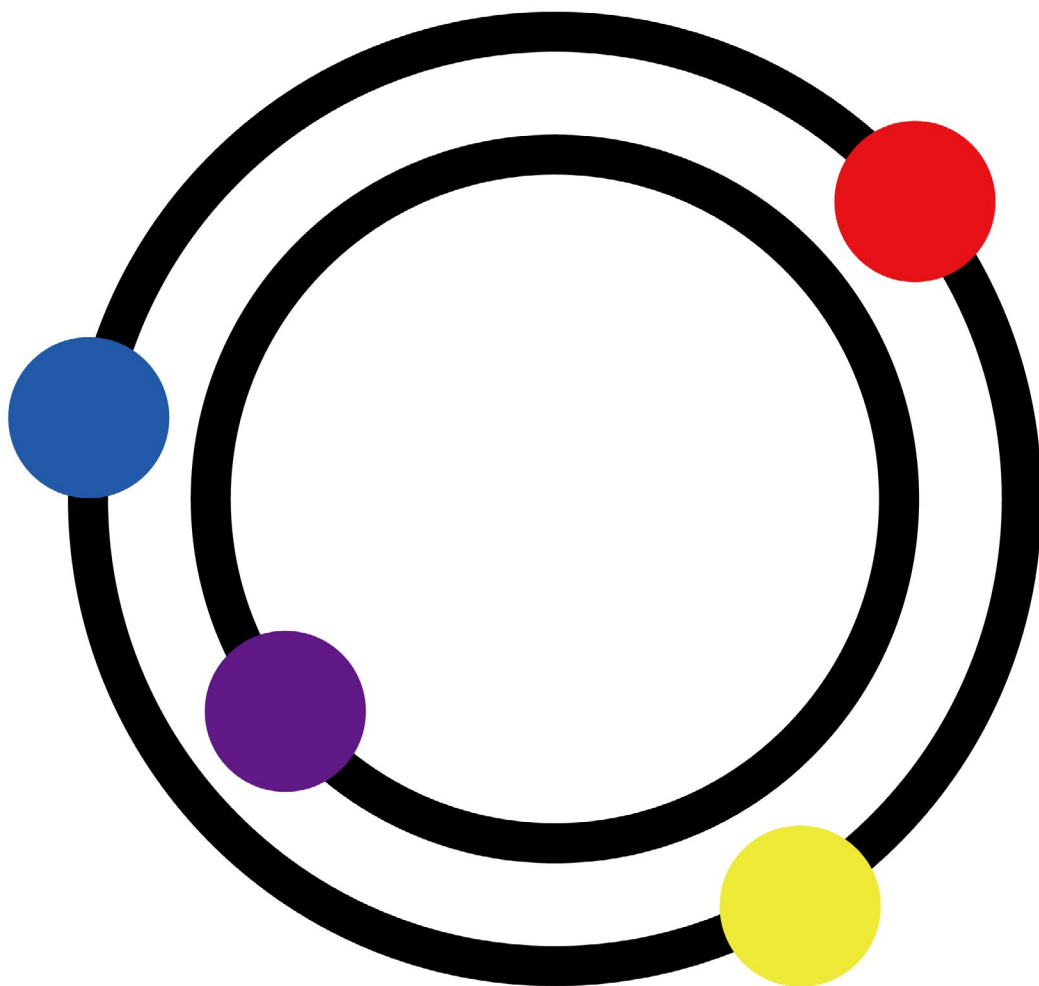


GLOBAL HALLYU
ISSUE MAGAZINE

〈한류NOW〉
한류 심층 분석 보고서

HALLYU NOW

HALLYU STORY
WITH STATISTICS
FRANCE



KOFICE
한국국제문화교류진흥원

HALLYU NOW

GLOBAL HALLYU ISSUE MAGAZINE

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A Deep Dive Into Hallyu in France



Since Korean films entered the Cannes Film Festival in the early 2000s, the Korean Wave, which began becoming known to active French filmgoers, has entered a full-fledged spread through the entry of K-pop idols, including BTS, and Netflix dramas in France. This trend is newly interlocking with the rapid growth of the OTT platform industry and the change of the times through full social lockdowns in the early stages of COVID-19 in France. In the process, works such as *Squid Game* (2021), which recorded a global hit through Netflix, began to show some aspects of Hallyu reception and consumption in the new era. The popularity of *Squid Game* is not merely a phenomenon in France, but the enthusiasm for this work is still stronger as it interacts with the long-standing experience of a solid audience group for Korean films. This situation also leads to the explosive growth of K-pop influence derived from BTS, laying the foundation for the emergence of lifestyle elements including Korean food and fashion as a new trend of the Korean Wave in France.

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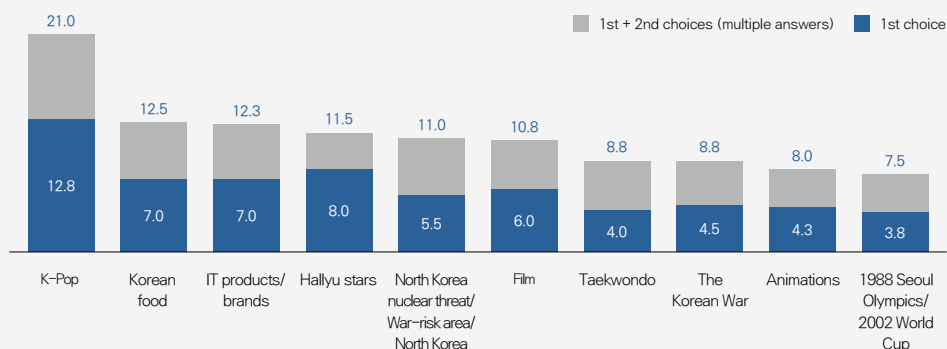
The Korean Wave in France has been gradually spreading through several important inflection points since the 2000s. The first inflection point was when the public was introduced to certain Korean films led by multiple Korean directors (e.g., Im Kwon-taek, Hong Sang-soo, Kim Ki-deok, Park Chan-wook, and Bong Joon-ho) through the Cannes Film Festival in the early 2000s. The great popularity of the drama *Winter Sonata*, which aired in Japan in 2003, was an important opportunity for the French “J-culture manias,” who were interested in Japanese dramas and related music, to spread their interests to Korean dramas and popular music (Ryu, 2011). With the performances and TV appearances of SM Entertainment artists in Paris in 2011, more people gradually began to form a new interest in Korean pop music. Since then, the interest in K-pop and K-dramas has steadily expanded. PSY’s “Gangnam Style” and the rise of BTS served as an extremely important driving force that led this trend to curiosity and interest toward Korea.

In the *2022 Survey on Overseas Hallyu Status*, published in 2022, this basic trend remained. According to the survey, “K-pop (21.0%)” was still the strongest image of Korea among consumers in France, followed by “Korean food (12.5%),” “IT products/brand (12.3%),” and “Hallyu stars (11.5%).” One can observe the “North Korean nuclear threat (11.0%)” and “the Korean War (8.8%),” which have been imprinted on the French and Europeans for a relatively considerable period, are being pushed back in the order.

Image Associated With Korea

BASE: Total, n=400, Unit: %

Q. What is the first image that comes to mind when you think about Korea?



Additionally, COVID-19, which has affected the world since 2020, has had a significant impact not only on the French society as a whole but also on the Korean Wave phenomenon in France. Unlike Korea, France suffered several lockdown measures during the initial quarantine process. Therefore, the digital transformation in various daily aspects, which had been difficult to bring about, occurred during this period. In the case of media sector, France also continued expanding various digital and social media services throughout the 2010s. Nevertheless, it is no exaggeration to state that the spread of OTT platforms (which had been relatively slow in its implementation and dissemination) occurred in earnest in the wake of such social isolation. In the process, the Korean Wave is also undergoing fundamental changes in terms of the pattern and scope of French use.

With these points in mind, this article will examine the trend in the awareness of and important changes in the Korean Wave occurring in France as of 2022. First, we will explore the explosive growth of OTT services that conclusively impact the flow of Hallyu in France, and discuss the aspects of Hallyu including elements of K-pop and K-lifestyle that have the potential to spread in the future.

2 What COVID-19 has Left us

: Transition Toward a Non-face-to-face Society, Explosive Growth of OTT

The wounds or legacy left by COVID-19 have affected the world since 2020 and are still present in the French society. However, it is also undeniable that considerable changes have occurred in the overall daily structure of the society. Since the first restriction period that took effect on March 17, 2020 (during the early days of COVID-19), French society began its unprecedented experience of requiring companies to work from home and starting a remote class system in the educational scene. During this period, the proportion of social communication and e-commerce using social networks exceeded 80% of all economic activities. As such, “normal” face-to-face activities were restricted and the pattern of digital technology supplementing them became more common; it was a period of great growth for the media industry than any other field. And it was also a moment of breakthrough growth, not for all

media industries (i.e., newspapers, broadcasting, advertisement, etc.), but for the digital-based social media and video content¹ platform industry.

According to Min (2022), the usage of digital mobile content in France has continued growing significantly since 2016, and COVID-19 and the resulting social lockdowns have exhibited a great impact (p. 90). For example, the video content consumption accounted for only 23% of the total population in 2016, but the rate soared to 68.3% in 2021. Messenger services, mobile gaming, and music streaming services have also more than tripled in the proportion of users compared to 2016. This situation was caused by a sudden social lockdown at a time when digital services were disregarded due to the slow speed caused by low-quality networks. Consequently, telecommunications operators invested heavily into infrastructure that would increase the network speed and bandwidth between 2020 and 2021 (CNC, 2021).

In this process, France's OTT industry served as a key growth driver for the entire media content market in 2021. According to CNC, a French broadcasting and video promotion agency, the total media content market grew by EUR 1.7465bn (a YoY increase of 11%; approx. KRW 2.6tn) in 2021 from the previous year, with OTT platforms accounting for 87.6% of the market (CNC, 2021). Netflix has an overwhelming share of the OTT market in France. Approximately 63.1% of OTT users consumed more than one piece of content on "Netflix," followed by "Amazon Prime Video (41.7%)" and "Disney+ (29.5%)." By contrast, the utilization rate of platforms of French domestic operators—including Orange's "Orange VOD," major terrestrial broadcasters, and relatively new operator SALTO platforms—was only approximately 10% (CNC, 2021). In any form, French broadcast video content providers have now entered a phase of global competition with respect to OTT platforms and are inevitably undergoing a major change in this process, reflecting the new ways of content consumption in France.

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.).

3 Spread of OTT Platforms and K-dramas

It is well-known that the Korean Wave in France has a long history. Most of the Hallyu contents that received attention were directly influenced by a small number of active users who shared information with each other through social networks (Cichelliet and Octobre, 2019, p. 136). However, the spread of digital OTT platforms is bound to cause a significant change in the consumption pertaining to the Korean Wave.

An interesting finding revealed in this survey may be that the proportion of online/mobile platforms was overwhelmingly high in terms of the access channels of Korean cultural content by consumers in France. In fact, the results of the survey demonstrated that the frequency of using online/mobile platforms far exceeded the frequency of TV viewing in dramas, movies, and music. In the case of dramas, it was virtually impossible to find cases wherein broadcasters in France programmed Korean dramas in the past; thus, Korean drama fans in France had no choice but to watch them through various online alternatives. However, around 2020, the frequency in the use of platforms such as Netflix and YouTube exploded in France; consequently, in the 2022 survey, 83.8% of respondents stated that they had encountered K-dramas through Netflix, 44.8% through YouTube, 36.2% through Amazon Prime Video, and 16.2% through YouTube Premium. This means that the channels to access Korean dramas are actually integrated into platforms such as Netflix and Amazon Prime Video. Inevitably, since this includes the consumption of global hits such as *Squid Game*, we should also consider that the significance of such consumption cannot be explained merely as the tendency of maniacs who religiously follow Korean dramas.

In this process, dramas have already become the most important type of content consumed among the various Korean cultural products. In this study, the average proportion of consumption per person was separately surveyed for each type of content, and the proportion of dramas was the highest at 24.3%. Additionally, it was found that in terms of changes in the level of consumption, dramas increased the most (40.1%) compared to the period prior to the COVID-19 outbreak. Furthermore, dramas showed the highest favorability (76.2%)—in terms of overall favorability for Korean cultural content.

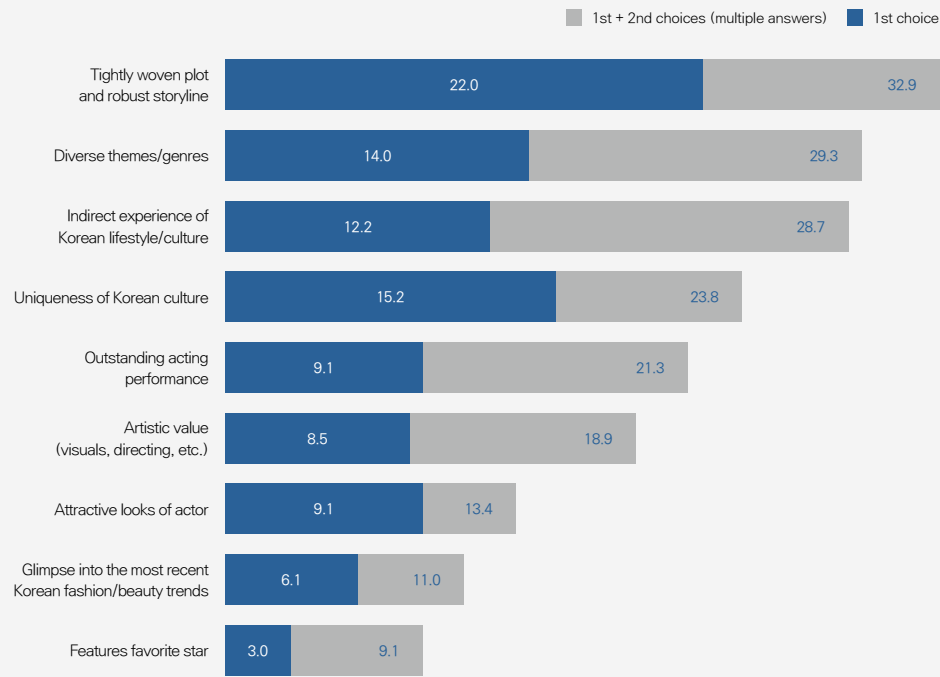
In a survey on the likability factors of Korean dramas and other cultural products, a “well-structured story (32.9%)” was recognized as the biggest popular factor for Korean dramas, followed by “various themes/genres (29.3%).”

This can be understood along with the fact that a “well-structured story (36.6%)” was mentioned as a factor in the popularity of Korean films. Therefore, Korean cultural materials like Korean dramas and films were appealing to consumers in France in that they have an interesting storyline above all else. This is somewhat different from the likability factor of Korean variety shows. Surveyed together, results showed “indirect experience of Korean life/culture (31.7%)” and “fun games/themes (29.6%)” were most important in Korean variety shows.

Factors Driving Popularity of K-dramas

French with experience of consuming Korean dramas, n=164, unit= %

Q. What do you think drives the popularity of K-dramas in your country? Please choose 2, in order.



Indubitably, it is necessary to remember the various possible interpretations of the phrase “well-structured story” mentioned here. There is a group of people that recognize and consume such content as an interest-oriented story with commercial potential—comparable to that of Hollywood movies and series. However, it is further important to take into account the continuing trend wherein the French K-drama fans perceive K-dramas as being “unique,” given its characteristic of being rather emotional and pure, with a “conventional” narrative structure. This is perceived as different from the U.S. dramas, which

have complex plots and structured stories (Hong, 2013). At the same time, these answers may consider works like *Squid Game* or *Dr. Brain*, directed by Kim Ji-woon who is already widely known through his movies and aired on Apple TV+. In other words, this may be an answer related to the overall perception of Korean film/video content held by cultural consumers in France, who have been actively consuming Korean films since the early 2000s.

In fact, the method of interpreting *Squid Game* in France is an extension of the framework for interpreting a series of works previously directed by Bong Joon-ho. Therefore, the issues of capitalism, class, family and society, and class inequality especially found in a globalized neoliberal society, are particularly highlighted in a series of works such as Bong Joon-ho's *Memories of Murder* (2003), *Snowpiercer* (2013), and *Parasite* (2019). This means that *Squid Game* speaks about not only a problem in Korean society but also a global issue, thus exhibiting greater universality. Dhilly (2022) also attempts to interpret *Squid Game* philosophically, based on this fundamental perception. In this sense, it is essential to consider that Korean dramas and movies are perceived to have the same foundation, at least in the French market, as they have continuously expanded public favorability based on films, and that they are both expected to exert long-lasting influence by more actively utilizing this. Additionally, to capture these detailed changes, it is necessary to suggest that a more detailed presentation of the survey findings is urgently required, given the special context of the reception of the Korean pop culture in each of the surveyed countries.

4 Potential of K-pop and K-culture, or the Korean Wave's Power and Sustainability in France

As Korean pop music (led by idol bands) led the Korean Wave, Korean culture has gradually expanded to all areas of food, tourism, fashion, and traditional culture or art, which is the most distinguishing aspect in the so-called "Korean Wave 3.0" era since the 2010s (Kim, 2022, p. 8). This includes the process of foreigners who have increased their curiosity and affinity for Korea while listening to K-pop idols' music, and in the process, they consume food and fashion seen in Korean dramas and learn Korean

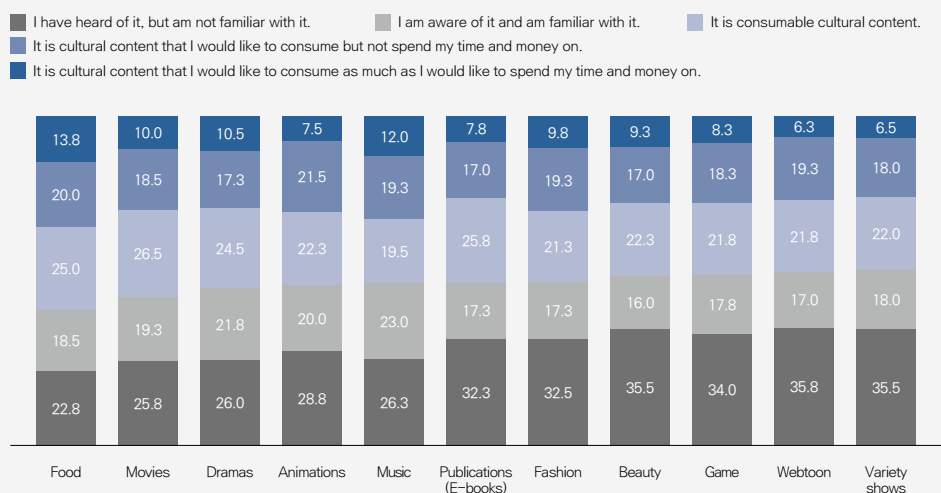
language themselves. Korean dramas as well as K-pop idol bands, such as BTS, BLACKPINK, TWICE, and Red Velvet, are at the center of the trend, thus expanding the spread of the new Korean Wave to the world including Europe. However, in the case of France, K-pop music was never favorable from the beginning. Unlike the ways in which criticism and interest from the *auteur's* perspective of the Korean films spread to the public in France, the French media at the time exhibited an extremely negative attitude toward K-pop stars who were increasing their opportunities to perform and appear in local broadcasting since the 2010s. For example, news articles introducing the SM Town Paris Concert, which was held on June 10, 2011, included harsh criticism of the style (i.e., group dance, etc.) and musicality of K-pop artists, as well as reports on the process of fostering these idol bands and inhumane elements of trainee life (Mesmer, 2011). However, BTS' positive impact may have changed the French public's perception of K-pop itself dramatically and visibly.

As a result, the long-standing negative perception of K-pop is also changing. For example, factors such as “attractive appearance and style,” “addictive and easy-to-follow chorus rhythm,” and “artist's outstanding performance” are now acting as unique popularity factors—rather than being negative factors—of K-pop (Ryu, 2020). Moreover, long-standing strategies of the K-pop industry, such as the ease of enjoyment through digital and mobile media, global distribution and marketing networks based on social media, and localization strategies targeting the global market have slowly begun emerging as strengths of K-pop. Building on these strategies, BTS, have formed an independent fandom that projects their own narrative and emotional structure, and they finally attained the name “The Beatles of the SNS Generation” from the French media (Falletti, 2018).

In this regard, when measuring the attitude toward Korean cultural content, the results of the survey suggested that the most popular content related to the statement “It is cultural content I would like to use as much as I would like to spend my time and money on” included “food (13.8%),” “music (12.0%),” and “drama (10.5%).” “Food (Korean food)” is particularly the most important and direct area among various types of Korean lifestyle, which is basically a crucial area that establishes the foundation for the long-lasting Korean Wave, such as travel to Korea and daily exchanges with Korea. In that respect, the need for policy interests in and consideration for K-lifestyle is even greater in connection with the explosive spread of K-pop and the possibility of continuous development of K-dramas and films.

Attitude Toward Korean Cultural Content

BASE: Total, n=400, Unit: %



5 Concluding Remarks

In the above discussion, we briefly looked into the new leap forward of the Korean Wave in France that is still ongoing to this day. As mentioned earlier, the Korean Wave in France, which began becoming known to active filmgoers in France in the early 2000s—along with the entry of Korean films into the Cannes Film Festival—has since entered a full-fledged expansion through the entry of K-pop idol bands and the emergence of PSY’s “Gangnam Style.” This trend is newly interlocked with the rapid growth of France’s OTT platform industry and the change of the times of the full social lockdown during the early stages of COVID-19. In the process, works such as *Squid Game*, began to show some aspects of Hallyu reception and consumption in the new era. The popularity of *Squid Game* is not merely a phenomenon in France, but the enthusiasm for this work is still stronger as it interacts with the long-standing experience of a solid audience group for Korean films. This situation also leads to the explosive growth of K-pop influence derived from BTS, thus laying the foundation for the emergence of lifestyle elements including Korean food and fashion as a new trend of the Korean Wave in France.

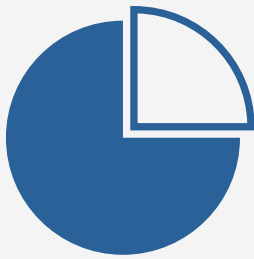
The Korean Wave is the result of French people’s increasing affinity for Korea as

a country itself and a wide range of opportunities to continue and expand their interest in the country. In that sense, in the case of France, people highly value the growing popularity of cultural content from films to K-pop and dramas; yet, we also realize how important it is to maintain the dynamic development and attractiveness of Korean society, which was the driving force of such popularity. Additionally, the sustainability of such attraction will be an indicator to predict the expansion of the Korean Wave in the future in so-called “culturally advanced countries,” such as France. In that sense, it would be unwise for us to be overly obsessed with or emphasize some of the commercially successful cases from the past with respect to Hallyu content. We should consider the cultural context of consumers in the country, their long experience of reception, and the recognition that cultural aspects of various lifestyles within daily lives beyond media content will soon become the fundamental assets of the future Korean Wave. Thus, continuous efforts and investments will be needed. 

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STATISTIC



INSIDE

STATISTIC INSIDE

1 Hallyu - Manufacturing Sector

□ Beauty

Cosmetic Exports:

A Trend of Decreasing Chinese and Increasing American Exports

The amount of beauty exports to major countries in Q2 2022 was estimated to be USD 2.129bn (approx. KRW 2.8172tn). This is a YoY decrease of 8.95%, but it can also be considered as a 19.09% increase compared to the last quarter, when exports fell sharply. By country, China is the largest market (51.34%). This fell by 13.39% YoY to USD 1.0796bn (approx. 1.4455tn). This is believed to be due to the viral re-proliferation of COVID-19 in China and the contraction of consumer sentiment in China, combined with a lockdown on major cities (e.g., Shanghai), which took effect from the end of March. The market for cosmetics has generally declined in the Asian region, but it has been on the rise in Southeast Asia, including Myanmar (+269.57%), Cambodia (+73.33%), the Philippines (+43.32%), and Thailand (+10.04%). Meanwhile, the Americas recorded significantly positive results. The U.S. accounted for the second-highest proportion of countries (10.98%) and rose 1.21% YoY, to USD 230.94mn. Growth was especially high in Canada and Brazil, which recorded 43.29% and 115.66% YoY, respectively. Seemingly, the domestic cosmetics industry has been targeting new markets, such as the U.S., as an alternative to instability in the Chinese market—occurring not only due to the COVID-19 lockdown in China but also the Chinese nationalism caused by the political conflict. The rise in domestic cosmetics exports to the U.S., which boasts the world's largest cosmetics market, is not only expected to enhance export stability by reducing its dependence on China but is also expected to exert a ripple effect and positively influence other regions, including South America, Europe, and Australia.*

*Reference

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Cosmetic Exports (Q2 2021~Q2 2022)

(Unit: \$ k)

Region	Country	2021			2022		Contribution	▲ YoY
		Q2	Q3	Q4	Q1	Q2		
Asia	Japan	207,504	192,891	199,874	207,413	205,013	9.75%	-1.20%
	China	1,246,542	1,222,886	1,288,759	818,385	1,079,620	51.34%	-13.39%
	Hong Kong	159,628	132,254	128,581	93,975	118,193	5.62%	-25.96%
	Singapore	34,248	28,615	28,974	27,721	29,942	1.42%	-12.57%
	Taiwan	45,018	35,435	47,383	49,404	53,510	2.54%	18.86%
	Vietnam	88,034	50,703	77,833	73,146	92,146	4.38%	4.67%
	Malaysia	31,254	22,609	24,252	26,199	28,629	1.36%	-8.40%
	Indonesia	21,593	13,267	14,550	14,572	14,815	0.70%	-31.39%
	Thailand	36,541	32,748	34,372	36,150	40,210	1.91%	10.04%
	Philippines	11,063	10,927	10,151	12,661	15,856	0.75%	43.32%
	Myanmar	2,974	2,994	7,676	8,908	10,991	0.52%	269.57%
	Cambodia	4,413	4,978	7,036	6,492	7,649	0.36%	73.33%
	Kazakhstan	12,897	10,692	8,757	9,052	11,222	0.53%	-12.99%
	Mongolia	7,127	7,116	4,870	6,412	7,694	0.37%	7.96%
Americas	USA	228,196	216,434	214,139	220,322	230,949	10.98%	1.21%
	Canada	10,961	10,541	11,787	15,220	15,706	0.75%	43.29%
	Mexico	3,266	3,693	3,025	3,404	3,409	0.16%	4.38%
	Brazil	1,175	1,957	4,103	1,822	2,534	0.12%	115.66%
Europe	France	15,827	11,947	16,753	16,144	15,735	0.75%	-0.58%
	UK	20,309	15,808	14,376	13,826	17,165	0.82%	-15.48%
	Germany	8,851	6,131	6,680	6,573	7,671	0.36%	-13.33%
	Italy	2,410	2,862	2,547	2,780	2,724	0.13%	13.03%
	Spain	5,329	3,521	4,287	5,156	4,488	0.21%	-15.78%
	Hungary	356	386	439	410	651	0.03%	82.87%
	Russia	79,943	62,149	75,201	65,328	62,589	2.98%	-21.71%
	Netherlands	9,399	9,678	8,293	8,951	8,325	0.40%	-11.43%
	Romania	1,540	1,407	1,968	1,748	1,943	0.09%	26.17%
Oceania	Australia	11,719	11,442	11,228	12,323	11,861	0.56%	1.21%
	New Zealand	1,497	1,725	1,555	1,411	1,743	0.08%	16.43%
Total		2,309,614	2,127,796	2,259,449	1,765,908	2,102,983	100.00%	-8.95%

* Source: Korea International Trade Association (KITA) website, 'K - Statistics - By Commodity (By Country)
- MTI code 227 (soaps, toothpaste, and cosmetics)', as of August 22, 2022

□ Fashion

Fashion Exports Increase Slightly YoY and QoQ

In Q2 2022, fashion exports to major countries increased 0.39% YoY to USD 527.462mn (approx. KRW 707.6bn), up 6.3% from the first quarter. Vietnam, the largest market, recorded exports of USD 137.924mn (approx. KRW 185bn), up 2.56% YoY and 100.22% QoQ. This was highest in the period between the second quarter of 2021 and the second quarter of this year. Additionally,

China and Japan, which accounted for a high proportion in Asia, fell 28.66% and 13.71% YoY, to USD 78.012mn (approx. KRW 104.6bn) and USD 76.535 mn (approx. KRW 102.6bn), respectively. Here, the sharp decline in fashion exports to China can be understood in the same context, as the contraction of consumer sentiment in cosmetics as the lockdown measures imposed under the “Zero COVID-19” policy in China. Noteworthy, the Americas exhibited a high rise in three of the four major countries, driving the quarterly increase in exports. First, the U.S., which accounted for the second-highest proportion (17.98%) of total exports, rose 36.7% YoY (USD 94.85mn, approx. KRW 127.3bn), while Mexico and Canada rose 23.94% and 74.04%, respectively. In the case of the U.S., local clothing consumption increased as the COVID-19 situation transitioned into an “endemic,” and analysis reveals that golf clothing consumption increased sharply due to the golf boom. Although this quarter did not exhibit an extremely high level of increase overall, the trend still prevails, as domestic industries are preparing various strategies, including the launch of global e-commerce platforms (e.g., ZigZag global service).*

Fashion Exports (Q2 2021~Q2 2022)

(Unit: \$ k)

Region	Country	2021			2022		Contribution	▲YoY
		Q2	Q3	Q4	Q1	Q2		
Asia	Japan	88,692	77,868	92,397	78,775	76,535	14.51%	-13.71%
	China	109,353	150,971	174,367	139,809	78,012	14.79%	-28.66%
	Hong Kong	23,545	25,278	26,595	28,017	29,535	5.60%	25.44%
	Singapore	4,235	1,161	1,591	1,992	2,175	0.41%	-48.64%
	Taiwan	15,194	14,291	21,667	15,510	16,845	3.19%	10.87%
	Vietnam	134,476	80,583	132,971	68,885	137,924	26.15%	2.56%
	Malaysia	2,052	505	1,553	1,208	1,202	0.23%	-41.42%
	Indonesia	19,266	15,996	22,593	16,309	17,670	3.35%	-8.28%
	Thailand	2,595	2,816	4,055	2,871	3,458	0.66%	33.26%
	Philippines	4,601	2,660	5,207	3,425	4,505	0.85%	-2.09%
	Myanmar	7,945	5,709	7,343	6,672	11,460	2.17%	44.24%
	Cambodia	2,626	2,530	4,007	2,122	2,022	0.38%	-23.00%
	Kazakhstan	488	447	536	356	484	0.09%	-0.82%
	Mongolia	1,773	2,239	2,742	2,634	2,474	0.47%	39.54%

*Reference

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Americas	USA	69,388	93,721	85,114	78,776	94,850	17.98%	36.70%
	Canada	4,445	8,472	8,486	13,287	7,736	1.47%	74.04%
	Mexico	1,487	802	3,152	1,087	1,843	0.35%	23.94%
	Brazil	443	538	747	143	198	0.04%	-55.30%
Europe	France	9,306	8,410	9,921	8,482	7,575	1.44%	-18.60%
	UK	6,681	5,701	7,455	6,929	7,513	1.42%	12.45%
	Germany	4,896	5,112	5,174	5,406	7,609	1.44%	55.41%
	Italy	4,069	6,319	3,994	5,825	7,081	1.34%	74.02%
	Spain	265	123	232	316	242	0.05%	-8.68%
	Hungary	183	197	240	288	258	0.05%	40.98%
	Russia	1,436	1,314	1,927	1,494	1,178	0.22%	-17.97%
	Netherlands	1,756	2,539	2,028	2,503	2,912	0.55%	65.83%
	Romania	50	33	28	3	34	0.01%	-32.00%
Oceania	Australia	3,615	2,717	3,453	2,449	3,445	0.65%	-4.70%
	New Zealand	555	582	909	636	687	0.13%	23.78%
Total		525,416	519,634	630,484	496,209	527,462	100.00%	0.39%

* Source : Korea International Trade Association website, 'K-Statistics - By Commodity (by country)
- MTI code 441 (garments/clothes),' as of August 22, 2022

2 Hallyu – Tourism Sector

Number of Inbound Tourists Recorded its Highest Since COVID-19

In Q2 2022, the number of inbound tourists from major countries increased by 135.17%, compared to the same period last year to about 447,000. The figure is the highest in more than two years, since Q2 2020. This was after March 2020, when the WHO declared the COVID-19 as a “pandemic.” In this quarter, 105,896, 147,053, and 193,872 foreign inbound tourists visited Korea in April, May, and June, respectively, exhibiting a gradual increase each month. Among major countries, China is the only country with a 22.21% YoY decrease due to the lockdown policy following the re-proliferation of COVID-19 in the region, but it still accounted for the third-highest proportion (7.66%) among all inbound foreign tourists. As far as Asia, the number of inbound tourists from Southeast Asia (e.g., the Philippines, Thailand, Vietnam, and Singapore) was higher than that of Japan and China, which have accounted for a high proportion in the past, with Thailand and Singapore rising 1,319.60% and 7,608.06% YoY, respectively. Meanwhile, the U.S., which has continued accounting for the

largest proportion (28.83%) during the COVID-19 pandemic, recorded the largest number of inbound foreign tourists among major countries once again at 129,000. Australia, which has recorded less than 1,000 tourists during the COVID-19 pandemic, also recorded 10,236 tourists in this quarter, exhibiting a YoY increase of 1809.7%, with the increase starting in Q4 2021. Considering the current situation, wherein COVID-19 is shifting from the pandemic to endemic level, the status of inbound foreign tourists entering the country is expected to continue rising at a high level.*

Inbound Tourist Arrivals (Q2 2021~Q2 2022)

(Unit: persons)

Region	Country	2021			2022		Contribution	▲ YoY
		Q2	Q3	Q4	Q1	Q2		
Asia	Japan	3,150	4,281	3,867	5,493	11,787	2.64%	274.19%
	China	43,993	49,716	38,198	40,967	34,224	7.66%	-22.21%
	Hong Kong	212	418	291	498	1,109	0.25%	423.11%
	Singapore	273	540	6,451	5,284	21,043	4.71%	7,608.06%
	Taiwan	902	1,199	1,006	1,576	2,299	0.51%	154.88%
	Vietnam	5,208	5,486	7,394	12,416	23,354	5.23%	348.43%
	Malaysia	828	1,266	1,430	2,168	7,127	1.60%	760.75%
	Indonesia	12,298	11,715	12,221	13,209	18,239	4.08%	48.31%
	Thailand	2,061	2,150	2,601	4,052	29,258	6.55%	1319.60%
	Philippines	26,918	30,943	33,011	29,798	41,396	9.26%	53.79%
	Myanmar	13,618	12,702	16,119	14,287	15,616	3.49%	14.67%
	Cambodia	1,764	873	1,392	2,568	4,339	0.97%	145.98%
	Kazakhstan	1,716	2,483	1,181	1,113	8,528	1.91%	396.97%
	Mongolia	721	2,348	2,076	3,106	6,043	1.35%	738.14%
Americas	USA	48,381	61,563	58,535	48,383	128,816	28.83%	166.25%
	Canada	4,841	8,163	12,671	9,054	19,843	4.44%	309.89%
	Mexico	881	947	763	998	1,647	0.37%	86.95%
	Brazil	304	478	488	645	1,689	0.38%	455.59%
Europe	France	2,636	4,559	4,572	6,109	11,697	2.62%	343.74%
	UK	1,256	3,225	3,257	3,077	8,743	1.96%	596.10%
	Germany	3,714	6,086	6,564	5,904	13,195	2.95%	255.28%
	Italy	699	1,162	1,559	1,464	3,491	0.78%	399.43%
	Spain	325	953	962	961	2,536	0.57%	680.31%
	Hungary	168	258	365	391	722	0.16%	329.76%
	Russia	7,995	8,402	9,740	8,668	10,642	2.38%	33.11%
	Netherlands	3,628	3,393	3,243	3,067	5,708	1.28%	57.33%
	Romania	661	841	1,060	1,146	1,210	0.27%	83.06%
Oceania	Australia	536	796	1,607	1,999	10,236	2.29%	1,809.70%
	New Zealand	315	409	607	623	2,284	0.51%	625.08%
Total		190,002	227,355	233,231	229,024	446,821	100.00%	135.17%

* Source: Korea Tourism Organization (KTO) website (Notice - Data - Korea Tourism Statistics), as of August 22, 2022

*Reference

Korea Tourism Organization, Korea Tourism Statistics, April, May, June 2022

Han, J. (2022, June 17). "Airways now opening up"---Why the Duty-Free industry is still gloomy. *Business Watch*.

3 Hallyu – Education Sector

Number of International Students and Trainees Increased YoY and on a Continuously Increasing Trend

In Q2 2022, a total of 13,393 visitors entered Korea from major countries for study abroad and training purposes. With 8,072 students, this is a 65.92% YoY increase, and there were 2,685, 4,226, and 6,482 inbound international students and trainees in April, May, and June, respectively, exhibiting a gradual increase each month. This is predominantly believed to have been caused by COVID-19 shifting from pandemic to endemic. In particular, the active push for face-to-face classes at universities under government guidelines starting in May this year is thought to have been the main driver. The number of Vietnamese foreign students, who accounted for the highest proportion (36.31%) of all international students studying in Korea this quarter, increased 108.09% YoY, to 4,863 students. China (24.62%) and Japan (12.01%) recorded 3,297 (-6.97%) and 1,609 (+112.55%) students, respectively. The slight decrease in the number of Chinese students entering the country compared to the same period last year is seemingly owing to the lockdown policy imposed in China. The number of international students and trainees in Korea is generally lower in the second and fourth quarters, compared to the first and third quarters, as semesters start in the first and third quarters. However, only the Philippines exhibited an increase (+101.49%, 135 students). Meanwhile, the U.S. (-5.74%, 230 students) recorded the largest number from the Americas, yet decreasing slightly, while other major countries exhibited an upward trend. In Europe, the number of international students and trainees was highest from France (+1,592.86%, 237 students), Russia (-5.81%, 162 students), and Germany (+150%, 125 students). As the current government recommends that face-to-face classes be conducted more actively in the second semester, the number of international students and trainees visiting Korea is expected to continue increasing in the future.* 

*Reference

Korea Tourism Organization, Korea Tourism Statistics, April, May, June 2022

Moon, B. (2022, April 20). No more remote classes for quarantine – returning to school starting May 1st. *ETNews*.

Hong, J. (2022, August 4). Face-to-face classes and self-diagnosis to remain in 2nd semester... COVID-19 patients disallowed to go to school for 7 days.

JoongAng Ilbo.

Entry of International Students·Trainees (Q2 2021~Q2 2022)

(Unit: persons)

Region	Country	2021			2022		Contribution	▲ YoY
		Q2	Q3	Q4	Q1	Q2		
Asia	Japan	757	1,895	614	2,652	1,609	12.01%	112.55%
	China	3,544	17,311	3,522	13,511	3,297	24.62%	-6.97%
	Hong Kong	79	215	79	287	256	1.91%	224.05%
	Singapore	14	49	19	199	28	0.21%	100.00%
	Taiwan	120	366	107	609	240	1.79%	100.00%
	Vietnam	2,337	2,021	2,458	6,165	4,863	36.31%	108.09%
	Malaysia	40	317	52	631	85	0.63%	112.50%
	Indonesia	94	296	139	944	233	1.74%	147.87%
	Thailand	54	244	155	386	227	1.69%	320.37%
	Philippines	17	85	6	67	135	1.01%	694.12%
	Myanmar	59	295	244	384	266	1.99%	350.85%
	Cambodia	19	82	9	139	36	0.27%	89.47%
	Kazakhstan	72	415	12	193	145	1.08%	101.39%
	Mongolia	276	1,427	896	1,419	929	6.94%	236.59%
Americas	USA	244	1,730	92	1,571	230	1.72%	-5.74%
	Canada	25	77	27	160	27	0.20%	8.00%
	Mexico	9	202	17	249	22	0.16%	144.44%
	Brazil	12	83	22	137	43	0.32%	258.33%
Europe	France	14	844	237	1,802	237	1.77%	1592.86%
	UK	2	187	5	90	33	0.25%	1550.00%
	Germany	50	1,245	57	1,014	125	0.93%	150.00%
	Italy	28	226	43	265	62	0.46%	121.43%
	Spain	16	461	38	343	55	0.41%	243.75%
	Russia	172	648	262	597	162	1.21%	-5.81%
	Netherlands	8	269	14	348	30	0.22%	275.00%
	Romania	4	33	6	27	0	0.00%	-100.00%
Oceania	Australia	6	20	19	34	17	0.13%	183.33%
	New Zealand	0	3	1	6	1	0.01%	100.00%
Total		8,072	31,046	9,152	34,229	13,393	100.00%	65.92%

* Source : Korea Tourism Organization website (Notice - Data - Korea Tourism Statistics, as of August 22, 2022)