

Survey Period (April – May, 2024)

Executive Summary

K I N U
Unification
Survey
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North Korea's Two-States Claim /
US Presidential Election Outlook and
ROK-US Relations



Corresponding Author

Sang Sin LEE (KINU)

Co-authors

Tae-eun MIN (KINU)

Juhwa PARK (KINU)

Moo Chul LEE (KINU)

Kwang-il YOON
(Sookmyung Women's Univ.)

Bon-sang KOO
(Chungbuk National Univ.)

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I

KINU Unification Survey

I. KINU Unification Survey

1. Research Objectives

■ Through face-to-face surveys, KINU Unification Survey seeks to:

- (1) Research changes in the South Korean public's perception on reunification, policy towards North Korea, North Korean defectors, inter-Korean integration, and security;
- (2) Identify various factors that determine and influence such perception; and
- (3) Contribute to establishing unification and North Korea policies that are supported by public opinion and consensus based on the above research findings.

■ History of KINU Unification Survey

- The KINU Unification Survey has been accumulating data since 2014. Although it is an annual public opinion survey, in 2019, 2020, and 2021, it was conducted twice, in spring and fall. A total of 14 surveys have been conducted up to 2024.
- Unless otherwise noted, statistics in this summary report are based on data collected in April 2024.

<Table I - 1> Survey Periods: 2014~2024

Survey No.	Year	Survey Periods
1	2014	Sep. 22 ~ Oct. 6
2	2015	Jul. 27 ~ Aug. 14
3	2016	Jun. 2 ~ Jun. 24
4	2017	Mar. 21 ~ Apr. 14
5	2018	Apr. 5 ~ Apr. 25
6	2019, 1 st	Apr. 5 ~ Apr. 25
7	2019, 2 nd	Sep. 7 ~ Oct. 8
8	2020, 1 st	May 20 ~ Jun. 10
9	2020, 2 nd	Nov. 10 ~ Dec. 3
10	2021, 1 st	Apr. 26 ~ May 18
11	2021, 2 nd	Oct. 21 ~ Nov. 22
12	2022	Apr. 6 ~ May 2
13	2023	Apr. 15 ~ May 10
14	2024	Apr. 18 ~ May 16

2. Cohorts in Korean Society

■ Cohorts of KINU Unification Survey

- KINU Unification Survey uses the cohort classification based on the birth year of respondents. The cohort classification is based on previous research.

<Table I - 2> Cohort Classification in the KINU Unification Survey

Cohort	Birth Year	Frequency (2024)	Percentage (%)
War generation	Born before 1950	51	5.1
Industrialization generation	1951-1960	162	16.2
386 generation	1961-1970	241	24.1
X generation	1971-1980	187	18.7
IMF generation	1981-1990	149	14.9
Millennials	Born after 1991	211	21.1
Total		1,001	100.0

3. Overview of the 2024 Survey

<Table I - 3> Overview of Survey

Classification	Contents
Population	South Korean adults over 18
Sampling Frame	South Korean Resident Registration Data (Ministry of the Interior and Safety, March 2024)
Sampling Method	Stratified Random Sampling (by gender, region, and age)
Sampling Unit	1,001
Sampling Error	Assuming random sampling, sampling error is $\pm 3.1\%$ at the 95% confidence level
Survey Method	Face-to-Face Interview with structured questionnaire
Survey Period	From April 18 to May 16, 2024
Research Institute	Hankook Research

4. Summary of Findings

■ KINU Unification Survey 2024

- The KINU Unification Survey 2024 was designed around the following two main topics:
 - In December 2023, North Korea declared the "abandonment of unification," abolishing the concept of a single nation and defining North Korea and South Korea as two independent states. Consequently, the 2024 KINU Unification Survey investigated public reactions to North Korea's two-states claim and analyzed its impact on perceptions of unification and North Korea.
 - The US presidential election is scheduled for November 2024, and significant changes in ROK-US relations are anticipated based on its outcome. The KINU Unification Survey asked the public for their outlook on the US presidential election and measured the potential changes in ROK-US relations resulting from the election.

■ Public Opinion on Unification

- Since 2020, the public perception of the necessity of unification has hit its lowest point.
 - In the 2024 survey, 52.9% of respondents believed unification was necessary. After the failure of the Hanoi Summit in 2019, which marked the escalation of tensions between North and South Korea, recording 52.7% in 2020, it has been the lowest recorded figure since then.
 - The war generation showed the most proactive attitude towards unification, with 73.6% believing it necessary. However, as age decreases, the perceived necessity of unification diminishes. Only 46.5% of millennials saw unification as necessary.
- Among young people, the primary reason for supporting unification is the alleviation of the threat of war.
 - The proportion of those considering "ethnic kinship" as the most important reason for unification is higher among the elderly. 45.1% of the war generation stated that unification should happen because of "ethnic kinship," while only 26.1% of millennials agreed.
 - Conversely, the younger generation is more inclined to see "alleviation of the threat of

war" as the most critical reason for unification. This suggests that emphasizing the potential for peace through unification might be more effective in persuading the younger generation of its necessity.

■ Attitudes toward North Korea

- There has been a sustained trend of viewing North Korea as a threat or adversary rather than a partner for support and cooperation.
- The proportion of respondents who believe that North Korea desires communist unification reached its highest level since 2018 at 49.7%.
 - The unprecedented level of military provocations by North Korea in 2022, followed by continued provocations in 2023, is speculated to have influenced such opinions.
- Only 15.4% believe that economic sanctions will lead to North Korea's denuclearization, marking the lowest level since the survey's inception.
 - This skepticism towards the efficacy of economic sanctions in achieving denuclearization is prevalent across all age and ideological groups.
 - The ongoing advancement of North Korea's nuclear capabilities, including the launch of ICBMs and satellites, despite economic sanctions, seems to have influenced public opinion.
- Doubts about North Korea's proposition of using nuclear weapons and missiles solely as diplomatic tools and not attacking South Korea are increasing.

■ North Korean Nuclear Threat and Two-States Claim

- South Koreans tend not to perceive North Korea's nuclear weapons as a crisis, as the nuclear threat from North Korea has become normalized and internalized.
 - Only 18% of respondents believe that North Korea's nuclear threat affects their lives, while 47.9% think it does not.
- 47.5% of respondents expressed interest in North Korea's declaration of abandoning unification, while 40.9% stated disinterest, and 11.7% claimed they had never heard of it.
 - The possibility of increased military provocations by North Korea following its shift in policy towards the South was perceived by 46.4%, while 48.1% believed there had

been no change.

- Regarding South Korea's policy choices in response to North Korea's two-states claim, 31.9% preferred "resuming dialogue and restoring cooperative relations," 29.8% favored "inducing internal change in North Korea through pressure," and 35% supported "strengthening cooperation between South Korea, the United States, and Japan."

■ Outlook on the US Presidential Election

- Over half of the respondents stated disinterest in the US presidential election, but more than 3 out of 4 recognized its impact on South Koreans' lives.
- The millennial generation showed the lowest interest in the US election (38.4%).
- 62.8% of respondents supported Biden's presidency for the benefit of South Korea.
- It is predicted that Trump's election would lead to deterioration in ROK-US relations and changes in the alliance.
 - 56.6% predicted that Trump's re-election would lead to another summit with Kim Jong-un.
- 77% of respondents anticipated an increase in defense cost-sharing after Trump's election, and 51.1% believed in the possibility of US troop reduction or withdrawal.
 - Although relatively low, 31.7% foresaw the possibility of the dissolution of the ROK-US alliance after Trump's election.

■ ROK-US Relations

- Overwhelming support for the ROK-US alliance persists.
 - Since the first survey in 2020, the proportion of respondents who believe the ROK-US alliance is necessary consistently hovered around 90%.
- The necessity of the US Forces Korea (USFK): present and post-unification
 - Since 2020, the proportion of respondents who believe the USFK is currently necessary has consistently exceeded 85% each year.
 - Over half of South Koreans believe that the USFK presence is necessary even after

unification, indicating a realistic understanding of the strategic importance of the USFK among South Koreans.

- Nearly half of respondents (44.1%) evaluated that ROK-China relations worsened over the past year, while only 2.8% thought they improved.

■ ROK-US Relations and South Korea's Nuclear Armament

- Since 2014, the support for South Korea's own nuclear armament has gradually increased, peaking at 71.3% in October 2021. After a decline until 2023, it rebounded to 66.0% in 2024.
- Before the 2024 survey, respondents preferred the USFK presence over South Korea's nuclear armament. However, in the 2024 survey, the preference for nuclear armament surpassed that of the USFK presence for the first time. However, supporters of both major parties still prefer the USFK presence over nuclear armament. Notably, over half of independent voters chose nuclear armament.
- Trust in US policy towards the Korean Peninsula increased compared to 2023. Particularly, there was a significant increase in trust among democrats and independents, reducing the disparity in trust between different political party affiliations. However, trust in the US nuclear umbrella policy decreased slightly compared to 2023, mainly led by People Power Party(PPP) supporters.
- In the 2024 survey, the number of respondents opposing South Korea's nuclear armament due to the possibility of economic sanctions decreased. Conversely, support for nuclear armament increased despite the potential for economic sanctions.

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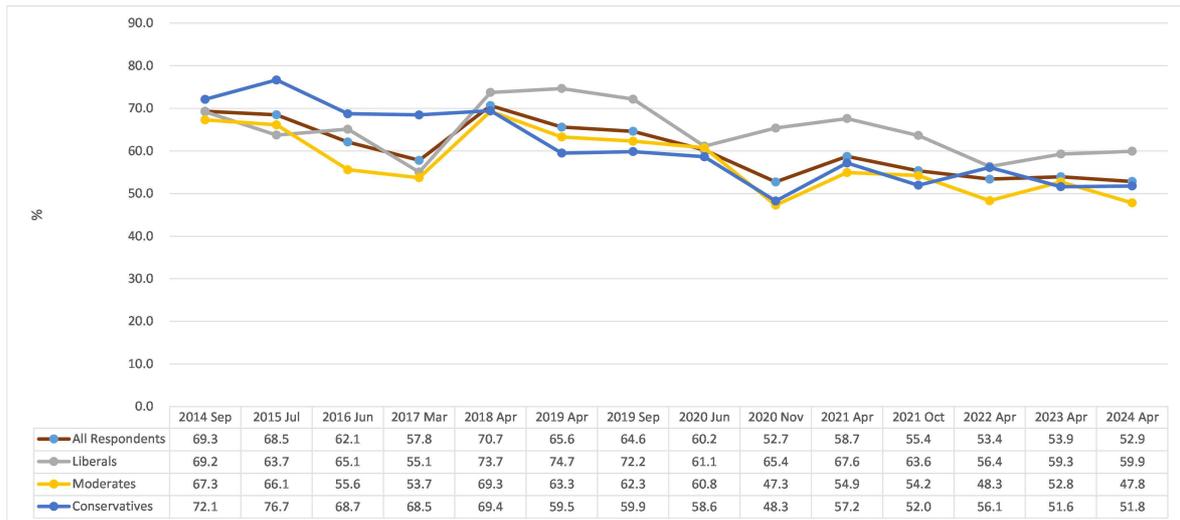
Public Opinion on Unification

Sang Sin LEE (KINU)

II. Public Opinion on Unification

1. Necessity of Unification

<Figure II - 1> Opinion on Necessity of Unification: 2014~2024



■ Questions

- “How necessary do you think unification is?”
 - 1=strongly unnecessary; 2=somewhat unnecessary; 3=somewhat necessary; 4=strongly necessary
 - 3+4=“Unification is necessary.” Only the 'Necessary' responses are shown on the graph.

■ The Necessity for Unification has reached its Lowest Point since 2020

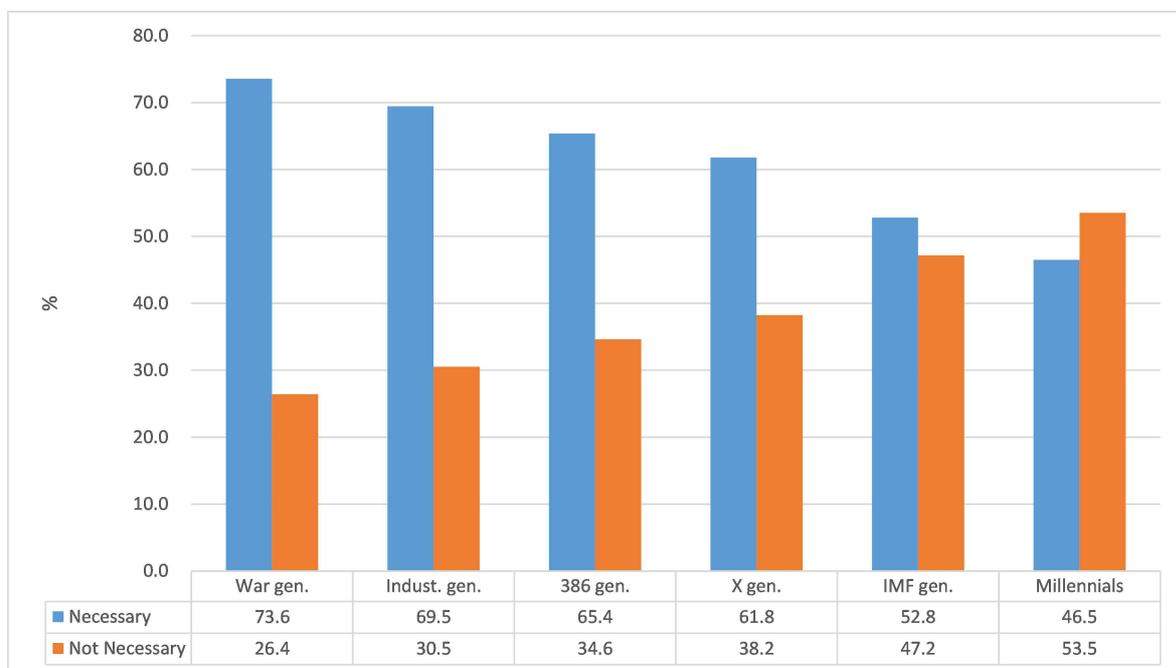
- In the 2024 survey, 52.9% of respondents said unification is necessary. This is the lowest point since 52.7% in 2020 following the failure of the 2019 Hanoi summit, which marked the beginning of significant tensions in inter-Korean relations.
- Since peaking at 70.7% during the inter-Korean summit in 2018, the trend has continuously declined. The trend of a passive and indifferent view towards unification continues to spread.
- However, compared to last year, the decline was only 1%. It appears that North Korea's

two-states claim and abandonment of unification have little impact on the public opinion regarding the necessity of unification.

- When comparing respondents by ideology in the 2024 survey, 59.9% of liberal respondents, 51.8% of conservative respondents, and 47.8% of moderate respondents said unification is necessary.
- The relatively passive attitude of the moderate group towards unification continues. While liberal respondents are the most supportive of unification, there has been a significant decline compared to 74.7% in 2019.

■ Passive Attitude of the Younger Generation towards Unification

<Figure II - 2> Necessity of Unification by Cohorts: 2014~2024

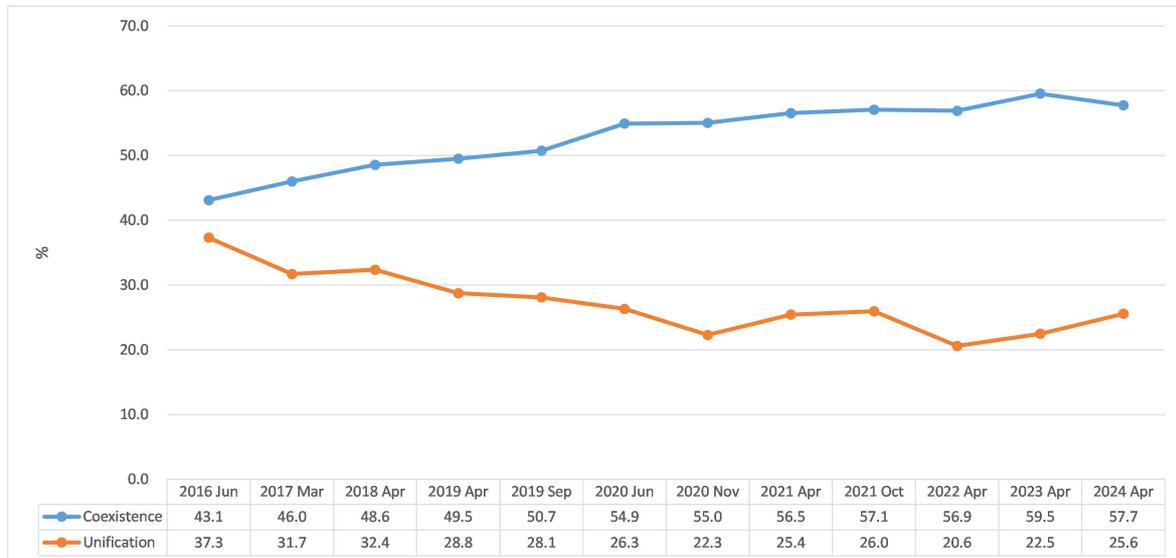


- The graph above presents a cross-sectional analysis based on cohorts using data collected from the KINU Unification Survey from 2014 to 2024.
- The generation showing the most proactive attitude towards unification is the War generation, with 73.6% responding that unification is necessary. However, as we move to younger generations, the perceived necessity for unification decreases, with only 46.5% of the Millennials stating that unification is necessary.

- The Millennials are the only generation among all to fall short of a 50% positive response regarding the necessity for unification.
- The fact that both the IMF generation and the Millennials, which will soon become the mainstream in South Korea, exhibit such a passive attitude towards unification is a concerning trend, requiring measures to address it.

2. Unification vs Peaceful Coexistence

<Figure II - 3> Unification vs Peaceful Coexistence: 2016~2024



■ Questions

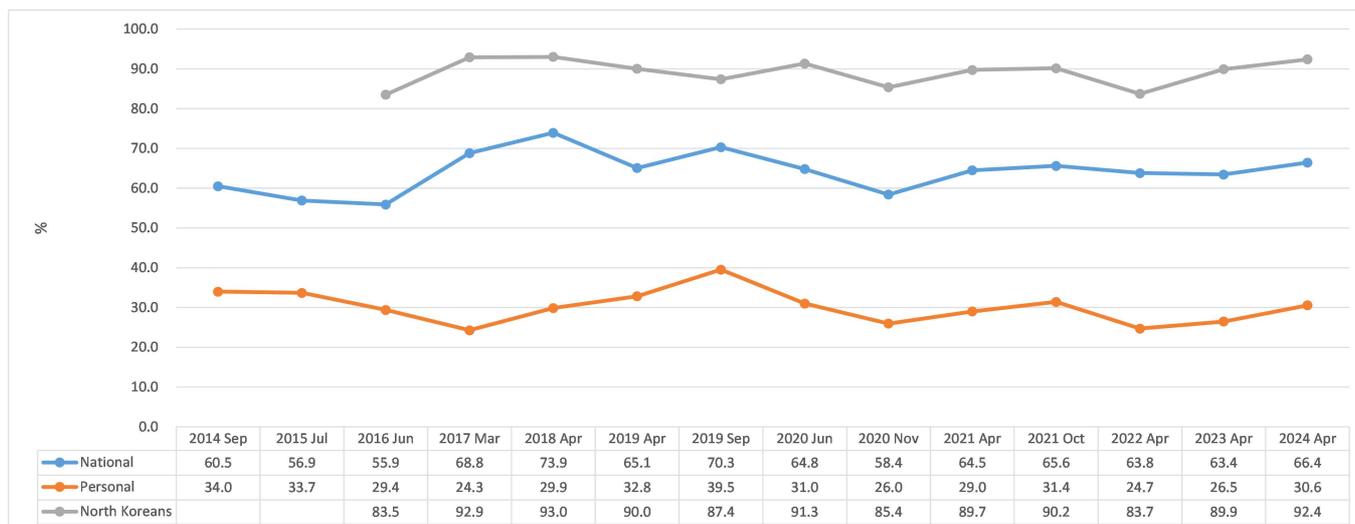
- “If South and North can peacefully coexist without war, the unification is not necessary.”
 - 1=strongly disagree; 2=somewhat disagree; 3=neither agree nor disagree; 4=somewhat agree; 5=strongly agree
 - 1+2=“Preference for Unification”; 4+5=“Preference for Peaceful Coexistence”

■ Increase in Preference for Unification

- In 2022, the preference for unification hit its lowest point at 20.6%, but it has gradually risen since then, reaching 25.6% in the 2024 survey. In contrast, the preference for peaceful coexistence decreased from 59.5% in 2023 to 57.7%.
- While not a significant change, it is noteworthy for indicating the possibility of growing positive attitudes towards unification in the future.

3. Benefits of Unification

<Figure II - 4> Benefits of Unification: 2014~2024



■ Questions

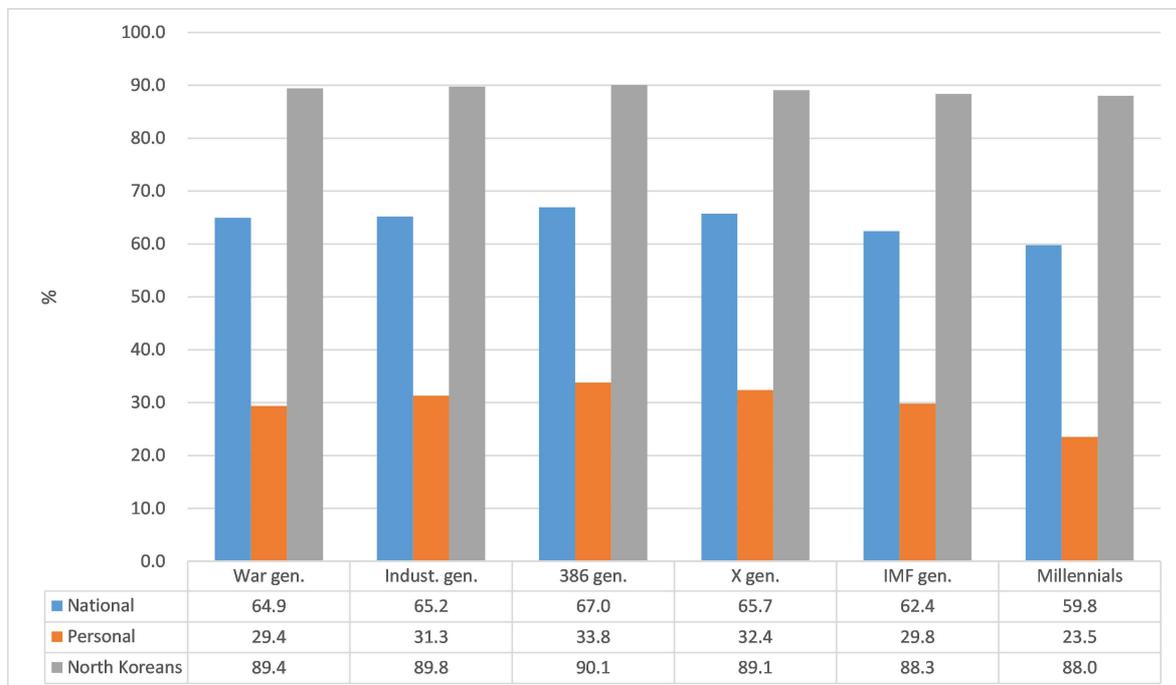
- National benefit: “How much do you think unification would benefit the entire nation of South Korea?”
- Personal benefit: “How much do you think unification would benefit yourself? ”
- Benefit to North Koreans: “How much do you think unification would benefit North Korean residents?”
 - 1=no benefit at all; 2=not too much; 3=somewhat beneficial; 4=very much
 - 3+4= (national / personal / North Korean) benefit

■ Unification is Beneficial to the Nation and North Korean Residents

- Despite changes in inter-Korean relations and international dynamics, responses to these questions about the benefits of unification have remained largely unchanged.
- The response that unification would be beneficial to individuals has remained around 30%, except for 2019. In the 2024 survey, 30.6% of respondents said that unification would be beneficial to them personally.

- On the other hand, 66.4% of respondents in 2024 said that unification would benefit the nation, and 92.4% said it would benefit North Korean residents.
- This indicates that the perception persists that unification would primarily benefit the nation as a whole and North Korean residents, while respondents believe they would not gain much personally from unification.
- This view may be a fundamental reason for the spread of passive and indifferent public opinion towards unification.

<Figure II - 5> Benefits of Unification by Cohorts: Cross-Sectional Analysis



■ Little Differences among Cohorts regarding the Benefits of Unification

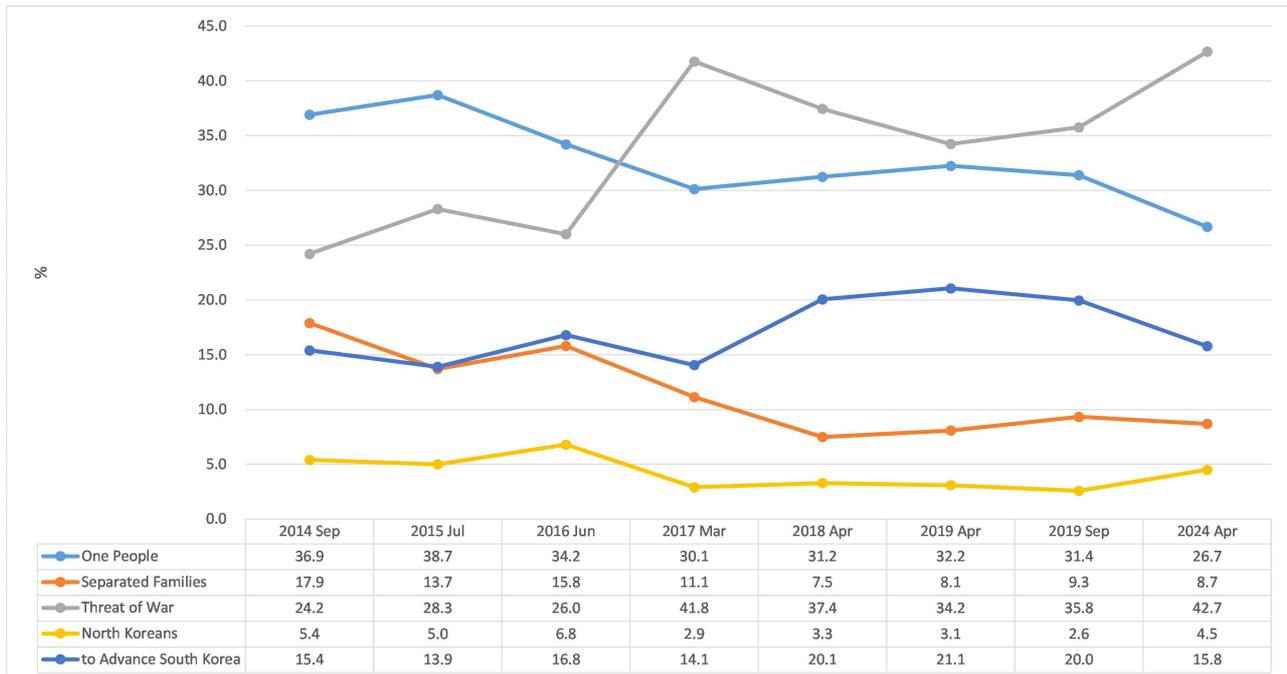
- A cross-sectional comparison of data collected from 2014 to 2024, divided by cohorts, reveals no significant differences in attitudes towards the benefits of unification. Even the War generation and the Industrialization generation, who are relatively more proactive about unification, do not expect unification to benefit them personally.
- However, among the Millennials, 23.5% responded that unification would benefit them personally, which shows a statistically significant difference compared to the older

generations(at 99% significance level). Additionally, only 59.8% of Millennials believe that unification would benefit the nation.

- The reason Millennials do not resonate with the necessity of unification is due to their lack of conviction that unification would be beneficial both personally and nationally.

4. Reasons for Unification

<Figure II - 6> Reasons for Unification: 2014~2024



■ Questions

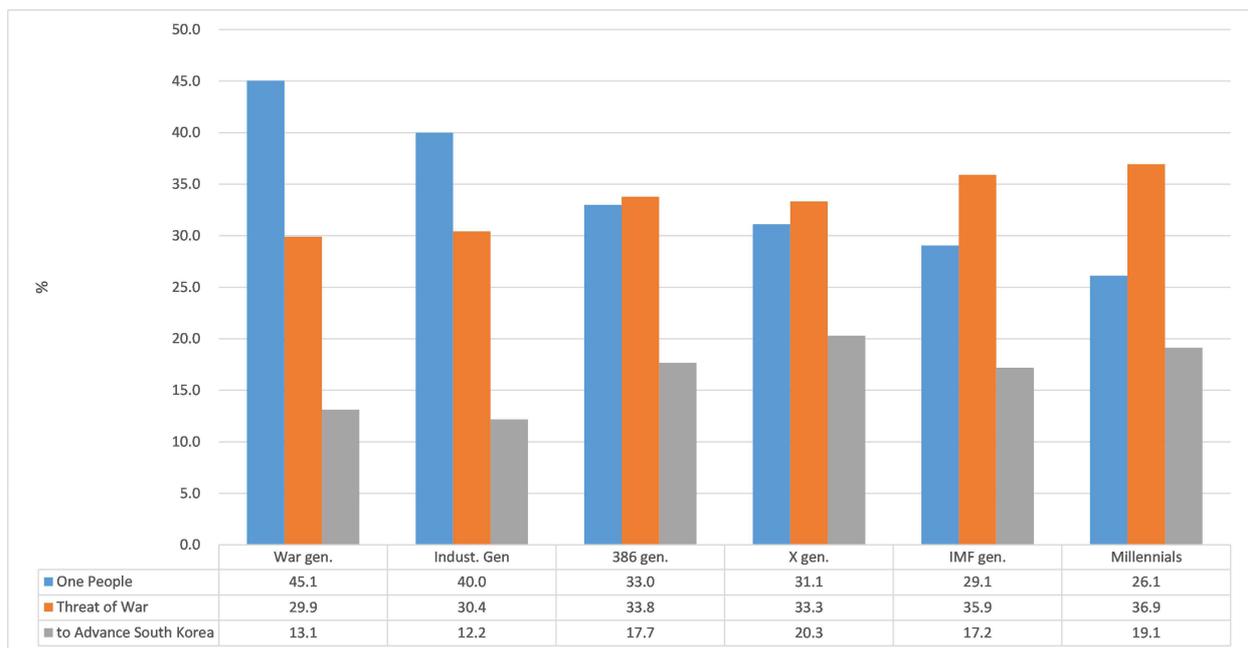
- “What do you think is the most important reason for unification between the two Koreas?”
 - 1=Because we are one people; 2=to ease the pain of separated families; 3=to get rid of the threat of war between two Koreas; 4=to help North Korean residents have better life; 5=for South Korea to become a more advanced country; 6=etc.

■ The Most Important Reason is the Elimination of War Threats

- Surveys from 2014 show that the three most important reasons respondents cited for unification were “one people,” “elimination of war threats,” and “advancement of South Korea.”
- Until 2016, “one people” was the most important reason among these, but since 2017, the ranking has changed to “elimination of war threat.” North Korea declared the completion of its nuclear capabilities in 2017, potentially signaling a turning point in public opinion among South Koreans regarding unification.

- Subsequent significant changes in reasons for unification are not readily apparent, but in a 2024 survey, the response citing “one people” as a reason for reunification recorded the lowest level at 26.7% after the survey.

<Figure II - 7> Reasons for Unification by Cohorts: Cross-Sectional Analysis



■ **For the Younger Generation, the Elimination of War Threats is the most Important Reason for Unification**

- With the top three answers considered most important for unification, we compared data accumulated since 2014 by cohorts.
- Generational differences are also distinctly evident. The proportion of the older Koreans who consider "one people" as the most important reason for unification is higher. 45.1% of the War generation answered that unification should happen “because we are one people.” However, only 26.1% of the Millennials selected "one people" as a reason for unification.
- On the other hand, the younger the generation, the more they regarded "eliminations of war threats" as the most important reason for unification. This suggests that emphasizing the potential for resolving war threats through unification may be

effective in persuading the younger generation of the necessity of unification in the future.

- The relatively high number of responses regarding "to advance South Korea" is attributed to Generation X, as they are playing a pivotal role in the national economy.

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III

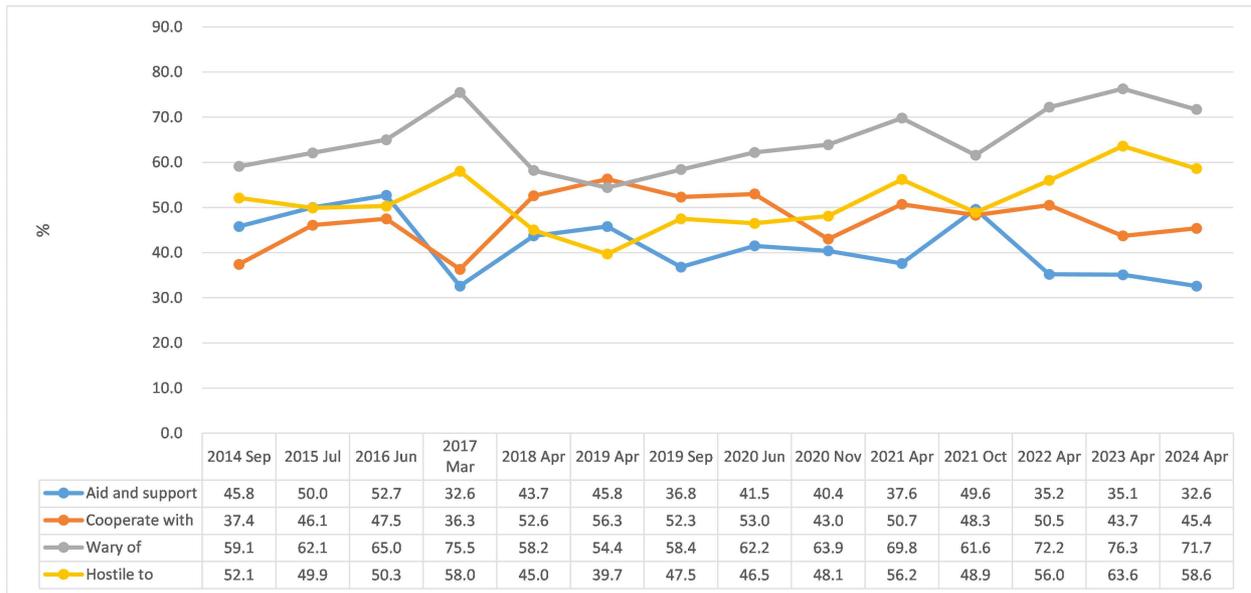
Attitudes toward North Korea

Juhwa PARK (KINU)

III. Attitudes toward North Korea

1. National Images of North Korea

<Figure III - 1> National Images of North Korea: 2014~2024



■ Questions

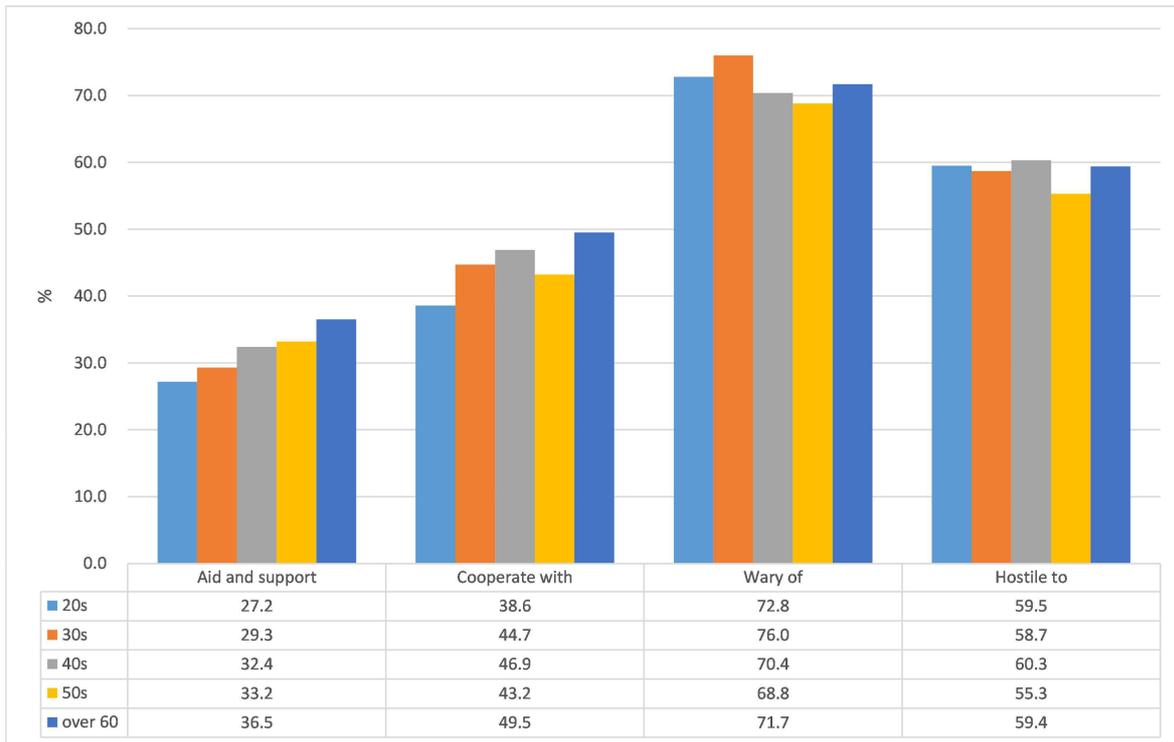
- “What do you think North Korea is to us?”
 - Four national image categories for North Korea: “someone to give aid and support”; “someone to cooperate with”; “someone to be wary of”; “someone to hostile to”
 - Each category was measured on an 11-point scale (0 = Strongly Disagree; 5 = Neutral; 10 = Strongly Agree).
 - The 11-point scale was converted to a 3-point scale, and positive responses were aggregated and visualized in the graph.

■ Negative Image of North Korea Continues to Prevail

- The perspective that views North Korea as an object of wariness and hostility continues to be more prevalent than the perspective that views it as an object of aid and cooperation.
- Compared to 2023, the proportion of those viewing North Korea as an object of wariness decreased by 4.6%, those viewing it as an object of hostility decreased by

5.0%, those viewing it as an object of aid decreased by 2.5%, and those viewing it as an object of cooperation increased by 1.7%.

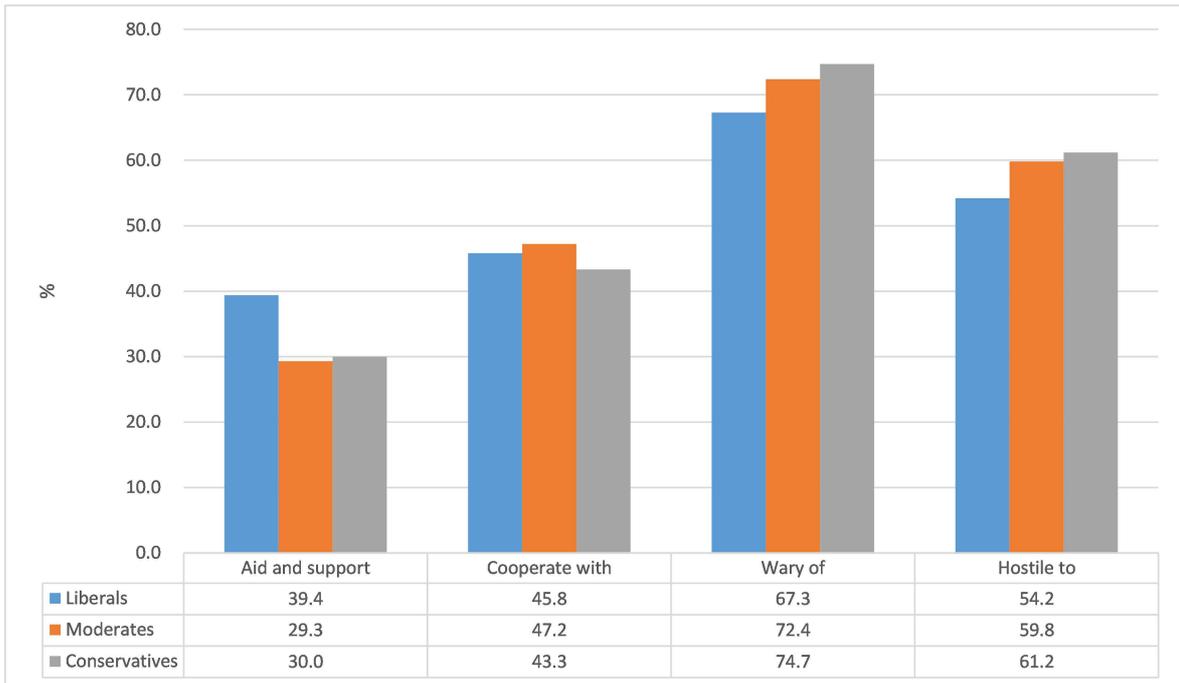
<Figure III - 2> National Images of North Korea by Age Groups: 2024



■ A Negative Image of North Korea Prevails across All Age Groups

- In all age groups, the proportion of those viewing North Korea as an object of wariness is around 70%, and the proportion of those viewing it as an object of hostility is around 60%.
- In contrast, the proportion of responses viewing North Korea as an object of cooperation or aid is below 50%.

<Figure III - 3> National Images of North Korea by Political Ideologies: 2024

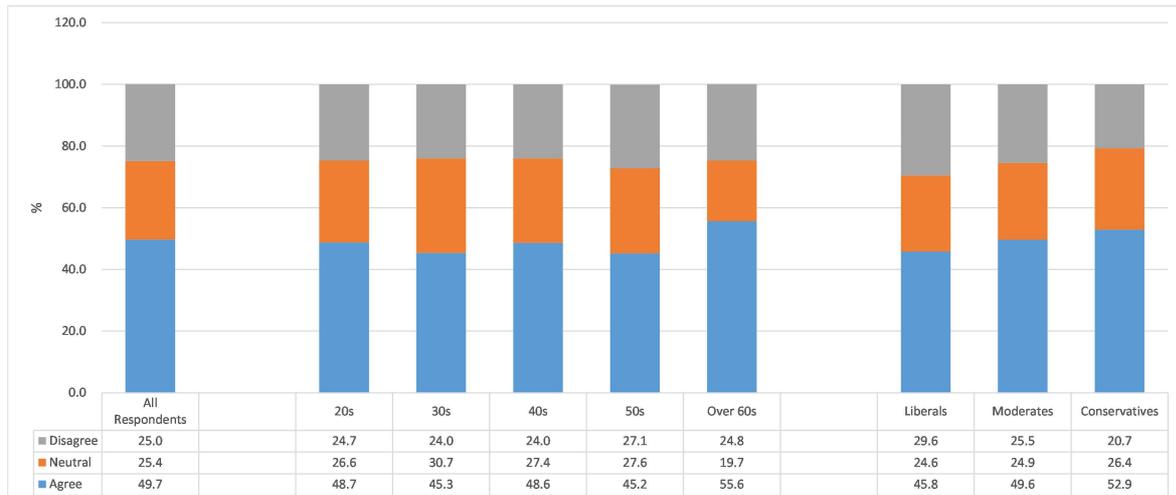


■ **A Negative Image of North Korea Prevails across All Ideological Groups**

- The levels at which North Korea is viewed as an object of wariness, hostility, and cooperation show minimal differences across ideological groups.
- Relatively, the liberals tend to view North Korea as an object of aid more favorably.

2. North Korea's Intent for Communist Unification

<Figure III - 4> North Korea's Intent for Communist Unification: 2024



■ Questions

- “North Korea wants the communist unification.”
 - 1=strongly disagree; 2=somewhat disagree; 3=neutral; 4=somewhat agree; 5=strongly agree
 - converted to a 3-point scale (1+2=“Disagree”; 3=“Neutral”; 4+5=“Agree”), and visualized in the graph.

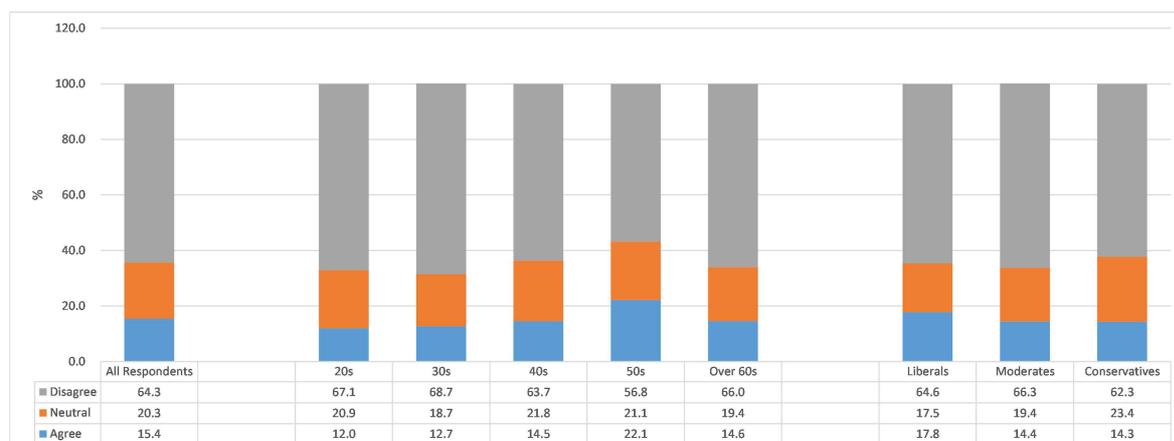
■ The Response that North Korea Wants Communist Unification Has Increased

- The proportion of those who believe North Korea wants communist unification is 49.7%, the highest level since 2018.
 - The proportion of those who responded "No" is 25.0%, and "Neutral" is 25.4%.
 - This has been on a clear upward trend, following 38.5% in 2022 and 45.2% in 2023.
- It was found that in all age groups and ideological groups, the majority believe North Korea wants communist unification.

- Relatively, positive responses are higher among those aged 60 and above (55.6%) and conservatives (52.9%).
- It is evaluated that unprecedented levels of North Korean military provocations in 2022 and continued provocations in 2023 have influenced this perception.

3. Economic Sanctions and Denuclearization

<Figure III - 5> Economic Sanctions and Denuclearization of North Korea: 2024



■ Questions

- “If economic sanctions on North Korea strengthen, North Korea will eventually give up nuclear power.”
 - 1=strongly disagree; 2=somewhat disagree; 3=neutral; 4=somewhat agree; 5=strongly agree
 - converted to a 3-point scale (1+2=“Disagree”; 3=“Neutral”; 4+5=“Agree”), and visualized in the graph.

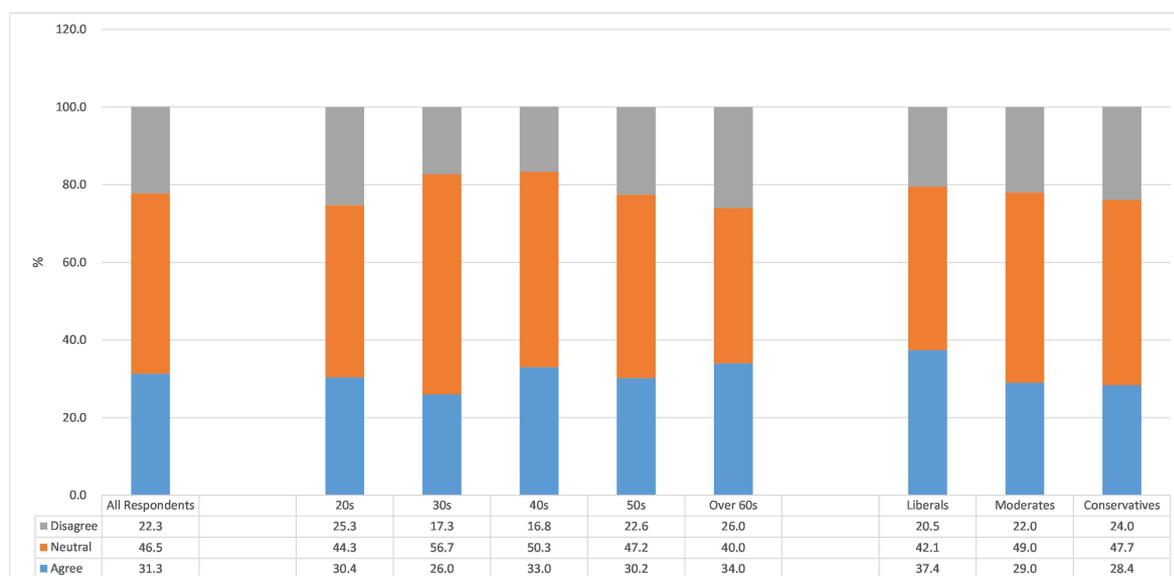
■ People Believe that Economic Sanctions Will Not Lead to North Korea's Denuclearization

- Only 15.4% believe economic sanctions will lead North Korea to give up its nuclear weapons. This is the lowest level since the survey began.
 - 64.3% believe that strengthening economic sanctions will not lead to North Korea giving up its nuclear weapons.
 - Compared to 2023 (17.4%), the proportion of people who believe in the effectiveness of economic sanctions has decreased by 2.0%.
- In all age groups and ideological groups, the prevailing view is that economic sanctions will not lead to North Korea's denuclearization.

- The 50s age group is the only group where the positive response rate exceeds 20%.
- Despite economic sanctions, North Korea's continued advancements in nuclear capabilities, such as ICBM launches and satellite launches, seem to have influenced public perception.

4. The Intent behind North Korea's Nuclear Armament

<Figure III - 6> The Intent behind North Korea's Nuclear Armament



■ Questions

- "North Korea's development of nuclear weapons and missiles is only a diplomatic means, and the possibility to attack South Korea is very low. "
 - 1=strongly disagree; 2=somewhat disagree; 3=neutral; 4=somewhat agree; 5=strongly agree
 - converted to a 3-point scale (1+2="Disagree"; 3="Neutral"; 4+5="Agree"), and visualized in the graph.

■ Increased Doubts about North Korea's Nuclear Weapons

- The response that North Korea's nuclear weapons are solely a diplomatic tool has been on a clear decline since peaking at 54.9% in 2017.
- In all age groups and ideological groups, "neutral" responses were predominant regarding the use of North Korea's nuclear weapons.
- Doubts are increasing about the statement that North Korea will use nuclear weapons solely as a diplomatic tool and not attack South Korea.

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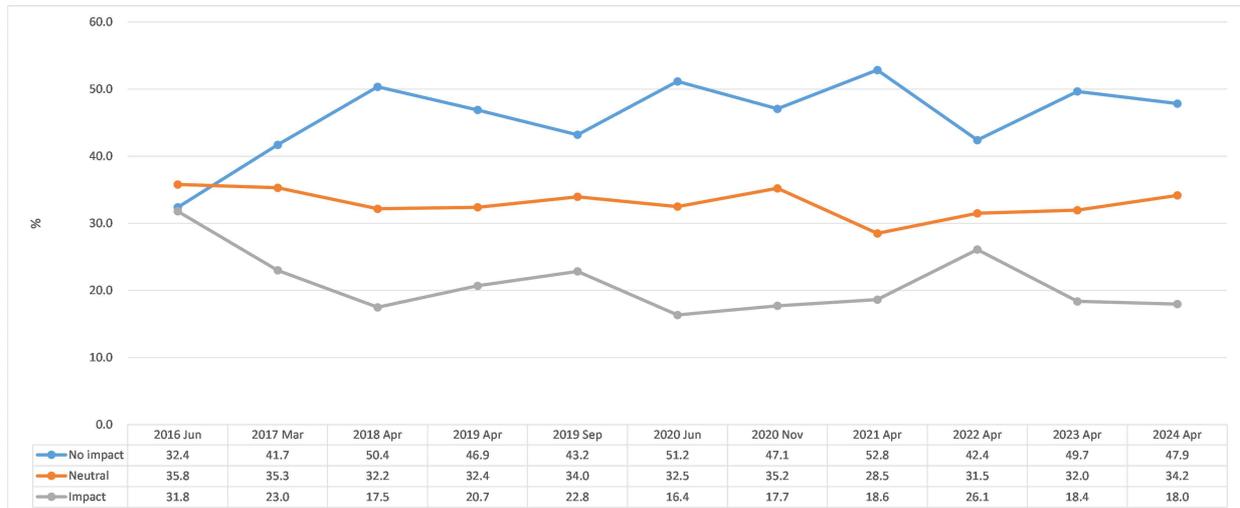
North Korean Nuclear Threat and Two-States Claim

Moo Chul LEE (KINU)

IV. North Korean Nuclear Threat and Two-States Claim

1. North Korean Nuclear Threat

<Figure IV - 1> The Impact of North Korean Nuclear Weapons on Life: 2016~2024



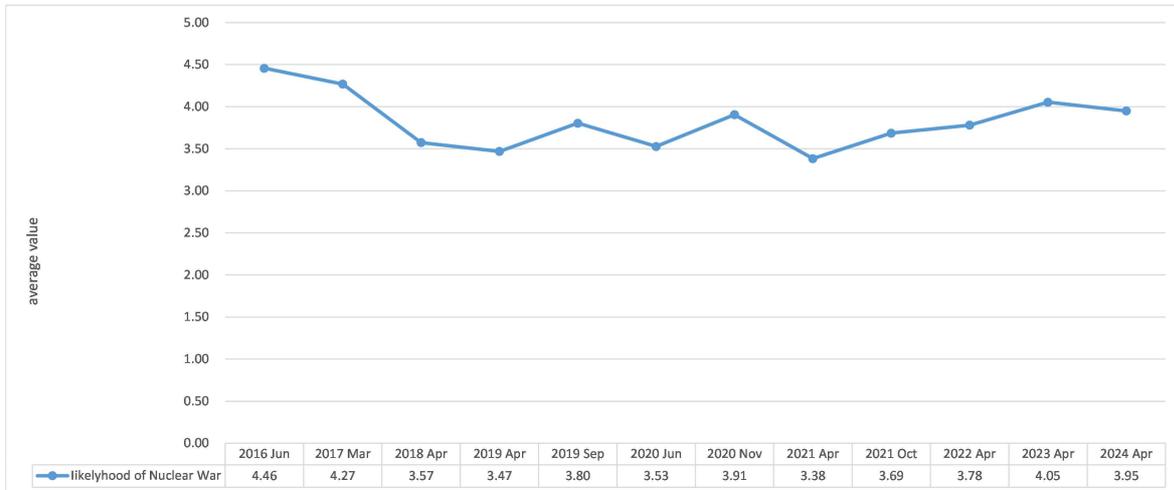
■ Questions

- “How much impact does North Korea's nuclear threat have on your life?”
 - 1=it has no impact at all; 2=it has little impact; 3=neutral; 4=it has some impact; 5=it has strong impact
 - converted to a 3-point scale (1+2=“No impact”; 3=“Neutral”; 4+5=“Impact”), and visualized in the graph.

■ The Normalization of the North Korean Nuclear Threat

- The proportion of people who think that the North Korean nuclear threat affects their lives was highest in 2016 at 31.8%, but it has been declining since then.
 - In 2024, the responses were: 47.9% believe it does not affect their lives, 34.2% are neutral, and 18% believe it does affect their lives.
 - The decrease in responses indicating that North Korea's nuclear weapons affect their lives is likely because it is impossible to maintain constant attention on the North Korean nuclear issue, which has become a part of everyday life.

<Figure IV - 2> Likelihood of Nuclear War with North Korea: 2016~2024



■ Questions

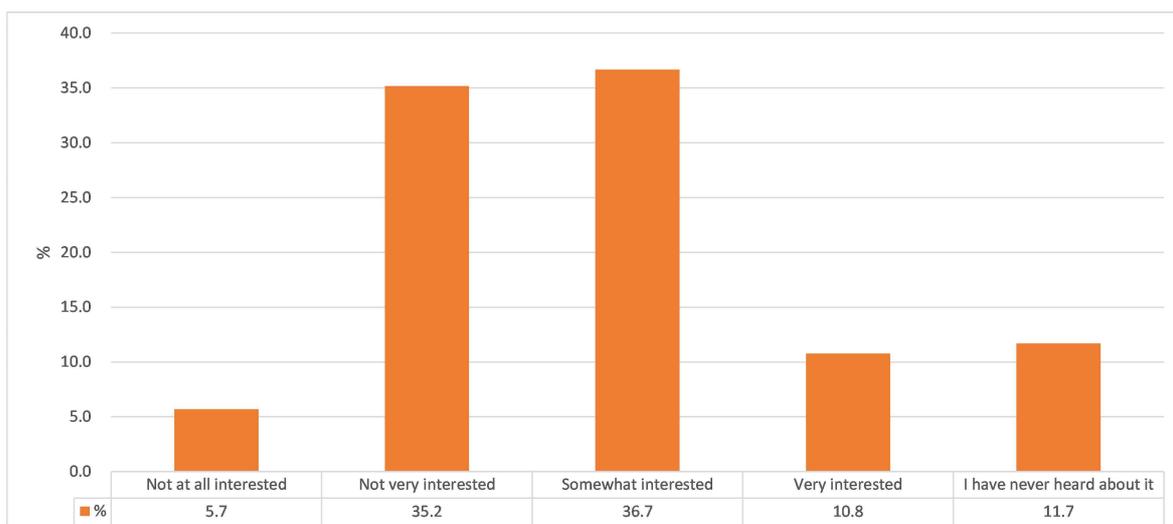
- “How likely do you think a nuclear war will break out with North Korea in 10 years? Please answer freely and frankly.”
 - Measured on an 11-point scale (0 = Not likely at all; 5 = Neutral; 10 = Very much likely).
 - The average value of this variable is shown in the graph above. A higher value indicates a higher perceived possibility of nuclear war.

■ The Internalization of the Everyday North Korean Nuclear Threat

- The average value of the variable measuring the likelihood of nuclear war with North Korea within the next 10 years, surveyed since 2016, was highest in 2016 at 4.46.
 - There were no significant differences by generation, political party, or ideology regarding the possibility of a nuclear war with North Korea.
 - In 2024, 52.1% responded that war is not likely, while 22.6% responded that nuclear war is possible.
- Since 2021, the outlook that a nuclear war is possible has been rising. However, it has not yet reached the levels seen in 2016 and 2017 when the North Korean nuclear threat was at its peak.
- Due to the normalization of the North Korean nuclear threat and the structural entrenchment of division of two Koreas, North Korea's nuclear threat and the possibility of nuclear war are not perceived as realistic possibilities.

2. North Korea's Two-States Claim

<Figure IV - 3> Interest in North Korea's Giving up Unification: 2024



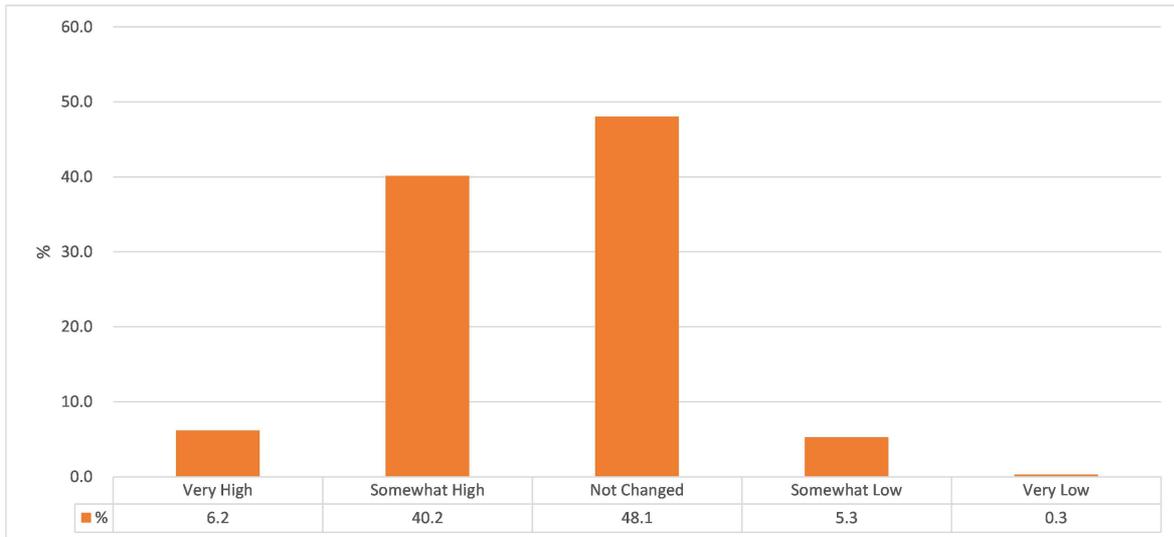
■ Questions

- “North Korea recently labeled South Korea as the “most hostile country” and not of the same ethnicity, and declared that it will no longer pursue unification. How much do you care about North Korea's declaration to give up unification?”
 - 1=Not at all interested; 2=Not very interested; 3=Somewhat interested; 4=Very interested; 5=I have never heard about it.

■ Majority of Respondents are Unaware of or Uninterested

- More than half of the respondents answered that they do not know or are not interested in North Korea's abandonment of unification
 - Similar trends are observed across generations, political parties, and ideologies, with no significant differences.
- This trend needs to be understood in the same context as the spread of a passive attitude towards the necessity of unification and the gradually increasing negative perception of North Korea.
 - In the 2024 survey, 65.5% of respondents said they were not interested in North Korea.

<Figure IV - 4> Likelihood of North Korea's Military Provocations: 2024



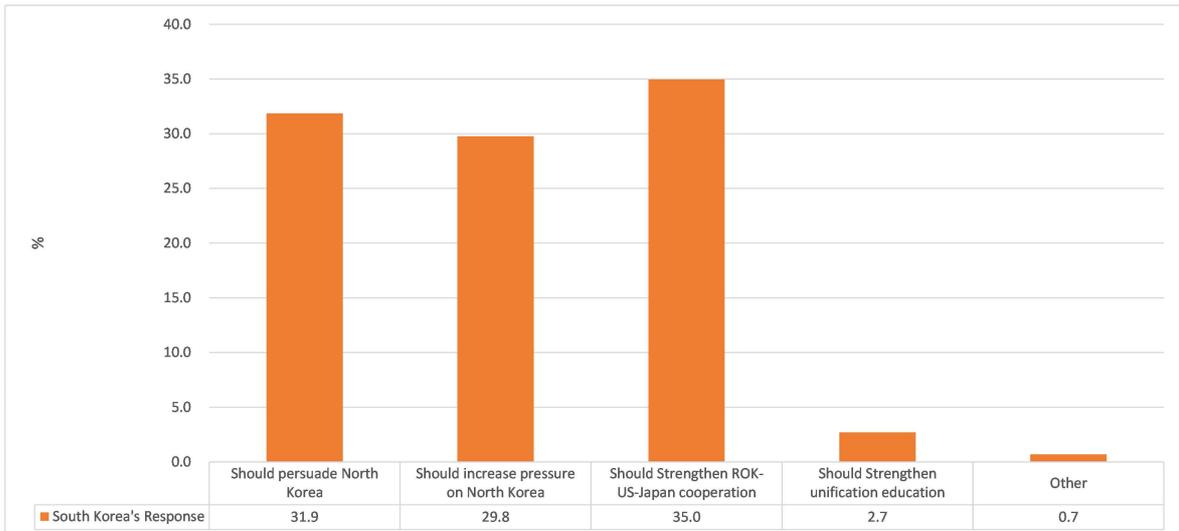
■ Questions

- “What are your thoughts on the likelihood of North Korea's military provocations following this declaration of abandonment of unification?”
 - 1=very high; 2=somewhat high; 3=not changed; 4=somewhat low; 5=very low

■ North Korea's Policy Shift and the Possibility of Military Provocation

- In the survey, 48.1% of respondents believe that the likelihood of North Korean military provocation has remained unchanged, representing the highest percentage.
 - Those who think the possibility has increased (very high + somewhat high) account for 46.4%.
 - Similar trends are observed across different generations, political party affiliations, and ideologies, with no significant differences.
- Public opinion is divided on the likelihood of North Korea's two-states claim leading directly to military provocation.
- This perception may change depending on future developments in inter-Korean relations.

<Figure IV – 5> South Korea’s Response: 2024



■ Questions

- “How do you think the South Korean government should respond to North Korea's declaration of abandoning unification?”
 - 1=The South Korean government should actively persuade North Korea through dialogue to restore a cooperative relationship for unification; 2=The South Korean government should increase pressure on North Korea, including economic sanctions, to induce internal change; 3=ROK-US-Japan cooperation should be strengthened to respond to North Korea's military provocations; 4=South Korea should strengthen unification education so that South Koreans believe that the country must be unified; 5=Other

■ Strengthening ROK-US-Japan Cooperation is the Most Preferred Response

- When asked about how to respond to North Korea's two-states claim, the most supported response was "strengthening ROK-US-Japan cooperation to respond to North Korea's military provocations," with 35% support.
 - Next, "resuming dialogue and restoring cooperative relations with North Korea" received 31.9%, and "inducing internal change in North Korea through sanctions and pressure" received 29.8%.
- The preference for ROK-US-Japan Cooperation, and inducing internal change in North

Korea reflects a loss of trust in the Kim Jong-un regime and a decreased need for dialogue.

- Long-term trends in the survey show that trust in the Kim Jong-un regime has been continuously declining.
 - In the 2024 survey, in response to the question "Do you think the current Kim Jong-un regime is a partner for dialogue and compromise?" 67.9% answered negatively.
- In the current situation, where the momentum and driving force for resuming dialogue have been lost and trust in the Kim Jong-un regime has declined, policies and responses aimed at maintaining the status quo are receiving public support.

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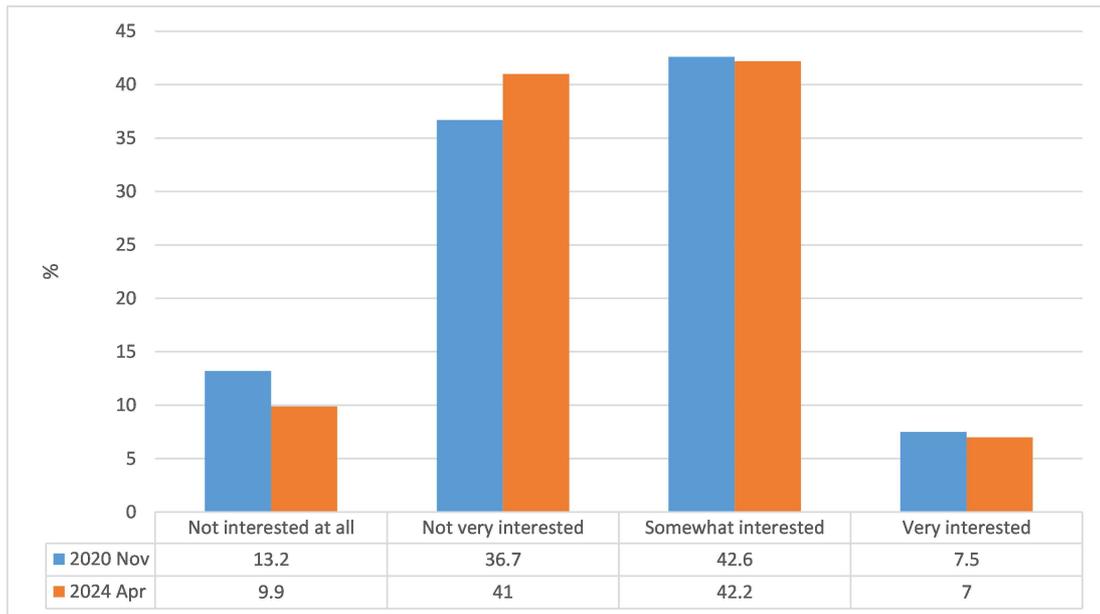
Outlook on the US Presidential Election

Tae-eun MIN (KINU)

V. Outlook on the US Presidential Election

1. Interest in the US Presidential Election

<Figure V - 1> Interest in the US Presidential Election: 2020 & 2024



■ Questions

- "How interested are you in the US presidential election?"
 - 1=Not interested at all; 2=Not very interested; 3=Somewhat interested; 4=Very interested

■ 49.2% of South Koreans are interested in the US presidential election

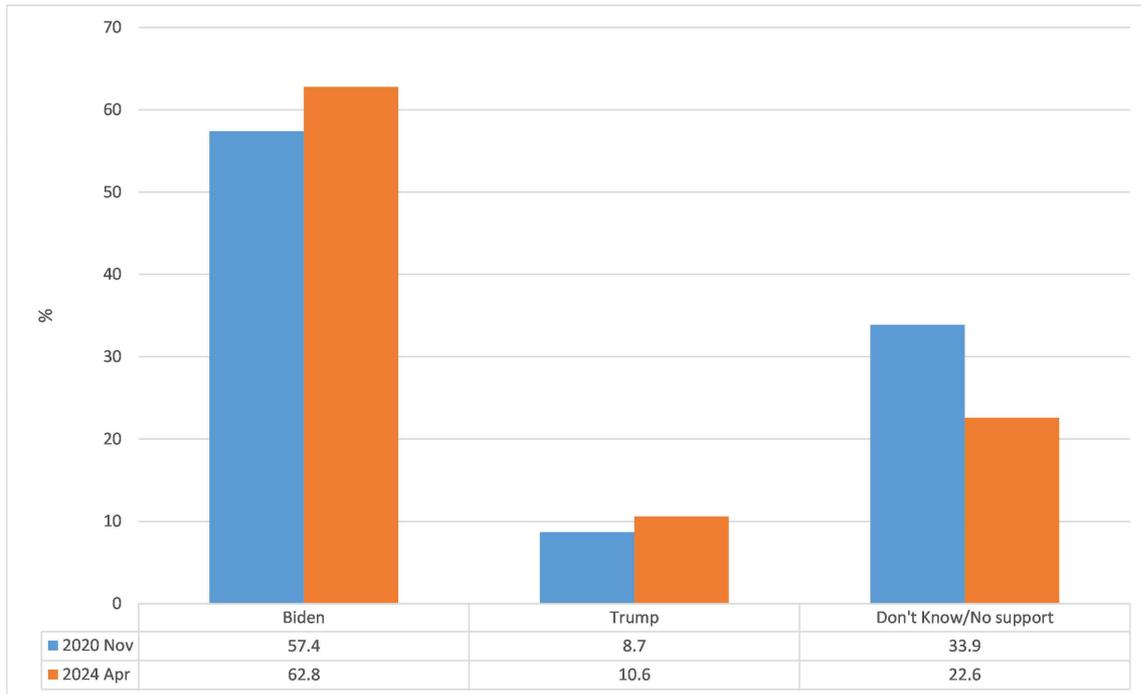
- Among the cohorts, millennials showed the least interest. While the industrialization generation and the 386 generation showed the highest interest at 55% and 54.4% respectively, only 38.4% of millennials were interested in the US presidential election.

■ Three-quarters believe the US presidential election affects their lives

- In response to the question, "to what extent do you think the outcome of the US presidential election this November will affect your life and the lives of the South Korean people?" 76.8% said it would have an impact.
- This indicates that a majority of the public recognizes the influence of the US political landscape on the Korean Peninsula.

2. Support for US Presidential Candidates

<Figure V - 2> Support for US Presidential Candidates



■ Questions

- 2024: "Which candidate do you think will better serve South Korea's national interests in the US presidential election this November?"
 - 1=Joe Biden; 2=Donald Trump; 3=Don't know
- 2020: "The US presidential election was held on November 3, 2020. Which candidate between Trump and Biden did you want to win in the US presidential election?"
 - 1=Donald Trump; 2=Joe Biden; 3=Did not support any candidate

■ Joe Biden is better for South Korean Interests

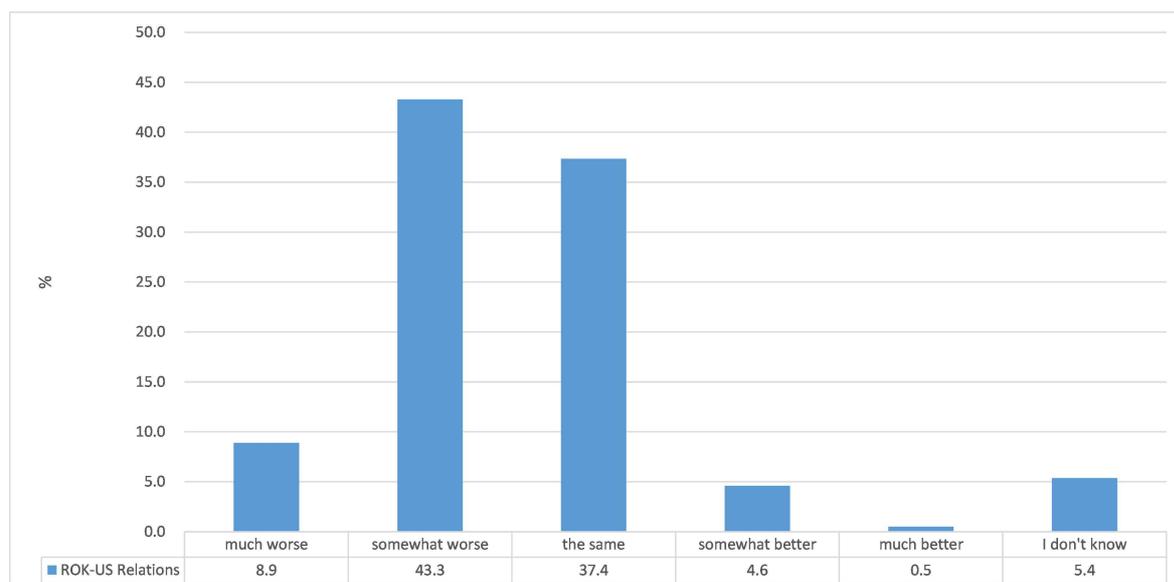
- 62.8% prefer President Joe Biden, which is six times the support for Donald Trump, who has 10.6% support.
 - This marks a 5.4% increase in support for Biden compared to the survey conducted right after the 2020 US presidential election.

■ Impact of Negative Experience with the Trump Administration

- It appears that South Koreans, having experienced President Trump's selective isolationism and unilateral foreign policy based on "America First" principles, overwhelmingly support Biden.

3. Trump's Election and the Outlook for ROK-US Relations

<Figure V - 3> Trump's Election and the Outlook for ROK-US Relations: 2024



■ Questions

- “If Donald Trump wins the US presidential election this November, what do you think will happen to ROK-US relations?”
 - 1=much worse; 2=somewhat worse; 3=the same; 4=somewhat better; 5=much better; 6=I don't know.

■ Trump's Election is Expected to Lead to Deterioration in ROK-US Relations

- 52.2% of respondents expect ROK-US relations to worsen if Trump is elected, which is nearly ten times the percentage that expects relations to improve (5.1%).
- Notably, a high percentage of PPP supporters anticipate negative outcomes.
 - Excluding respondents who answered "I don't know," People Power Party(PPP) supporters predict a deterioration in ROK-US relations at a rate about 7% higher than Democratic Party supporters.

**<Table V - 1> Trump's Election and the Outlook for ROK-US Relations
by Political Party Affiliations: 2024**

(unit: %)

	PPP	Democrats	Independents
Worse	57.6	50.5	56.3
The Same	35.7	42.7	41
Better	6.7	6.8	2.7

Note. Excluding the responses "I don't know."

■ **The Majority of Respondents Expect Trump to Meet with Kim Jong-un**

<Table V - 2> Trump's Election and the US-DPRK Summit

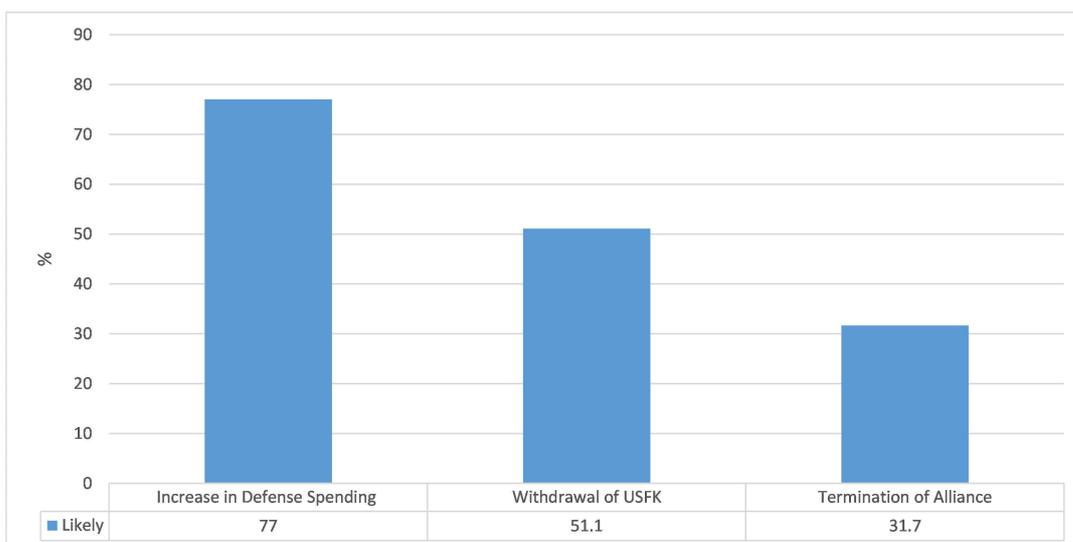
(unit: %)

	Very Likely	Somewhat Likely	Somewhat Unlikely	Very Unlikely	I don't know
Trump-Kim Summit	9.5	47.1	21.1	7.5	14.9

- "If Mr. Trump wins the US presidential election this year, do you think it is likely that Mr. Trump will meet with North Korean leader Kim Jong-un again?"
 - 1=very likely; 2=Somewhat likely; 3=Somewhat unlikely; 4=Very unlikely; 5=I don't know.
- If Trump is elected, 56.6% of respondents expect him to meet with Kim Jong-un again.
- The majority of people anticipate that if former President Trump is re-elected, ROK-US relations will deteriorate, while US-DPRK relations will improve.

4. The Future of the ROK-US Alliance with Trump's Election

<Figure V - 4> The Future of the ROK-US Alliance with Trump's Election: 2024



■ Questions

- “If Mr. Trump wins the US presidential election this year, do you think it is likely that South Korea's share of defense spending on US forces in South Korea will increase significantly?”
- “If Mr. Trump wins the US presidential election this year, do you think it is likely that Mr. Trump will reduce or withdraw US troops from South Korea?”
- “If Mr. Trump wins the US presidential election this year, do you think it is likely that Mr. Trump will terminate the ROK-US alliance?”
 - 1=Very likely; 2=Somewhat likely; 3=Somewhat unlikely; 4=Very unlikely; 5=I don't know.

■ 77% Expect an Increase in Defense Spending

- 77% of respondents anticipate an increase in defense spending contributions. 51.1% foresee a reduction or withdrawal of USFK. And 31.7% predict the possibility of the alliance being terminated.
- South Koreans perceive Trump's winning the election as a key factor that could bring significant changes to the future of the ROK-US Alliance.

■ Negative Outlook on Trump's Election across Political Parties

<Table V - 3> Outlook on Trump's Election by Political Party Affiliations

(unit: %)

	Increase in Defense Spending			Withdrawal of USFK			Termination of Alliance		
	PPP	Dem.	Inde.	PPP	Dem.	Inde.	PPP	Dem.	Inde.
Not Likely	16.9	17.7	13.1	43.4	44.6	38.7	64.8	62.4	63.9
Likely	83.2	82.4	86.9	56.7	55.5	61.3	35.2	37.6	36.1

Note. Excluding the responses "I don't know."

- Both supporters of the People Power Party(PPP) and the Democratic Party expect an increase in contributions, a reduction or withdrawal of US troops, and the termination of the ROK-US alliance at similar rates.
- Supporters of conservative parties do not necessarily prefer conservative US candidates or have a more positive outlook on ROK-US alliance.

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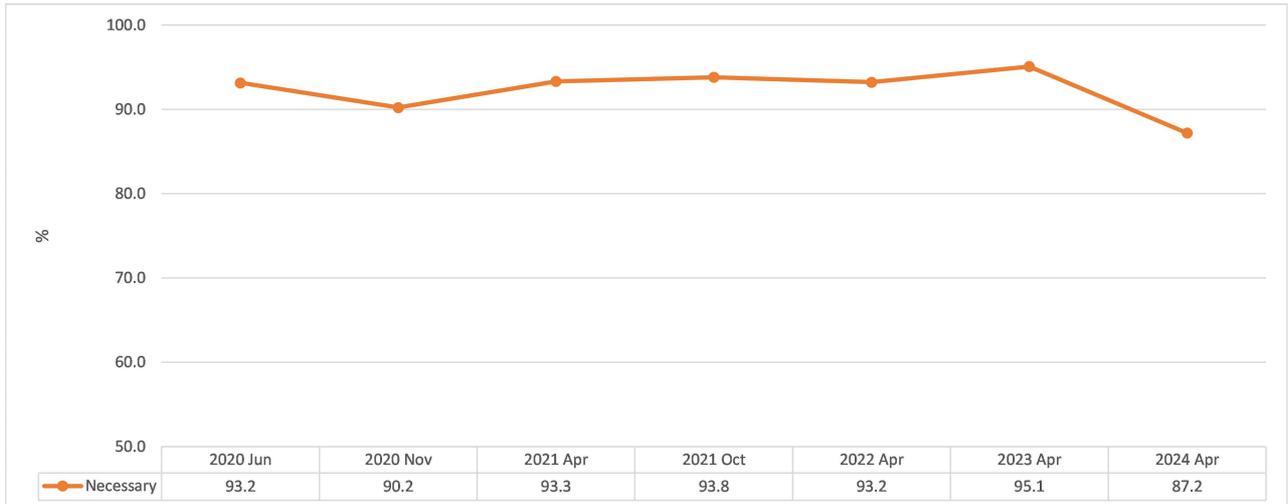
ROK-US Relations

Kwang-il YOON
(Sookmyung Women's Univ.)

VI. ROK-US Relations

1. Necessity of ROK-US Alliance

<Figure VI - 1> Necessity of ROK-US Alliance: 2020~2024



■ Questions

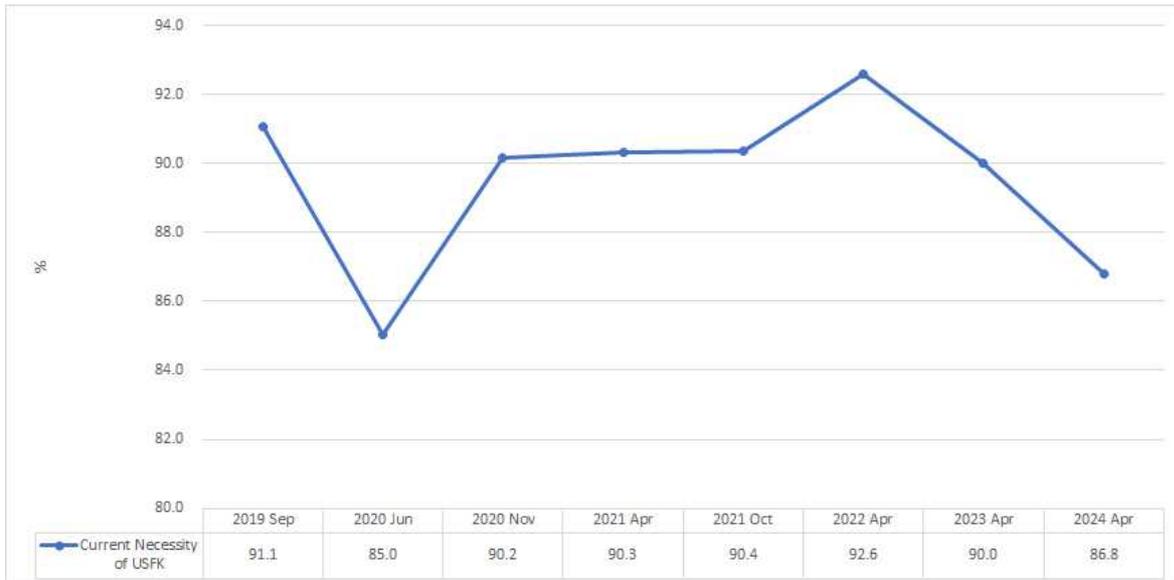
- “Do you believe that ROK-US Alliance will still be necessary in the future?”
 - 1=not necessary at all; 2=not particularly necessary; 3=somewhat necessary; 4=absolutely necessary
 - 3+4=“Necessary”

■ Overwhelming Support for the ROK-US Alliance Continues

- Since the first survey in 2020, around 90% of respondents have consistently stated that the ROK-US Alliance is somewhat or very necessary.
- In the 2024 survey, for the first time, this percentage dropped below 90%, to 87.2% (55.8% somewhat necessary + 31.4% very necessary).
- Considering the current status of the ROK-US Alliance, the negative perception of Trump may have influenced these survey results.

2. Current Necessity of US Forces in Korea

<Figure VI - 2> Current Necessity of USFK: 2019~2024



■ Questions

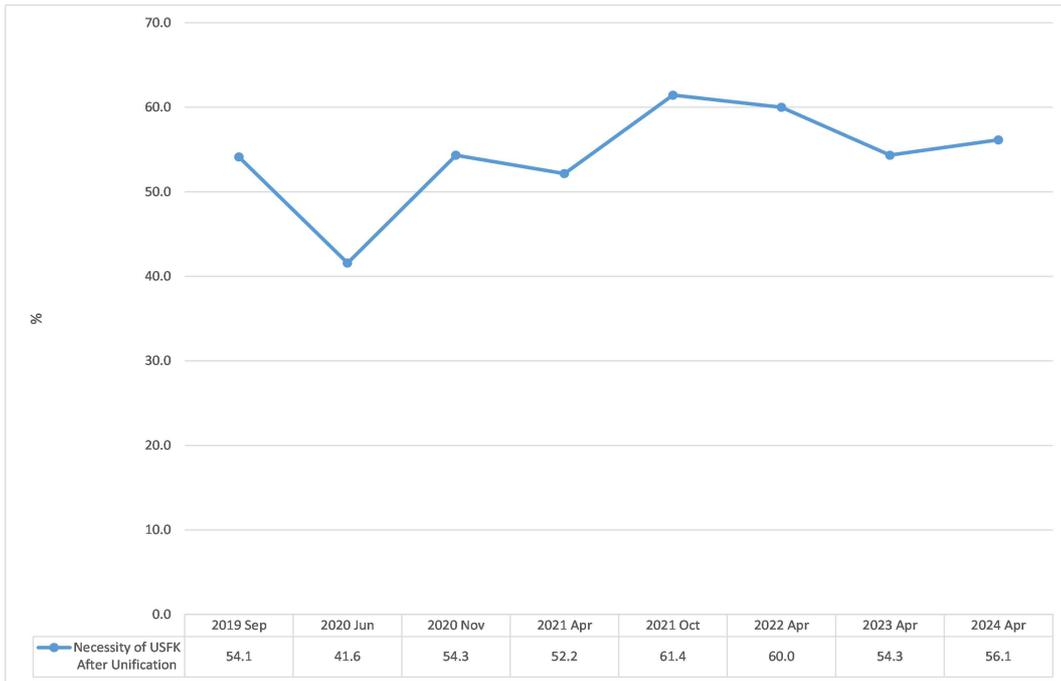
- “Do you think that US Forces Korea is needed now?”
 - 1=Not at all needed; 2=Not particularly needed; 3=Somewhat needed; 4=Very needed
 - 3+4=“Current Necessity of USFK”

■ Overwhelming Agreement on Necessity

- Since the first survey in 2019, the percentage of respondents who believe that USFK are currently necessary has consistently exceeded 85%.
- However, in the 2024 survey, this percentage was 86.8%, which is the lowest since the 85.0% recorded in the June 2020 survey.
- There is still near-universal national agreement on the necessity of the US military presence in Korea. The change in this year's survey results, similar to the previous survey on the ROK-US Alliance, may reflect a negative response to Trump's candidacy in the US presidential election.

3. Necessity of USFK After Unification

<Figure VI - 3> Necessity of USFK After Unification: 2019~2024



■ Questions

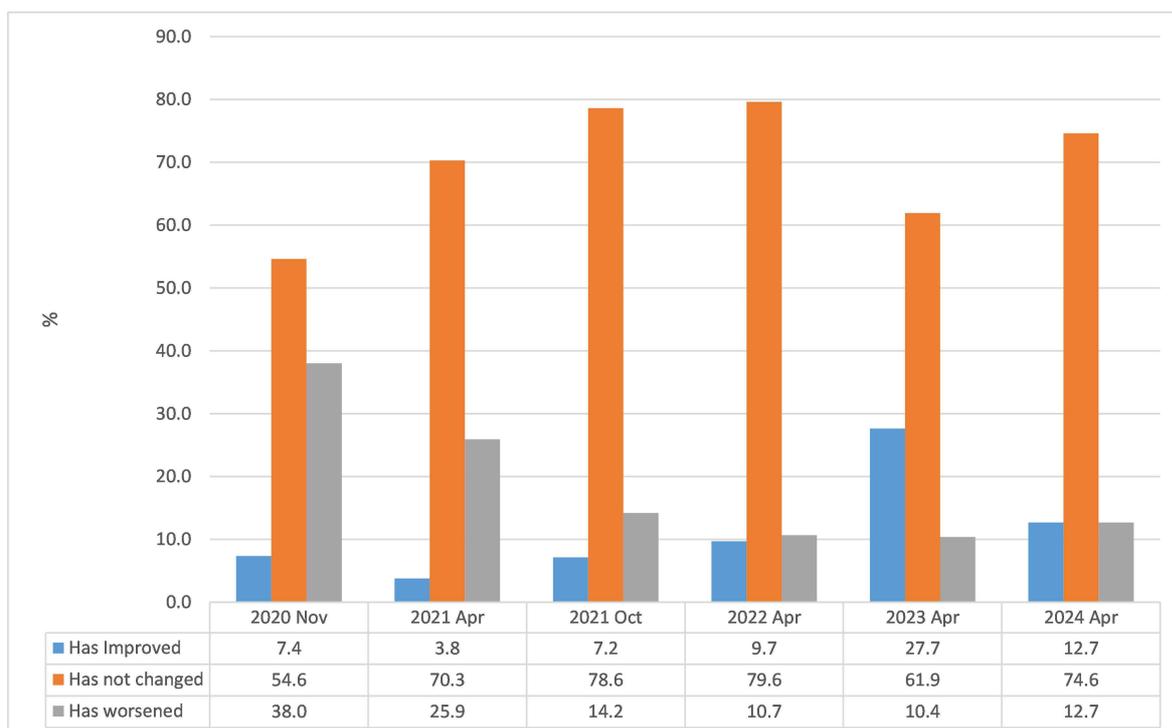
- “Do you think that US Forces Korea will be needed even after Unification of Korea?”
 - 1=Not at all needed; 2=Not particularly needed; 3=Somewhat needed; 4=Very needed
 - 3+4=“Necessity of USFK After Unification”

■ Majority Support for US Troops After Unification

- Since 2019, the percentage of respondents who believe US forces are necessary even after unification has generally remained above 50%.
- In the 2024 survey, this percentage was 56.1% (49.9% somewhat necessary + 6.3% very necessary), showing a slight increase of 1.8% compared to last year's survey.
- The fact that more than half of the population maintains a positive perception of the necessity of US forces in Korea even after unification suggests that South Koreans have a realistic understanding of the strategic importance of the US military presence.

4. Evaluation of ROK-US Relations

<Figure VI - 4> Evaluation of ROK-US Relations over the Past Year: 2020~2024



■ Questions

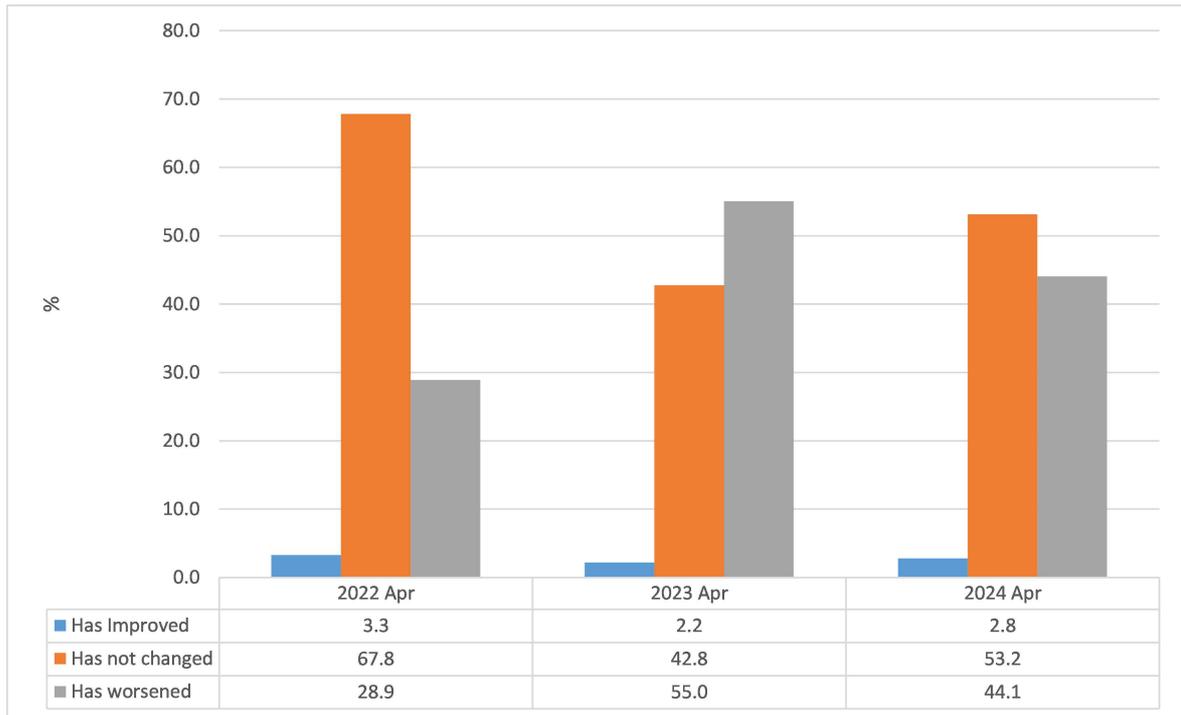
- “How do you evaluate ROK-US relations over the past year?”
 - 1 = Has improved; 2 = Has worsened; 3 = Has not changed much

■ Majority Believe ROK-US Relations have Not Changed Much over the Past Year

- A survey conducted one year after the Yoon Suk Yeol administration took office in 2023 showed that, for the first time, the percentage of respondents who believe ROK-US relations have improved over the past year exceeded double digits at 27.7%.
- Despite this, an overwhelming 74.6% of respondents stated that ROK-US relations have remained unchanged, which can be seen as a somewhat positive result.

5. Evaluation of ROK-China Relations

<Figure VI - 5> Evaluation of ROK-China Relations over the Past Year: 2022~2024



■ Questions

- “How do you evaluate ROK-China relations over the past year?”
 - 1 = Has improved; 2 = Has worsened; 3 = Has not changed much

■ High Percentage of Negative Evaluations

- In the past year, the percentage of respondents who believe ROK-China relations have worsened is relatively high at 44.1%, nearing half.
- A survey conducted one year after the Yoon Suk Yeol administration took office in 2023 showed that, for the first time, the percentage of respondents who believe ROK-China relations have worsened exceeded 50% at 55.0%, maintaining a relatively high trend of negative evaluations.
- The percentage of respondents with a positive assessment, believing relations have improved, is very low at 2.8%, similar to previous surveys.

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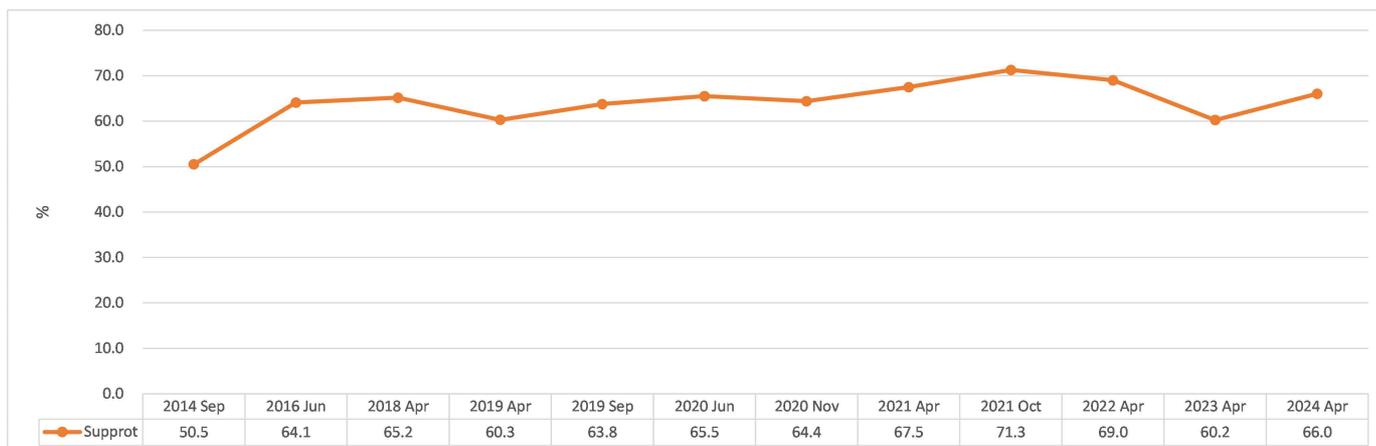
ROK-US Relations and South Korea's Nuclear Armament

Bon-sang KOO
(Chungbuk National Univ.)

VII. ROK-US Relations and South Korea's Nuclear Armament

1. South Korea's Nuclear Armament

<Figure VII - 1> Changes in Public Opinion Supporting South Korea's Nuclear Armament: 2014~2024



■ Questions

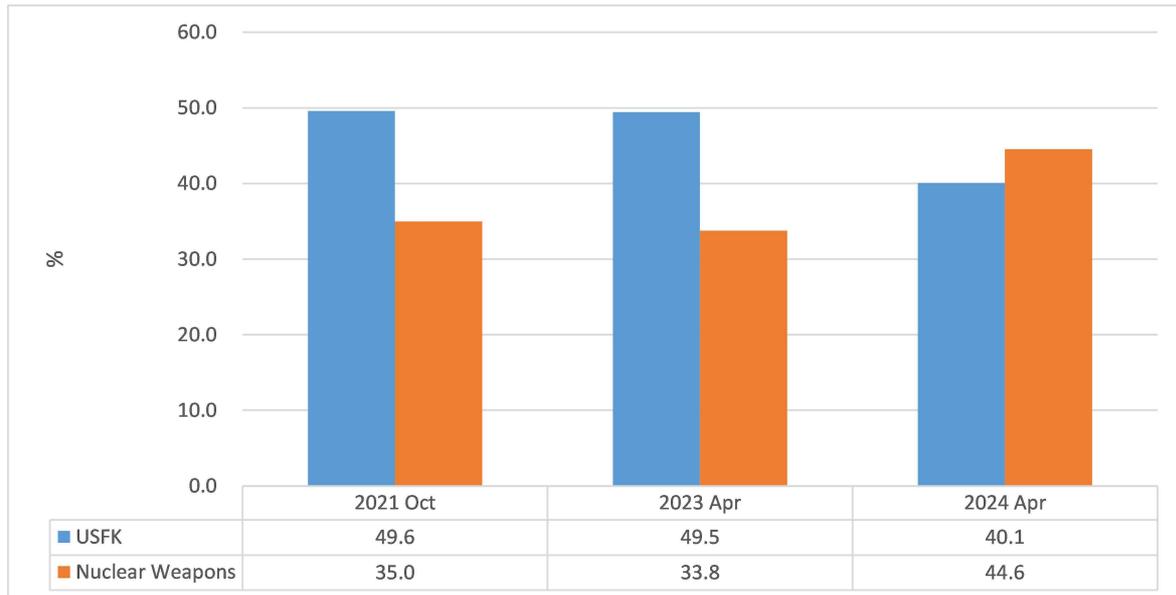
- “There is an argument that South Korea should also possess nuclear weapons if North Korea does not give up its nuclear weapons. What do you think of this argument?”
 - 1=strongly oppose; 2=somewhat oppose; 3=somewhat support; 4=strongly support
 - 3+4=“Support”

■ Rebound in Public Opinion on South Korea's Nuclear Armament

- Since 2014, opinions on nuclear armament have gradually increased, peaking at 71.3% in a survey conducted in October 2021. Although the percentage decreased until 2023, it rebounded to 66.0% in 2024.
- During the 2023 survey, a US-South Korea summit was held. In this summit, both countries agreed to enhance and expand the nuclear umbrella policy through close cooperation, which was reflected in the Washington Declaration. The support for nuclear armament decreased in the 2023 survey, likely influenced by the summit agreement.
- To accurately determine whether the rebound in public support for nuclear armament in 2024 is a return to the average level since 2020 or a shift in public opinion, further follow-up surveys are needed.

2. USFK or Nuclear Weapons

<Figure VII - 2> USFK or Nuclear Weapons: 2021~2024



■ Questions

- “If you had to choose between the presence of US forces in Korea and the possession of nuclear weapons for our national defense, which one would you choose?”
 - 1=USFK; 2=Nuclear Weapons; 3=I don’t know.

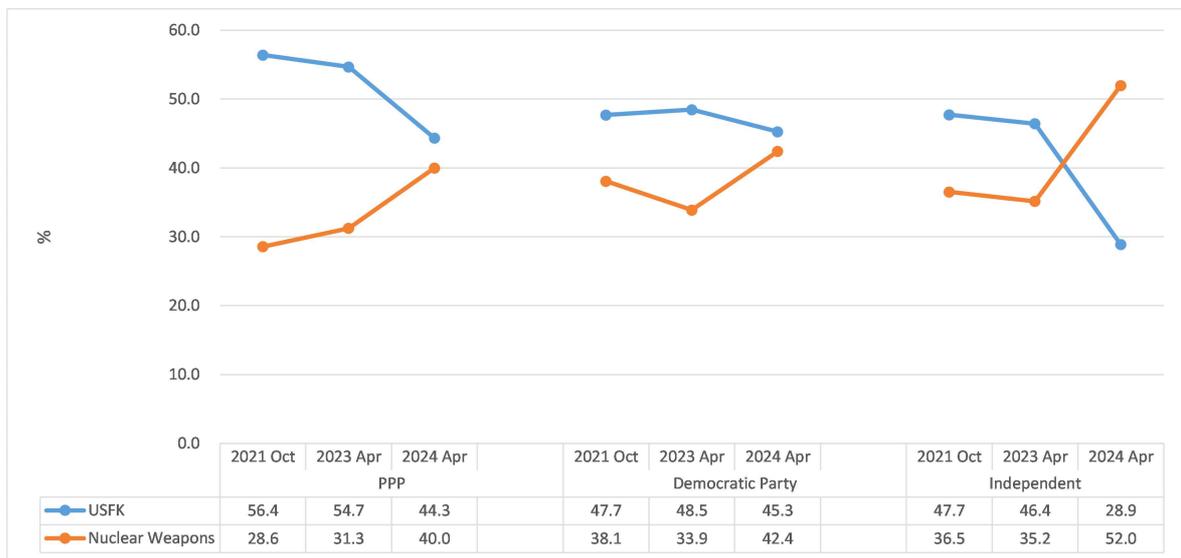
■ For the First Time, Preference for Nuclear Weapons Surpasses Support for USFK

- Prior to the 2024 survey, when excluding the “Don't know” responses, more respondents chose the presence of US forces in South Korea over possessing nuclear weapons. However, in the 2024 survey, for the first time, the preference for nuclear weapon possession (44.6%) surpassed the preference for the presence of US forces (40.1%).
- Compared to the 2023 survey results, the overall rate of choosing nuclear weapons increased regardless of political party affiliation. Notably, since the 2021 survey, the preference for nuclear weapons among People Power Party supporters has continuously risen (28.6% → 31.3% → 40.4%). Additionally, compared to the 2023

survey results, there was a significant increase in the preference for nuclear weapon possession among Democratic Party supporters (33.9% → 42.4%).

- However, supporters of both major parties still showed a preference for the presence of USFK over possessing nuclear weapons (People Power Party 44.3%, Democratic Party 45.3%).

<Figure VII - 3> USFK or Nuclear Weapons by Political Party Affiliations: 2021~2024

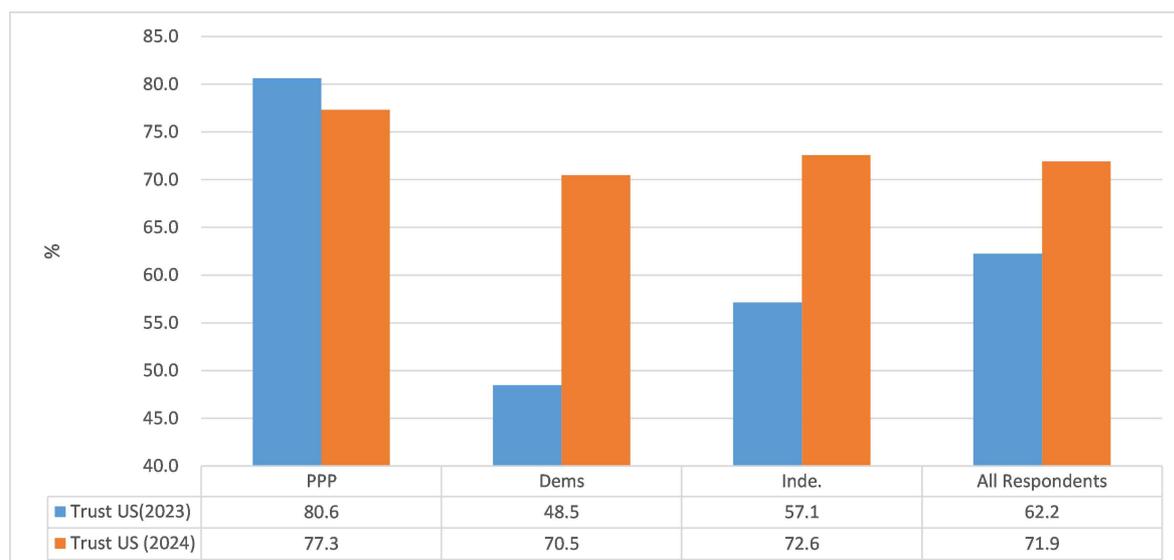


- On the other hand, among respondents who stated they did not support any political party (independent voters), the majority (52.0%) preferred nuclear weapon possession in the 2024 survey. This suggests that the motivation for supporting nuclear weapons is much stronger among the group that could not fully align with either of the two major parties, even during the general election period.¹⁾

1) In the 2023 survey, which was conducted in a non-election year, a significant proportion of respondents (36.4%) indicated that they did not support any political party. However, in the 2024 survey, conducted right after the general election, the proportion of respondents who reported no party affiliation dropped significantly to 27.7%, as the sample included more supporters of the two major parties. This indicates that a substantial portion (about 23%) of those who had no party affiliation in 2023 could be classified as party supporters in the 2024 survey. Therefore, caution is needed when comparing the 2023 and 2024 results.

3. Trust in US Policy on the Korean Peninsula

<Figure VII - 4> Trust in US Policy on the Korean Peninsula
by Political Party Affiliation: 2023 & 2024



■ Questions

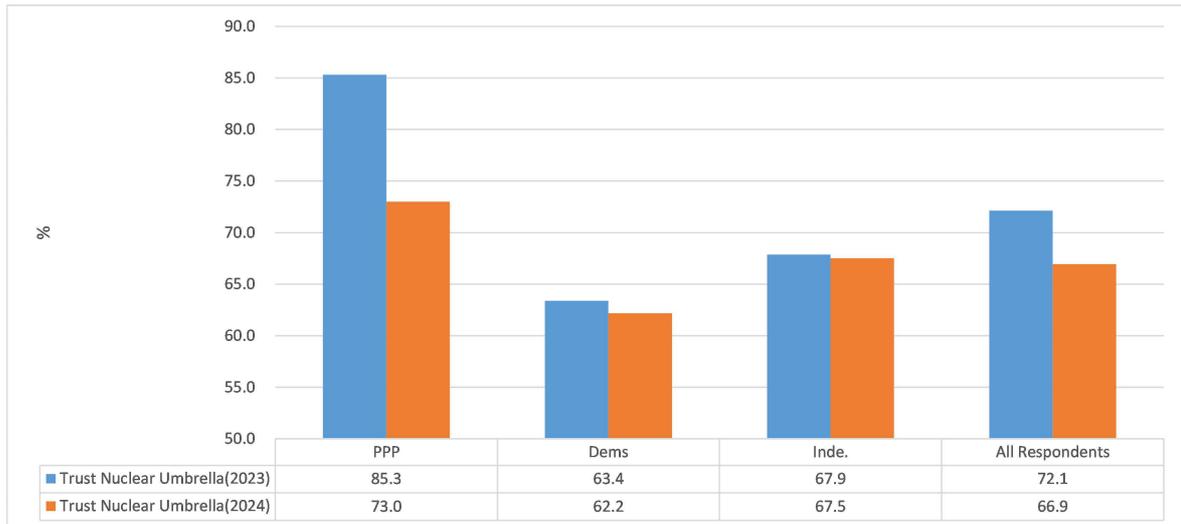
- “How much do you trust the US policy toward the Korean Peninsula?”
 - 1=Not at all; 2=Not very much; 3=Somewhat trusting; 4=very trusting
 - 3+4=“Trust US”

■ Trust in US Policy on the Korean Peninsula Has Improved

- Trust in US policy on the Korean Peninsula has increased significantly compared to 2023.
- Notably, there was a substantial increase in trust among Democratic Party supporters and independent respondents, narrowing the trust gap between different political groups.
- This is likely because, in 2023, there was significant uncertainty regarding South Korea's potential nuclear armament. However, the Washington Declaration solidified the continuation of the existing nuclear umbrella policy over South Korea's possession of nuclear weapons, aligning with the traditional policy preferences of Democratic Party supporters.

4. Trust in US Nuclear Umbrella

<Figure VII - 5> Trust in US Nuclear Umbrella: 2023 & 2024



■ Questions

- “How much trust do you have in the US nuclear umbrella policy that the US will retaliate with a nuclear strike against North Korea if North Korea attacks South Korea with a nuclear weapon?”
 - 1=Not at all; 2=Not very much; 3=Somewhat trusting; 4=very trusting
 - 3+4=“Trust Nuclear Umbrella”

■ Decreased Trust in the Nuclear Umbrella Policy among PPP Supporters

- Trust in the US nuclear umbrella policy has slightly decreased compared to 2023.
- This change has been driven by PPP supporters. Although their trust in the nuclear umbrella policy remains above average, it has significantly declined. In 2023, 85.3% of PPP supporters expressed trust in the US nuclear umbrella policy, but this percentage dropped to 73.0% in 2024.
- Contrastingly, there was no substantial change in the trust levels among Democrats and independent respondents. This contrasts with the noticeable improvement in the overall trust in US policy on the Korean Peninsula.
- These survey results suggest that South Koreans distinguish between the general US policy on the Korean Peninsula and the specific nuclear umbrella policy.

5. Conditions for Nuclear Armament: Economic Sanctions

<Table VII - 1> Nuclear Armament and Economic Sanctions: 2023~2024

		Despite an economic crisis, South Korea should develop nuclear weapons	
		Agree	Disagree
Nuclear Armament would cause an economic crisis	Agree	(1) Nukes First 24.8% → 35.7%	(3) No Nukes, Because of Economic Crisis 50.5% → 40.7%
	Disagree	(2) Justification for Nukes 2.1% → 1.0%	(4) No Nukes, Regardless of Economic Crisis 22.6% → 22.7%

■ Questions

- “It has been argued that if South Korea develops nuclear weapons, it will cause an economic crisis due to international economic sanctions. Do you agree or disagree with this claim?”; “Do you agree or disagree with the statement that South Korea should develop nuclear weapons despite the possibility of an economic crisis due to international sanctions?”
 - 1=Strongly disagree; 2=Somewhat disagree; 3=Somewhat agree; 4=Strongly agree
 - 1+2=“Disagree”; 3+4=“Agree”
- Respondents in favor of developing nuclear weapons are classified into two types: (1) the "Nukes First" type, who agree on the possibility of a crisis due to economic sanctions, and (2) the "Justification for Nukes" type, who do not agree on the possibility of an economic crisis.
- Respondents not in favor of developing nuclear weapons are divided into (3) the "No Nukes, Because of Economic Crisis" type, who agree on the possibility of an economic crisis due to economic sanctions, and (4) the "No Nukes, Regardless of Economic Crisis" type, who do not agree on the possibility of an economic crisis. Among these four types, the "Nukes First" type is the most strongly in favor of nuclear development.

■ Decrease in “No Nukes, Because of Economic Crisis”, Increase in “Nukes First”

- According to surveys from 2023 and 2024, substantial changes occurred among those who acknowledge the possibility of economic sanctions due to nuclear weapon development.
- The proportion of the "No Nukes, Because of Economic Crisis" type, who oppose nuclear development considering economic sanctions, decreased (50.5% → 40.7%), while the proportion of the "Nukes First" type, who prioritize nuclear development despite recognizing sanction risks, increased (24.8% → 35.7%).
- In contrast, there was no significant change in the "Justification for Nukes" type and the "No Nukes, Regardless of Economic Crisis" type.
- This indicates that the number of individuals who believe nuclear development is necessary, even considering the possibility of economic sanctions, increased as much as the number of those who oppose it due to sanctions decreased.
- Hardliners want nuclear development despite the various issues associated with it. Their numbers have significantly increased compared to 2023.
- These results can be understood in the context that the increased trust in US policy on the Korean Peninsula after the Washington Declaration did not translate into trust in the nuclear umbrella policy, especially among conservatives who showed a decline in trust in the nuclear umbrella policy.
- In other words, those who trust US policy on the Korean Peninsula but not the nuclear umbrella policy (mainly conservative party supporters) are likely to shift to the "Nukes First" type, advocating for nuclear development despite potential economic sanctions.

