	4 (5.6%)	2.1	17 (17.5%)	6.8	7 (21.9%)	8.1
Fantasy	12 (16.9%)	6.3	22 (22.7%)	8.8	5 (15.6%)	5.8
Romance	31 (43.7%)	16.2	33 (34.0%)	13.2	5 (15.6%)	5.8
Horror	2 (2.8%)	1.0	4 (4.1%)	1.6	4 (12.5%)	4.7
Mystery	9 (12.7%)	4.7	23 (23.7%)	9.2	4 (12.5%)	4.7
Sci-fi	0	0	1 (1.0%)	0.4	3 (9.4%)	3.5
History	9 (12.7%)	4.7	3 (3.1%)	1.2	2 (6.3%)	2.3
Others	9 (12.7%)	4.7	5 (5.2%)	2.4	4 (12.5%)	4.7

Note. “Count” (%) reports the proportion of titles tagged with each genre in each data set (*n/N*). “Per 100” reports the proportion of each genre among all retained genre tags in each data set (totals: 191/250/86; sums to 100). Up to three IMDb genre tags were retained per title, and low-frequency tags outside the main analytical categories were grouped under “Others.” Created by the author.

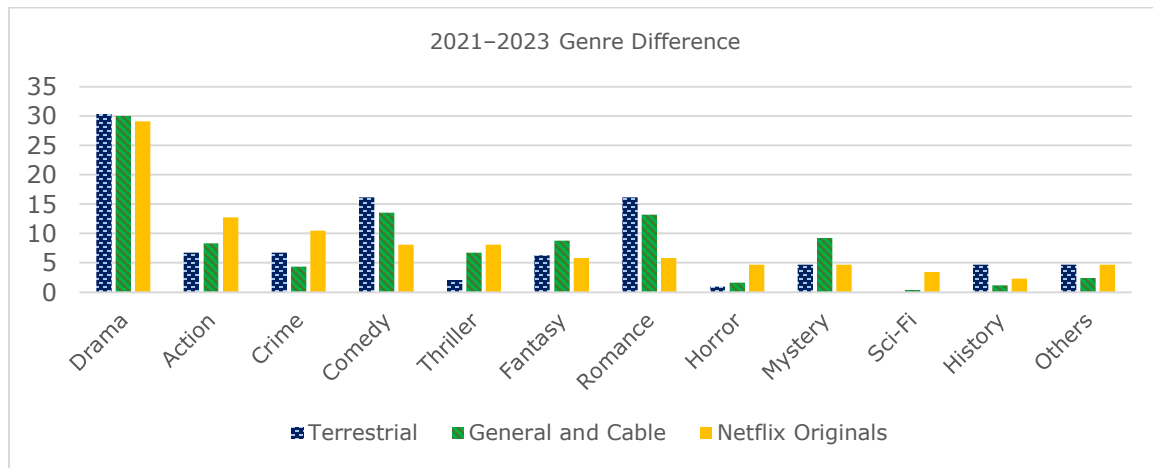


Figure 2. Genre comparison, 2021–2023.

One business manager (Interviewee E) recounted a case in which two superstar actors were initially secured for a new drama production, but ultimately withdrew because Netflix was not involved. According to several drama directors (Interviewees F, G, and H), this shift reflects Netflix's considerable financial capacity, which affords creators both greater budgets and more generous production timelines, enabling them to pursue genres and storytelling approaches that have previously been difficult to realize within the constraints of domestic broadcasting. A drama director elaborated:

With the rise of Netflix, the production environment began to move in a markedly different direction from traditional terrestrial broadcasting. Netflix invested production budgets at a level that local broadcasters could not match, which led to a sharp increase in both production costs and creators' remuneration. As financial incentives grew, talented creators began to follow this new flow of capital, expanding their creative autonomy in the process. Additionally, the greater freedom in production and the broader range of themes and expression to explore proved especially appealing to creators. (Interviewee F, drama director)

Under capitalist production systems, particularly in Korean drama production with its small, limited local market, directors continually face budgetary pressures and must negotiate expenses with producers. Limited time and money unavoidably compromise production quality. From this perspective, increased financial backing can create better conditions for directors to experiment with diverse genres. However, in the platform era, marked by large influxes of global capital into the Korean drama sector, decisions about drama production cannot be made solely on the basis of artistic quality or creative ambition. As one interviewee stated:

There is now a broad consensus that drama has become the genre with the greatest impact on a broadcaster's financial performance, requiring the mobilization of company-wide resources in the selection process. In choosing which dramas to produce, it is

increasingly important to assess not only the artistic quality and core production elements but also the distribution potential, particularly in global markets. (Interviewee C, a former director of the drama department)

This trend is also evident in the interview with the head of a production company that produces dramas for terrestrial broadcasters, general programming and cable channels, and Netflix:

We've got about 10 projects currently in production and another 10 in development. Generally speaking, strong packages tend to be pitched first to Netflix, followed by tvN and JTBC, and then to the terrestrial broadcasters, but production decisions are not necessarily determined by budget alone. Things like the ratings system and the target audience also matter. Usually, if the content is more explicit, the topic is controversial, or the expression is strong, it's easier to take it to an OTT platform. (Interviewee A, CEO of a production company)

The interviews reveal that multiple factors beyond financial considerations shape production decisions. However, in a media environment marked by declining advertising revenue and intensified competition, Netflix's strong financial capacity to commission large-scale projects has become increasingly influential, especially when combined with chronic budgetary pressures in traditional channels. Production companies increasingly prefer Netflix commissions not only for the higher budgets and global distribution reach they provide but also because Netflix's cost-plus model guarantees full production cost recovery, providing a degree of financial security that is difficult to secure through domestic broadcasting arrangements, particularly amid the current contraction of the Korean drama market.

Nonetheless, such preferences exist within a complex field of institutional and cultural pressures. Terrestrial broadcasters, as stakeholders in the domestic OTT platform Wavve, pressure their own drama departments to supply a certain portion of content to the local OTT platform. As a former drama department director (Interviewee C) at a terrestrial broadcaster explained:

When considering outlets for drama distribution, it often seems advantageous to supply content to Netflix, given the higher budgets and global reach. At minimum, we don't lose money when supplying content to Netflix. However, it is not that straightforward since company management also expects us to deliver to Wavve, a domestic OTT with strong terrestrial ties. This creates tensions between the drama department, which prioritizes profitability and global exposure, and executives who emphasize maintaining relationships with domestic platforms.

These negotiations around the competing demands of creative autonomy, commercial viability, and institutional obligations reveal the complex dynamics through which Netflix has reshaped Korean drama production. Clearly, Netflix's financial resources and global reach have made it an attractive partner for production companies and even in-house drama departments in terms of producing diverse genres. However, this influence operates within and is mediated by existing institutional structures, including terrestrial broadcasters' stakes in domestic platforms and corporate strategic decisions.

Discussion

The findings reveal a complex transformation of diversity in the Korean drama production industry. While content diversity, measured through genre distribution, has expanded in the streaming era, source diversity has declined as production becomes increasingly concentrated among fewer large studios and capital-intensive companies. This shift must be understood within the broader restructuring of the Korean television industry. Since the early 2000s, the globalization of Korean dramas has made overseas sales central to the industry's business model (Roh, 2015). Deregulatory reforms also enabled large conglomerates to enter the television market, weakening terrestrial broadcasters' dominance and accelerating capital concentration. The arrival of global streaming services further complicated diversity debates by extending them beyond national boundaries. As Lobato (2019) argues, Netflix operates as "a collection of national services tied together in one platform" (p. 184), combining local customization with global integration. Thus, diversity in Korean drama production should be analyzed not only in relation to domestic industrial structures but also through the interaction between local producers seeking to generate revenue by targeting global markets and global streaming services seeking to maximize returns by positioning Korea as a regional production hub.

From the perspective of source diversity, the findings reveal a clear trend toward increasing concentration among production companies. As production costs have risen and global distribution has become an essential part of business models, drama production has increasingly consolidated around firms capable of mobilizing large-scale investment. In this context, the emergence of a nascent Korean studio system can be understood as a strategic response to these structural conditions, as major conglomerates sought to maximize returns through competitive content production, diversified revenue streams, and multiwindow distribution. Instead of the fragmented outsourcing structure that once characterized Korean drama production, the industry is increasingly organized around vertically integrated studio-centered entities that coordinate multiple production labels under a single corporate umbrella. This pattern suggests that global and local capital should not be understood as oppositional forces, but as complementary actors operating within the shared logic of capital globalization, in which investment flows converge around the pursuit of maximum returns.

Nonetheless, Netflix's capital dominance has produced a paradoxical outcome: While production has become increasingly concentrated among well-funded firms, genre diversity has expanded. Genres traditionally considered marginal in Korean television, such as thriller, horror, crime, and action, have gained prominence as Netflix's investment power enables productions previously difficult to realize within the constraints of domestic broadcasting. Zombie series such as *Kingdom* (S. Kim, 2019) and *All of Us Are Dead* (Lee & Kim, 2022) exemplify genres rarely attempted before Netflix's entry. Action has become more visible in Netflix originals, reflecting the global circulation of spectacle-driven storytelling that travels easily across linguistic and cultural boundaries (Olson, 1999), while thriller and crime have emerged as particularly prominent commissioning genres in the contemporary OTT landscape (Szalai, 2023). Exemplifying what Lobato (2019) calls the localized nature of global taste (p. 182), Netflix monetizes niche preferences through an on-demand model that organizes audiences as transnational communities structured around shared tastes rather than geography (Lotz, 2021, p. 207).

However, this numerical expansion of genres raises questions about the nature of diversity itself. While quantitative indicators suggest a broader distribution of genres, concerns are growing that Korean dramas are becoming increasingly characterized by violent content (Hong, 2024), particularly in the thriller and action genres favored by global audiences. This pattern reflects Netflix's branding of diversity as a strategy that mobilizes cultural difference for transnational appeal (Asmar et al., 2023). Similarly, Jin (2023) argues that such genre shifts may undermine local specificities by prioritizing internationally marketable formats over culturally specific narratives.

Finally, it is important to emphasize the asymmetrical power relationship between global platforms and local producers. Drawing on its substantial global revenues, Netflix has invested heavily in Korean drama production, attracting top-tier creators and enabling large-scale, high-quality productions. By contrast, local OTT platforms, constrained by the limited domestic market, remain locked in persistent deficit structures. Moreover, Netflix's control over IP rights limits revenue returns to local creators and production companies (Davis, 2023; Park et al., 2023). In this sense, Korean producers' collaboration with Netflix cannot be understood as a purely voluntary market choice, but rather as a structurally constrained response to their dependence on Netflix's capital and global distribution infrastructure. This structural dependence complicates conventional understandings of media diversity, as expanding genre variety may coexist with increasing concentration and asymmetrical power relations in the production system.

Conclusion

This study highlights the paradoxical transformation of diversity in the Korean drama production industry in the streaming era. While Netflix's entry has expanded genre diversity and global visibility for Korean dramas, it has also accelerated capital concentration among large production firms. As global streaming platforms increasingly shape the organization of production and distribution, the benefits of globalization remain unevenly distributed across the industry. Terrestrial broadcasters have become increasingly marginalized, while large capital studio-centered entities consolidate power. Although genre diversity seems to have expanded, it remains constrained by the need to align with transnational platforms' global revenue models, limiting the scope of genuinely local distinctiveness. Within this broader shift, the Korean drama industry has gradually moved from a terrestrial broadcaster-centered system toward a studio-centered production model.

Netflix originals have expanded Korean drama genres in quantitative terms, introducing previously underrepresented categories such as thrillers, horror, and science fiction. Netflix's substantial investment capital has further broadened creative possibilities, enabling producers to experiment with new genres and production scales, yet this quantitative expansion of genres does not necessarily translate into meaningful cultural diversity. When examined through the lens of global taste hierarchies, such diversification paradoxically contributes to a narrowing of genre orientations, as content increasingly conforms to internationally marketable formats rather than culturally specific narratives (Hong, 2024; Jin, 2023).

The present study provides empirical evidence for the paradoxical nature of diversity under platform capitalism, through the contextualized analysis of the Korean case. However, several limitations

should be acknowledged. First, as many scholars have noted, the measurement of diversity is inherently contingent on the analytical perspective and methodological choices adopted. The indicators used in this study therefore do not represent an absolute measure of diversity, but rather one possible operationalization among several alternatives. Second, although this study employed multiple measurement approaches and robustness checks because of limited access to firm-level data, the multidimensional nature of diversity requires cautious interpretation. In particular, the disparity in sample sizes across the three distribution segments reflects actual production volumes during the study period rather than a sampling decision. Nevertheless, because concentration indices such as CR3 and CR5 are sensitive to sample size, cross-segment comparisons should be interpreted with appropriate caution.

In addition, genre classification remains an inherently complex task, as contemporary dramas frequently blend multiple generic conventions, and any categorization involves a degree of interpretive judgment. Although this study used IMDb's first three genre tags to capture genre hybridity in a consistent manner, the results should be understood as an aggregate mapping of genre tendencies rather than a definitive classification of individual titles.

A further limitation concerns exposure diversity, which addresses how algorithmic curation shapes what audiences actually encounter. As the present study focuses on source and content diversity, a systematic analysis of exposure diversity lies beyond its scope. Nevertheless, exposure diversity warrants policy attention, as the UNESCO (2025) report on platform transparency and recommendation algorithms underscores its growing centrality to regulatory debates on cultural diversity. Exposure diversity therefore remains an important avenue for future research.

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