GLOBAL HALLYU
ISSUE MAGAZINE

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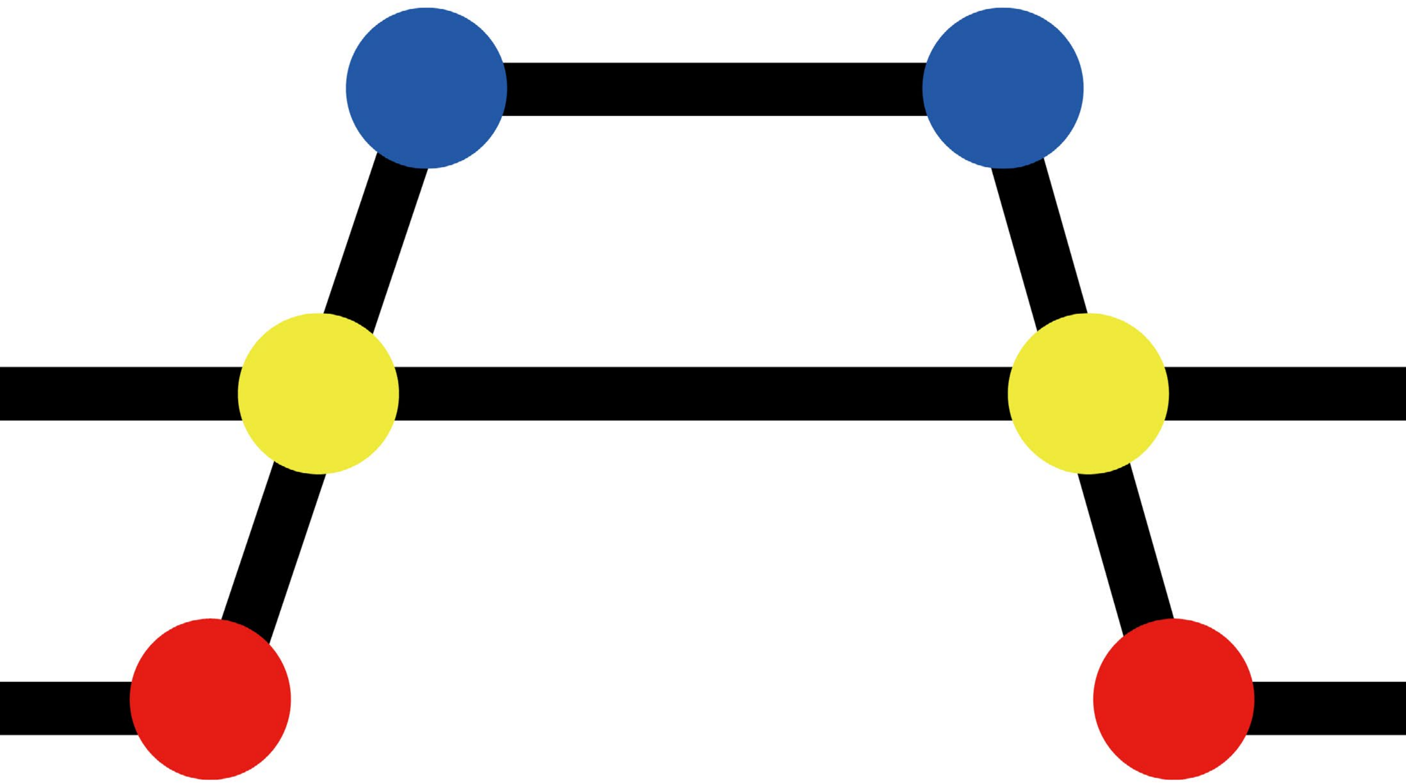
HALLYU NOW

HALLYU STORY
WITH STATISTICS
THE UK



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HALLYU NOW

GLOBAL HALLYU ISSUE MAGAZINE

CONTENTS

2021 Survey on Overseas Hallyu Status

A Deep Dive into Hallyu in the UK

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This article provides an analysis of Hallyu in UK based on the statistical results of the *2021 Survey on Overseas Hallyu Status* (March 2021), a report published by the Korean Foundation for International Cultural Exchange (KOFICE). The report can be found online at www.kofice.or.kr.

The 'British Invasion' refers to British pop culture taking on the US in the past. The serial success of BTS, *Parasite and Squid Game* is now being dubbed the 'Korean Invasion.' The UK is a strategically important country for Korean cultural content* as it lies at the heart of global pop-culture discourse albeit not playing an essential role in the powerful narrative of the historical development of Hallyu. Korean culture in Britain has never been mainstream. However, the growth of online and mobile platforms has increased accessibility and interest in Korean culture. The survey on the consumption and status of Korean cultural content in the UK raises some questions about the conventional beliefs of globalization of the Korean Wave. During the Covid-19 pandemic, the British government implemented a relaxed quarantine policy of social distancing or staying at home, which led to the growth of video consumption. Higher viewership of variety shows and stronger interest in Korean cuisine were especially evident. The UK, a country that maintains close diplomatic relations based on a diverse array of cultural exchange activities, is showing a unique dynamic of Hallyu.

The report critically reviews the *2021 Survey on Overseas Hallyu Status* to derive the following implications:

1. The mutual reliance between Korean cultural contents, global media and online platforms is exceptionally high.
2. It is essential to understand Hallyu by genre and region.
3. The characteristics of Korean culture, or Korea's national traits, are not always a positive force.
4. The successful strategies in Asia, for example, leveraging Hallyu for PR or Hallyu star marketing, may not be effective in the UK.

As such, the UK, being at the forefront of the new Hallyu paradigm and as a strategic location, offers important implications for the global dissemination of Hallyu. The UK can serve as a bridge for the future Hallyu as a testing ground for the new Hallyu paradigm. In this regard, the implications of this report will hopefully contribute to the improvement of the statistical structure of the *2021 Survey on Overseas Hallyu Status* and the interpretation of its results.

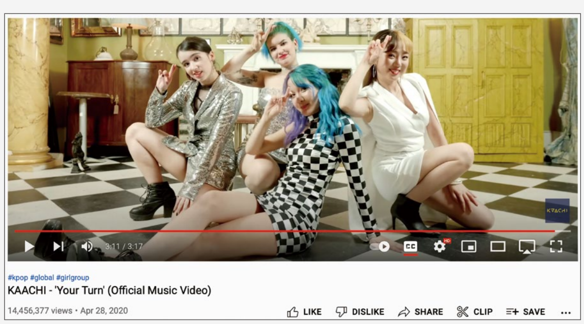
* The term "cultural content" or "content" is frequently used in Korean society and cultural contents are an integrated discipline that combines humanities, social sciences, natural sciences, and the arts. The cultural content industry is defined as the industry related to the production, distribution,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

1 The Origin of the Creative Industries, Cultural Policy and Pop-Culture Discourse

The Korean ‘contents industry’ is in line with the British ‘creative industries’ in that it leads to the ‘social justification and public investment in the cultural industries (Lee, 2016).’ The discourse of the Korean cultural content industry has actively accepted the concept of creativity of the British creative industries in terms of creativity and innovation (Lee, 2021). For example, in 2013, the Ministry of Culture, Sports and Tourism of Korea and the UK’s Department of Digital, Culture, Media & Sport inked an MOU on the cooperation of the cultural and creative industries of Korea and the UK. It held the *Korea-UK Creative Industry Forum* from 2014 to 2018. At the Forum, events that encouraged the exchange and promotion of cultural content companies were mainly led by CT (Cultural Technology) based content start-ups. In addition, the British Council and the Art Council Korea co-hosted the *Korea-UK Culture-Art Conference*. As such, the British creative industries and art policies were introduced in Korea as best practices.

The word ‘phenomenon’ better describes Hallyu in the UK than ‘fever’ (Sa, Hye Won, 2021). London, the UK capital, is a melting pot of diverse ethnic groups and has hosted various events that promote Korean culture or cater to Hallyu fans. For example, Korea and the UK designated 2017-2018 as the Year of Mutual Exchange and held the *London Korean Festival*. Also, the *London Korean Film Festival*, sponsored by the Korean Film Council, celebrated its 16th anniversary in 2021 and the Korean Cultural Centre UK started running

1. The *Hallyu Con 2020* poster (Source: Ministry of Culture, Sports and Tourism, Korean Culture and Information Service)
2. UK K-pop girl group 'KAACHI' (Source: KAACHI official Youtube channel)



the K-Pop Academy, a cultural education program, in 2012. More than 600 graduates of the program have become a driving force of Hallyu by starting regional Hallyu communities (Choi, Yoon Jeong, 2021). The Korean Cultural Centre UK continuously hosts cultural events based on close cooperation with such communities. Recently, Hallyu fans took the lead in holding the *Hallyu Con 2020*. As the stage for the cultural exchange of Hallyu communities, London gave birth to a new convergence phenomenon such as 'KAACHI', Europe's first K-pop idol group (Lim, Hee Yoon, 2020). The gathering of Hallyu fans who admire Korean idols and female cultural content entrepreneurs has led to the expansion of the scope of Hallyu. This case raises questions while presenting the potential of the scope of Hallyu's Korean identity or Korean-ness. It shows that the value of 'Made in Korea' that cuts across Hallyu is continuously challenged amid globalization.

The UK is not a major consumer of Hallyu content or a strategic export market. Nevertheless, it has symbolic meaning as the production base of media discourse. In 2016, a BBC documentary *South Korea: The Silent Cultural Superpower* portrayed the journey of Korea from one of the poorest countries in the world undergoing rapid economic development and threw light on the success of Korea's pop culture as post-economic development. In 2020, BBC interviewed Lee, Soo Man, Chief Producer of SM Entertainment, for its documentary on K-pop. Also, BBC's *K-Pop Idols: Inside the Hit Factory* looked into BTS's concert held in London's Wembley Stadium as a landmark event and explained the growth of K-pop as resistance to and challenging the Western-dominated global music industry (Kim, Hyo Jeong, 2019). Such an approach generally maintains a value-neutral position toward

3. Interview with Lee, Soo Man in *K-Pop Idols: Inside the Hit Factory* by BBC4
4. Summary of foreign press on entries of Korean vocabulary into the Oxford Dictionary (Source: Ministry of Culture, Sports and Tourism, Korean Culture and Information Service)

the success of Hallyu while making an attempt to understand the drivers of the phenomenon. The programs were compelled by the idol system of Korea, a unique in-house production system, which is atypical in the UK. It was an approach that analyzes Hallyu as a regional phenomenon rather than an analysis by Hallyu recipients. In particular, viewing Hallyu as a force of resistance to the the US-dominated pop culture hegemony seems to be a shared understanding within BBC, evidenced by the BBC describing Director Bong, Joon Ho academy award-winning *Parasite* as “Hallyu sweeps Hollywood!” (Li, So Yeon, 2020). The storytelling of such success becomes the centre of foreign press and creates a certain discourse.
Another symbolic event in 2021 was the entry of Korean vocabulary into the British Oxford Dictionary, which made headlines in Korea. Meanwhile, the global success of *Squid Game* has expanded the interest of the press from K-pop to overall Korean culture. The Daily Mail, a British media, commented on an article titled “How Did Hallyu Become Mainstream in the UK?” that “It has become easy to come across Korean food, fashion, music and the Korean language in Britain.” The attempt is to explain the popularity of Korean food, beauty and other genres of Korean culture and products as an intentional growth narrative of the cultural industry in a comprehensive manner. However, such logic still remains superficial (Kim, Min Ju, 2021). Likewise, the UK served as a production site of creative industries, cultural policy and pop culture discourse. In this regard, the report will critically analyze the results of the *2021 Survey on Overseas Hallyu Status* conducted in the UK to understand the Hallyu phenomenon's complexity, rather than to make an effort to infer the Hallyu fever in the UK.

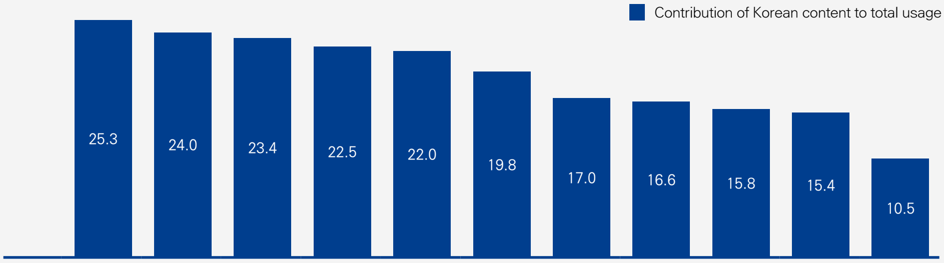
2 Re-Understanding the Role of Global Platforms and Distribution of Korean Cultural Content

One of the most evident trends in the *2021 Survey on Overseas Hallyu Status* was the increasing consumption of variety shows. The pandemic caused higher consumption of variety content and 43.8% replied that their consumption of variety content has increased since the outbreak of COVID-19, a global phenomenon. The growth of variety show consumption, compared to other genres, was record-breaking not only in the UK but also in China, Japan, India, the US, France and Russia. In addition, variety shows took up the largest portion, 25.3%, of per capita consumption of Korean cultural content. Regarding viewing hours, variety shows ranked higher than dramas or films and was even noted as the most accessible content.

Per Capita Consumption by Cultural Content Genre

BASE: Persons with experience of using Korean cultural content, by genre, in the UK, Unit: %

Q. In general, how many hours do you use Korean content and how much does Korean cultural content contribute to your total content consumption?



Content	Variety shows	Beauty	Fashion	Drama	Webtoon	Film	Publication (e-books)	Animation	Game	Music	Cuisine
n	(132)	(159)	(142)	(127)	(123)	(201)	(123)	(176)	(158)	(263)	(288)
Usage	11.7	26.7	38.3	9.7	7.7	5.3	7.0	5.5	7.5	7.1	18.4
Unit	hours/ month	USD/ month	USD/ month	hours/ month	hours/ month	no. of episodes/ 3months	hours/ month	hours/ month	hours/ month	hours/ month	USD/ month

Distribution Channel by Genre

BASE: Persons with experience of using Korean cultural content by genre in the UK, Unit: %, multiple answers

	Drama	Variety Show	Film	Music	Animation
No. of Samples	(127)	(132)	(201)	(198)	(220)
Online/mobile platform	69.3	72.0	53.2	75.3	59.1
TV broadcast	48.8	47.7	39.8	35.7	47.7
CD/DVD/Blueray /video tape	18.9	17.4	36.3	17.1	16.5
Theatre in home country			16.4		
Local film screening, film festival, event			6.5		
Radio				12.2	

Understanding the access route for each type of Korean content is required to understand the figures properly. The distribution channel for drama, cinema, variety shows, music and animation was available and for variety shows, 72% answered that they use online and mobile platforms. This implies that online and mobile platforms are the main distribution channels for Korean variety shows and leads to the assessment that users are finding it easy to access such programs via these channels. The backdrop of such assessment can be deduced by comparing the different consumption behaviour of a similar genre, video content.

In general, the consumption of Korean variety shows is increasing but still lacks awareness compared to film or music and consequently, press coverage is also comparatively weak. Given the relatively higher entry barrier, compared to video content of other genres, the above results can be interpreted as a viewership behaviour that heavily relies on passive viewership driven by algorithms of Netflix and Youtube. In essence, the only plausible reason would be that Netflix is carrying more Korean variety shows. If such a premise is duly established, a strategic approach to enhance accessibility and usability by improving the quality of translation and increasing the volume of variety shows on online/mobile platforms are necessary. However, this can be considered as the role and function of online platforms which suggest that strategies and policies to simply strengthen distribution channels or support local OTT platforms may not be sufficient. Ultimately, improving algorithms, higher volume of content for AI learning, enhanced quality of subtitles and dubbing would be imperative. However, as can be seen in major online/mobile platforms, the competition among global content distribution channels is fierce. A few large media platform companies dominate the market, even if there are many smaller international players. The globalization of Netflix is bringing down the barriers of subtitles and dubbing. It seems that the '1-inch tall barrier' mentioned by Director Bong, Joon Ho has already been considerably overcome and Netflix has been making substantial investments to improve these limitations technologically. In fact, <Squid Game> has been dubbed in 13 languages and has subtitles in 31 languages (Lee, Woon Ja 2021). It can be said that the competition of global platforms and their strategy for expansion have been the most effective tool for overcoming Hallyu's language barrier. The hasty entry of Korean OTTs into overseas markets and government support may not be a strategic choice. In this sense, strengthening the international competitiveness of local OTT platforms should be approached from the perspective of developing a local ecosystem rather than from the perspective of Hallyu.

Main Online/Mobile Platform

BASE: Persons with experience of using online/mobile platforms when using Korean cultural content in the UK, Unit: %, multiple answers

Q. Please choose all of the online/mobile platforms you use to use Korean content.

	Drama	Variety Show	Film	Animation
No. of samples	(88)	(95)	(108)	(104)
Netflix	68.2	55.8	68.2	51.9
Youtube	56.8	57.9	55.1	59.6
Amazon Prime	40.9	37.9	43.0	24.0
Youtube Premium	17.0	25.3	7.5	15.4
Hulu	13.6	15.8	6.5	3.8
Youku	10.2	14.7	4.7	9.6
iQiyi	6.8	14.7	0.9	2.9
Sling TV	6.8	11.6	1.9	1.0
iflix	4.5	9.5	2.8	3.8
Others	3.4	1.1	3.7	1.9

	Music
No. of samples	(198)
Youtube	66.7
Spotify	43.4
Amazon Music	24.2
iTunes	18.2
Apple Music	18.2
Google Play Music	10.1
Deezer	8.1
QQ Music	6.6
Others	3.0

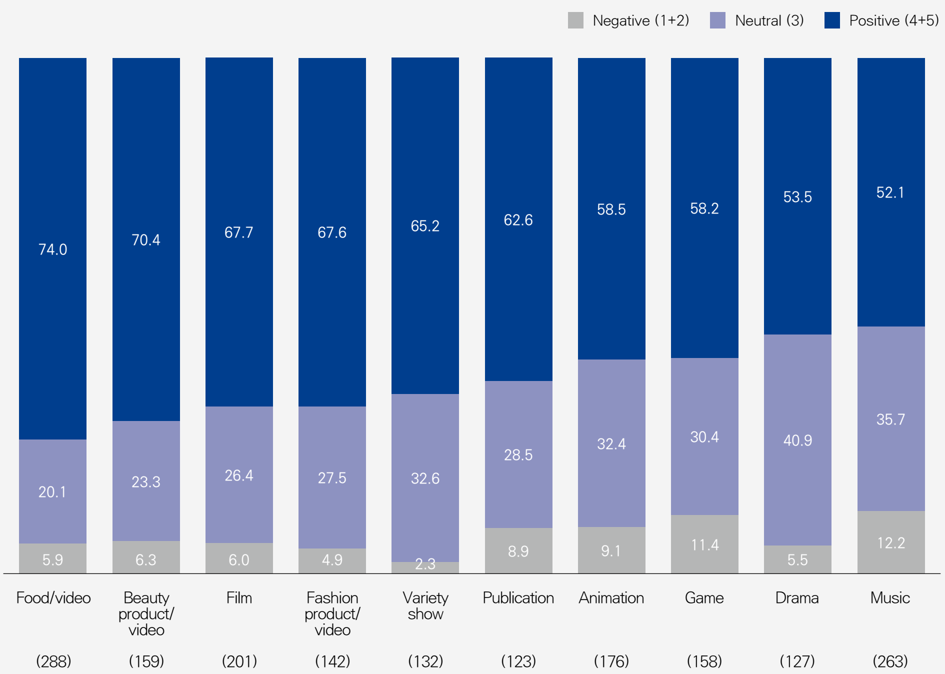
3 Re-Visiting Regional Differences and the Attributes of Each Genre of Hallyu

In the UK, the likability of Korean food scored the highest. The likability of music and drama was only around 52.1% and 53.5%, respectively, while it was very high for cuisine and fashion, 74% and 70.4%, respectively. The drivers of Korean gastronomy were taste (59.4%), healthy ingredients (35.8%) and high value for money (20.8%). Only 19.1% replied ‘Korean cuisine featured in Korean cultural content’ and an even smaller number, a mere 6.9%, answered ‘advertisement by favourite Hallyu star.’ This implies that the analysis that the popularity of Korean food is the result of the promotion of Korean gastronomy about Hallyu pop culture and its expansion into Korean culture, often cited in the Korean government’s Hallyu policy, may not be valid in the UK. Moreover, it is questionable whether consumption of foreign cuisine driven by pragmatic reasons such as taste or affordability can be considered a Hallyu phenomenon. The same goes for the use and purchase of fashion and beauty brands. Looking at Korean products' purchasing experience and purchasing frequency in the recent year, ‘purchase of food (73.2%)’ and ‘dining at restaurants (66.4%)’ were the highest. There is a need to reconsider the connection between cultural likability and product purchase. It is necessary to understand that pragmatism is prevalent when choosing food, given the diversity and multi-culturalism of British culinary culture and the historical and cultural background of the UK.

The colonial history opened Britain up to exotic spices and recipes. The globalized dining culture of the UK is a very different behaviour of cultural consumption than China's 'Chimac' fervour. It is worth contemplating whether categorizing cuisine as a Hallyu product or connecting Korean gastronomy to Hallyu without geographic consideration is effective. A look into why consumers are buying Korean products offers more insight. In the UK, 'quality (71.7%)' and 'price (40.7%)' were the biggest drivers while 'because it appeared on a TV show (11.7%)' scored very low. In the case of fashion, 38.7% answered 'design' and 29.6% replied 'price' as the main motivation while only 13.4% mentioned 'the product is promoted by my favourite Hallyu star.' Similar patterns can be seen for beauty. 'High effectiveness and quality' and 'affordable price' scored 32.1% and 26.4%, respectively, while only 13.8% answered 'the product is promoted by my favourite Hallyu star.' The survey suggests that beauty products are like other manufactured goods such as electronics or automobiles in that the performance and price levels are the main factors that the impact purchase. In contrast, cultural factors were relatively less effective motivators of consumption.

Overall Likability of Korean Cultural Content

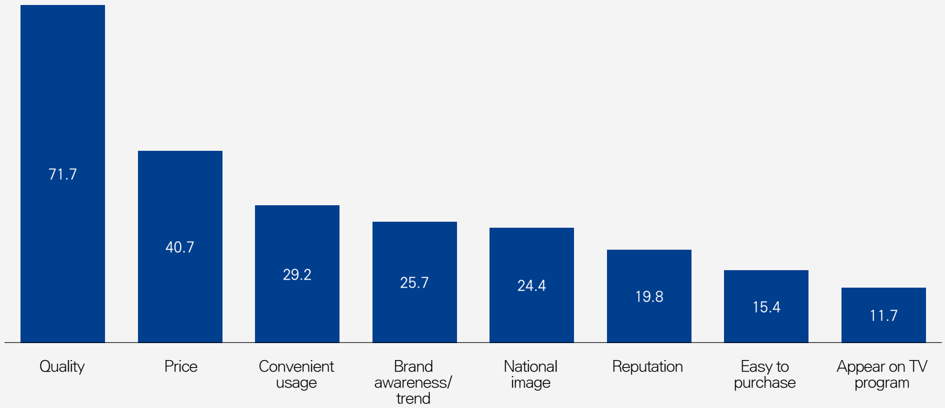
BASE: Persons with experience of using Korean cultural content, by genre, in the UK, Unit: %



Reasons for Purchasing Korean Products/Services

BASE: Persons with experience of purchasing a low involvement Korean product/service in recent 1 year or persons with experience of purchasing a high involvement Korean product/service in recent 4 years n=(435) Unit: %, multiple answer

Q. Please choose up to 3 reasons, in order of importance, on why you purchased a product or service of a Korean brand.



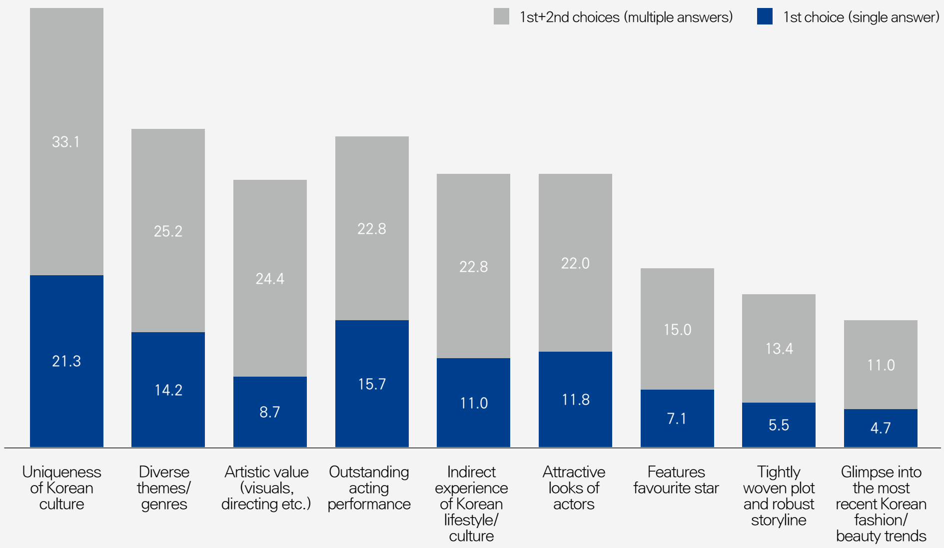
Meanwhile, the statistics on the popularity of Korean content such as drama, cinema and variety shows indicate that 'Korean-ness' or the Korean identity are not only perceived as diversity or uniqueness but is also the positive driver of popularity. For example, Korean drama's main drivers of popularity were 'uniqueness of Korean culture (33.1%)' and 'diverse themes and genres (25.2%)' while for Korean film, they were 'uniqueness that cannot be found in local film (28.4%)' and 'indirect experience of Korean life and culture (26.9%).' This suggests that British consumers of video content perceive the characteristics of Korean culture as unique and such attributes of the genres are considered to be an important appealing point of Korean cinema and drama from the perspective of cultural diversity. The result shows that the premise that pop culture, as an attribute of the new Hallyu, enhances the likability of Korean culture overall can be different by geography. Consequently, the figures above imply that a different approach based on the distinctive characteristics of each genre is required for products linked to Hallyu to make inroads into the UK.

Drivers of Popularity

Korean Drama

BASE: Persons with experience of using Korean drama in the UK, n=(127) Unit: %

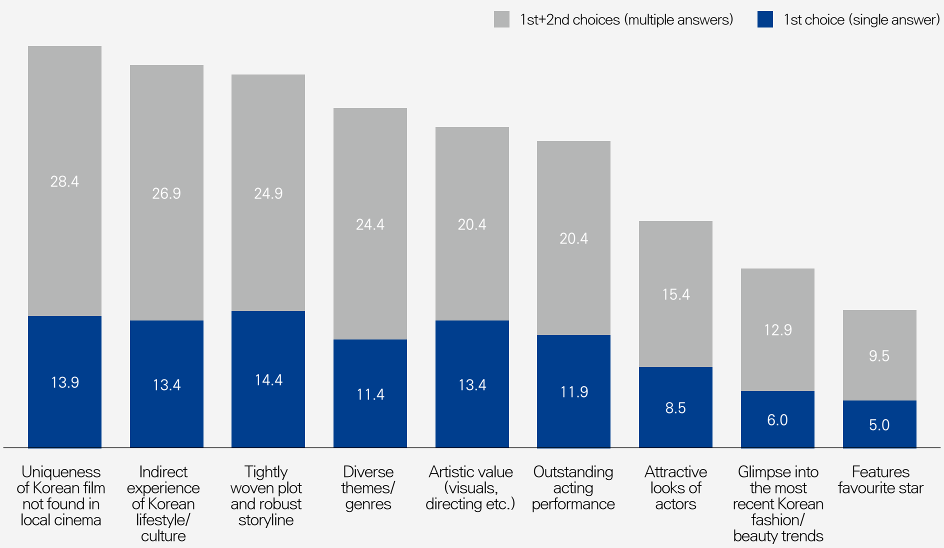
Q: What do you think drives popularity of Korean dramas in your country? Please choose 2, in order.



Korean Film

BASE: Persons with experience of using Korean film in the UK, n=(201) Unit: %, multiple answers

Q: What do you think drives popularity of Korean film in your country? Please choose 2, in order.



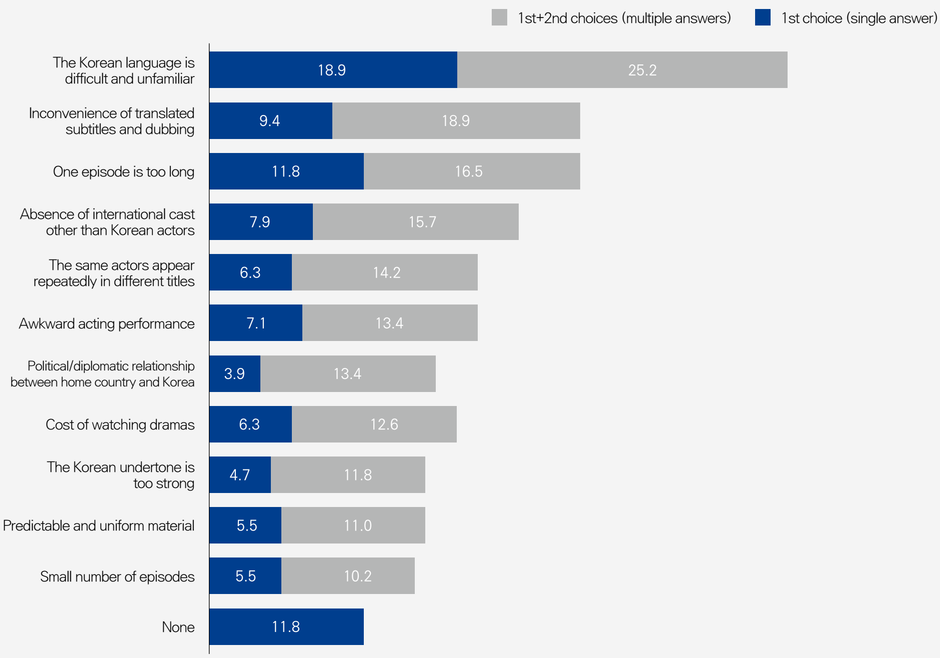
One of the most important factors in the statistical analysis of the *2021 Survey on Overseas Hallyu Status* are the factors that undermine likability. Foremost, this is due to the language barrier of Korean video content. Factors that hinder positive feelings toward Korean drama were 'the Korean language is difficult and too unfamiliar (25.2%)' and 'it is inconvenient to watch through translation subtitles or dubbing (18.9%).' The unfamiliarity with the Korean language ranked first (22.7%) for variety shows, second (23.9%) for film and first (27.8%) for music. The Korean language, the unique feature of Korean culture, has become the biggest hurdle for Korean content consumption. Contrary to conventional wisdom, K-pop fans become interested in overall Korean culture to start learning the Korean language. Of course, the language issue is more about inaccurate translation or the lack of technical quality of dubbing rather than the language itself. However, the survey offers the basis for the improvement of Korean language education.

Factors that Hinder Likability

Korean Drama

BASE: Persons with experience of using Korean drama in the UK, n=(127) Unit: %

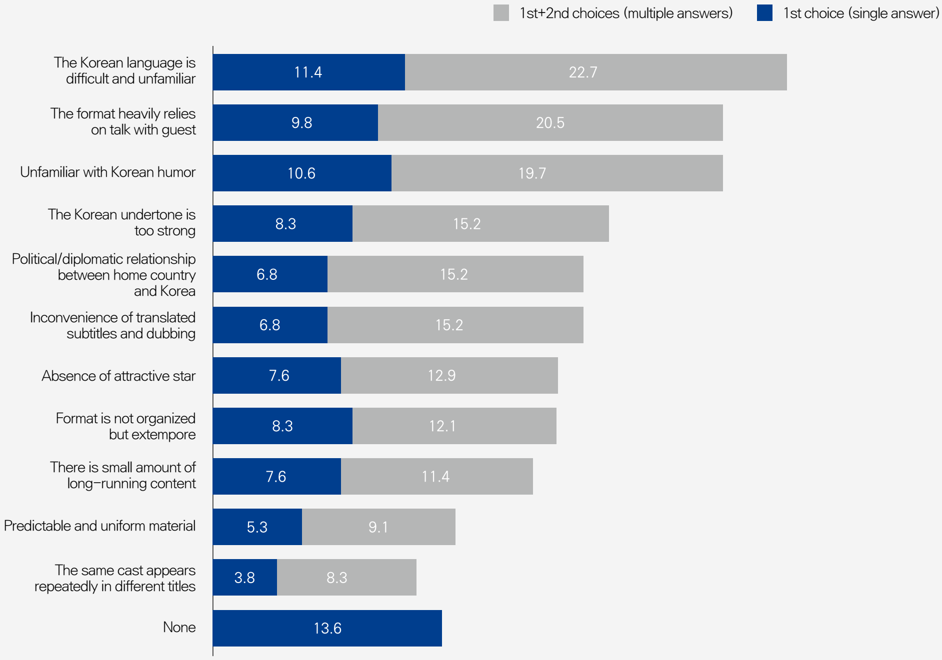
Q: What do you think hinders likability of Korean drama in your country? Please choose 2, in order.



Korean Variety Shows

BASE: Persons with experience of using Korean variety shows in the UK, n=(132) Unit: %

Q: What do you think hinders likability of Korean variety shows in your country? Please choose 2, in order.



The second factor undermining likability is that the 'Korean-ness' is too strong. While the uniqueness of Korean culture is considered an appealing point for Korean videos, it is attributed as a source of negativity for other genres. For instance, 'the strong Korean undertone' was 15.2% for games and 26.8% for publications, both very high, and 13.1% for animation, which was also relatively high. Lastly, the political and diplomatic relationship between Korea and the home country hindering the likability of Korean content was low but widely observed across variety shows (15.2%), cinema (8.5%), music (9.5%), animation (12.5%) and publications (18.7%). It should be noted that even for games, 7.6% answered that the political and diplomatic relationship was negatively impacting likability. While we cannot jump to a clear conclusion, it can be understood that 'Korean-ness' or the uniqueness of Korean culture negatively influences the consumption of Korean culture in the UK. In some cases, removing or diluting the distinctive elements of Korea can be a strategic response.

In the case of games, the analysis is much more multi-layered. First, cultural elements tend not to be a dominating factor, given the nature of games. In this regard, from the viewpoint of the content value chain, while the development and creation of games may be strongly related to the cultural industry, in terms of

Hallyu, the cultural elements that are manifested in terms of global consumption and distribution can be weak. In fact, looking into the awareness and preference of Korean games, *PUBG: Battlegrounds* topped the list with 29.7%, followed by *Crossfire* (26.6%), *Black Desert* (24.7%), *Dungeon & Fighter* (24.1%) and *Ragnarok* (24.1%).

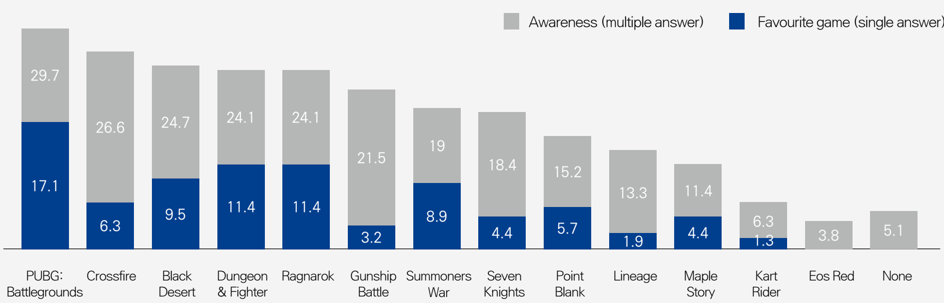
Each of these games has its unique universe, which does not necessarily reflect Korean cultural characteristics or the Korean identity. Also, as can be observed from the awareness and preference results, the global audience of games does not necessarily associate these games with Korea. Even for *PUBG: Battlegrounds*, only 17.1% of the respondents knew that it was a Korean game. Moreover, these numbers do not imply that gamers are choosing to play the particular game because it is Korean, nor does it suggest that they find it more entertaining because it is Korean. Nevertheless, the survey provides meaningful insights into the global success of Hallyu content, the advancement of the game industry and Korean developers and companies. For example, the drivers of popularity were 'stunning graphics (33.5%),' 'diverse genres/stories (22.8%),' and 'gaming method of networking and cooperating with other gamers (22.2%).' In particular, 'preference of Korean professional gamers (14.6%)' and 'preference of video streamers of Korean games (14.6%)' stood out, given that major Korean e-sports gamers play *League of Legends* and *Overwatch*, which are not Korean games. In addition, regarding streamers, they do not need to be Korean streamers. In fact, most streamers that are prevalent on Youtube or Twitch are foreigners. This dynamic of such preference leading to heightened interest in Korean games provides implications for policy and business strategy in that it suggests that conventional knowledge should be rethought.

Favourite Korean Game and Awareness

BASE: Persons with experience of using Korean games in the UK, n=(158) Unit: %,

**Presented in accordance to order of awareness*

Q: Choose all of the games that you recognize as Korean
Q: Which is your favourite game?

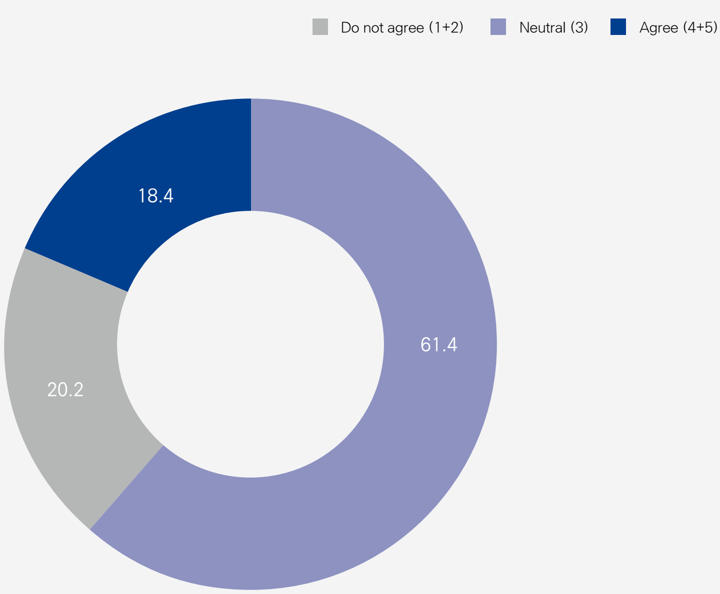


5 Re-thinking the Hallyu-Linked PR Strategy and Hallyu Star Marketing

The study on the 'Korean Wave Ripple Effect' of the *2021 Survey on Overseas Hallyu Status* presents insights on the perception of Korea. 'Korea is a likeable country' scored the highest with 64.6%, while 'Korea is a cultural leader' only scored 51.2%, the lowest, which shows that the effect of Hallyu as a soft power or as a national brand is not so strong in the UK. While the average perception of all respondents was 67%, the figure was the highest in the 50s age group, with 78.3%. In the 50s age group, 'Korea is an economically advanced country' scored 81.2% and 'Korea is a likeable country' scored 75.4%. The demography that would be expected to have relatively less direct experience of Korean cultural content actually showed the highest positive perception of Korea, which seems to be mainly driven by political and economic factors. This finding suggests that support for the quality growth of the Korean content market is required to achieve sustainable growth of Hallyu in the Western hemisphere, including the UK.

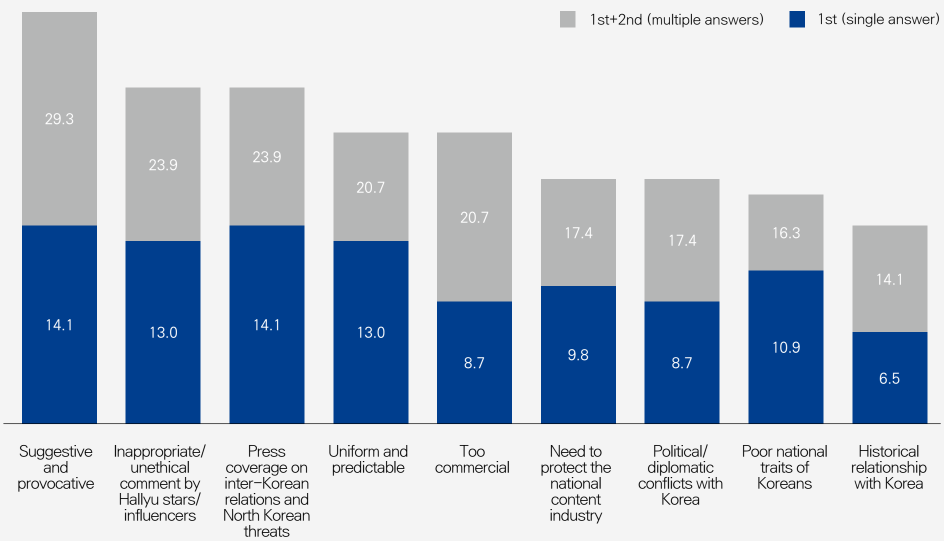
Negative Perception of Hallyu

BASE: UK total n=(500) Unit:%



Factors Contributing to the Negative Perception of Hallyu

BASE: UK total n=(92) Unit:%



Meanwhile, the study on negative perception also offers insights. The question simply asks about likability. However, the reasons are specifically laid out for the respondent, enabling a deeper, analytical understanding of the complexity behind Hallyu. It is first worth noting that the negative perception is different between regions where Hallyu is strong and where Hallyu is weak. In the case of the UK, negative perception of Korea scores 2.97 out of 5, one of the 6 in 18 countries that scored below 3. The other 5 are Brazil (2.84), Argentina (2.72), Russia (2.69), Turkey (2.86) and South Africa (2.87). On the other hand, Asian countries such as Thailand (3.25), China (3.26) and Vietnam (3.24), where consumption of Hallyu is high, also showed relatively high negative perception, which implies that higher consumption of Hallyu can also lead to higher negative perception. While it can not be decisively determined by statistics alone, it can be inferred that there is a possibility that promoting and supporting the overseas presence of Hallyu strengthens negative perceptions. Looking at the details of negative perception more precise insights. The main reasons for negative perception in the UK were 'Hallyu is too aggressive and suggestive (29.3%),' 'Korean celebrity/influencer's inappropriate/unethical talk and behaviour (23.9%)' and 'the division of the two Koreas and reports on the international threats North Korea poses (23.9%).'

In contrast, 'need to protect the domestic content industry (17.4%)' and 'too commercial (20.7%)' scored low. It can be derived that the consumption of

Hallyu cultural content does not threaten UK consumers. And their general understanding of the commercial aspect of cultural products is high. According to the survey results of entire countries, ‘too commercial’ scored 25.9% and ‘need to protect domestic content industry’ scored 21.8%, both very high. The response in the UK survey can be inferred to be based on the solid competitiveness of local content and because Hallyu cultural content only takes up a meagre portion of the pie. This again implies that the assessment and future strategy for Hallyu in Asia and the West should be treated and developed separately. Another insight is that while in countries where Hallyu consumption is strong, the commercial attitude of culture and the sense of crisis of the local content industry feeling threatened can be the biggest hurdles. In contrast, international and ethical issues of the content or Hallyu itself can be a risk in countries like the UK.

Favourite Korean Drama

BASE: Persons with experience of using Korean drama in the UK n=(127) Unit %

Q: What is your favourite Korean drama that you watched in 2020? Choose one only.
**** based on total, only responses with at least 1.6% shown***

	Total	Gender		Age				
		Male	Female	10s	20s	30s	40s	50s
No. of samples	(127)	(67)	(60)	(27)	(47)	(35)	(13)	(5)
Crash Landing on You	11.0	7.5	15.0	18.5	4.3	14.3	7.7	20.0
It's Okay Not to Be Okay	4.7	0.0	10.0	11.1	4.3	2.9	0.0	0.0
Kingdom	3.9	4.5	3.3	0.0	4.3	8.6	0.0	0.0
Itawon Class	1.6	1.5	1.7	0.0	2.1	2.9	0.0	0.0
Love Alarm	1.6	1.5	1.7	3.7	2.1	0.0	0.0	0.0
Descendents of the Sun	1.6	3.0	0.0	3.7	0.0	0.0	7.7	0.0
Hotel Del Luna	1.6	0.0	3.3	3.7	0.0	2.9	0.0	0.0
None/Don't know	61.4	65.7	56.7	44.4	63.8	62.9	84.6	60.0

Favourite Korean Film

BASE: Persons with experience of using Korean film in the UK n=(201) Unit %

Q: What is your favourite Korean film that you watched in 2020? Choose one only.
**** based on total, only responses with at least 1.0% shown***

	Total	Gender		Age				
		Male	Female	10s	20s	30s	40s	50s
No. of samples	(201)	(112)	(89)	(42)	(52)	(57)	(25)	(25)
Parasite	25.9	25.9	25.8	26.2	26.9	22.8	24.0	32.0
Train to Busan	4.5	4.5	4.5	0.0	1.9	5.3	12.0	8.0
Steel Rain	1.5	1.8	1.1	4.8	1.9	0.0	0.0	0.0
The Handmaiden	1.5	0.0	3.4	2.4	1.9	0.0	0.0	4.0
The Host	1.5	0.0	3.4	7.1	0.0	0.0	0.0	0.0
Time to Hunt	1.5	1.8	1.1	4.8	0.0	0.0	4.0	0.0
Intrusion	1.5	2.7	0.0	2.4	1.9	0.0	4.0	0.0
Peninsula	1.0	1.8	0.0	2.4	0.0	1.8	0.0	0.0
None/Don't know	49.3	47.3	51.7	42.9	51.9	57.9	44.0	40.0

The survey on awareness and preference for drama and cinema captures the situation of Hallyu in Britain. While the drama *Crash Landing on You* was pretty popular, with 11%, 61.4% of respondents with the experience of watching a Korean drama answered 'none/I don't know.' The film fared better with *Parasite* scoring 25.9%. However, still 'none/I don't know' received 49.3%. A similar trend can be observed in music. The preference for BTS was the highest, with 22.4%, but 'none/I don't know' reached 53.2%. Most seem to be casual viewers rather than active fandom or repeating loyal viewers. For cinema, other than the globally renowned *Parasite* and *Train to Busan* which was quite popular among foreigners, most converge to 0. This means that at least for content preference, global recognition is important. It is difficult to conclude that there is a meaningful continuous audience for Korean cinema itself. Ultimately, the case of the UK suggests that the so-called Hallyu star marketing or corporate PR may not be effective because the preference of British users of Hallyu is concentrated on a handful of internationally proven stars, mainly BTS. This implies that the Hallyu star marketing frequently observed in Thailand or Vietnam may not be valid in the UK.

The last implication that can be derived from the *2021 Survey on Overseas Hallyu Status* is that there are areas that require support strategies in terms of the possibility of convergence with storytelling and IP usage. For example, the detailed statistics on the distribution of games showed that ‘directly playing online’ was the leading distribution channel (all countries 62.6%, UK 57.0%), which in the case of all nations, was followed by ‘playing directly on mobile (52.6%).’ Interestingly, in the UK, the second answer was watching Korean game videos on online platforms (38.6%). This suggests that there is a broad audience of Korean game videos in the UK. At the same time, the high game video viewership shows the convergent characteristic of game consumption. Moreover, it is important to remember that the emergence of game streamers who broadcast themselves playing games on Twitch and other platforms and the videos they produce has become globally popular. This shows the possibility of Korean streaming services such as Afreeca making inroads into overseas markets while also presenting the potential for Afreeca game BJs to grow into global influencers.

The top online/mobile platforms for video content were Netflix and Youtube, while Youtube and Spotify for music. Such a trend can also be observed in the regional statistics of the *2021 Survey on Overseas Hallyu Status*. However, the survey distinguishes Youtube and Youtube Premium. If they are combined, Youtube would be the most dominant platform for video viewership. In addition, the use of Amazon Prime was 40.9% for drama, 37.9% for variety shows and 43% for film, showing that Amazon Prime is a widely used platform in the UK, albeit not in Korea, which suggests that active marketing targeted at Amazon Prime is necessary. However, for animation, compared to other video content, the reliance on Netflix was low which should be understood in relation to the low accessibility mentioned earlier. It ultimately means that Korean animation is not abundant on online and mobile platforms, including Netflix and, therefore, lacks accessibility.

Meanwhile, results on the distribution of publications and games provide implications for other content genres in terms of value chain when venturing overseas. First, the distribution channel for drama, animation and variety shows were relatively simple, mainly online/mobile platforms, TV and analogue storage mediums like CDs. On the other hand, in the case of publications, it is noteworthy that there are 7 diverse access channels. An understanding and strategy based on the usage of copyrights and the diversity of distribution channels in the publishing industry are required. 'Home country online site or mobile app' scored 39.8%, 'Korean online site or mobile app' received 34.1% and 'global online site or mobile app' was 30.9%. The results suggest that the digitalization of publications online, such as e-books, is necessary. Developing a UX and UI that can enhance the accessibility of global consumers via Korean websites and apps is also important. At the same time, offline stores are still significant in that consumption through 'stores in home country' and 'stores in Korea' received 26% and 14.6%, respectively. 'Access via offline store in home country' for publications was a sizeable 26% and 'access via theatres' was a substantial 16.4% for the film. As can be seen, while online consumption takes up a large portion, offline channels are still used to consume content. A deeper understanding of cultural consumption habits in the UK, as well as stronger competitiveness of copyright and publication right experts, are required to venture overseas.

7 Conclusion

In the UK, from the perspective of consumption of Korean cultural content, Hallyu is not a fervent phenomenon. A fandom whose consumption is above a certain level, or for that matter, their influence, is not evident in statistics. Nevertheless, interest in Hallyu and ensuing consumption is increasing in line with global trends. In particular, the growth of different genres is supported by global platforms, media and press. The above discussions show that a systematic understanding and detailed research on the changing Hallyu phenomenon are necessary. In addition, the UK, the spearhead of pop culture that regionally represents Europe or native English speaking countries, is meant as a research comparison to Asia, where Hallyu consumption is high. Meanwhile, the fact that cultural elements of Korea are commonly found in factors that hinder Hallyu implies that the global popularity of Korean pop culture is not always positive from the viewpoint of the advancement of Hallyu.
However, the exchange between the UK and the Korean Hallyu is expected to accelerate which can be interpreted as a changing paradigm into a convergence event with art. The Victoria and Albert Museum will hold 'Hallyu! The Korean

Wave' exhibition which looks at Korean pop culture until 2023. The author of this paper will participate in the 'Globalizing South Korean Creativity: Exhibiting and Archiving Hallyu, the Korean Wave,' a Hallyu research network project funded by the ESRC** of the UK, as a young researcher. I expect that the research by British and Korean academics will focus on the expansion of Hallyu into art and fandoms in the UK. If Hallyu in the US is meaningful because Hallyu has penetrated capitalistic pop culture, such an attempt and movement shows that Hallyu in the UK is significant in terms of exchange and cultural diplomacy. Ultimately, the future direction of Hallyu in the UK, where the Hallyu phenomenon has been relatively weak, holds important meaning as a modern testing ground for the new Hallyu paradigm.

** ESRC(Economic and Social Research Council) is the UK's largest funder of economic, social, behavioural and human data science.

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STATISTIC

INSIDE

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1 Hallyu-Manufacturing

□ Beauty

Beauty Exports Buoyed by Year-End Shopping Season

Beauty exports amounted to USD 2.2959449bn (KRW 2.7206tn) in 2021Q4, an 8.73% increase YoY. Exports bounced back after being subdued in the previous quarter. Exports to China, the largest export market, rose by 15.91% YoY to reach USD 1.288759bn (KRW 1.5506tn). Korean beauty products fared well thanks to the Single's Day and the year-end shopping season despite lacklustre consumer sentiment due to the spread of COVID-19 variants, government policies to limit consumption and the visible growth of Chinese cosmetic brands supported by Guo-Chao (国潮) which means patriotic consumption. Exports to the US increased by 17.97% YoY but shrunk by 1.06% compared to Q2 to stand at USD 214.139mn (KRW 257.7bn) while exports to Japan rose by 14.50% YoY and 3.62% from Q2 to reach USD 199.874mn (KRW 240.5bn). Exports bounced back from weak figures in Q3 in most countries, mainly driven by the year-end shopping season except for Hong Kong, Indonesia, the United Kingdom and Kazakhstan, which showed decline YoY. Beauty exports in 2021 were record-breaking as the awareness of Korean basic skincare, sheet masks and colour makeup products rose. It will be interesting to observe whether the Korean beauty industry can carry on the momentum in 2022. *

*Reference
《Prime Economy》(Dec. 23, 2021.), "[2021 Closing-Beauty] C Beauty Hits K Beauty... "Disappointing Report Card"".

Cosmetic Exports (2020 Q4~2021 Q4) (Unit: $ k)

Region	Country	2020	2021				Contribution	▲YoY
		Q4	Q1	Q2	Q3	Q4		
Asia	Japan	174,561	204,396	207,504	192,891	199,874	8.85%	14.50%
	China	1,111,854	1,164,691	1,246,542	1,222,886	1,288,759	57.04%	15.91%
	Hong Kong	194,963	160,566	159,628	132,254	128,581	5.69%	−34.05%
	Singapore	30,928	27,200	34,248	28,615	28,974	1.28%	−6.32%
	Taiwan	45,026	45,852	45,018	35,435	47,383	2.10%	5.23%
	Vietnam	83,667	90,181	88,034	50,703	77,833	3.44%	−6.97%
	Malaysia	25,753	30,318	31,254	22,609	24,252	1.07%	−5.83%
	Indonesia	19,710	22,682	21,593	13,267	14,550	0.64%	−26.18%
	Thailand	28,950	33,309	36,541	32,748	34,372	1.52%	18.73%
	Philippines	10,051	10,874	11,063	10,927	10,151	0.45%	0.99%
	Myanmar	6,297	4,567	2,974	2,994	7,676	0.34%	21.90%
	Cambodia	5,374	6,351	4,413	4,978	7,036	0.31%	30.93%
	Kazahstan	10,924	12,376	12,897	10,692	8,757	0.39%	−19.84%
	Mongolia	2,839	3,960	7,127	7,116	4,870	0.22%	71.54%
Americas	US	181,527	190,356	228,196	216,434	214,139	9.48%	17.97%
	Canada	10,588	7,933	10,961	10,541	11,787	0.52%	11.32%
	Mexico	2,731	2,816	3,266	3,693	3,025	0.13%	10.77%
	Brazil	1,899	1,374	1,175	1,957	4,103	0.18%	116.06%
Europe	France	13,055	13,082	15,827	11,947	16,753	0.74%	28.33%
	UK	18,548	14,357	20,309	15,808	14,376	0.64%	−22.49%
	Germany	4,171	5,485	8,851	6,131	6,680	0.30%	60.15%
	Italy	1,664	1,520	2,410	2,862	2,547	0.11%	53.06%
	Spain	4,206	3,971	5,329	3,521	4,287	0.19%	1.93%
	Hungary	311	509	356	386	439	0.02%	41.16%
	Russia	68,062	73,825	79,943	62,149	75,201	3.33%	10.49%
	Netherlands	6,265	7,509	9,399	9,678	8,293	0.37%	32.37%
	Romania	1,598	1,808	1,540	1,407	1,968	0.09%	23.15%
Oceania	Australia	10,974	10,865	11,719	11,442	11,228	0.50%	2.31%
	New Zealand	1,537	1,281	1,497	1,725	1,555	0.07%	1.17%
Total		2,078,033	2,154,014	2,309,614	2,127,796	2,259,449	100.00%	8.73%

* Source : Korea International Trade Association website, 'K-Statistics-By Commodity (By Country) - MTI code 227 (Soaps, toothpaste and cosmetics),' as of Feb. 10, 2022

□ Fashion

Fashion Exports Record Historic High since 2016Q2

In 2021Q4, fashion exports jumped by 16.53% YoY to reach USD 630.484mn (KRW 757.52653bn), 21.33% increase from Q3. The growth of online exports was especially notable thanks to K-pop, K-dramas and K-beauty. Exports to China, the largest market, recorded a 29.83% growth YoY and a 15.50% rise from Q2 to stand at USD 174.367mn (KRW 209.51939bn), continuing exceptional growth. Exports to Vietnam, the second-largest market (21.09%), rose by 22.76% YoY and 22.33% from Q2 to reach USD 132.971mn (KRW 159.85774bn). China and Vietnam were the main growth drivers for the quarter. Exports to Japan stood at USD 92.397mn (KRW 111.09815bn), a 10.72% reduction YoY but an 18.66% increase from Q2. The rapid resurgence of COVID-19 variants seems to have supported the consumption of direct online sales and overseas direct purchases in Japan. In 2022, positive consumer sentiment and economic recovery have been visible in countries worldwide as mask mandates are lifted and mobility volume increases. It would be interesting to see whether the online-led increase in consumption can continue to drive fashion exports amid the still prominent coronavirus (omicron).*

Fashion Exports (2020 Q4~2021 Q4)

(Unit: $ k)

Region	Country	2020	2021				Contribution	▲YoY
		Q4	Q1	Q2	Q3	Q4		
Asia	Japan	103,496	89,210	88,692	77,686	92,397	14.65%	−10.72%
	China	134,300	116,342	109,353	150,971	174,367	27.66%	29.83%
	Hong Kong	33,687	24,604	23,545	25,278	26,595	4.22%	−21.05%
	Singapore	4,052	1,527	4,235	1,161	1,591	0.25%	−60.74%
	Taiwan	22,188	17,542	15,194	14,291	21,667	3.44%	−2.35%
	Vietnam	108,314	62,612	134,476	80,583	132,971	21.09%	22.76%
	Malaysia	997	519	2,052	505	1,553	0.25%	55.77%
	Indonesia	18,909	13,882	19,266	15,996	22,593	3.58%	19.48%
	Thailand	2,292	2,697	2,595	2,816	4,055	0.64%	76.92%
	Philippines	7,226	4,386	4,601	2,660	5,207	0.83%	−27.94%
	Myanmar	5,399	3,901	7,945	5,709	7,434	1.16%	36.01%
	Cambodia	2,634	1,842	2,626	2,530	4,007	0.64%	52.13%
	Kazahstan	494	930	488	447	536	0.09%	8.50%
	Mongolia	950	1,348	1,773	2,239	2,742	0.43%	188.63%
Americas	US	55,208	54,569	69,388	93,721	85,114	13.50%	54.17%
	Canada	5,278	6,394	4,445	8,472	8,486	1.35%	60.78%
	Mexico	659	951	1,487	802	3,152	0.50%	378.30%
	Brazil	278	357	443	538	747	0.12%	168.71%

*Reference
Korea Federation of Textile Industries (2021), 「Korea Fashion Market Trend 2021」

Europe	France	10,096	8,566	9,306	8,410	9,921	1.57%	−1.73%
	UK	8,094	8,587	6,681	5,701	7,455	1.18%	−7.89%
	Germany	6,183	4,108	4,896	5,112	5,174	0.82%	−16.32%
	Italy	3,224	3,247	4,069	6,319	3,994	0.63%	23.88%
	Spain	392	506	265	123	232	0.04%	−40.82%
	Hungary	222	470	183	197	240	0.04%	8.11%
	Russia	1,576	958	1,436	1,314	1,927	0.31%	22.27%
	Netherlands	1,554	2,191	1,756	2,539	2,028	0.32%	30.50%
	Romania	29	0	50	33	28	0.00%	−3.45%
Oceania	Australia	2,903	2,882	3,615	2,717	3,453	0.55%	18.95%
	New Zealand	421	526	555	582	909	0.14%	115.91%
Total		541,055	435,654	525,416	519,634	630,484	100.00%	16.53%

* Source : Korea International Trade Association website, 'K-Statistics – By Commodity (by country) – MTI code 441 (garments/clothes),' as of February 10, 2022

2 Hallyu-Tourism

Continued Recovery of Foreign Inbound Tourism in 2021Q4

In 2021Q4, the number of inbound tourists jumped by 45.77% YoY to reach approximately 233,000 mainly because of the COVID-19 base effect. Inbound tourists in October, November and December amounted to 76,704, 79,786 and 76,741, respectively, thanks to the removal of travel restrictions and widespread vaccination. The total number of inbound tourist arrivals rose by 2.58% QoQ. Visitors from the US, the largest origin of tourists for 2 consecutive quarters (25.1%), surged by 55.81% YoY to reach 58,535. In the case of China, despite the continued ban on inbound and outbound group travel, 38,198 tourists entered Korea, which is a 33.38% increase YoY, taking up 16.38% of total inbound tourists. The Philippines followed the US and China with 33,011 visitors, an 18.95% YoY and a 15.99% rise in QoQ. The accelerated resurgence of the COVID-19 variant (omicron) has triggered many countries, including Japan to strengthen and maintain restrictions on the entry and departure of travel for tourism. In addition, the Center for Disease Control and Prevention (CDC) of the US, the largest origin of inbound visitors, has issued a Level 4 Travel Advisory (very high level) for Korea, discouraging Americans from travelling to Korea, which should also have a negative impact. Moreover, visitation from Europe should shrink as well due to the Ukraine-Russia war as Russia (4.18%) is the second-largest origin of inbound arrivals from Europe following the UK.*

Inbound Tourist Arrivals (2020 Q4~2021 Q4)

(Unit: person)

Region	Country	2020	2021				Contribution	▲YoY
		Q4	Q1	Q2	Q3	Q4		
Asia	Japan	3,132	3,967	3,150	4,281	3,867	1.66%	23.47%
	China	28,638	38,308	43,993	49,716	38,198	16.38%	33.38%
	Hong Kong	207	279	212	418	291	0.12%	40.58%
	Singapore	731	261	273	540	6,451	2.77%	782.49%
	Taiwan	862	1,023	902	1,199	1,006	0.43%	16.71%
	Vietnam	3,891	4,858	5,208	5,486	7,394	3.17%	90.03%
	Malaysia	609	964	828	1,266	1,430	0.61%	134.81%
	Indonesia	11,743	10,329	12,298	11,715	12,221	5.24%	4.07%
	Thailand	1,234	1,507	2,061	2,150	2,601	1.12%	110.78%
	Philippines	28,459	25,361	26,918	30,943	33,011	14.15%	15.99%
	Myanmar	15,627	14,289	13,618	12,702	16,119	6.91%	3.15%
	Cambodia	980	1,385	1,764	873	1,392	0.60%	42.04%
	Kazahstan	784	1,832	1,716	2,483	1,181	0.51%	50.64%
	Mongolia	381	624	721	2,348	2,076	0.89%	444.88%
Americas	US	37,568	35,546	48,381	61,563	58,535	25.10%	55.81%
	Canada	4,092	4,120	4,841	8,163	12,671	5.43%	209.65%
	Mexico	889	881	881	947	763	0.33%	−14.17%
	Brazil	259	413	304	478	488	0.21%	88.42%
Europe	France	2,864	3,933	2,636	4,559	4,572	1.96%	59.64%
	UK	1,737	1,236	1,256	3,225	3,257	1.40%	87.51%
	Germany	3,386	3,674	3,714	6,086	6,564	2.81%	93.86%
	Italy	639	671	699	1,162	1,559	0.67%	143.97%
	Spain	284	479	325	953	962	0.41%	238.73%
	Hungary	228	207	168	258	365	0.16%	60.09%
	Russia	6,008	6,760	7,995	8,402	9,740	4.18%	62.12%
	Netherlands	3,145	3,170	3,628	3,393	3,243	1.39%	3.12%
	Romania	660	733	661	841	1,060	0.45%	60.61%
Oceania	Australia	638	564	536	796	1,607	0.69%	151.88%
	New Zealand	321	329	315	409	607	0.26%	89.10%
Total		159,996	167,703	190,002	227,355	233,231	100.00%	45.77%

* Source : Korea Tourism Organization website (Notice – Data – Korea Tourism Statistics) as of February 10, 2022

* Reference
Korea Tourism Organization, Korea Tourism Statistics, October, November, December 2021
Sang Don Park (Feb 16, 2022) "210,000 Foreign Tourists Visited Korea Last Year...Only 1.5% of Pre-Covid Levels"《Yonhap News》.

3 Hallyu-Education

YoY Increase of International Students and Trainees

In 2021Q4, 9,152 foreigners entered Korea for training or education, a 37.85% jump from 2020Q4 (6,639) as major universities finished the second semester based on their academic calendar and courses were taught on and offline depending on vaccination. International students from China grew by 5.45% YoY to stand at 3,522. Meanwhile, 2,458 Vietnamese entered Korea for educational purposes during the same period, a 45.53% increase YoY, to secure a market share of 26.86%. The surge in entries for educational purposes from Asia was evident, including Myanmar (+1255.56%), Thailand (+131.34%), Indonesia (+178.00%) and Mongolia (+371.58%), as well as from Latin American countries such as Mexico (+112.50%) and Brazil (+214.29%). On the other hand, international students coming from the Philippines (-90.16%), The UK (-68.75%) and Cambodia (-52.63%) substantially declined. It is difficult to project an increase of international university students and foreign trainees for the first quarter of 2022, as the Ministry of Education has announced 'Measures to Protect and Manage International Students for the 2022 Academic Year', which strongly recommends international students attending the first semester of 2022 to be vaccinated before arriving in Korea. In addition, the recent spread of the COVID variant has triggered a surge in the number of confirmed cases, deaths and critically ill patients in Korea, another factor that can undermine the entry of international students and trainees.*

* **Reference**
Korea Tourism Organization, Korea Tourism Statistics, October, November, December 2021
《Newsis》(Jan. 27, 2022), "Ministry of Education Makes Strong Recommendation"International Students Should Be Vaccinated before Arrival" .

Entry of International Students·Trainees (2020 Q4~2021 Q4)

(Unit: person)

Region	Country	2020	2021				Contribution	▲YoY
		Q4	Q1	Q2	Q3	Q4		
Asia	Japan	374	1,352	757	1,895	614	6.71%	64.17%
	China	3,340	10,341	3,544	17,311	3,522	38.48%	5.45%
	Hong Kong	100	141	79	215	79	0.86%	−21.00%
	Singapore	15	34	14	49	19	0.21%	26.67%
	Taiwan	121	271	120	366	107	1.17%	−11.57%
	Vietnam	1,689	3,139	2,337	2,021	2,458	26.86%	45.53%
	Malaysia	33	217	40	317	52	0.57%	57.58%
	Indonesia	50	593	94	296	139	1.52%	178.00%
	Thailand	67	135	54	244	155	1.69%	131.34%
	Philippines	61	65	17	85	6	0.07%	−90.16%
	Myanmar	18	158	59	295	244	2.67%	1255.56%
	Cambodia	19	79	19	82	9	0.10%	−52.63%
	Kazahstan	22	309	72	415	12	0.13%	−45.45%
	Mongolia	190	397	276	1,427	896	9.79%	371.58%
Americas	US	63	575	244	1,730	92	1.01%	46.03%
	Canada	18	50	25	77	27	0.30%	50.00%
	Mexico	8	99	9	202	17	0.19%	112.50%
	Brazil	7	70	12	83	22	0.24%	214.29%
Europe	France	125	1,241	14	844	237	2.59%	89.60%
	UK	16	20	2	187	5	0.05%	−68.75%
	Germany	4	633	50	1,245	57	0.62%	42.50%
	Italy	28	149	28	226	43	0.47%	53.57%
	Spain	33	253	16	461	38	0.42%	15.15%
	Russia	177	375	172	648	262	2.86%	48.02%
	Netherlands	7	61	8	269	14	0.15%	100.00%
	Romania	4	18	4	33	6	0.07%	50.00%
Oceania	Australia	12	14	6	20	19	0.21%	58.33%
	New Zealand	2	3	0	3	1	0.01%	−50.00%
Total		6,639	20,792	8,072	31,046	9,152	100.00%	37.85%

* Source : Source : Korea Tourism Organization website (Notice – Data – Korea Tourism Statistics,' as of February 10, 2022