

## Korean Dramas and Films: Key Factors for Their International Competitiveness

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### Abstract

The Korean wave, which is the popularity of Korean entertainment outside Korea, is a fairly new phenomenon. Encompassing Korean dramas, films, and songs, it has been highlighted by international media outlets and scholars. Several prestigious newspapers and scholars attempted to explain the competitiveness of the Korean wave, but they have remained biased by missing, over-emphasizing, or overlapping important success factors. To provide a more comprehensive and accurate analysis, this paper conducts a rigorous study on the competitiveness of Korean entertainment industry focused on Korean dramas and films with a comprehensive analytical tool, the generalized double diamond model. The results of this study provide evidences that the Korean wave is not a temporary phenomenon but a sustainable industry segment. For further enhancement of this important industry, this paper suggests useful implications, including international cooperation with other countries.

### Keywords

Korean wave, Hallyu, competitiveness, diamond model, generalized double diamond model, pop-culture

### Introduction

In February 2011, at the *Vesoul International Film Festival of Asian Cinema*, in France, 36 films received more than 300 visitors for each showing during the “Week of Korea.” This feverish and unexpected response to Korean films surprised the film festival staff. Further, in April 2011, a Belgium production purchased the broadcast rights to three Korean dramas: *Iris*, *Chuno* (Slave Hunter), and *Jeonwoo* (Comrades), in order to televise them in Europe (Dongailbo, 2011). In a response to this ever-increasing popularity of Korean dramas and films, some countries try to protect their own culture. For example, in February 2012, China’s *State Administration of Radio, Film and Television* issued a directive direction to ban foreign dramas, notably increasingly popular Korean dramas, between 7 p.m. and 10 p.m. to protect the local entertainment industry (The Asahi Simbun, 2012).

This phenomenon or the “Korean wave (*Hallyu* or *Hanryu*),” is a term coined in the late 1990s by Beijing journalists startled by the growing popularity of Korean entertainers and goods in China. This craze for all things about Korea has spread across Asia, driving regional sales from cars to *Kimchi* (The Washington Post, 2006). However, in the late 2000s, exports of Korean dramas decreased. Particularly, in 2006, the number of exported Korean dramas dropped by 16.3%. Not only the number, but also the average unit price of exported dramas was reduced (Lee and Lee, 2007). Thus, the Korean wave was often regarded as a temporary phenomenon or fad that was expected to either decline or disappear soon (Chua and Iwabuchi, 2008).

However, in 2009 the Korean wave returned in a revitalized form. The main drivers of *Hallyu* have been even expanded from dramas and films to musicals and pop songs. The popularity of Korean wave may have remained in the realm of speculation because the scope is limited. However, the geographical scope of the Korean wave has been widened from East Asia to many countries in Europe, Latin America, and the Middle East (Kim, 2010). This implies that their success may be beyond speculation.

In order to sustain and enhance the popularity of the Korean wave, the Korean government and many related organizations have tried to find new and effective strategies. Media outlets and scholars, as well as government organizations, have tried to discover why the Korean wave is popular in foreign countries, but their findings and suggestions are not satisfactory. Thus, the purpose of this study is to conduct a rigorous and comprehensive analysis of the competitiveness of Korean dramas and films, which is the main momentum for the beginning of Korean wave. This research and its methodology are integral for Korea which tries to promote a positive image of Korea and Korean goods, and also other nations that would like to enhance their cultural strength.<sup>1</sup>

## Review of Previous Studies

Since the Korean wave is fancy and fairly new, renowned media outlets have tried to explain the competitiveness of Korean dramas and films.<sup>2</sup> For the

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<sup>1</sup> A very brief journalistic analysis similar to this is found in Moon (2011). However, this article conducts a more comprehensive and in-depth academic analysis. Some parts of this paper are also extended from a project, promoting Korean studies: a series of books for Korean studies (Asia and the Korean wave), funded by Korean Studies Promotion Service of the Republic of Korea.

<sup>2</sup> MK Business (2010) classified Korean wave as “Korean wave 1.0” and “Korean wave 2.0.” The first refers to mainly Korean dramas and films, while the latter is extended to Korean musicals and K-pop. This paper focuses more on Korean dramas and films which are the main momentums for the beginning of the Korean Wave.

success of *Hallyu*, the New York Times (2006) pointed out several reasons, such as cultural proximity, filtered Western values, democratization, and Chinese preference for Korean culture to Japanese. The Washington Post (2006) credited this phenomenon to good marketing, coupled with good-looking young men with muscular bodies, and solid storylines of unconditional love. Whereas the Wall Street Journal (2009) stated that the most important reason of *Hallyu*'s popularity is Korea's economic success.

Scholars are also interested in this topic. To explain the success of Korean dramas and films, Sung (2010) extracted factors such as nationalism of the drama theme, as shown in *Dae Jang Geum* (Jewel in the Palace), which tells the tale of an orphaned cook who became the king's first female physician at a 16th-century royal court of Korea, and family values, which are derived from Confucianism and represent the real sentiments of East Asian lives.

Ko (2005) and Lee and Lee (2007) applied a management model, Michael Porter's *diamond model*, in order to analyze the competitiveness of the Korean wave.<sup>3</sup> In the introduction, Ko (2005) firstly mentioned good and solid storylines, the striking appearance and performance of the Korean actors and actresses, beautiful backdrops, and other themes for the competitiveness variables of *Hallyu*. She then analyzed the competitiveness of Korean dramas and films with other variables: abundant labor (students in the artiste [entertainment] field), and good traditional culture for *factor conditions*; foreign demand and the dynamism of Korean consumers for *demand conditions*; well-developed communication infrastructure in Korea for *related and supporting sectors*; and competitive environment and niche market strategy for *business context*.

Applying the same diamond model, Lee and Lee (2007) analyzed the Korean wave with different variables: good writers, producers, appearance of actors and actresses, and consistent investment for *factor conditions*; sophisticated Korean consumers and fervent preference for dramas for *demand conditions*; considerable exports of Korean films for *related and supporting sectors*; and the oligopolistic structure of Korean broadcasting stations and competition over audience measurement for *business context*.

Shim (2006) and Ryoo (2009) presented cultural hybridization, very interesting views on the Korean wave's popularity that local culture interacts with foreign culture, and as a result a globalized local culture is produced. This globalized one can be a resource for the future development of local culture. Thus, their relationship is like the evolutionary process from thesis, to antithesis and then synthesis. In addition, other scholars asserted successful variables such as

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<sup>3</sup> For the analysis of the Korean wave, Lee and Lee (2007) focused on Korean dramas and films, whereas Ko (2005) dealt with K-pop as well as Korean dramas and films, although most of Ko's variables were for explaining Korean dramas and films.

cultural diversity (Park, 2009), Korean tradition (Kim and Kim 2009), and the depiction of “pure love,” nostalgia, longing, resonance with character portrayals, and esthetic and poetic beauty (Hanaki, Singhal, Han, Kim, and Chitnis, 2011), while several scholars pointed out recipient and audience conditions (Kim, 2004) and political and economical reasons (Jin, 2003; Son, 2001).

### Critics and Extension

As explained in the previous section, various media outlets and scholars have tried to explain competitiveness of the Korean wave, but they are not free from criticism. In this section, the existing studies will be critically evaluated.

First of all, the New York Times' (2006) variables such as cultural proximity, filtered Western values, and Chinese preference for Korean cultures could explain Korean wave's popularity to some extent. However, these findings cannot explain *Hallyu's* expansion from East Asia to Europe, Latin America, and the Middle East, which are culturally different from Korea and China. The New York Times' other explanatory variable, the democratization of Korea, can explain the quality enhancement of Korean pop culture compared with its past, but cannot explain why the Korean wave is more popular than pop-culture from more democratic countries, including Japan and other Western countries.

The Washington Post's (2006) good marketing strategy is based on good-looking young men and solid storylines, not the marketing strategy *per se*. Therefore, it can be classified under appearance and a good story. The solid storyline of unconditional love is only one of Korean dramas' various stories (or themes), and the variety of story can be treated as strategy. The Wall Street Journal's (2009) economic development is not a very significant variable. There are some other Asian countries which have more successful economic achievement than Korea; such as Japan, Singapore, and Hong Kong. But their pop cultures are not as popular as that of Korea. Therefore, economic development cannot be a main factor to explain the popularity of *Hallyu*. The nationalism of Korea explained by Sung (2010) is hard to be a main factor, either, because emphasis on nationalism may cause anti-Korean feeling in Asia (Lee and Lee, 2007). In addition, Sung's (2010) concept of East Asian sentiments is inappropriate to explain Korean wave's expansion to Western countries.

Analyses on the competitiveness of the Korean wave by utilizing a comprehensive management model, i.e., Porter's (1990) diamond model are very meaningful academic works since their studies are more systematic than other existing studies by applying a useful analytical tool. However, Ko (2005) and Lee and Lee (2007) are not entirely satisfactory since some of their variables

are overlapping and not very much relevant, and some other important variables are missing.

For example, several important variables, such as story, striking appearance, and performance, were mentioned by Ko (2005), but were not fully studied in her study. Furthermore, some variables are misclassified under an inappropriate category; various themes are categorized into factor conditions but they are directly related to the story, so they should be categorized under the heading of story. The niche market strategy is too narrow, and this can be applied only to *BoA*, a Korean female singer who replaced a Japanese top singer, *Amuro Namie*, and became very famous in Japan (Ko, 2005), but this strategy is not applicable to other singers, actors and actresses. Overemphasis on a traditional culture is a bit risky due to the strong emotions regarding past events and cultural conflicts between China, Japan, and Korea (Calder, 2006; Cooney and Scarbrough, 2008; Liu and Atsumi, 2008). Other variable, for example, foreign demand is not a cause but an effect, because the well-made and interesting *Hallyu* products will result in enlarged foreign demand.

In Lee and Lee (2007), the variable “good (Korean) writers” is arguable, since filmmakers and drama producers in Korea complain about a shortage of good stories, reflecting the lack of good writers (The Korea Times, 2010). The considerable export of Korean films is an effect, not a cause as previously mentioned. The oligopolistic structure of Korean broadcasting stations is also doubtful because there is controversy over the structure of Korean broadcasting stations whether it is beneficial or not for the Korean wave (Moon and Lee, 2005; Choi, 2010).

Cultural hybridization of Shim (2006) and Ryoo (2009) is meaningful. Yet, the scope of Shim’s (2006) hybridization is narrow, referring only to market size and quality (or sophistication) when it is analyzed with the diamond model. In addition, Ryoo (2009) argued that the Korean wave is a clear indication of new global and regional transformations in the cultural arena. However, the units of analysis need to be more specified. Thus, their arguments on hybridization will be further developed in this paper. Park’s (2009) cultural diversity needs to be dealt carefully, since Korea used to be known as “Hermit Kingdom.”<sup>4</sup> Kim and Kim’s (2009) Korean tradition can explain the popularity

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<sup>4</sup> Regarding cultural diversity, Korea is often referred to as a less globalized country than other Asian countries, such as Japan, Singapore, and Malaysia. According to the 2011 KOF Index of Globalization (KOF, 2011), the ranking of Korea’s globalization index is 54th, while Singapore is 18th, Malaysia 37th, and Japan 44th. In the case of social globalization’s ranking, one of the sub-variables of the globalization index, Korea is ranked 86th, whereas Singapore is ranked 22nd, Macao 41st, Japan 48th, Malaysia 58th, and Saudi Arabia 63rd. Therefore, we can assume that cultural diversity is hard to be considered as one of competitiveness factors of *Hallyu*.

for few, not for the majority of Korean dramas and films. In addition, variables of Hanaki *et al.* (2011), including depiction of pure love, nostalgia, longing, resonance with character portrayals, and beautiful backdrops, depend on the story, thus these variables can be incorporated into story.

Other studies' arguments, such as recipient and audience conditions (Kim, 2004) and political and economical reasons (Jin, 2003; Son, 2001), are external factors that are uncontrollable and cannot explain specifically the popularity of Korean wave abroad, assuming these conditions and reasons affect equally to other countries' entertainment products.

To sum up, many variables of existing studies are just subsets or sub-factors of core factors, or do not have significantly explanatory power for the Korean wave's popularity in Asian and Western countries. Furthermore, several important variables were not studied appropriately. Thus, a more rigorous study is needed for further development of *Hallyu*, which can then provide useful guidelines for Korea and other countries that aim to promote their culture and image.

### In-depth Analysis: The Diamond Model Approach

The diamond model was introduced by the business strategy guru, Michael Porter, to explain competitiveness. He said that competitiveness is the outcome of four interlinked factors and activities (Porter, 1990). The diamond model is very useful in analyzing the competitiveness of industries, including the entertainment industry of which Ko (2005) and Lee and Lee (2007) applied to analyze the competitiveness. Porter's diamond model is excellent in its concepts of the four determinants,<sup>5</sup> but it misses an important dimension, i.e., the international activities (Rugman, 1991; Moon, 1994; Moon, Rugman, and Verbeke, 1995, 1998; Moon and Lee, 2004; Liu and Hsu, 2009). To improve existing studies, this study employs the *generalized double diamond (GDD) model* developed by Moon *et al.* (1998), an extension to Porter's (1990) diamond model. Since *Hallyu* arises from an interaction between local and international cultures (Shim, 2006; Ryoo, 2009), GDD model is better than Porter's single diamond model to analyze *Hallyu*.

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<sup>5</sup> Porter's (1990) diamond model has four determinants and two additional variables: four endogenous and two exogenous. The two exogenous variables are government and chance and they are uncontrollable for firms and industries (Porter, 1990: 73). Therefore, this study focuses on the four endogenous determinants.

The four determinants of the diamond model are 1) factor conditions: the industry's position in factors of production, such as skilled labor or technology, necessary to compete in a given industry, 2) demand conditions: the nature of home-market demand for the industry's product or service, 3) related and supporting sectors: the presence or absence in the industry of supplier and other related sectors that are internationally competitive, and 4) business context: the conditions in the industry governing how companies are created, managed, as well as the nature of domestic rivalry.<sup>6</sup> Each determinant of the diamond and the diamond as a system, affect essential ingredients for achieving international success. Factor conditions are further specified into "basic" and "advanced." Demand conditions consider both "size" and "quality" of the market. Related and supporting sectors represent internationally competitive "supplier industries" and other pertinent "related sectors." Lastly, business context refers to the nature of "domestic competition and conditions" with regard to organizing and managing businesses (Cho and Moon, 2000).

Meanwhile, there can be a valid concern that quantitative analysis may not be able to adequately explicate the pleasures of cultural or aesthetic products. Even though the cultural industry has increasingly begun to function like other industries and to borrow managerial tools, the methodologies developed for other industries might not necessarily work in the context of cultural products as their pleasures. Yet, gratifications are less tangible or concrete than those offered by other products. We agree that cultural products are less tangible than other products. However, we can make them more tangible with more quantification, by changing tacit variables into more explicit ones.

Using the diamond model, the important variables derived from the existing studies are compared and contrasted in Table 1. The table shows clearly that existing studies only dealt with several variables incomprehensively, which may lead to somewhat biased-analysis of the competitiveness of *Hallyu*. Although Ko (2005) and Lee and Lee (2007) were relatively more comprehensive, half of the significant variables at sub-factor level are missing. Furthermore, existing studies did not consider internationalization.<sup>7</sup>

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<sup>6</sup> Porter and Stern (2001) used "context for strategy and rivalry" instead of "strategy, structure and rivalry" employed by Porter (1990). In this study, context for strategy and rivalry is referred as business context.

<sup>7</sup> Moon *et al.* (1995, 1998) distinguished domestic and international variables to highlight that multinational activities are as important as domestic ones. However, our study considers the overall effects of domestic and international variables as a whole, taking into account Shim (2006) and Ryoo's (2009) cultural hybridization, an interaction of local and foreign cultures.



In order to conduct more rigorous and comprehensive research, this study has reorganized significant variables from existing studies, and added other important variables that were missed in the existing studies. Firstly, the “appearance” variable from the Washington Post (2006) and Lee and Lee (2007) — Ko (2005) mentioned but did not incorporate — is adopted and classified as *basic factor conditions*. However, “performance of actors and actresses” is more important for the competitiveness of dramas and films but has not been studied in existing studies, thus we newly include this variable in *advanced factor conditions*.

The “size of the Korean market” studied by Lee and Lee (2007) and Shim (2006) is categorized under *size* of demand conditions. “Sophisticated Korean consumers” (Ko, 2005; Shim, 2006; Lee and Lee, 2007) are put under *quality* of demand conditions. “Investment” (Lee and Lee, 2007) is classified as *suppliers* of related and supporting sectors. “Communication infrastructure” (Ko, 2005) is incorporated into *related sectors* of related and supporting sectors. “The computer graphics (CG) industry,” which is very important for films and dramas, is also added to related and supporting sectors. Various stories or themes (The Washington Post, 2006; Kim and Kim, 2009; Hanaki *et al.*, 2011) are incorporated into *strategy* of business context. Lastly, high competition and competitive environment including audience measurement are classified as *rivalry* of business context. Lastly, Ko (2005) classified abundant labor, particularly students in the artiste (entertainment) field who are competing and hoping to become actors and actress, or producers in the future, as factor conditions. However, this should be treated as a variable of business context, rather than one of factor conditions.

To sum up, this study offers a range of important variables as follows: 1) factor conditions: appearance of actors and actresses, and their performance, 2) demand conditions: market size and market sophistication, 3) related and supporting sectors: investment, communication infrastructure, and CG industry, and 4) business context: competitive environment such as audience measurement, and people in the artiste field, and variety of story (see Table 1). These reorganized variables from the previous studies and new variables added in this paper are listed in Table 1. A rigorous analysis for each variable will be conducted in the following sections.



Table 1: Comparison of variables: existing studies and this study

Factors	Sub-factors	S1	S2	S3	S4	S5	S6	This Study
Factor Conditions	Basic Advanced	appearance	abundant labor	appearance				appearance
Demand Conditions	Size Quality		sophisticated Korean consumers	size sophisticated Korean consumers	size sophisticated Korean consumers			size of Korean market sophisticated Korean consumers
Related and Supporting Sectors	Suppliers Related Sectors		communication infrastructure in Korea	investment				investment communication infrastructure in Korea, CG industry
Business Context	Strategy Rivalry	story	competitive environment	audience measurement		story	story	Various stories (themes) competitive environment (audience measurement, and abundant labor)

Notes: 1) S1-The Washington Post (2006), S2-Ko (2005), S3-Lee and Lee (2007), S4-Shim (2006), S5-Kim and Kim (2009), S6-Hanaki et al. (2011)

2) The variables, mentioned but not studied well in the existing studies, were not included in this table.

3) Newly added variables are in bold, and underlined variable is rearranged from the existing studies.

## Factor Conditions

### *Basic Factors*

The Washington Post (2006) argued that the competitiveness of *Hallyu* is derived from appearance — good looking and tall actors and actresses, particularly young handsome actors. To prove this, we compared Korea, China,<sup>8</sup> and Japan that have the largest entertainment industries in Asia, and the students from these three countries studying in *the Graduate School of International Studies, Seoul National University*, were randomly selected and then asked to pick their five top actors from their own country.

A total of fifteen actors were selected; five from each country. In Korea, these were Yong-joon Bae, Dong-gun Jang, Seung-hun Song, Byung-hun Lee and Bin Won. In Japan, they were Takuya Kimura, Yutaka Takenouchi, Yuji Oda, Tsuyoshi Kusanagi, and Tatsuya Fujiwara. Lastly, in China, Chaowei Liang, Yincho Wu, Chengwu Jin, Kun Chen, and Dehua Liu were chosen. After the fifteen actors were sorted, their heights and ages were compared. We then found that Ko (2005) and the Washington Post's (2006) arguments were meaningful. Korean actors tended to be taller, younger, and probably more handsome than their counterparts from Japan and China (see Table 2).

Although it was perceived that “Asianness” was never a merit to appeal to a non-Asian audience (Shin, 2009), recently Kim and Chung (2009) shows that there is assimilation of beauty and attractiveness between Americans and Koreans. This means that Korean actors and actresses have appeal and can gain popularity in non-Asian countries.

### *Advanced Factors*

Although the appearance of actors and actresses is important, their performance quality is even more so. To evaluate this variable, by counting the major awards of four famous international film festivals (*the festival de Cannes, the Berlin International Film Festival, the Venice Film Festival and the Moscow International Film Festival*), three principal Asian winners — China, Japan and Korea — are compared, on the assumption that the better the performance, the higher the possibility of receiving major awards. The awards were counted from 2002, when the Korean wave became popular, until 2012. So far, Korea has earned thirteen awards; China, fifteen; and Japan, six. Although China has won more awards than Korea from the four international film festivals, it is noteworthy that awards of Hong Kong and Chinese Taipei are treated as Chinese. (see Table 3).

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<sup>8</sup> Hong Kong and Chinese Taipei are included in China.

Table 2: Top 5 actors (Korea, Japan and China)

Country	Rank	1st	2nd	3rd	4th	5th
Korea		Bae, Yong-joon	Jang, Dong-gun	Song, Seung-hun	Lee, Byung-hun	Won, Bin
		1972	1972	1976	1970	1977
		180 cm	182 cm	180 cm	177 cm	178 cm
Japan		Kimura, Takuya	Takenouchi, Yutaka	Oda, Yuji	Kusanagi, Tsuyoshi	Fujiwara, Tatsuya
		1972	1971	1967	1974	1982
		176 cm	178 cm	177 cm	170 cm	178 cm
China		Liang, Chaowei	Wu, Yincho	Jin, Chengwu	Chen, Kun	Liu, Dehua
		1962	1974	1973	1976	1961
		172 cm	183 cm	179 cm	176 cm	174 cm

Data source: Naver, [www.naver.com](http://www.naver.com) (accessed 9 March 2012)

Note: 1) The order is by name, year of birth, and height.

2) China includes Chinese Taipei and Hong Kong.

Table 3: Main awards received (Korea: 13, China: 15, Japan: 6)

	Festival de Cannes <sup>a</sup>	Berlin International Film Festival <sup>b</sup>	Venice Film Festival <sup>c</sup>	Moscow International Film Festival <sup>d</sup>
2012		<ul style="list-style-type: none"> <li>• Silver Bear: White Deer Plain (CN)</li> </ul>	<ul style="list-style-type: none"> <li>• Golden Lion: Pieta (KR)</li> </ul>	
2011			<ul style="list-style-type: none"> <li>• Silver Lion: People Mountain People Sea (CN)</li> <li>• Coppa Volpi: A Simple Life (CN)</li> <li>• Marcello Mastroianni Award: Himizu (JP)</li> </ul>	<ul style="list-style-type: none"> <li>• Silver St. George: Revenge: A Love Story (CN)</li> </ul>
2010	<ul style="list-style-type: none"> <li>• Award for Best Screenplay: Poetry (KR)</li> </ul>	<ul style="list-style-type: none"> <li>• Silver Bear: Apart Together (CN)</li> </ul>		
2009	<ul style="list-style-type: none"> <li>• Award for Best Screenplay: Spring Fever (CN)</li> <li>• Jury Prize: Thirst (KR)</li> </ul>			
2008		<ul style="list-style-type: none"> <li>• Silver Bear: In Love We Trust (CN)</li> <li>• Golden Bear: Tuya's Marriage (CN)</li> <li>• Alfred-Bauer Prize: I'm a Cyborg, But That's Ok (KR)</li> </ul>		
2007	<ul style="list-style-type: none"> <li>• Grand Prix: The Mourning Forest (JP)</li> <li>• Award for Best Actress: Secret Sunshine (KR)</li> </ul>			
2006			<ul style="list-style-type: none"> <li>• Golden Lion: Still Life (CN)</li> </ul>	

Table 3 (cont.)

	Festival de Cannes <sup>a</sup>	Berlin International Film Festival <sup>b</sup>	Venice Film Festival <sup>c</sup>	Moscow International Film Festival <sup>d</sup>
2005	<ul style="list-style-type: none"> <li>Jury Prize: Shanghai Dreams (CN)</li> </ul>	<ul style="list-style-type: none"> <li>Silver Bear: Peacock (CN)</li> <li>Silver Bear: The Wayward Cloud (CN)</li> <li>Alfred-Bauer Prize: The Wayward Cloud (CN)</li> </ul>		
2004	<ul style="list-style-type: none"> <li>Grand Prix: Old Boy (KR)</li> <li>Award for Best Actor: Nobody Knows (JP)</li> </ul>	<ul style="list-style-type: none"> <li>Silver Bear: Samaria (KR)</li> </ul>	<ul style="list-style-type: none"> <li>Award for Director: 3-Iron (KR)</li> <li>FIPRESCI Award: 3-Iron (KR)</li> </ul>	
2003		<ul style="list-style-type: none"> <li>Silver Bear: Blind Shaft (CN)</li> <li>Alfred-Bauer Prize: Hero (CN)</li> </ul>		<ul style="list-style-type: none"> <li>Silver St. George: Save the Green Planet! (KR)</li> <li>Silver St. George: The Owl (JP)</li> <li>Silver St. George: Blue (JP)</li> </ul>
2002	<ul style="list-style-type: none"> <li>Award for Best Director: Chihwaseon (KR)</li> </ul>	<ul style="list-style-type: none"> <li>Golden Bear: Sento chihirono kamikakushi (JP)</li> </ul>	<ul style="list-style-type: none"> <li>FIPRESCI Award: Oasis (KR)</li> <li>Special Award for Director: Oasis (KR)</li> </ul>	

Data sources: a) Festival de Cannes, [www.festival-cannes.com](http://www.festival-cannes.com), b) Berlin International Film Festival, [www.berlinale.de](http://www.berlinale.de), c) Venice Film Festival, [www.labiennale.org](http://www.labiennale.org), d) Moscow International Film Festival, [www.moscowfilmfestival.ru](http://www.moscowfilmfestival.ru), (all accessed 11 February 2013).

Notes: 1) This table includes only main awards of the festivals. 2) The nationality of movie follows that of the director. 3) CN-China, JP-Japan, and KR-Korea.

**Demand Conditions**

*Size*

Traditional economic theory treated size (i.e., economies of scale) as one of the most important factors for competitiveness. From this view, the Korean movie market looks small since the population of Korea is no more than 50 million. However, when the market size is calculated by total sales, Korea’s entertainment industry was ranked 11th in 2009 after China and Canada (European Audiovisual Observatory, 2010), implying that the Korean market is not small.

Furthermore, when visits per capita are calculated, Korea was ranked 3rd, following U.S.A. (1st) and Australia (2nd). The admission per capita of Japan, the world’s 2nd largest entertainment industry (PricewaterhouseCoopers, 2010), was only 0.13; China, which has the world largest population, was 0.16; and Korea was 3.22 (European Audiovisual Observatory, 2010). The populations of China and Japan are 27.3 and 2.6 times as large as that of Korea, respectively, but individual Korean visits to movie theaters approximately 20 and 25 times the Chinese and Japanese, respectively (see Table 4).

**Table 4: Top 15 movie markets (2009)**

Rank (by Gross Box Office)	Country	Gross Box Office (US\$, mil.)	Visits per capita and Population*	Rank (by Visits per capita)
1	U.S.A.	9,630.0	4.47 307,007,000	1
2	Japan	2,200.0	1.30 127,560,000	12
3	India	1,860.0	2.41 1,155,347,678	7
4	France	1,710.0	3.11 62,616,488	5
5	U.K.	1,470.0	2.83 61,838,154	6
6	Germany	1,360.0	1.79 81,879,976	10
7	Italy	940.0	1.86 60,221,211	9
8	Spain	928.5	2.38 45,957,671	8
9	China	906.3	0.16 1,331,460,000	15

**Table 4 (cont.)**

Rank (by Gross Box Office)	Country	Gross Box Office (US\$, mil.)	Visits per capita and Population*	Rank (by Visits per capita)
10	Canada	863.0	3.20 33,739,900	4
11	<b>Korea</b>	<b>854.4</b>	<b>3.22</b> <b>48,747,000</b>	3
12	Australia	848.4	4.20 21,874,900	2
13	Russia	735.7	0.98 141,850,000	13
14	Mexico	562.5	1.66 107,431,225	11
15	Brazil	482.9	0.58 193,733,795	14

Data sources: European Audiovisual Observatory (2010), \*World Bank, <http://data.world-bank.org> (accessed 1 April 2012)

Koreans are not very nationalistic as many foreign observers may argue. For example, in the case of the movie, “Avatar,” one of the top world box office ranked movies since 2009, the total sales in Korea ranked 8th, after Germany (6th) and Russia (8th). When other considerations such as GDP per capita and population are taken into account, the Korean market size is not small (see Table 5).

### *Quality*

Korean consumers are very dynamic and sophisticated. They behave as “prosumers” — a compound word formed from the words “producer” and “consumer,” sharing interests and news online (Lee and Lee, 2007). They sometimes make a group movement to pressure drama writers to change storylines for a better fit. If the quality of a film is good, Korean consumers use blogs and the Internet community to share opinions and aggressively persuade others to see the films (Ko, 2005). As a result, for a very good movie, more than 10 million people, one fifth of Korea’s entire population, visit to movie theaters of the same movie within several weeks. In addition, Korean consumers download dramas and films onto their mobile phones, tablet PCs or other portable devices to enjoy them on the bus, subway or elsewhere.

Some websites are uniquely devoted to finding flaws of dramas or films, such as the taxis with the same license plate number appearing over and over,



**Table 5: International sales of 'Avatar' (film)**

Rank	Country	Total Gross (US\$)
1	Japan	186,753,197
2	China	182,238,768
3	France	158,261,059
4	Germany	157,564,785
5	U.K.	150,025,197
6	Russia	117,103,251
7	Australia	105,779,507
8	Korea	105,485,521
9	Spain	93,868,373
10	Italy	83,498,193
11	Brazil	58,218,829
12	Mexico	44,229,043
13	Poland	26,135,805
14	India	24,216,860
15	Netherlands	23,686,268

Data source: Box Office Mojo (accessed 17 March 2012)

Notes: 1) France includes Algeria, Monaco, Morocco, and Tunisia.

2) UK includes Malta and Ireland.

3) Russia includes all the members of CIS.

4) U.S.A. is excluded.

a seam opened on the dress of an actress, and so on. To meet Korean consumers' quality, *Hallyu* products become more sophisticated to minimize any possible flaws and to meet customers' expectation.

## Related and Supporting Sectors

### *Suppliers*

Once Korean market opened, producers struggled for financial aids to compete against foreign dramas and films. As Korean dramas and films became successful, investors found business potentials in the cultural industry. Thus, some Korean *chaebols* (conglomerates) have actively invested in the film industry (Ryoo, 2008; Huang, 2011) and these investments have been expanding (Lee and Lee, 2007). However, the amount of investment toward this industry was not remarkable in the beginning. It was only in 2005, when the first

private equity fund, the “Good & Rich Drama Special Private Equity Fund,” was installed to help Jong-hak Kim, a famous producer and director who directed several popular drama series (Kim and Yoon, 2009). The fund was very successful and since then a number of private equity funds have been established to produce dramas.<sup>9</sup>

Furthermore, there is a trend of blockbuster dramas in Korea. For example, *Chuno* (Slave Hunter) cost 15 billion won (US\$ 13 million) for production and *Iris* cost a staggering 20 billion won (US\$ 17 million). When the cost to produce dramas is compared with that of Japanese dramas, the absolute amount of investment in Korea per drama is modest, but when we take GDP per capita and population of the two countries into account, Korean drama producers spend relatively large amount of money in their investments (see Table 6).

### Related Sectors

Recently, the Social Network Service (SNS) has become an important tool of communication all over the world and this service gives a substantial impact on the Korean wave. Since Korea has a world-class Internet infrastructure (Ko, 2005; The New York Times, 2008; Lee, 2009), Korean entertainment companies

**Table 6: Average cost of drama (Korea vs. Japan)**

	Korea	Japan	Korea/Japan × 100 (%)
<b>Cost (2009)<sup>a</sup></b>	approx. KRW 260,000,000 (US\$ 240,151)	approx. JPY 40,000,000 (US\$ 499,517)	48.08
<b>GDP per capita (US\$, 2009)<sup>b</sup></b>	17,078	39,738	42.98
<b>Population (2009)<sup>b</sup></b>	48,747,000	127,560,000	38.21

Data sources: a) Kim (2009), b) World Bank, <http://data.worldbank.org> (accessed 1 April 2012)

Note: US\$ 1 is calculated as JPY 80.07, and KRW 1,082.62.

<sup>9</sup> Several articles highlighted the role of Korean government for its aggressive help in the cultural industry (Jin, 2006; Ryoo, 2008; Huang, 2011). However, a famous Korean director, Dong-hoon Choi, said in an interview with the Korea Times that the government was not as supportive as Chinese Taipei's and Japanese governments were. He also doubted that Korean government ever considered seriously helping Korean film industry (The Korea Times, 2010). Ko (2005) also argued that the Korean government was not interested in helping Korean dramas, until some dramas became popular abroad, notably the success of *Winter Sonata* in 2004. Therefore, the support of Korean government is not certain at the beginning stage of promoting Korean wave.

actively use the SNS as a tool to promote *Hallyu* content. Most of entertainment companies have their official channels on YouTube and Facebook to share news, new films, and dramas' trailers. Through the Internet, international consumers can enjoy *Hallyu* content and become fans of the Korean wave.

Computer graphics (CG) has been a pillar in the image making process and the contents field, which has mushroomed to other achievements in various industries. Korea's high-technology based CG has stimulated foreign CG markets and the U.S., Canada, and Singapore try to lure Korea's CG studios by providing capital and supporting tax benefits. In 2009, Korea increased its source of income by twelve times that of the previous year, by obtaining 10 percent of Hollywood movies' CG market. Korea's CG technology is very competitive and popular in the international market (IT Times, 2010).

## Business Context

### *Strategy*

Korean dramas are diverse in stories and themes, so appeal to different generations and social groups. In Japan, *Winter Sonata* was popular particularly among middle-aged women because of the charming appearance and performance of actors and actresses, and its nostalgic story of pure love (Hanaki *et al.*, 2011). *Dae Jang Geum* (Jewel in the Palace) gained popularity in Chinese Taipei and Hong Kong due to its dramatic story along with the extravagant yet realistic Korean cuisine. In China, where women's rights are strongly expressed, *Sarangi muogilae?* (What is love?), was popular among Chinese men, as one of the drama characters was very male-chauvinist. Family-oriented dramas were popular in Vietnam, since they experienced a war and had separated family members as Korea experienced.

In addition, Korean dramas vary in terms of theme; from non-violent stories to very dynamic and violent stories. *JSA* and *Swiri* dealt with the conflicting situation between North and South Korea. *A Moment to Remember* had a storyline of a couple, one of whom was suffering from Alzheimer's disease. *My Sassy Girl* showed a comic love story. *Old Boy*, a Grand Prix winner at the 2004 Cannes Film Festival, *Sympathy for Lady Vengeance*, and *Sympathy for Mr. Vengeance* represented a trilogy of twisted, cynical, and violent stories. These different films were loved in different countries along with their preferences.

As Korea becomes more internationalized with increasing immigrants and exports of entertainment products, Korean dramas and films try to avoid racism issues, in particular after a Korean entertainment show denigrated African people (Hankookilbo, 2012). Reducing racism and increasing consideration of

foreign cultures will make Korean dramas and films more competitive in the global market.

### *Rivalry*

In Korea, popularity for certain areas of study in university has been used to estimate the projected success of a related industry. It was textile engineering in the 1960s, shipbuilding and mechanical engineering in the 1970s, and electronic engineering in the 1980s. Korea has continued to develop on a similar path (Ko, 2005). Recently, culture-related studies have become popular in Korea.

Compared with Japan, the number of students in the artiste (entertainment) field in Korea is more than that of Japan. In 2003, there were 120,000 students in Korea, whereas Japan had only 70,000 (Ko, 2005), although Korea's population is only 38.2% of Japan's. Furthermore, Korea's entertainment industry is more active and competitive than these numbers show. For example, there are open-audition TV programs for would-be actors and actresses in Korea, and even foreigners participate in these programs, which intensifies the competitive environment.

Compared with Japan, although Korea has less scheduled dramas (20 in Korea, 35 in Japan), Korea broadcasts them more frequently (64 times in Korea, 60 times in Japan). When the population of two countries is taken into account, Korea has a larger number of dramas per capita. As a result, the Korean drama market has a more competitive environment than Japan (see Tables 7 and 8).

**Table 7: Drama schedule and frequency (1 month) (Korea vs. Japan)**

Korea	Type	Japan
2	1/week	29
6	Mon. – Fri.	5
2	Mon. – Sat.	1
3	Mon. & Tue.	-
3	Wed. & Thu.	-
4	Sat. & Sun.	-
20	No. of Drama	35
64	No. of Broadcasting	60
48,747,000	Population (2009)*	127,560,000

Data sources: Kim (2009), \*World Bank, <http://data.worldbank.org> (accessed 1 April 2012)

Note: Observed periods are January 2009 for Korea and October 2008 for Japan, based on the program log of main terrestrial broadcasters.

**Table 8: Viewer rating of top 10 (Korea vs. Japan)**

Type of Program	Korea	Rank	Japan	Type of Program
Drama	31.8	1	19.8	Drama
Sports	30.4	2	19.3	Quiz
Drama	29.3	3	18.8	Variety Show
Drama	27.3	4	18.8	Comedy
Drama	27.1	5	18.6	News
Variety Show	23.0	6	17.8	Variety Show
Comedy	22.8	7	17.7	Variety Show
Drama	19.6	8	17.7	Drama
Drama	19.2	9	17.3	Educational
Drama	17.8	10	16.7	Quiz

Source: Kim (2009)

Note: Observed period is from 30 March to 5 April 2009, based on main terrestrial broadcasters.

Moreover, dramas face high competition in Korea and the “losers” are replaced immediately by new dramas. The winner dramas will be exported soon and become popular abroad.

### The Importance of Internationalization

By using the diamond model, this paper analyzed rigorously the success factors of *Hallyu*. Since the Korean wave has become fashionable in many countries, from Asia to other regions, internationalization and controllable international factors should be analyzed for the competitiveness research. Although many of the success factors seem to originate from domestic scope, their interactions with international scope, through “leaning from Hollywood” and diffusion of globalization to cultural creativity, infrastructure, and audience, are very important as shown in Shim (2006) and Ryoo (2009).

This international interaction is also in line with Lee, Kim, and Min’s (2009) hybridization in communication environment. Examples include the recognition of Korean dramas and films in the international film festivals, sophisticated Korean consumers through experiencing foreign influence and global trend, expansion of demand (Chua, 2010), investments in order to compete against the challenges of foreign dramas and films, international expansion through well-developed infrastructure, CG industry’s enhancement in international market, and gaining global competitiveness adopting and adjusting themes to

meet foreign preferences. These international activities will enhance each corner of the diamond and these four corners mutually reinforce one another.

To complement this analysis, this paper has applied a comprehensive analytical model, *the generalized double diamond model*, which considers the international as well as domestic variables. Throughout the analysis, this paper found that the internationalization of *Hallyu* is critically important in order to strengthen each determinant of the diamond model for Korean dramas and films.

## Conclusion

This study reviewed most of the important existing studies critically and drew important variables to explain the competitiveness of Korean entertainment industry, notably *Hallyu*. Some earlier studies selected variables such as actors' good looks, beautiful settings, theme of undying love, and so forth. These variables are important but they are not systematically organized in the existing studies. This paper has incorporated the most critical variables more systematically using the diamond model and added some other important variables missing in the earlier studies.

It should also be noted that not all of these variables may be critically important. For example, the number of people employed in an industry does not necessarily guarantee their popularity nor does the availability of finance improve the quality of the product. However, other things being equal, a higher number of staff in making drama and film, and a larger amount of investment would positively affect the quality of drama and films. There can be another issue that because a "good look" is culture-specific and relative, it is not easy to generalize. This is an interesting issue for further study.

Based on existing studies and by using a good analytical tool, we analyzed the variables of the four determinants and it is important to note that the competitiveness of these variables is not temporary, since it takes time for each variable to form certain strengths to compete. Furthermore, the competitiveness of Korean dramas and films does not come from one or a few but interactions of all of these variables, and they can be further strengthened through internationalization. As a result, the Korean wave is not a short-term fad, but rather a sustaining pop culture.

Another important point is that the Korean wave has a virtuous circle with economy, both domestic and international. It attracts more domestic and foreign tourists to Korea, and enhances the image of Korea and Korean products. Therefore, the Korean wave affects positively not only tourism, but also other industries. During the *Athens 2004 Summer Olympics*, Japanese broadcasting

stations televised more Korean dramas than Olympic events, which helped stimulate the stagnant Japanese drama industry. There has also been an increase in the sales of *Hallyu-related* Korean products in Japan and other countries as well. All of these facts make the Korean wave more sophisticated and the Korean products more competitive. Through cooperation with other countries, both exporters and importers of cultural products can have more benefits through enhancing synergy effects.

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