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A Comparative Analysis of Netflix and Korean Broadcasters' Contents Diversity: Focusing on socially disadvantaged contents

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A Comparative Analysis of Netflix and Korean Broadcasters' Contents Diversity

: Focusing on socially disadvantaged contents¹

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Keywords: Contents Diversity, Social Minority, Global Streaming Service, Broadcast station

1. Research Background

With the advent and development of online video streaming platforms like Netflix and Hulu, new platforms have emerged to replace traditional television viewing experiences, ushering in an era of intense competition where diverse content with high accessibility competes alongside traditional TV programs (Tukachinsky, 2015). Particularly in the Korean media market, where terrestrial broadcasting channels, general programming channels, and OTT platforms compete, the industry faces heightened competition. Moreover, the entry of global OTT platforms like Netflix, Disney+, and Apple TV has intensified this competition. As competition intensifies, individual media channels seek to expand program and scheduling diversity to prevent viewer churn and attract new audiences (Litman, 1979; Moran, 2003; 2005; 2008), resulting in the creation of various programs utilizing diverse formats, themes, and subjects (Van Cuilenberg, 2002). In Korea, within the highly competitive media industry, there is a movement among production companies and broadcasting stations to enhance content diversity by attempting new formats and subjects that were previously unexplored. This includes efforts to highlight diverse aspects of life that were previously not covered. Examples include the Netflix original film

<Kill Bok-soon (2023)>, which depicts an ordinary mother secretly working as a contract killer, and the Wavve original variety show <Merry Queer (2022)>, featuring gay and lesbian couples getting married. Beyond the relatively free production companies and OTT platforms, even general programming channels and terrestrial broadcasters are now showcasing programs featuring diverse casts and subjects, such as divorced families, the elderlies, and unmarried teenage mothers, which go beyond the traditionally dominant 20-40 year old male-centric cast (Information and Communications Policy Research Institute, 2019). This trend mirrors Netflix's 'diversity' inclusion strategy.

Netflix has published inclusion/diversity reports through the Annenberg Inclusion Initiative, highlighting the increase in representation and appearance of Black people, minorities, women, and LGBTQ individuals. This demonstrated diversity is considered a key success factor for Netflix's content (Agina, 2021; Barker & Wiatrowski, 2017; Corfield, 2017; Higson, 2021), and Netflix emphasizes how their content inclusively represents social minorities through these reports. Given this context, the study aims to examine the current state of content diversity related to social minorities in Korean broadcasting stations and OTT platforms. Furthermore, it seeks

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to determine whether the programs featuring social minorities, which have recently gained attention in Korea, have been influenced by global OTT platforms like Netflix, by comparing content diversity trends among different broadcasting stations.

2. Literature Review

2.1 Relationship Between Increased Competition and Broadcasting Diversity

Based on the 'marketplace of ideas' principle, which posits that the existence of diverse sources (source diversity) enhances diverse ideas (content diversity), increased competition could lead to the provision of various program types, formats, themes, and subjects. Following this assumption, research on the relationship between market competition and diversity within the broadcasting industry has been conducted. Greenberg & Barnett (1971) analyzed the relationship between the number of available channels and viewership, discovering that an increase in channels led to an increase in diverse program production and viewership. Similarly, Dominick & Pearce (1976) found that market competition positively affected program diversity during prime time from 1953 to 1976, and Litman (1979) noted that the intensification of competition in the US terrestrial television market since 1976 increased diversity. However, Noll, Peck, & McGowan (1973) and Grant (1994) argued against these findings, claiming that an increase in channels did not lead to increased diversity and that more popular genres and formats tended to dominate prime time to maintain competitiveness. These conflicting results suggest that the relationship between increased competition and broadcasting diversity is not yet conclusively established and may vary depending on the criteria (genre, format, cast, production entity) used to define diversity.

2.2 Classification and Criteria of Broadcasting Diversity

Media diversity has long been recognized as a driving force for democracy (McQuail, 1992) and a

core concept for the public interest of media (Lee, Seo, & Park, 2009). Efforts to measure the diversity of broadcasting companies, channels, and contents have been made both domestically and internationally. Diversity refers to 'the number of opportunities for access to diverse opinions and sources in society' or 'the extent to which the media truthfully and sufficiently reflects diverse empirical realities in society' (McQuail, 2008). However, since diversity is inherently a normative 'mega concept' intertwined with various other concepts (McLeod & Pan, 2005), its classification may differ depending on the perspective from which it is viewed. Napoli (2011) categorized diversity into supply, content, and exposure aspects. Supply diversity includes the diversity of production entities, program and scheduling diversity, media channel ownership diversity, and media channel workforce diversity. Content diversity refers to the diversity of genres, actors, and subjects within programs, including program types, demographic variables of characters, and the diversity of ideas and perspectives in programs. Litman (1979) and Levin (1980) further divided content diversity into horizontal and vertical diversity. Horizontal diversity refers to the diversity of programs across all channels at a specific time, while vertical diversity refers to the diversity of programs offered within a single channel. Exposure diversity indicates the extent to which viewer choice diversity is secured, meaning how much diverse programming viewers can access, and the extent to which viewers can utilize diverse media systems and content of interest. Wurff & Cuilenburg (2001) proposed two dimensions of exposure diversity: reflective diversity and open diversity. Reflective diversity assesses whether the media covers diverse opinions and topics according to viewer demand, while open diversity examines whether diverse content is covered regardless of viewer demand. The study adopts the 'content diversity' perspective (Napoli, 2011) and the 'vertical diversity' perspective (Litman, 1979; Levin, 1980), which refers to the diversity of programs provided within a single channel, to analyze the subjects and cast of

programs to understand diversity from the aspect of 'inclusion of social minorities.'

2.3 Research Trends on Broadcasting Industry and Diversity Research in Korea

In Korea, research on the impact of rapid changes in the media environment, such as the introduction of cable TV in the mid-1990s, on the diversity of broadcasting programs has been conducted (Sung, 2012). This can be categorized into changes in diversity within terrestrial programming, the impact of the introduction of new comprehensive programming channels on the diversity of terrestrial and general programming channels, and changes in diversity of traditional broadcasting due to the emergence of new media channels such as IPTV and OTT platforms.

Research on the broadcasting industry and diversity trends in Korea has largely been conducted from two perspectives: supply and demand. From the supply perspective, media diversity research assumes that if the supply is diverse, the basic conditions for diversity are met. From the demand perspective, even if a variety of content is provided from the supply side, if it is not consumed diversely in practice, the policy goals of diversity are not achieved. Based on these criteria, diversity can be measured in (1) form (sources, genres, producers), (2) content (topics, perspectives), and (3) other factors (market share, etc.). Sung (2012) noted through a meta-analysis of domestic research on broadcasting diversity that most studies have analyzed diversity at the genre level from the supplier's perspective, while there has been relatively little research on broadcasting diversity at the level of program topics or perspectives. The study aims to enrich the discussion on domestic media diversity research by focusing on program topics and perspectives that have been relatively under-examined in the Korean broadcasting industry research.

Additionally, broadcasting diversity research in Korea has shown a temporary increase during periods of changes in the media environment, such as the launch of SBS in the early 1990s, the

introduction of cable TV in the mid-1990s, the implementation of outsourcing policies in the late 1990s, and revisions to the Broadcasting Act in the late 2000s. This indicates that most research has been conducted on how broadcasting diversity changes with the introduction or emergence of new broadcasting platforms. Changes in the broadcasting environment include the introduction of new broadcasters (Han, 1989) or general programming channels (Lee, 1998; Park, 2003), as well as the introduction of new media channels such as IPTV (Han, 2010) and YouTube (Kim, 2020). However, there have been no attempts to comprehensively examine the impact of global OTT platforms on the diversity of domestic general programming and terrestrial broadcasting programs, or to understand the current status of broadcasting diversity among Korea broadcasting industry involvers.

According to the Korea Information Society Development Institute, the OTT usage rate in Korea increased from 36% in 2017 to 66% in 2020, and it is expected to reach 77% in 2024. In contrast, the viewership of terrestrial and general programming broadcasters has decreased by more than half. Considering the growing influence of OTT platforms, research on broadcasting diversity should not be limited to within broadcasting stations but should comprehensively consider domestic and global OTT platforms. Therefore, this study aims to expand existing research that has primarily compared the diversity of existing broadcasters whenever new channels are introduced, by comprehensively analyzing how the diversity of terrestrial broadcasters, general programming channels, and domestic OTT platforms has changed after the introduction of global OTT platforms. In summary, this study seeks to propose new standards for diversity based on "inclusiveness of socially disadvantaged groups," focusing on content diversity, which has been relatively overlooked in domestic broadcasting diversity research. It also aims to contribute by not just comparing global OTT platforms and existing broadcasters but by comprehensively analyzing the

various media channels in Korea.

2.4 Diversity Offered by Netflix in the Global Streaming Era

Netflix has sophisticated algorithms and user data to purchase, develop, and distribute a wide variety of content, targeting as many segmented audience groups as possible. This approach is considered the opposite of traditional broadcasting programs (Barker & Wiatrowski, 2017). As a result, Netflix has boldly started to feature stories about groups that have traditionally received less attention. In January 2021, Netflix released the first report of its newly launched inclusivity strategy, which examined films and series produced by Netflix US between 2020 and 2021 based on 22 diversity and inclusion indicators, including gender, disability, race, and sexuality (Myers, 2021). This content analysis was based on the social identities of the characters (cast) and key production staff (producers, directors, writers). According to the report, the percentage of female lead actors increased from 48.6% in 2018 to over 61% in 2021. This figure is significantly higher than the 41% average for female leads in the top 100 films at the US box office and also higher than the actual percentage of women in the US population (50.8%). The percentage of major characters from minority ethnic groups has also been steadily increasing, with 47% of lead roles being non-white actors in 2021, nearly half. The report further analyzed the social identities of the production staff, indicating that the increase in diversity among production staff has led to an increase in diversity among the cast. Similarly, various studies have noted that Netflix's diversity and inclusion policies positively impact diversity enhancement. Corfield (2017) found that Netflix reduces existing distortions in the representation of socially disadvantaged groups and women in TV programs and assigns them more diverse roles. Smith et al. (2021) investigated Netflix's social inclusivity and diversity, discovering that Netflix makes more efforts toward gender equality and Black representation in production than other broadcasters. As a result,

many researchers argue that Netflix's diversity and inclusion policies depict the company as one that promotes cultural diversity (Agina, 2021; Higson, 2021). Considering Netflix's diversity and inclusion policies through the lens of content diversity as described by Napoli (2011), has the diversity of content related to socially disadvantaged groups increased in domestic broadcasters and OTT platforms after Netflix? For instance, MBN's <High School Moms and Dads (2022)>, which depicts the reality of teenage parents who experienced pregnancy and childbirth, gained significant attention. TV Chosun's <Love Unification: South and North (2014)>, a virtual marriage variety show between South Korean male celebrities and North Korean women, is one of the network's most successful entertainment programs in terms of ratings and buzz. On terrestrial channels, SBS's <Kick a Goal (2021)>, where South Korean female celebrities form a women's soccer team, combines the typically male-dominated sport of soccer with female cast members and has spawned various spin-off programs due to its popularity. These phenomena are similar to Netflix's diversity inclusion strategy.

2.5 Socially Disadvantaged Groups and Content Diversity: Why Focus on Socially Disadvantaged Groups?

The study aims to compare the trends in diversity among domestic general programming channels, terrestrial broadcasters, and K-OTT platforms, focusing on the inclusivity of socially disadvantaged groups emphasized by Netflix. It also seeks to determine whether the increase in diversity of Netflix original content has contributed to the increase in diversity within the Korea media industry.

Socially disadvantaged groups typically refer to those with lower economic status, social status, and social power, who are more likely to face social discrimination (Havighurst 1964; Percy-Smith 2000). The concept of a socially disadvantaged group is relative, depending on comparisons among groups and value assessments. It is defined as

people within a community who are treated as weaker in a social sense. Typically, socially disadvantaged groups include women, low-income individuals, the elderly, people with disabilities, sexual minorities, migrant workers, North Korean defectors, and foreigners in Korea (Lee & Hwang, 2019).

There are two reasons why this study focuses on content diversity related to socially disadvantaged groups. First, it aims to apply Netflix's concept of 'inclusivity' to the domestic broadcasting industry by expanding it into a theoretical concept of diversity. This study uses content diversity (Napoli, 2011) and vertical diversity (Litman, 1979; Levin, 1980) as criteria for diversity. Netflix's report utilized Luther et al. (2018)'s concept of social identity, categorizing social groups by race, gender, sexual orientation, age, disability, and class. According to Seeman (1959), groups that are not quantitatively or powerfully dominant (ethnic minorities, women, sexual minorities, the elderly, children, people with disabilities, and low-income individuals) can be considered socially disadvantaged. Therefore, this study analyzes content diversity by utilizing the concept of "socially disadvantaged groups." Second, content diversity related to socially disadvantaged groups is considered to encompass all the positive functions of diversity as proposed by McQuail (1992). McQuail (1992) highlighted the beneficial functions of media diversity, such as reflecting societal differences, providing access to diverse perspectives, and broadening the range of choices for the audience. Including various socially disadvantaged groups in content reflects societal differences, allows understanding their perspectives, and exposes audiences to a broader range of content. Therefore, analyzing broadcasting diversity based on socially disadvantaged groups fully incorporates the concept of diversity and could become a crucial standard for achieving genuine diversity in the media industry. Thus, the study intends to compare the current state of content diversity related to socially disadvantaged groups in domestic broadcasters and OTT

platforms with Netflix's diversity viewed as inclusivity of socially disadvantaged groups. Based on these objectives, the research questions proposed by this study are as follows:

Research Question 1. *What is the current state of content diversity related to socially disadvantaged groups in the Korea broadcasting industry?*

Research Question 1-1. *How does the number of content pieces related to socially disadvantaged groups differ between the Korean broadcasting industry and Netflix? (Quantitative Diversity)*

Research Question 1-2. *How does the scope of inclusion of content related to socially disadvantaged groups differ between the Korean broadcasting industry and Netflix? (Qualitative Diversity)*

Research Question 2. *Has the emergence of global streaming services like Netflix influenced the content diversity related to socially disadvantaged groups in the Korea broadcasting industry?*

3. Methodology

To answer the research questions presented above, the study's methodology was conducted in three stages: 1) Data Collection and Content Analysis, 2) Frequency Analysis, and 3) Measurement of the HHI Index and Graph Plotting.

3.1 Data Collection and Content Analysis

Content Analysis is a research method that systematically analyzes various forms of data, such as text, images, audio, and video, to derive meanings, patterns, and themes contained within them (Krippendorff, 2018). This method can handle both qualitative and quantitative data and is widely used in various academic fields, including social sciences, communication studies, psychology, and marketing. In this study, researcher classified the data into various categories or themes through coding. This process involved identifying the main features of the data and analyzing the relationships

between different data points.

The analysis focused on Netflix original content in the entertainment/variety genre and entertainment/variety programs from Korean OTT platforms (Wavve, TVing), the three major Korean terrestrial broadcasters (KBS, MBC, SBS), and three general programming channels (JTBC, MBN, TVN) produced after 2015. The period from 2015 to 2023 was selected to examine the trend of increasing diversity since the release of Netflix's first original entertainment/variety content in 2015. The genre was limited to entertainment/variety because entertainment programs often attempt content changes or new formats, making the subject matter significant (Pyo & Yoo, 2016). Thus, it was deemed the most appropriate genre for analyzing content diversity. Additionally, OTT platforms users primarily consume entertainment content, including variety shows (Pyo, 2022) and broadcasting companies strategically schedule entertainment programs as a key genre to secure ratings (Kang & Yoon, 2002). Therefore entertainment/variety program occupies an important position in both OTT platforms and broadcasting stations' channel programming. Moreover, entertainment programs not only align well with viewers' media usage patterns but also offer stable revenue generation with relatively low production costs, resulting in less scheduling burden compared to dramas (Korea Creative Content Agency, 2019), making possible to take on more challenges by diversifying the subject matter and cast. Consequently, the analysis was limited to the entertainment/variety genre. Based on these criteria, Netflix's analysis included all original content in the entertainment/variety genre available exclusively on Netflix(Netflix Original), while domestic OTT platforms and Broadcasters were analyzed based on the entire entertainment/variety program lineup provided in their regular schedules. A total of 238 Netflix programs, 33 TVing programs, 31 Wavve programs, 276 TVN programs, 158 JTBC programs, 123 MBN programs, 116 KBS programs, 96 SBS programs, and 83 MBC programs were analyzed.

The units of analysis were 'program topic' and 'program cast.' Program topic was defined by the main elements that implement the program's planning intent, considering the actual materials used by the production team for planning intent and competitiveness (Kim & Jang, 2018). This involved identifying whether the social disadvantaged were included in the plot or planning intent provided by each broadcaster/platform. The cast was defined as the group of participants appearing in a work, identifying cases where a particular group made up the entire cast or more than half of the cast, or where a specific cast member's name was mentioned in the program title. For the classification of socially disadvantaged groups, Seeman's (1959) criteria for categorizing socially isolated groups based on power, interaction, culture, and moral/normative aspects were referenced. This included low-income groups, women, and children/adolescents under 'power-disadvantaged groups,' the disabled and elderly under 'interaction-disadvantaged groups,' and foreigners (migrant workers, migrant spouses), divorced families/Single parent families and sexual minorities under 'cultural and moral/normative-disadvantaged groups.' Considering the unique context of Korea's division, North Korean defectors or North Korean were added. The codes used for coding based on these criteria are shown in Table 1.

Table 1. List of Codes

Category	Code name	Code contents
Topic	T1	Woman
	T2	Low income
	T3	Elderly
	T4	Disabled
	T5	Sexual Minority
	T6	Foreigner/ Migrant workers/ Migrant spouses
	T7	North Korean defectors, North Korean
	T8	Single parent / Divorced
	T9	Children/ Adolescents
Cast	C1	Woman
	C2	Low income
	C3	Elderly
	C4	Disabled
	C5	Sexual Minority
	C6	Foreigner/ Migrant workers/ Migrant spouses
	C7	North Korean defectors, North Korean
	C8	Single parent / Divorced
	C9	Children/ Adolescents

3.2 Frequency Analysis

Frequency Analysis is a method of measuring the occurrence of specific items (words, phrases, codes, etc.) in a given text or dataset (Krippendorff, 2018). This technique is useful for understanding the distribution and patterns of data, as well as identifying major themes or trends. By counting the frequency of specific items, it helps to understand the basic distribution of data, uncover frequency patterns, and derive important information or trends. The study conducted a frequency analysis to understand both quantitative and qualitative diversity. First, for quantitative diversity, the researcher examined the ratio of content featuring socially disadvantaged groups to the total number of contents released annually by each broadcaster/platform. To measure quantitative diversity, the researcher calculated the market share of content featuring socially disadvantaged groups for each broadcaster (number of contents featuring socially disadvantaged groups released annually / total number of contents produced annually by each broadcaster). In contrast, qualitative diversity refers to how many different categories of socially disadvantaged groups were addressed annually. The researcher analyzed the number of categories of socially disadvantaged groups covered each year relative to the total number of contents released by each broadcaster/platform (number of different categories of socially disadvantaged groups covered annually / total number of contents produced annually by each broadcaster). The coding results used to assess quantitative/qualitative diversity can be found in the Appendix A.

3.3 HHI Index Measurement and Graph Plotting

The Herfindahl-Hirschman Index (HHI) is an indicator used to measure the concentration of a particular market and has been primarily used in economics and business to evaluate the degree of competition within a market. It has also been applied in the media sector to measure diversity in genres, formats, and production companies within

the media industry. The HHI is calculated by squaring the market share of each firm within the industry and then summing the resulting values. A value close to the minimum of '0' indicates a competitive market, while a value approaching the maximum of '10,000' indicates an oligopoly or monopoly (Napoli, 2001). Thus, the closer the graph is to 0, the more diversity increases, whereas the closer it is to 10,000, the more diversity decreases.

4. Results

4.1 Quantitative Diversity of Content Featuring Socially Disadvantaged Groups

The frequency analysis results for quantitative diversity (see Table 2) show that MBN, a general programming channel, experienced a significant increase in quantitative diversity between 2018 and 2019 and continued to produce the most content featuring socially disadvantaged groups. MBN aired the most content featuring socially disadvantaged groups in terms of both subject matter and cast. KBS, a terrestrial broadcaster, ranked second in terms of subject matter diversity, while Wavve, a Korean OTT platform, ranked second in terms of cast diversity. Netflix showed the lowest figures in subject matter diversity but demonstrated high diversity in terms of cast. Additionally, terrestrial broadcasters SBS and MBC exhibited relatively low diversity compared to other broadcasters/platforms.

Table 2. Analysis results for Quantitative diversity

Broadcaster/Platform	Topic Diversity	Casting Diversity	Total Diversity
Netflix	9.66%	20.17%	29.83%
TVING	15.15%	21.21%	36.36%
WAVVE	9.68%	32.26%	41.94%
TVN	10.14%	15.22%	25.36%
JTBC	13.29%	17.72%	31.65%
MBN	38.21%	45.53%	84.55%
KBS	19.83%	23.28%	43.10%
SBS	11.46%	16.67%	28.13%
MBC	14.46%	12.05%	26.51%

According to the comparison of diversity trends by year (see Figure 1), Netflix ranked low in quantitative diversity for most years except 2019. There was a sharp increase in diversity between 2018 and 2019, and it maintained a higher level of

diversity than before. During this period, the diversity of general programming channels like MBN and TVN also increased. Following 2019, KBS and Wavve showed increased diversity, and it is notable that the diversity of all broadcasters except Netflix increased between 2020 and 2021.

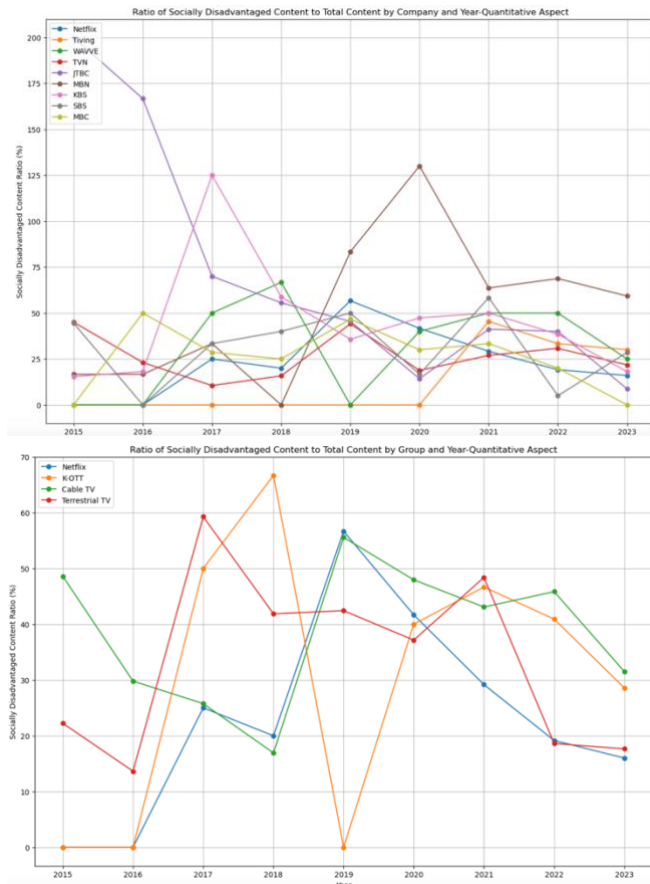


Figure 1. Comparison of Quantitative media diversity trends by year

4.2 Qualitative Diversity of Content Featuring Socially Disadvantaged Groups

The results of qualitative diversity, which examined how many different categories of socially disadvantaged groups were addressed by each broadcaster (see Table 3), revealed that, similar to the quantitative diversity results, MBN's programs included the most diverse range of socially disadvantaged groups in terms of both subject matter and cast. However, unlike quantitative diversity, the proportion was not significantly higher. Furthermore, all three terrestrial broadcasters exhibited high qualitative diversity, while TVN and JTBC, except for MBN,

showed relatively low qualitative diversity.

Table 3. Analysis results for Quantitative diversity

Broadcaster/Platform	Topic Diversity	Casting Diversity	Total Diversity
Netflix	8.40%	8.82%	16.81%
TVING	12.12%	15.15%	27.27%
WAVVE	6.45%	19.35%	25.81%
TVN	6.88%	7.97%	14.86%
JTBC	10.76%	13.29%	24.05%
MBN	21.14%	22.76%	43.90%
KBS	15.52%	14.66%	30.17%
SBS	10.42%	15.63%	26.04%
MBC	14.46%	10.84%	25.30%

By year, Netflix consistently maintained similar qualitative diversity without significant changes, and overall, the trend was similar to the year-by-year increase in quantitative diversity (see Figure 2).

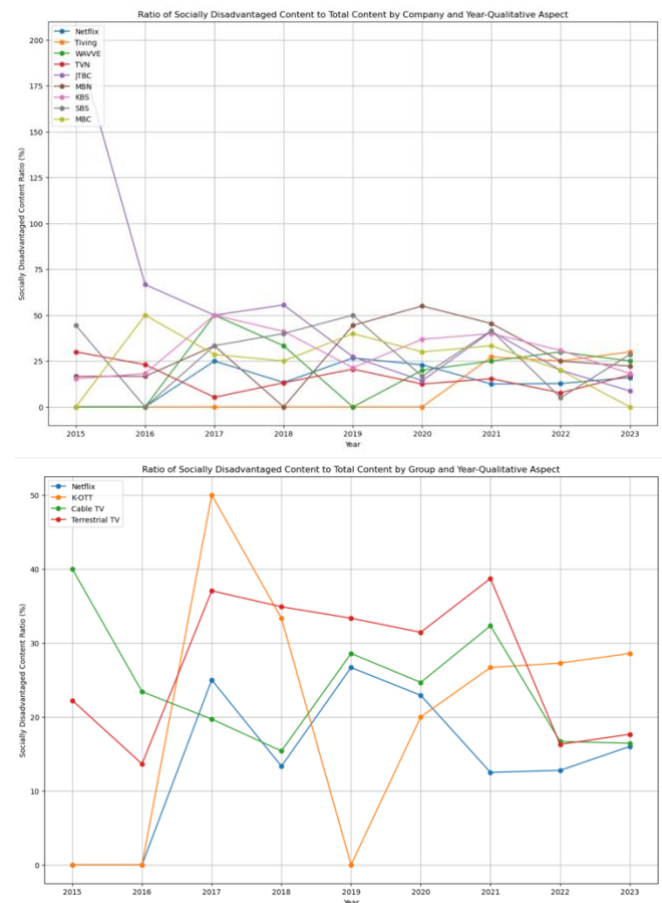


Figure 2. Comparison of Qualitative media diversity trends by year

4.3 Diversity Trends Based on HHI Results

Compared to 2015, content related to socially disadvantaged groups in 2023 increased both qualitatively and quantitatively (Figure 3). Quantitative diversity particularly saw a significant

increase between 2016 and 2017, and qualitative diversity showed an increasing trend, especially after rising between 2015-2016 and 2016-2017, with continuous increases thereafter, except for some fluctuations.

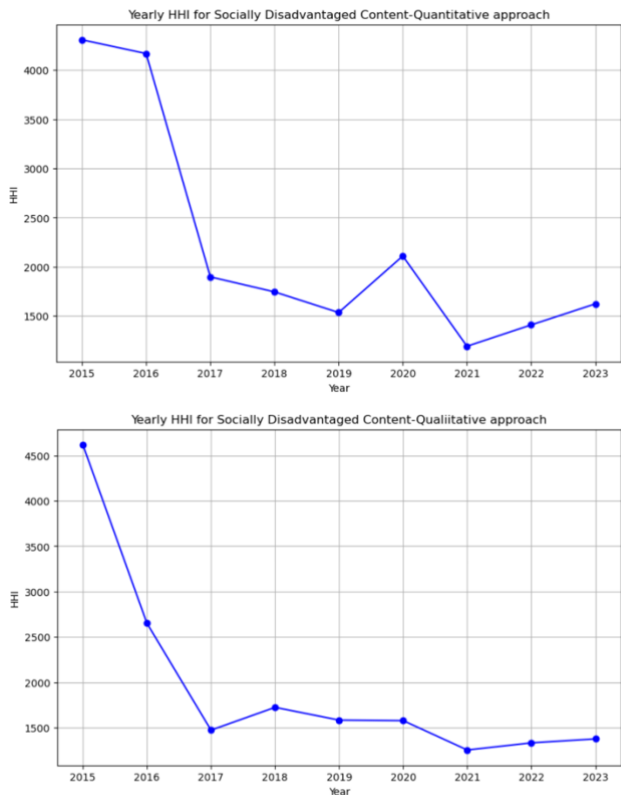


Figure 3. Total Quantitative & Qualitative HHI

Comparing the HHI by broadcaster/platform, domestic OTT platforms showed significant variations in diversity indices, while terrestrial and general programming channels consistently aimed to secure a certain ratio of content featuring socially disadvantaged groups both quantitatively and qualitatively. For Netflix, although quantitative diversity fluctuated, qualitative diversity steadily increased after 2019, with an increasing number of diverse socially disadvantaged groups featured annually (see Figure 4). In contrast, domestic terrestrial and general programming channels saw a sharp increase in both quantitative and qualitative diversity between 2020 and 2021, but this trend has been declining since then.

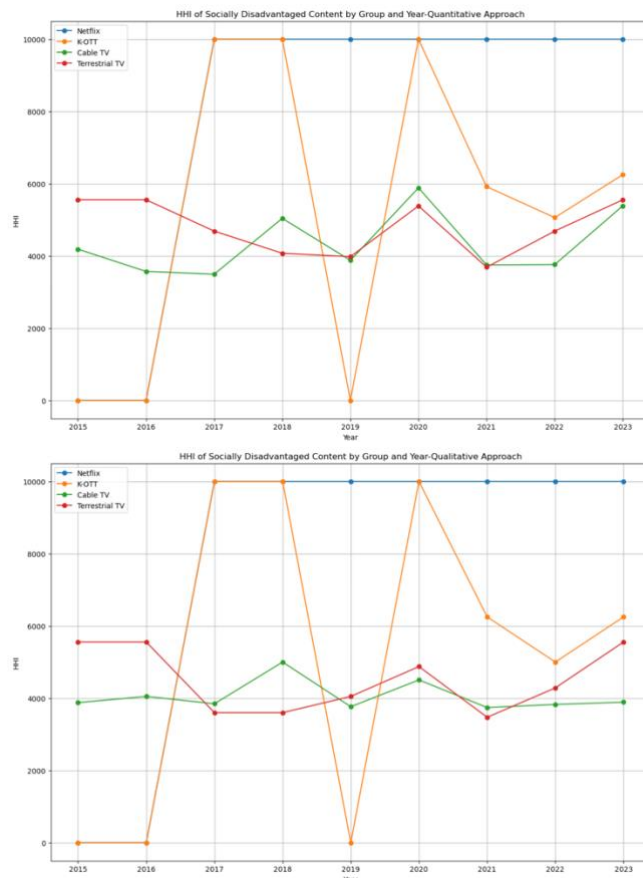


Figure 4. Quantitative & Qualitative HHI by group

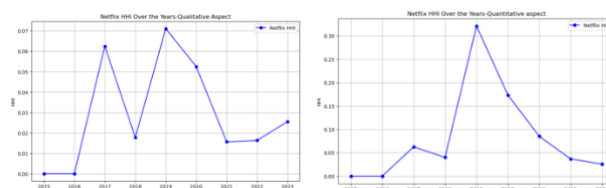


Figure 5. Quantitative & Qualitative HHI of Netflix

5. Discussion

Domestic OTT platforms, with relatively fewer programming constraints, had a higher ratio of content featuring socially disadvantaged groups compared to terrestrial and general programming channels. Although TVN ranked lower in both qualitative and quantitative aspects, MBN exhibited significantly higher quantitative and qualitative diversity, showing generally high diversity among domestic broadcasters/platforms. However, MBN's qualitative diversity was lower than its quantitative diversity, indicating that it produced many contents focused mainly on specific subjects and cast such as divorced families and women. While general programming channels

had a higher ratio of content featuring socially disadvantaged groups compared to terrestrial channels, terrestrial broadcasters maintained a relatively steady ratio without significant fluctuations. Nevertheless, two terrestrial broadcasters, MBC and SBS, showed significantly lower quantitative diversity compared to other broadcasters/platforms. On the other hand, the overall qualitative diversity of the three terrestrial broadcasters was higher than that of general programming channels, suggesting that while general programming channels planned programs around a few specific socially disadvantaged groups, terrestrial channels planned programs featuring various groups despite not having a high number of such programs.

Analysis by category of socially disadvantaged groups revealed that only Wavve featured sexual minorities, and no programs featuring people with disabilities were found during the analysis period. In contrast, Netflix frequently featured sexual minorities and people with disabilities during the analysis period, indicating that while domestic broadcasters/producers consistently produced programs featuring other socially disadvantaged groups like women, the elderly, and foreigners, they thoroughly excluded certain groups (sexual minorities, people with disabilities) from the Korean broadcasting industry.

Since the launch of Netflix original series, the quantitative and qualitative diversity of content featuring socially disadvantaged groups by domestic broadcasters has steadily increased. Netflix showed an increase in both quantitative and qualitative diversity of socially disadvantaged content between 2015-2017 and 2019-2021. K-OTT showed similar increases between 2018-2019 and 2021-2022, general programming channels between 2018-2019 and 2020-2021, and terrestrial broadcasters between 2016-2017 and 2020-2021. Although it is difficult to precisely determine if Netflix influenced the increase in content featuring socially disadvantaged groups by domestic broadcasters based on this data alone, the fact that

Netflix published a diversity report in January 2021 suggests a possible correlation with the subsequent increase in diversity by K-OTT and general programming channels. Conversely, terrestrial broadcasters showed generally lower diversity, exhibiting different trends compared to K-OTT and general programming channels.

6. Implications & Limitations

6.1 Implications

There has been a lack of research on whether the emergence of global OTT platforms has influenced the diversity of Korean media industry, particularly in terms of content diversity. The study expands on previous research on broadcasting diversity in Korea by empirically comparing changes in the diversity of content featuring socially disadvantaged groups across different groups, including Netflix, domestic OTT, and domestic broadcasters (terrestrial and general programming channels). The study also aimed to provide a new framework for content diversity by focusing on the diversity of subjects and cast related to socially disadvantaged groups, thereby extending the existing theory of content diversity.

Practically, the study provides insights into content production strategies that Korean broadcasters should consider in the new media environment based on the results. Comparing the diversity trends between domestic broadcasters/platforms and Netflix revealed that while Netflix advocates for social inclusion and diversity, traditional broadcasters (especially KBS, MBN) have consistently pursued similar efforts, with MBN showing significantly higher diversity than Netflix. However, in terms of qualitative diversity, domestic general programming and OTT platforms showed relatively lower figures, indicating the need for efforts to secure qualitative diversity by planning and programming around various socially disadvantaged groups. Additionally, while domestic broadcasters consistently produced programs featuring socially disadvantaged groups like women, elderly, and foreigners, they rarely produced programs

featuring sexual minorities and people with disabilities. Netflix, on the other hand, had relatively fewer contents featuring divorced families and child/adolescent compared to domestic broadcasters/platforms, suggesting the need for further research considering cultural differences, broadcasting trends, and policies of each country.

6.2 Limitations

Despite the various implications, the study also has limitations. Firstly, in terms of the collection target, Netflix's diversity report includes a wide range of content, including original productions, licensed content from external broadcasters, and outsourced productions. However, the study focused only on original content to avoid duplicates with domestic channels, leading to discrepancies between Netflix's diversity index measured in this study and the actual diversity reported by Netflix. Future studies could address this by categorizing Netflix's content into self-produced, externally produced, and licensed content for a comprehensive analysis of diversity indices.

Additionally, the methodology of this study makes it difficult to clearly distinguish the impact of the emergence of global OTT streaming services on domestic diversity. Although inferred through the annual HHI index, it is challenging to ascertain whether the increase in diversity during specific periods was due to Netflix's influence or social and cultural issues. Future studies could complement this by interviewing domestic broadcasting producers to understand the impact of global OTT content on planning and programming socially disadvantaged content or by conducting a time-series analysis to compare the release timings of socially disadvantaged content by Netflix and domestic broadcasters/platforms.

Lastly, this study limited its analysis to the entertainment/variety genre. Given that dramas, which are more expensive to produce and harder to schedule, might align more closely with the concept of diversity when featuring socially

disadvantaged groups, future research could apply the methodology of this study to various genres, including news programs and dramas, to compare and analyze how diversity is secured for socially disadvantaged groups across different genres.

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	T9	1	1	1							3
	T1		1	1	1	1	1	1			5
	T2										0
	T3	1		1	1						3
	T4										
	T5										
MBC	T6							1			1
	T7										
	T8										
	T9			1	1	1					3

	Code	2015	2016	2017	2018	2019	2020	2021	2022	2023	Total
	C1					5	5	7	4		21
	C2										0
	C3		1				2				3
	C4							1	1		2
Netflix	C5			2	3	2	1	1	1	1	10
	C6				2	3	3				8
	C7										0
	C8										0
	C9			1	1	1				1	4

	C1							2	2		4
	C2										
	C3										
	C4										
TVING	C5										
	C6										
	C7										
	C8							1	1		2
	C9									1	1

	C1		1	2		2		2			7
	C2										
	C3										
	C4										
WAVVE	C5							2	1		3
	C6										
	C7										
	C8										
	C9										

	C1	2	1		2	3		3	8	2	21
	C2										0
	C3	2	1		1	1			1		6
	C4										
	C5										
TVN	C6	1			1	1					3
	C7										
	C8			1							1
	C9	1		2		4	2	1		1	11

	C1	1	3	1	1	1	1	1	5	1	15
	C2			1							1
	C3							1			1
	C4										0
JTBC	C5										0
	C6	1		2	1	2	1	1	1		9
	C7										0
	C8	1						1			1
	C9			1							1

	C1	1	1	1		2	5	1	3	3	17
	C2						1				1
	C3		1	1		3	2	1			8
	C4										0
MBN	C5										0
	C6			1		2	3	2	1		9
	C7										0
	C8				1	2	2	5	3		13
	C9					1	1	3	3		8

	C1		1	4	2	1	2	2	1	1	14
	C2										0
	C3			1	2		1	1			5
	C4										0
	C5										0
KBS	C6	1			1						2
	C7										0
	C8										0

	C9				2	2	2				6
	C1		1	1		1	2	1	1		7
	C2										0
	C3								1		1
	C4										0
SBS	C5										0
	C6								1		1
	C7										0
	C8	1				1		1			3
	C9	1		1		1		1			4

	C1		1	1	2	1	1				6
	C2										0
	C3				1	1					2
	C4										0
MBC	C5										0
	C6							1			1
	C7										0
	C8										0
	C9					1					1