

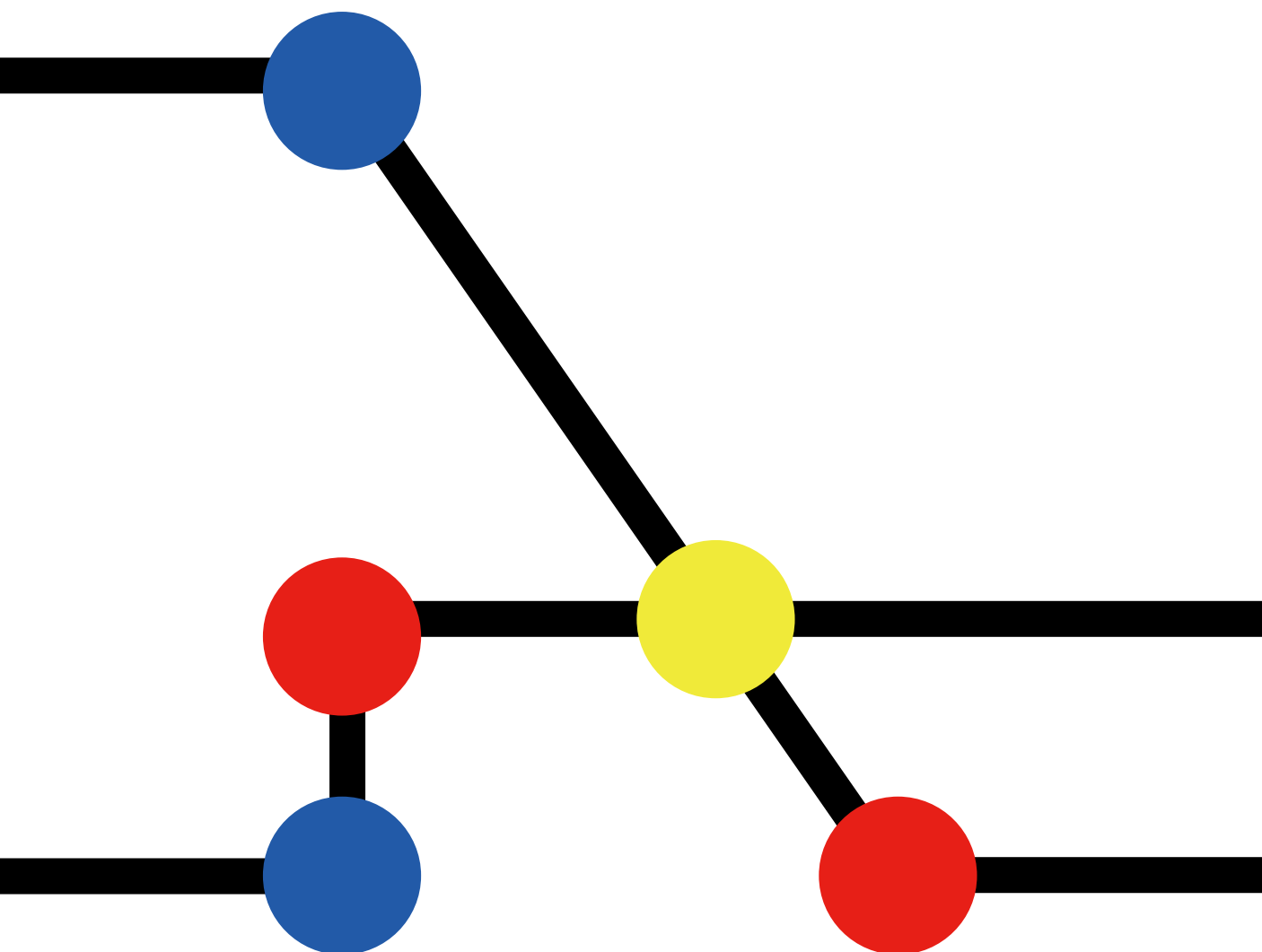
GLOBAL HALLYU
ISSUE MAGAZINE

〈한류NOW〉

한류 심층 분석 보고서

HALLYU NOW

HALLYU STORY
WITH STATISTICS
VIETNAM



KOFICE
한국국제문화교류진흥원

HALLYU NOW

GLOBAL HALLYU ISSUE MAGAZINE

CONTENTS

004	2021 SURVEY ON OVERSEAS HALLYU STATUS A DEEP DIVE INTO HALLYU IN VIETNAM
1	A Backdrop of Hallyu in Vietnam: Economic Cooperation and Cultural Sharing
2	Vietnamese Favorites: Likability by Content Types and Consumption Patterns
3	What Makes Korean Culture Attractive? Factors of Likability by Content Type
4	The Increase and Decrease of Consumption of Korean Cultural Content in Vietnam in the COVID-19 Era
5	Conclusion: Improving Negative Perception and Challenges Ahead

A Deep Dive Into Hallyu in Vietnam



Since 1992 when economic exchange started in earnest with Vietnam after establishing official diplomatic ties, Korean brands and products have become household names in Vietnam. The opening of the cultural market and culture marketing efforts paved the way for Korean culture in Vietnam to gain presence. In 1997, Korean dramas that were provided for free to Hanoi's regional broadcasters by the Korean embassy as part of a friendly cultural exchange became prime time favorites, and in 2005, *Jewel in the Palace* aired nationwide on Vietnam's central broadcaster Vietnam TV(VTV) every day on weekdays. The show aired again immediately after it finished airing thanks to the strong requests from the viewers. In recent times, the environment surrounding mutual cultural exchanges, such as cooperative projects between Korean and Vietnamese broadcasters, exchange between the Vietnamese music scene and the Korean entertainment industry, growth of the Korean society in Vietnam and ensuing proactive cultural exchange, activities of online K-pop communities, and active participation of Vietnamese teenagers in K-pop have contributed to Hallyu in Vietnam. In addition, K-pop artists and industry members of the Korean entertainment sector have been supporting the advancement of the Vietnamese entertainment business.

If Korea is to maintain an economic as well as culturally robust relationship with Vietnam, Korean cultural content needs to overcome its commercially-oriented dynamic and develop content that reflects respect and appreciation for Vietnamese culture. The various business agreements and MOUs, human exchanges, and social/economic/educational/medical support currently undergoing between Korea and Vietnam are expected to propel Hallyu in Vietnam toward co-existence and harmony.

Yoonhee Chang, Ph.D. — Adjunct Professor, Department of Korean Music, Seoul National University

1 A Backdrop of Hallyu in Vietnam: Economic Cooperation and Cultural Sharing

Hallyu in Vietnam is mostly translated as “Làn sóng Hàn,” which is the combination of “Làn sóng (tides and waves)” and “Hàn Quốc (Korea).” Other transcriptions include “Hàn lưu” and “Hallyu.” In the *2021 Survey on Overseas Hallyu Status*, more than 80% of respondents replied that Korean dramas (82.8%) and beauty content (82.9%) were the most popular foreign content in Vietnam, followed by more than 70% answering Korean variety shows, music, movies, and fashion, evidencing the impact of the Korean Wave. How did Korean culture gain such a strong foothold in Vietnam?

The history of Hallyu in Vietnam goes back to the “chính sách Đổi Mới (to change anew)” in 1986, when Vietnam opened its doors to attract foreign capital and technology as part of economic reform and made an effort to venture into overseas markets in order to develop local resources and invigorate the international market economy in Vietnam. Since Vietnam established official diplomatic ties with Korea in 1992, Korean brands such as Lotte, Samsung, Choco Pie, The Face Shop, and Mamonde have become household names. Additionally, opening the cultural market and culture marketing enabled Korean culture to make inroads into Vietnam.

After establishing diplomatic ties, the Korean government and companies started sponsoring Korean education in Vietnam as part of cultural education projects. In this sense, learning the Korean language may have triggered an interest in Korean culture. The Vietnam National University, Ho Chi Minh City, and the faculty of Oriental Studies of VNU University of Social Sciences and Humanities established the department of Korean language in 1994 and 1995, respectively. In the early 2000s, the Department of Korean language was promoted to the Department of Korean Studies, solidifying the size and status of Korean education. Soon, Korean education boomed in Vietnam. The Sejong Institute and private Korean teaching academies flourished, supported by the Vietnamese aspiring to work in Korean companies and an increasing number of international marriages and industrial training programs. Also, the Korea-Vietnam Speech Contest (Cuộc thi nói tiếng Hàn-tiếng Việt toàn quốc lần) was held nationwide and award winners received prize money and an opportunity to study in Korea. In 1997, the Korean embassy in Vietnam provided Korean dramas free of charge to regional broadcasters in Hanoi as part of a friendly cultural

exchange. Ever since, more than 40 TV channels have broadcasted over 20 Korean programs every day during prime time (12pm, 6pm, 9pm, etc.). *Feelings* (1994) which aired on Ho Chi Minh TV paved the way. In 1998, *Son and Daughter* (1992), *Medical Brothers* (1997), *Model* (1997), and *Star in My Heart* (1997) were televised. Then from 1999 to 2001, 30 Korean dramas aired in Vietnam. *Sandglass* (1995), *Autumn in My Heart* (2000), and *Winter Sonata* (2002), dramas that were massive hits in Taiwan, China, Japan, and other Asian countries, also became hugely popular in Vietnam. In 2005, *Jewel in the Palace* (2003) aired nationwide on weekdays on Vietnam's major broadcaster Vietnam TV(VTV). Thanks to the viewers' strong request and immense support, the drama was such a big hit that it was broadcasted again immediately after the show finished airing. The results of the *2021 Survey on Overseas Hallyu Status* showed that *Crash Landing on You* (2019), *Itaewon Class* (2020), and *Descendants of the Son* (2016) were the latest, most-viewed K-dramas, in order, in Vietnam.

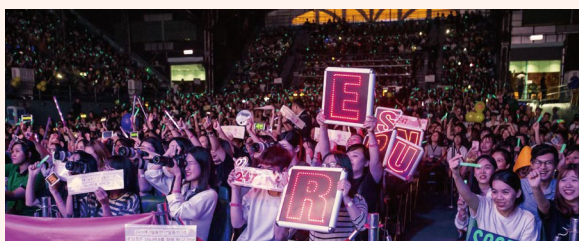
K-pop started to gain attention after Korean dramas swept the Vietnamese entertainment scene. The actors who played lead characters in popular dramas, such as Ahn Jae-wook and Rain (Jung Ji-hoon), who are both singers, sang the theme songs in the dramas' original soundtrack. Early on, these songs were translated into Vietnamese to become widely popular. More recently, the most sought-after K-pop groups, BTS and Blackpink, are steadily strengthening their presence in the country.

Scholars have provided various explanations for the success of Hallyu in Vietnam; The most sensible explanation is that the local creative industry

1



2



1. K-pop Super Concert held in 2020 in My Dinh National Stadium in Hanoi (Source: SM Entertainment / VovWorld (2019, December 18). "2020 K-pop Super Concert" being held").
2. Korea-Vietnam K-pop Friendship Concert held in 2017 in Lan Anh Stadium in Ho Chi Minh City (Source: *The Chosun Ilbo* (2017, November 13). "Hallyu in Vietnam in full bloom... Fans singing along Korean lyrics for 2 hours.")

and cultural programs could not keep up with the rising demand for the pop culture and the quality expectations of the Vietnamese people, especially the youth, as the income level and quality of life rose in the country. Second, the social, cultural, political, and economic commonalities between Korea and Vietnam are pointed out as drivers for Hallyu. For example, historically, both countries have been peripheral to China, have struggled against foreign powers, and have been subject to colonial rule. Also, both countries have experienced ideological division, rapid westernization, and accelerated economic development in modern times. In addition, traditional values stemming from Buddhism and Confucianism such as filial piety, respect for elders, patriarchy, and family-oriented culture are evident in both cultures. Recently, environmental factors surrounding exchanges between the two countries have also had some positive impact on Hallyu in Vietnam. Cooperation between Korean companies and Vietnamese broadcasters, collaboration between the Vietnamese music industry and the Korean entertainment sector, growth of the Korean society in Vietnam and proactive cultural exchange, online K-pop community activities, and active engagement of Vietnamese teenagers in K-pop are recent developments propelling Hallyu. For instance, the Vietnamese dance group ST.319 debuted in 2011 and gained popularity in Vietnam by covering songs and choreographies of K-pop groups. Korean labels such as SM, JYP, and YG have recognized their high-quality performance, and they even received an Achievement Award for their contribution to the promotion and positive awareness of K-pop groups in Vietnam.

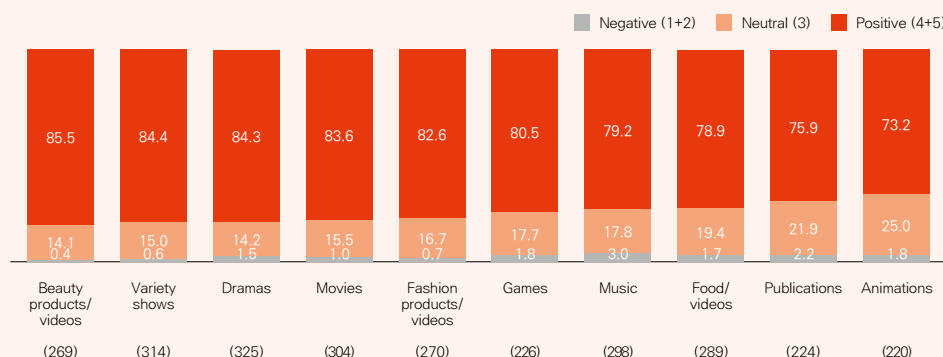
Korean entertainment professionals have also contributed to Vietnam's entertainment business development. In 2014, the K-pop reality show sponsored by Lotte and co-produced by Korean and Vietnamese companies, *VK-POP SUPER STAR*, featured Korean singer Baek Ji-young as a judge and offered an opportunity for young Vietnamese prospects to undergo the same training as Korean singers. In 2016, K-pop idol group Mamamoo's label, RBW, ventured into Vietnam jointly with Naver to produce local entertainment shows such as *Khánh Khánh Show* (2016), *Hát theo yêu cầu* (2016), *Gặp Là Chiến* (2017), and *M story* (2016) which aired on Naver VLIVE. In 2019, Midam Entertainment and Stardium Entertainment each inked an MOU with Vietnam's Your TV and VTC Online, respectively. Also, Microdot, a Korean music producer/rapper, has been coaching up and coming musicians in Vietnam as the leading producer of a Vietnamese music label.

2 Vietnamese Favorites: Likability by Content Types and Consumption Patterns

In the *2021 Survey on Overseas Hallyu Status*, the Vietnamese were found to have a positive image of Korean content overall. Taking a closer look, “Korean beauty products and videos” scored the highest likability of 85.5%, which was followed by “variety shows (84.4%),” “dramas (84.3%),” and “movies (83.6%).” “Fashion,” “games,” “music,” “cuisine,” “publications,” and “animations” ranked lower, but the scores were not far apart. “Animations” had the lowest likability, but the score was 73.2%, with a mere 1.8% of respondents replying negatively. “Music” recorded the highest negativity, but was only around 3%. The survey results showed that all types of content were perceived positively in Vietnam.

General Likability of Korean Cultural Content¹

Base: Vietnamese with experience of using the following type of Korean content, Unit: %



Looking at the average contribution of Korean content to the per capita cultural content consumption of Vietnam, “beauty products” were found to be at the top, with 40%, followed by “dramas (39.7%),” “music (34.9%),” and “movies (34.2%).” The order was largely in line with the result of the likability survey. The percentage of respondents with experience of purchasing Korean products within the past year was 94.4% for “Korean food products,” followed by 93.8% for “cosmetics” and “in-person dining at

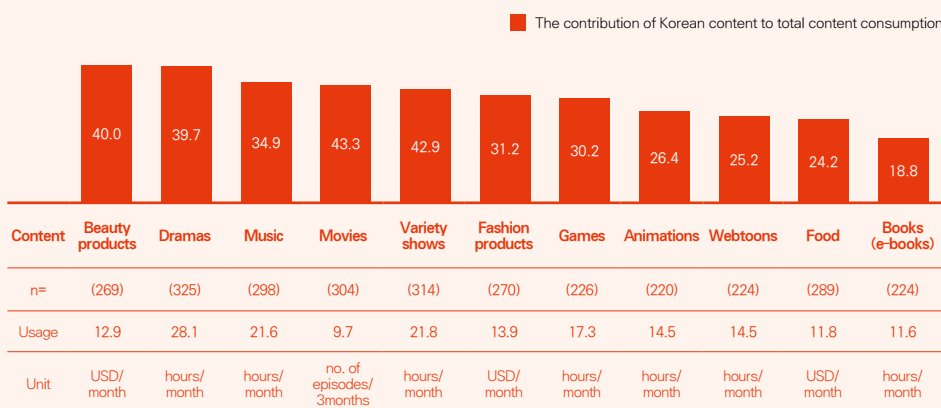
1. The term “cultural content” or “content” is frequently used in Korean society and cultural contents are an integrated discipline that combines humanities, social sciences, natural sciences, and the arts. The cultural content industry is defined as the industry related to the production, distribution, and consumption of cultural products and services (i.e., movies, games, animations, comics(webtoons), music, internet & mobile contents, broadcasting, etc.)

Korean restaurants,” and 93.6% for “fashion products.” For the recent four years, the percentage of respondents reporting to have purchased “home electronics” was the highest at 82.4%, followed by “cell phones” at 72.4%.

Per Capita Consumption of Korean Content by Content Type

Base: Vietnamese with experience of using the following type of Korean content, Unit: %

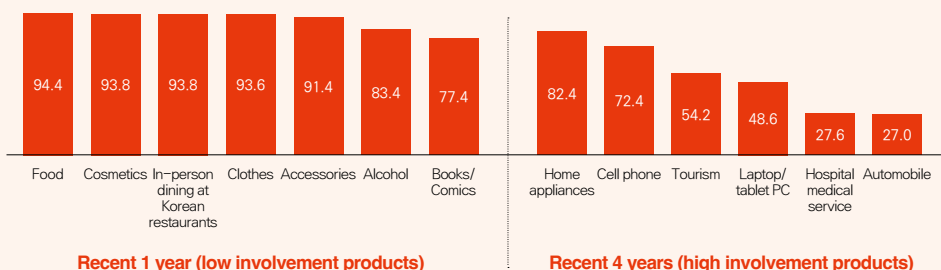
Q: How much time do you generally invest in Korean content and what is the contribution of Korean content to your total content consumption?



Percentage of Experience with Korean Products

Base: Vietnam total, n=(500), Unit: %

Q: Please mark the frequency closest to your experience of purchasing Korean products for the recent 1 year and recent 4 years for the following items.



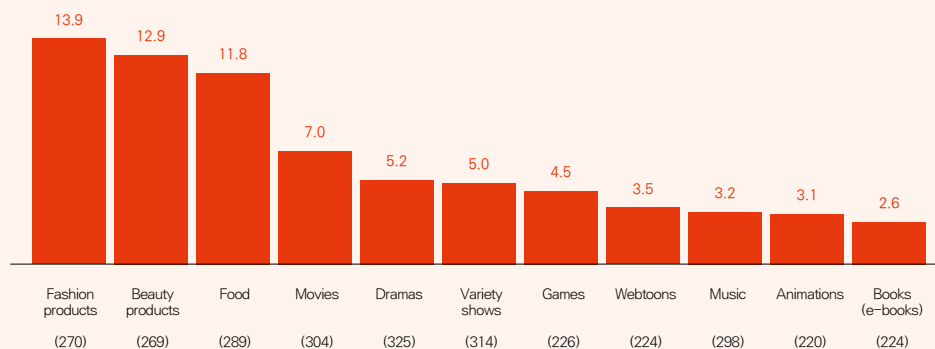
The average monthly spending was found to be inconsistent with the likability/ consumption, which seems to be related to the type and method of consuming content. For the high-spending categories such as “fashion products (\$13.9),”

“beauty products (\$12.9),” and “food (\$11.8),” it was found that an amount above a certain level was set for spending based on the price of products regardless of the frequency of purchase because they are used in the everyday lives of consumers. However, the average amount spent on video and publication materials such as “dramas,” “variety shows,” “games,” “webtoons,” “music,” “animations,” and “books(e-books)” was relatively lower (around \$2.6~\$7). This is probably because while the likability and frequency of usage may be high for audio and video content, consumers can enjoy low price or unlimited usage after paying the upfront cost charged by online platforms and media subscriptions.

Spending on Korean Cultural Content (Monthly Average)

*Base: Vietnamese with experience of using Korean cultural content, unit: USD (*1 month, with the exception of movies (3 months))*

Q: What is your average spending on Korean cultural content?



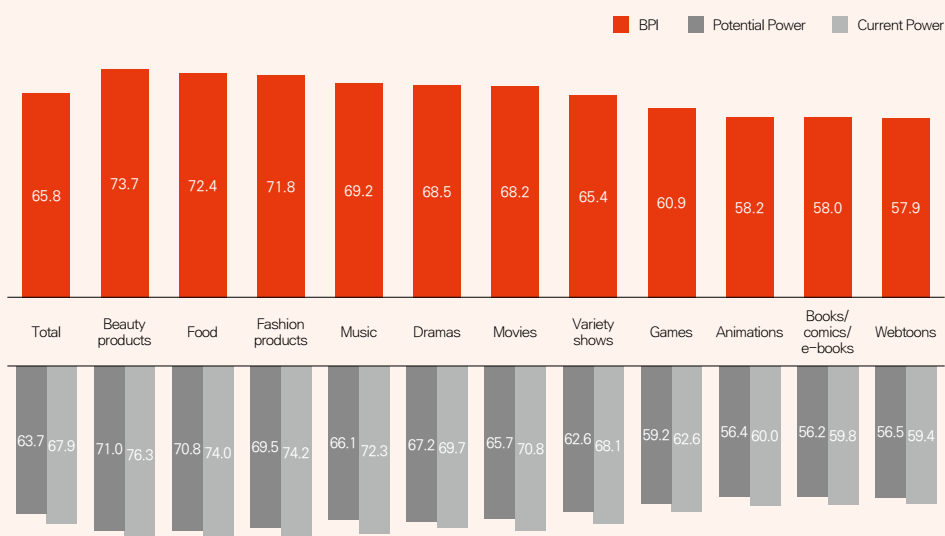
Product consumption or purchase is deeply related to brand power. The Brand Power Index (BPI) of Korean cultural content in Vietnam was 65.8. The top 3 content categories with the highest BPI score also showed the highest consumption. The BPI of Korean “beauty products” was the highest at 73.7, followed by “food” at 72.4 and “fashion products” at 71.8. Consumables such as cosmetics, food and beverages, and apparel boasted high BPI scores. In fact, a wide spectrum of products displayed strong brand power in Vietnam, including oriental cosmetics, accessories, hairstyles, cell phones, home appliances, kimchi, red ginseng (hongsam), as well as wedding dresses and children’s wear. Products featured in recently aired dramas and films were especially popular. For example, the clothes worn by Yoon Se-ri (the main character played by Son Ye-jin) in *Crash Landing on You* or accessories worn by Blackpink in their music videos were in vogue.

Brand Power Index (BPI) by Type of Korean Cultural Content

Base: Vietnam total, n=(500), Unit: score

Q: How popular is Hallyu in your country?

Q: Which best describes your attitude toward Korean cultural content?



3 What Makes Korean Culture Attractive? Factors of Likability by Content Type

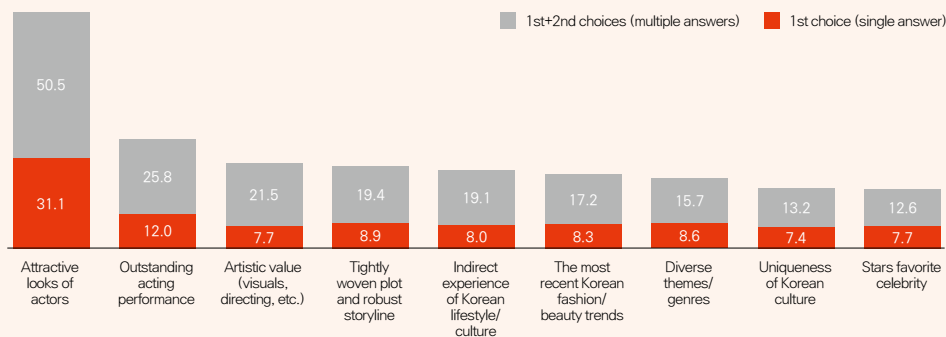
The *2021 Survey on Overseas Hallyu Status* showed that in Vietnam, the recent favorite dramas were *Crash Landing on You*, *Itaewon Class*, and *the Descendants of the Sun*, while *Parasite* (2020) and *Train to Busan* (2016) were the most popular Korean movies. Lee Min-ho, Song Hye-kyo, BTS, Blackpink, and Bigbang were the most popular Korean actors and singers. The main driver for video content was the “attractive appearance and outstanding acting skills of actors.” Notably, “attractive appearance of actors” scored 50.5% and 43.8% for dramas and movies, respectively, followed by “outstanding acting,” which was 25.8% and 31.3% for dramas and movies, respectively. The results were similar for K-pop; “attractive appearance and style of artists (38.9%)” surpassed the musical aspect, “addictive chorus/rhythm (29.5%).”

Factors Driving Popularity of Korean Content

Korean Dramas

Base: Vietnamese with experience of viewing Korean dramas, n=(325), Unit: %

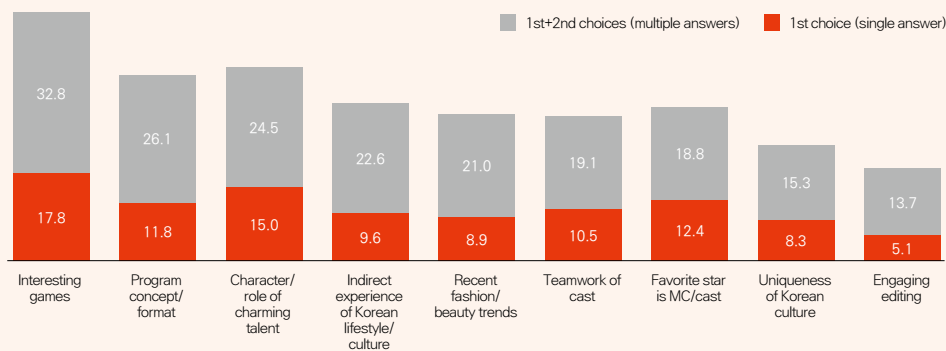
Q: What do you think drives popularity of Korean dramas in your country?



Korean Variety Shows

Base: Vietnamese with experience of viewing Korean variety shows, n=(314), Unit: %

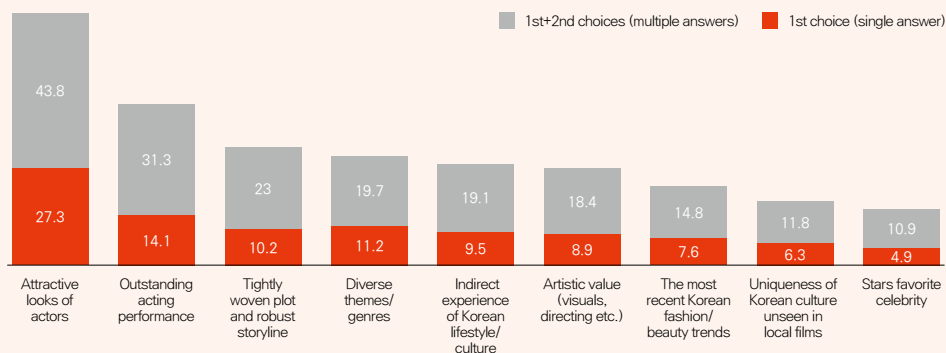
Q: What do you think drives popularity of Korean variety shows in your country?



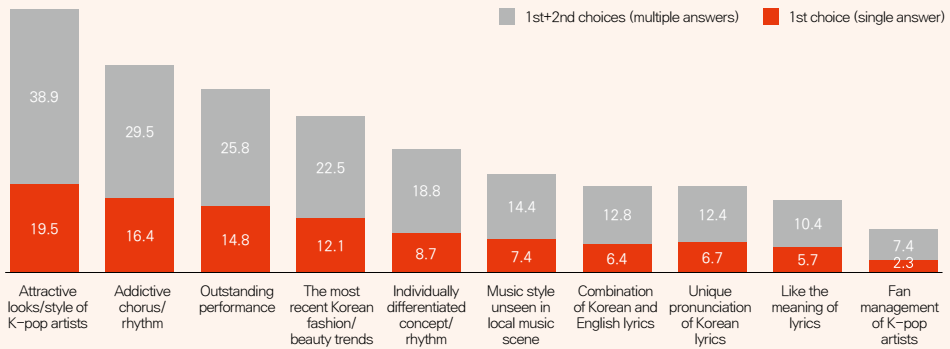
Korean Movies

Base: Vietnamese with experience of viewing Korean movies, n=(304), Unit: %

Q: What do you think drives popularity of Korean movies in your country?



Q: What do you think drives popularity of Korean music in your country?



Meanwhile, quality was the decisive factor for consumption activities, including the purchase of beauty, food, and fashion products. For beauty products, 54.6% chose “superior quality and effect” and for Korean food, 56.1% answered “taste” and 30.8% picked “healthy ingredients/recipe” for the main reasons for purchasing Korean brands, evidencing that quality was the most crucial factor. In the case of Korean fashion, “diversity and style,” “design,” and “promotion by stars/influencers” were some of the many factors that consumers considered along with quality. The results demonstrate that quality as well as stylish visuals and celebrity-driven marketing influence likability.

The most popular animation characters in Vietnam were Larva and Pinkfong. The game with the highest awareness was *Crossfire*, and the most preferred games were *Summoners War* and *Player Unknown’s Battleground*. In the case of animations, “visual aesthetics (37.7%)” and “character appearance/design (28.6%)” were found to be main drivers, while for games, they were “graphics/images (38.9%)” and “playing method/composition (24.8%).” In general, exterior sophistication (i.e., the looks, visuals, and design) on top of internal pragmatism (i.e., effective, high-quality content) were the main reasons for the popularity.

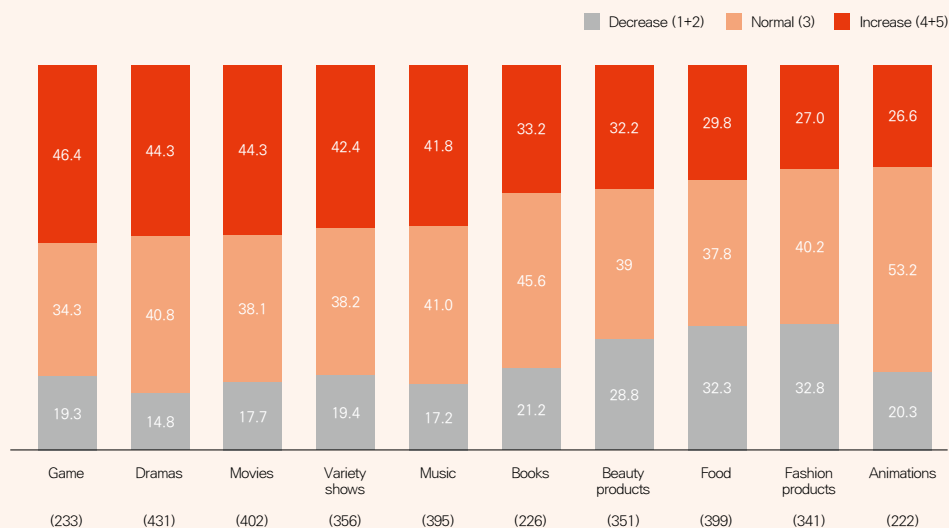
4 The Increase and Decrease of Consumption of Korean Cultural Content in Vietnam in the COVID-19 Era

Consumption of Korean cultural content in all areas except fashion and food were found to have increased since the pandemic. In particular, the consumption of dramas, movies, variety shows, and games grew significantly since the onset of COVID-19.

Change in Consumption of Korean Cultural Content Compared to Before COVID-19

BASE: Vietnamese with experience of consuming Korean cultural content, Unit: %

Q. How has your consumption volume changed for each of Korean cultural contents/products since the COVID-19 outbreak this year compared to before the COVID-19 outbreak (2019)?



This seems to be driven by the fact that the main distribution channels for dramas, movies, variety shows, music, animations, and games were online/mobile platforms and TV, which were less impacted by social distancing, working from home, or self-isolation driven by COVID-19. Meanwhile, consumption at theaters, local screenings, or film festivals was almost non-existent during the pandemic. Even for movies and music, the direct on-site experience was extremely low. This suggests that it was challenging for consumers to enjoy Korean cultural content in person or that the main consumption channels were digital during the pandemic.

Distribution Channel by Type of Korean Cultural Content

Base: Vietnamese with experience of consuming the following Korean cultural content, Unit: %, multiple answers possible

	Dramas	Variety shows	Movies	Music	Animations
Sample size	(325)	(314)	(304)	(298)	(220)
TV broadcast	 87.4	 83.4	 82.2	 75.8	 76.4
Online/mobile platform	 75.7	 81.5	 75.0	 83.9	 76.8
CD/DVD/Blu-ray/ Videotape	 16.9	 16.6	 19.7	 18.8	 16.8
Local theater			 38.5		
Local screening, film festival, event			 13.2		
Radio				 12.4	

Social distancing and self-isolation seemed to have posed challenges on outdoor activities and eating at restaurants, which should be why the increase and decrease of consumption of beauty products only slightly differed (32.2% and 28.8%, respectively) and the consumption of fashion and food decreased. Also, 47.4% for fashion, 43.5% for beauty, and 51.9% for food responded that “shows and exhibitions held in home country” was the leading distribution channel, implying that in-person communication was vital for consuming such categories. During the pandemic, consumption of food, apparel, and beauty products would have faced hurdles as an online or contact-free form of sales would not have been able to replace in-person consumption completely.

5 Conclusion: Improving Negative Perception and Challenges Ahead

Multiple sources confirm that the Vietnamese people trust the quality of Korean brands, are favorable toward the appearance and talent of Korean artists, and are actively consuming Korean products and cultural content. It

is notable that for beauty products, a large number of respondents, around 30%, reported that there are no factors that can undermine likability, which is grounds for optimism. However, there are still many reasons that are being stated as factors of negative perception, as can be seen by 35.4% responding that they “agree with the negative perception of Hallyu.”

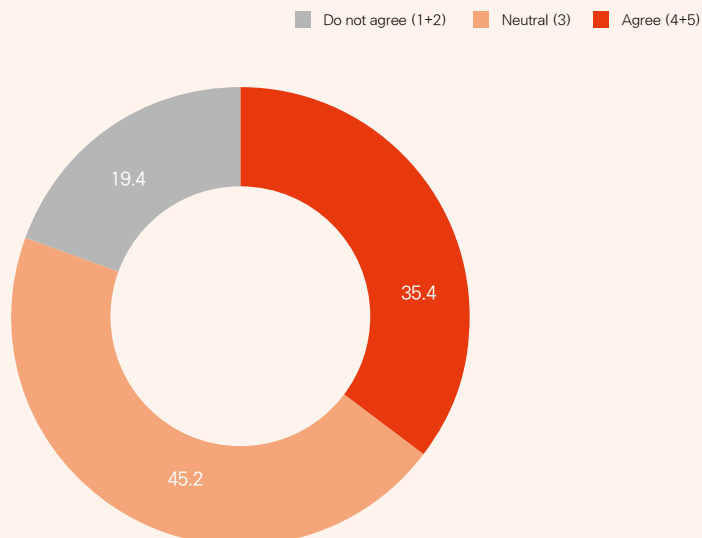
Factors hindering likability of dramas, movies, variety shows, music, and games include “predictable and uniform material,” “format that relies on talk with guest,” “unfamiliar and difficult Korean lyrics,” “low quality of the translation of lyrics,” and “requires high specification device.” These comments should be accepted and improved over the long term to advance Korean culture.

The commercial aspects of Hallyu, which was found to be one of the critical reasons for the negative perception of Hallyu, require self-reflection and self-realization by the Korean cultural scene. Meanwhile, “low value for money” for food and “high price compared to quality” for fashion and beauty products were cited as negative factors. Answers such as “inappropriate, unethical comments and behavior of Hallyu stars” and “suggestive and provocative content” can also be understood as pointing out Hallyu’s focus on commercial success.

Negative Perception of Hallyu

Base: Vietnam total, n=(500), Unit:%

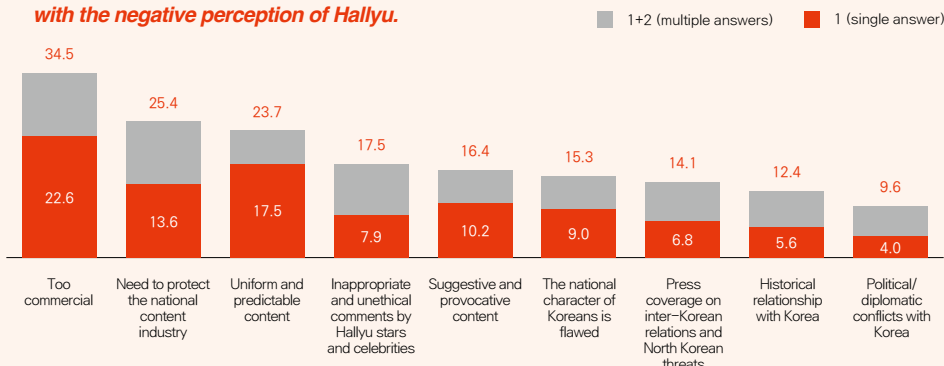
Q. Please mark your level of agreement with the negative perception of Hallyu.



Factors Contributing to the Negative Perception of Hallyu

Base: Vietnamese who agree with the negative perception of Hallyu, n=(177), Unit: %

Q: Please choose your 1st and 2nd reason, in order, for why you agree with the negative perception of Hallyu.



Contrary to the positivity of the early days, the Vietnamese media is increasingly raising concerns on Hallyu, as they feel a sense of urgency for the local cultural sector. The need to protect the national content industry is the foundation of the negative perception for Hallyu. The popularity of Korean dramas and K-pop is described as “the invasion of Korean culture (Thâm nhập của văn hóa HanQuoc)” or “a sweet invasion (sự xâm lăng ngọt ngào),” which shows a sense of crisis felt by the Vietnamese people and media. There are also discussions about how Korean pop culture is negatively influencing Vietnamese youth which can undermine national identity; and thus, some argue the time allocated to foreign content should be reduced and locally produced content reflecting the Vietnamese cultural context should be broadcasted more.

In this respect, for Korea to maintain a relationship with Vietnam that continues economic cooperation while sharing the culture and emotions of Korea, there is a need to overcome the commercially oriented dynamic of Korean cultural content and to develop content that reflects respect and appreciation for Vietnamese culture. As human exchanges, support, and MOUs between Korean talent agencies and Vietnamese entertainment companies are active, Hallyu in Vietnam should be able to develop a win-win partnership that promotes harmony. 🇰🇷

References

Korean Foundation for International Cultural Exchange (2021). *2021 Survey on Overseas Hallyu Status*.