

The Korean Wave (*Hallyu*) in East Asia: A Comparison of Chinese, Japanese, and Taiwanese Audiences Who Watch Korean TV Dramas*

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The major purpose of this study is to find out what factors are responsible for Hallyu, the flow and popularity of Korean popular cultural products in East Asia, and which direction Hallyu is heading for. To do this, recent structural and institutional changes in the region are examined and the 2008 EASS data analyzed. Opening up of the cultural market and development of the mass media industry, especially television, laid the ground for Hallyu in East Asia. The 2008 EASS data reveal that social proximity and two demographic variables are common factors for the rise of Hallyu in East Asia, but globalization and modernity variables had no effect on Hallyu. Females are more attracted to Korean TV dramas than males, but typical Hallyu fans are youngest in China, followed by Taiwan, and Japan the oldest. Besides these characteristics of Hallyu fans, the quality of Korean cultural products is an important factor in their success abroad. Since the second decade of the new millennium, Hallyu evolves into a new, or second, stage in which its contents, strategy, and media change considerably. Hallyu, representing a case of alternative globalization, signals a new phase in the recent history of globalization.

Keywords: Hallyu (the Korean wave), East Asia, popular culture, Audience, Korean TV drama

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Introduction

It has now been more than a decade since Korean¹ popular culture has made a massive inroad into East Asia and, subsequently, other Asian countries. The mass media and concerned scholars have given the appellation of “Korean Wave” (*Hallyu* in Korean) to such Korean cultural products as television dramas, popular music, and movies becoming so popular in these countries.² Since the mid-1990s, Korean popular culture has spread over the pan ethnic-Chinese countries including China, Hong Kong, Taiwan, and Singapore at first, then over such Southeast Asian countries as Vietnam, Thailand, Malaysia, and Indonesia, followed by Mongolia, Japan, and even beyond East Asia.³ The *Hallyu* boom in Japan was ignited by a 2004 television drama, *Winter Sonata*, and has since drawn a great deal of scholarly attention, because Japan is the first modernized or Westernized country in Asia and Japanese popular culture has been dominant in many East Asian countries for several decades. Korea is not an exception; its popular culture has also been strongly influenced by Japanese pop culture. Now, at least some members of the Japanese population are fascinated with Korean popular culture. Thus, some scholars regard *Hallyu* as “a counter-case to media imperialism: a fissure in West-centered globalization” (Kim 2009, pp. 732-37) or as a case proving that globalization is not a one-way traffic but a two-way flow (Cho-Han 2003, p. 40).

The surge of popularity of Korean popular culture in these countries has drawn “anti-*Hallyu*” sentiments and campaigns by a few local intellectuals, popular culture industries, and mass media (Chae et al. 2009), especially in China (Kang 2008; Yong-chan Kim 2008; Leung 2008; Yun 2009), Taiwan (Lin 2006), and Japan (Hanaki et al. 2007), with China and Japan historically having had either superior power or colonial power over Korea. These anti-*Hallyu* movements, combined with the fact that only a particular drama (for example, *Winter Sonata* in Japan) or a particular genre (e.g., trendy dramas with a love story) has been popular in these countries, have led some scholars

¹ Korea in this paper denotes South Korea only.

² In this paper, I use the term *Hallyu* to mean both the flow and popularity of Korean popular cultural products, especially media contents, in other Asian countries and beyond, as well as exported Korean popular cultural products themselves.

³ Korean news media recently reported that a Korean idol group concert in Paris was sold out within 15 minutes and a demonstration asking for another concert was staged in front of the Louvre museum by ardent fans that could not get tickets (KBS News, May 2, 2011).

to conclude that “*Hallyu*” is a short-term phenomenon that would last only a few years (Kyeong-mi Shin 2006; Yoon-Whan Shin 2006).

Despite the suspicion that the Korean Wave is only a temporal and isolated trend like a short-lived fashion, it has not only survived but expanded to more diverse and wider products and to countries beyond East Asia. Thus, a major Korean newspaper recently featured an article entitled “Evolving ‘*Hallyu*’... Japan Is Now Attracted by Korean Culture.” This article quotes a Japanese manager of an advertisement and events company saying, “The ‘*Hallyu*’ boom, which was initially limited to such TV dramas as *Winter Sonata* and its main actor Yong-joon Bae, has now expanded to such areas as Korean language, food and culture, and has evolved from passive reception to active participation in everything Korean” (*Chosun ilbo* Oct. 4, 2010. p. A20).

Since a Chinese newspaper coined the term *Hallyu* in 1997, media reports and scholarly research on the phenomenon have mounted. Topics and issues about *Hallyu* can be grouped into four broad areas. First, a majority of them attempt to explain the rise of *Hallyu* by asking questions like: What factors and backgrounds are responsible for this phenomenon? Why have Korean popular cultural products, and not others, become popular in those Asian countries? (Hanaki et al. 2007; Jeon 2006; Kim 2003; Kim 2007; Lee 2006; Leung 2008; Lin 2006; Shim 2008; Yoon-Whan Shin 2006). Second, in relation to above questions, some researchers concentrate on the issue of *Hallyu*'s reception. Why are Asian audiences fascinated with Korean popular culture? How do they interpret and evaluate imported Korean cultural contents? (Hong-xi Han 2005; Kim 2009; Sin 2005; Yun 2009). Third, there are also studies that try to assess the effects of *Hallyu* for both Korea and the receiving countries. Many of them are concerned with economic effects such as booming tourism, increasing sales of *Hallyu*-related products, and its marketing potential. Others focus on changing images of Korean people and culture in those countries where *Hallyu* has made a hit. A few studies report that Korean cultural products or cultural contents have become a part of everyday life and culture in these countries as a result of *Hallyu* (Chae 2006; Choe 2007; Eun-kyoung Han 2005; Hong, Gang, and Ohya 2007; Hwang 2008; Iwabuchi 2008; Kim et al. 2007). Finally, *Hallyu* has prompted theoretical debates on the interpretation of globalization (Cho-Han 2003; Chua 2004; Iwabuchi 2008; Kim 2009; Kwon 2006; Shim 2006; Yang 2007). Some observers regard *Hallyu* simply as part of globalization propelled by the logic of capital (Cho-Han 2003). Others see it as a case to counter media imperialism (Kim 2009). Still others argue for regionalization as part of, or against, globalization occurring in Asia. This latter view considers *Hallyu* as

the symptom of a new regional cultural formation (Chua and Iwabuchi 2008).

After more than a decade since its inception, the question of longevity, or the future, of *Hallyu* still remains a major concern of scholars, journalists, and policy makers because people's tastes change rapidly in this postmodern era and a country's popular culture is framed by many factors including economic situations, policy measures, cultural traditions, and historical contingencies. Despite skepticism and criticism, however, *Hallyu* is alive and expanding today. A major purpose of this study is to provide some empirical evidence for the presence of *Hallyu* in East Asia. Of course, the key for *Hallyu* is the audience of Korean cultural products. Thus, I will first examine the size and characteristics of the *Hallyu* audience in the three East Asian countries of China, Japan, and Taiwan by analyzing survey data. The audience, of course, does not reside and behave in a vacuum, but is influenced by structural and institutional conditions such as conditions in culture industry, cultural market, and mass media, which will also be examined as a background utilizing statistical data and previous studies. Another purpose of this study is to take stock of existing studies and to move one step further by generalizing and comparing the *Hallyu* phenomenon among the *Hallyu*-receiving countries. Past studies on this subject have mostly been case studies dealing with one specific popular cultural product, or *Hallyu*, in a particular country. Some studies have indeed compared several countries, but they focus only on a single cultural product and on selected audiences. These studies are limited in that they do not generalize the *Hallyu* phenomenon nor account for similarities and differences among countries. By analyzing the data collected from the national samples in 2008 for these three East Asian countries, supplemented by an examination of structural and institutional backgrounds for *Hallyu* in these countries, this study attempts to fill the gap left by previous studies in this regard.

Specifically, this study tries to answer the following questions. First, is *Hallyu* alive today in China, Japan, and Taiwan? If so, to what extent? Second, what are the characteristics of the *Hallyu* audience in these countries? In what terms is the *Hallyu* audience distinct from non-*Hallyu* audience? Third, do the three countries differ in terms of the characteristics of the *Hallyu* audience and of the structural and institutional conditions that can affect *Hallyu*? How?

Theoretical Approaches to and Empirical Works on *Hallyu*

One of the prominent theories that inform existing studies on *Hallyu* is the theory of globalization. It seems to be quite appropriate that *Hallyu* is approached from the perspective of globalization, because it involves cross-border flow of cultural products and recent globalization process in East Asia has laid the base for it through liberalization of markets and deregulation of the culture industry sector. In fact, *Hallyu* has provoked heated debates on the nature of globalization, especially in East Asia.

There are diverse models and dimensions of globalization. A prominent model is the political-economic one, which explains globalization in terms of changing conditions of capitalism. According to James Mittelman (2000), for example, the recent phase of globalization started as a response to the deep recession in Western countries in the 1970s. In order to get over the economic crisis, new strategies including restructuring, deregulation, privatization, and enhanced competitiveness, which have been elevated to the neo-liberal ideology, were adopted. In addition to the transnational ideology of neo-liberalism, Ramesh Mishra argues, hegemony of the Anglo-Saxon form of capitalism has also been extended and consolidated in this process (Mishra 1999, pp. 7-8). In this model, economic factors, or more precisely the logic of capital, are foremost in importance for the modern phase of globalization, and they subsume all other aspects of globalization.

But, globalization is a complex term involving many dimensions, including not only economic and political but also social and cultural ones. This study is specifically concerned with cultural globalization, the contemporary process of which has been driven by establishment of new global cultural infrastructure, the rise of Western popular culture, the dominance of multinational culture industries, and an increase in cultural exchange and interaction across national borders (Held et al. 1999, p. 341).

Cultural globalization is often associated with the notion of imperialism, which is regarded as its earlier form (Tomlinson 1991; Schiller 1979; Crane 2002; Curren and Park 2000). According to this conception, cultural imperialism refers simply to cultural domination, or to the imposition of a particular nation's beliefs, values, knowledge, behavioral norms, and style of life by core nations over peripheral ones. It emerged in the 1960s as part of a Marxist critique of advanced capitalist cultures that emphasize consumerism, hedonism, and mass communication.

Cultural imperialism has been criticized on many grounds. For one,

cultural flow is not necessarily one-way, from the core to the periphery, but multi-directional, sometimes flowing from the periphery to the core (Berger 2002; Crane 2002). Critiques also indicate that the theory fails to acknowledge the significance of local resistance to imperial culture, especially the rise of nationalism in opposition to globalization, and that it ignores the processes of negotiation, adaptation, and indigenization on the part of receiving cultures (Curren and Park 2000; Robertson 1994). Thus, it is often the case that, instead of a global, uniform culture as a result of cultural imperialism, local indigenous cultures are rediscovered, and hybrid cultures are created (Appadurai 1990; Nederveen Pieterse 1995).

Existing works on *Hallyu* based on the models of globalization may be grouped into the following three categories: the political-economic, the cultural, and the social. The first approach emphasizes political and economic backgrounds for the sudden boom of Korean popular culture in Asia. It takes neo-liberalism prevalent after the fall of the communist bloc in the late 1980s as a major contributor to the cultural flow from Korea to other East Asian countries. Many countries in Asia have opened up their markets, especially cultural markets, to foreign imports in the 1990s due to pressures from the super powers and international financial organizations such as the IMF and WTO. As a result, not only did cultural products begin to flow more freely among Asian countries, but increasing international competition has also led to heavier investments in the culture industry and to more choices for cultural consumers in this region. In this view, *Hallyu* is simply the case of Korean culture industry taking advantage of this changing market situation (Shim 2006; Kim 2009).

Some critical observers view *Hallyu* as a product of recent capitalist development. For example, according to Hyejung Cho-Han (2003), Korean cultural products are the Korean version of American commercial culture, and *Hallyu* is simply an extension of the Korean export industry that includes the culture industry. Major *Hallyu* products are cultural products of “turbo” capitalism that forsake tradition in a definite way (Cho-Han 2003, p. 35). In this sense, Korean popular cultural products are simply commodities like any other manufactured goods that are exported to other Asian countries. However, Cho-Han warns against viewing *Hallyu* as a case of cultural imperialism, e.g., the diffusion of superior culture to the inferior one. Rather, it should be regarded as part of the complex and dynamic process of cultural globalization which flows in both directions rather than in one direction.

In a similar vein, Hyun-Mee Kim (2003) explains the *Hallyu* phenomenon in the context of industrial restructuring after the 1997 economic crisis. The

economic crisis and attendant IMF bailout, according to Kim, have made Korea thoroughly reexamine the process of late modernization which was heavily dependent on manufacturing industries and turn to high value-added culture industry for a breakthrough (Kim 2003, p. 156). As a result, Korean cultural products are put on the Asian market and traded like other products along with other countries' cultural products. In her case study on *Hallyu* in Taiwan, Kim notes that "the popular culture industry in Taiwan is still dominated by the U.S., Japan, and China, and Korean popular culture is regarded simply as one of the other multiple foreign products" (Kim 2003, p. 178). Thus, she cautions that exportation of cultural products to other countries is certainly a novel phenomenon for Korea but should not be exaggerated because it is part of recent globalization occurring in Asia in general, thanks to the combination of new digital communications technologies and pre-modern system of circulation.

These political-economic approaches, whether critical or not, tend to emphasize structural or institutional backgrounds for the rise of *Hallyu*, and have certainly made a valuable contribution toward understanding its institutional or material base. But these approaches are not sufficient in explaining why Korean cultural products, and no other countries', have been successful in this particular juncture, especially when popular culture of Japan, which is economically and politically more powerful than Korea, had been dominant in this region for a long time. Also, these approaches tend to ignore the complex process of reception, which should be regarded as key in explaining the popularity of Korean cultural products in the receiving countries. At best, they assume passive audiences who consume, without much pondering, whatever products provided to them by culture industries or media. The audiences' desires or needs are supposed to be manufactured by culture industries which specialize in producing images, fantasies, and dreams, according to a critical view on contemporary capitalist popular culture (Kim 2003).

Thus, some researchers look to cultural aspects of *Hallyu* to find a clue to its success. Many of them pay greater attention to its contents, for example, Confucian elements or traditional values in Korean dramas, which attract certain segments of the population of the receiving countries (Hong-xi Han 2005; Lee et al. 2006; Yang 2006). Parallel to this emphasis on cultural contents, cultural tastes and the reception process of the audiences have been examined and found to contain certain common elements with Korean popular culture. Studies following this cultural reception approach agree mostly with the cultural proximity thesis. Simply put, it posits that culture

flows more easily between culturally similar countries than between culturally different ones (Chua 2004; Son and Yang 2003; Yang 2006). In other words, according to this theory, people tend to accept more readily those imported cultural products that have something common with their own values, feelings, and experiences. And some of the Korean popular cultural products, especially TV dramas and movies, are pregnant with Confucian ethics and traditional values such as harmony, community, strong morality, and respect for family ties, which seem to attract cultural consumers in East Asia (Yoon-Whan Shin 2006; Yun 2009). *Hallyu* in Japan is a typical case for this explanation. Japanese middle-aged women, who were fascinated with the Korean drama *Winter Sonata*, found in the drama their old-fashioned values such as respect for family and kinship networks, restrained expression of love, and pure love (Hanaki et al. 2007; Jeon 2006; Kyeong-mi Shin 2006). Others indicate that racial proximity, e.g., “shared norms of beauty, mannerism, styles in clothing, and sense of Asianness,” is the key to the flow of cultural contents in Asia, not cultural proximity (Kim 2007, p. 48).

But this cultural commonality approach is obviously not enough to explain the *Hallyu* phenomenon in Asian. For one, such South Asian countries as Malaysia, the Philippines, and Indonesia, not to mention Mongolia and Uzbekistan, are not Confucian and share little cultural elements with Korea (Yoon-Whan Shin 2006; Kim 2007; Yang 2006). It also tends to ignore the complexity of the reception process and the changing nature of national culture (Kim 2009).

In a similar vein, the concept of cultural discount emphasizes that distinctiveness of a country’s cultural products in terms of values, beliefs, and style may hinder their acceptance by consumers in other countries. Iwabuchi’s account of Japanese cultural products exported to other Asian countries is a typical example. He contends that Japanese cultural producers are careful to remove “Japanese odor” from their products so as not to induce resistance from foreign audiences (Iwabuchi 2004). In a sense, Korean cultural products, which have indigenized Western popular culture that resulted in a hybrid culture blending traditional Asian and modern Western cultures, provide less cultural discount to Asian audiences who want to enjoy modern Western popular culture but, at the same time, are reluctant to accept the latter outright due to ideological and other reasons (Gim 2007; Hong-xi Han. 2005; Lee et al. 2006; Lee 2006; Shim 2006; Yun 2009).

The thesis of cultural hybridity requests our attention be turned to the tastes of young Asian audiences who prefer modern to traditional, and

Western to Confucian, cultural products, because most of them grew up in a more prosperous period in history and are in better contact with Western culture due to recent developments in communication and transportation technologies. Some observers note that Korean popular cultural products are unique in that they are mainly Western in form but mostly traditional Confucian in contents (Yun 2009; Shim 2006; Lee 2006). These unique characteristics of Korean popular culture have attracted many young Asian audiences who are fond of cultural products of modern flavor but are uneasy with Western cultural contents. Unlike Japan where *Hallyu* is consumed mainly by older women, young Chinese are the majority consumers of Korean popular culture which seems to work to fill the gap between their desire for modern cultural products and the relative inability of the country's culture industry to meet their needs. A study of the Chinese culture industry reports that the main target of TV programs in China is middle-aged audiences who prefer traditional cultural contents over modern Western ones and that the socialist Chinese government has kept a repressive policy on the import of foreign, especially Western, cultural products because it is afraid the latter may contaminate Chinese people and culture with Western capitalist culture (Lee 2006; Yun 2009).

The reception theory or the cultural approach to *Hallyu* provide some important and interesting explanations as to why Asian people like imported Korean popular culture. But the explanatory power of these approaches is obviously limited, because there seem to be contradictory cases and Asian consumers of popular culture have apparently differing cultural tastes and preferences even within a single society. Thus, some researchers argue that people's tastes and behaviors tend to be differentiated greatly based on diverse social factors such as socio-economic status, demographic characteristics, and so on in this age of information and postmodernism. In other words, modern consumers, especially young ones, seem to emphasize their own individuality and distinction from others in their lifestyle and cultural consumption. Therefore, cultural contents themselves do not attract and classify consumers, but their social and demographic differences determine their consumption behavior. Their social backgrounds and life experiences, especially differences in the socialization process, seem to be more important than others in differentiating taste groups. Herbert Gans (1999) is an earlier proponent of this thesis. He identifies five social classes in America that have their own distinct cultural tastes and lifestyle. Crane (1992), on the other hand, talks about culture class rather than class culture. She argues that cultural tastes are no longer dependent on class differences but differentiated

based more on age group and gender. Many of the empirical works on *Hallyu* also find that social and demographic characteristics of its consumers are closely related to their consumption patterns (Heo 2002; Lee 2006; Lin and Tong 2008; Mori 2008).

From the above review of theories and empirical works on *Hallyu*, we may discern five distinct approaches, or groups of factors, that broadly help explain the flow of Korean popular cultural products to other Asian countries: structural and institutional backgrounds, globalism-nationalism dichotomy, the proximity theses, modernity approach, and socio-demographic factors. These approaches have contributed to the understanding of *Hallyu*, but each one of them has only a limited explanatory power if considered separately from others because they have been proved to work in differing degrees among the receiving countries of *Hallyu*. It is thus necessary to consider them together in order to have a fuller picture of the *Hallyu* phenomenon. But it is impossible to consider all of them fully in a single paper. Therefore, I will selectively consider the approaches and factors in this study by focusing on institutional backgrounds and the tastes and characteristics of audiences, with commonalities and differences among different receiving countries in mind.

Data and Method of Analysis

Data

Two kinds of data are utilized in this study. One is statistical data with regard to cultural markets and culture industry in Korea, most of which are produced by government agencies and research institutes. Data to be analyzed include the size as well as changes over time and variations among countries and genres of Korean cultural products exported to East Asian countries for the past several years. Changes in cultural policies and market situations both in Korea and other East Asian countries are also examined. Resulting data will provide evidence for the continuity and transformation of *Hallyu* at the aggregate level. They will also provide some information on the structural and institutional background of *Hallyu*.

The second, but very important, source of data in this study is the 2008 EASS (East Asian Social Survey). EASS is a national sample survey conducted annually in four East Asian countries of China, Japan, Korea, and Taiwan to collect data on various aspects of peoples' lives, opinions, and attitudes, and

the 2008 EASS was conducted in 2008 in each of the four member countries. A brief description of the four national samples is given in table 1. Each member country has its own questionnaire, but includes a special module that applies to all four members. The special module for 2008 EASS is “Culture and Globalization in East Asia,” which contains questions regarding consumption of foreign cultural products, cultural values and tastes, social distance and social networks, attitudes toward globalization, and so on. This study analyzes responses to the questions in this special module in China, Japan and Taiwan.

Measurement of Variables

The dependent variable is the consumption of Korean TV dramas by respondents in China, Japan, and Taiwan. It was, after all, Korean TV dramas that initiated and sustained *Hallyu* in East Asia, although *Hallyu* has subsequently expanded to other cultural products such as popular music, movies, digital games, fashion, food, etc. This variable is measured by asking, “How often do you watch Korean TV drama?” Respondents were instructed to pick one of four possible answers to this question: (1) often, (2) sometimes, (3) seldom, (4) not at all.

There are three types of independent variables, reflecting the three major approaches to *Hallyu*, that is, the globalization approach, the proximity thesis, and the modernity theory. The globalization approach assumes that *Hallyu* is simply part of the globalization process, to which each country responds either favorably or unfavorably, i.e., accepts foreign cultural products or resists them from a nationalistic standpoint. Globalism-nationalism that measures this variable consists of three items, to which respondents were asked to answer on a seven-point scale from ① “strongly agree” to ⑦ “strongly disagree.” The three questions are as follows. (1) The country (respondent’s own country) should limit importation of foreign products in order to protect its national economy; (2) The country should follow its national interests even if these would lead to conflicts with other nations’ and (3) Increased exposure to foreign films, music, and books is damaging our own culture. The measure of globalism-nationalism variable is simply the sum of the scores for the three items.

The second independent variable, social proximity, is also a composite variable consisting of three items measuring social distance to Korean people. This is a proxy variable for the cultural proximity thesis. Because the cultural proximity theory is limited in its application and other types of proximity

TABLE 1
DEMOGRAPHIC AND SOCIO-ECONOMIC CHARACTERISTICS OF THE SAMPLES (%)

| | China | Japan | Taiwan |
|---------------------------|-------------|-------------|-------------|
| Total | 3007 | 2144 | 2066 |
| Gender: Male | 1437 (47.8) | 997 (46.5) | 1030 (49.9) |
| Female | 1570 (52.2) | 1147 (53.5) | 1036 (50.1) |
| Age: Less than 30 | 581 (19.3) | 246 (11.5) | 483 (23.4) |
| 30-49 | 1430 (47.6) | 676 (31.5) | 791 (38.3) |
| More than 49 | 996 (33.1) | 1222 (57.0) | 792 (38.3) |
| Education: Elementary | 993 (33.1) | 35 (1.6) | 484 (23.4) |
| Middle-high | 1554 (51.7) | 1338 (62.6) | 903 (43.7) |
| College | 458 (15.3) | 766 (35.8) | 680 (32.9) |
| Working status: Working | 1956 (65.0) | 1307 (60.6) | 1266 (61.2) |
| Non-working | 1054 (35.1) | 849 (39.4) | 801 (38.7) |
| Subjective status: Bottom | 500 (16.6) | 142 (6.6) | 180 (8.9) |
| 01-02 | | | |
| 03-04 | 760 (25.3) | 590 (27.5) | 315 (15.6) |
| 05-06 | 1411 (46.9) | 1104 (51.5) | 1194 (59.3) |
| 07-08 | 296 (9.9) | 285 (13.3) | 267 (13.3) |
| Top | 43 (1.4) | 21 (0.9) | 59 (2.9) |
| 09-10 | | | |

NOTE.—Non-working includes helping family work.

such as racial proximity are proposed in explaining the popularity of Korean popular culture in Asia (Kim 2007), a more general measure of proximity seems to be necessary; social proximity can be an alternative. For this measure, respondents were asked to answer ① “yes” or ② “no” to the following three questions: (1) Can you accept Korean people working alongside you at your workplace? (2) Can you accept Korean people living on your street as neighbors? (3) Can you accept Korean people as close kin by marriage? The social proximity variable is the sum of the scores for these items.

The third independent variable is the modernity-tradition variable that which represents the modernity theory. This variable is measured by six items, which were answered on a seven-point scale from ① “strongly agree” to ⑦ “strongly disagree.” The six items are as follows: (1) It is not desirable to oppose an idea which the majority of people accept, even if it is different from one’s own. (2) One should not express one’s complaints about others in order to have a good relationship with them. (3) When hiring someone at a private company, it would be better to give the opportunity to relatives or

friends even if an unacquainted person is more qualified. (4) I feel honored when people who come from the same town play an important role in society. (5) A subordinate should obey superiors' instructions even if s/he does not agree with them. (6) It is better to let capable leaders decide everything. This variable is also a composite variable summing the scores for the six items.

Finally, control variables include gender, age, education (highest level of education attended), working status (working versus non-working), and subjective social status (subjective position on a ten-point scale) representing respondents' demographics, and socio-economic characteristics (cf. table 1 for a description of these variables).

Method of Analysis

For structural and institutional backgrounds on *Hallyu*, frequency tables and some cross-tabulations are mostly given, the goal of which is to provide some basic statistical information for the flow of Korean cultural products to the three East Asian countries on an aggregate level.

Survey data are analyzed using such statistical methods as cross tabulation and regression analysis. For multivariate analysis, the dependent variable is converted into a dummy variable by combining "often" and "sometimes" as 1, and "seldom" and "not at all" as 0. The three independent variables are all composite variables consisting of more than one item. In order to simplify the procedure, actual scores of the items for each variable are added to produce the score for the composite variable.⁴ For the multivariate relationship between the dummy dependent variable and the composite independent variables, logistic regression analyses are utilized.

Structural and Institutional Bases of *Hallyu*

It was, above all, the development of the Korean popular cultural market and industry, together with globalization and expansion of the Asian market that made *Hallyu* possible. This will be reviewed briefly below.

Korean cultural market had been closed to foreign input for quite a while, and its culture industry had been very much underdeveloped due to the government's strict control of cultural flow and cultural market since the

⁴ See appendix for factor analyses results for these variables.

liberation from Japanese colonial rule in 1945. The Kim Young Sam government (1992-1997), the first civilian government since the military dictatorship of two-and-a-half decades, took neoliberalism as its basic ideology and liberalized Korean economy by joining the WTO in 1995 and the OECD in 1996. This neoliberal economic policy is at least partly responsible for the 1997 economic crisis, which brought about the IMF intervention and liberalization policies. Subsequent Kim Dae Jung government (1998-2003) had no choice but to follow the IMF-mandated structural reform which emphasized liberalization, deregulation, and privatization (Yang 2007, p. 184).

As part of liberalization, Korean cultural market began to open to foreign influence. Allowing Hollywood film distributors to do business in Korea in 1988 was probably the first foreign intrusion into the Korean cultural market, although foreign films were screened by local distributors within the limit of certain quotas set by the government even before this event. Since the mid-1990s when cable television services started, the number of television channels has greatly expanded, followed by rapid increase in importation of foreign programs. Ban on importation of Japanese popular culture, which had been imposed for more than five decades, has been lifted step by step since 1998. These are a few of the events that have made the Korean cultural market wide-open, resulting in its globalization and enhanced competitiveness (Shim 2008; Yang 2007).

Korean government also realized and emphasized the economic value of the culture and media industry. The government has, since the early 1990s, supported the culture industry by establishing the Culture Industry Bureau for the first time in the Ministry of Culture and Tourism in 1994 and by enacting the Motion Pictures Promotion Law in 1995, which encouraged big corporations (*jaebeol*) to invest in the film industry. In response to this government effort and to the opportunities to make a profit in this sector, *jaebeols* actively participated in the industry but had to withdraw shortly after the 1997 economic crisis under the IMF-mandated restructuring scheme. However, their short-lived participation has left an important and positive legacy in the industry in the form of highly educated young professionals with top-notch management skills (Shim 2006; Yang 2007).

In addition to these government actions and market changes, the dramatic expansion of communications and information industries, their extensive penetration into everyday life, and people's greater concern with quality of life as a result of improvement in life conditions have contributed

greatly to the development of culture industry.⁵

Recent changes in other Asian cultural markets are no less important for the rise of *Hallyu*. Below, I will examine changes in the three East Asian countries' cultural markets, culture industries, and policies.

Japan has a unique place in East Asia because it is the first modernized country in Asia and the only country that colonized many parts of the region in modern times. Because of these facts, at least in part, it has always looked to the West and considered itself as "being in Asia but not part of Asia" (Chua 2008, p. 80) or "always in and yet always above Asia" (Iwabuchi 2004, p. 150). This attitude of "Japan is forward and the rest backward" is probably responsible for its reluctance to actively engage in a cultural relationship with other Asian countries. Japanese popular culture, however, has been popular since 1970 in a few East Asian countries such as Taiwan, Hong Kong, and Singapore. At first, audiences of Japanese popular culture in these countries were limited to a minority of enthusiasts but became widespread in the 1990s, especially among young people. At that time, Japanese culture industry, which had been mostly inward-looking because its domestic market was large enough to support it, began to search for overseas cultural markets. Paradoxically, the popularity of Japanese popular culture began to wane by then (Iwabuchi 2002).

Japan's cultural relationship with Korea had been strained for a long time because of the aforementioned ban on importing Japanese popular culture due to Korea's experience of colonial rule by Japan for 35 years. However, even before the opening-up of Korean cultural market to Japanese cultural products, they were smuggled in by enthusiastic fans and copied by Korean cultural producers, most notably television programs. Concurrently, a few Korean popular singers gained fame in Japan even before 1998, and some of the Korean films, such as *Shiri*, were well-received by the Japanese audience in early 2000s (Kyeong-mi Shin 2006). A series of events including the 1988 Seoul Olympic Games and the 2002 FIFA Korea-Japan World Cup also helped change Korea's image in Japan and the otherwise sore relationship between the two countries to a friendly one (Mori 2008).

Above all, it was the television drama series *Winter Sonata* that raised *Hallyu* to its zenith in Japan. It was aired in 2003 by NHK satellite, and rebroadcasted in 2004 by NHK free-to-air station in response to overwhelming audience ratings. It has had far-reaching effects on Japanese reception of Korean popular culture since then; in 2004 alone, 29 Korean movies were

⁵ See Shim (2008) and Yang (2009) for a detailed account of these changes.

screened in Japan and 63 terrestrial television stations out of a total of 127 broadcast 70 Korean dramas in early 2005 (Kyeong-mi Shin 2006, p. 234). Japanese and Korean experts often mention the following reasons for the enormous popularity of *Winter Sonata*, such as Japanese audience's sense of nostalgia and high quality of the drama, traditional values such as family-centeredness, pure love, restrained human relationship, simple and slow-moving story, stagnation of Japanese society following a long-term economic recession, and changes in Korea's image among the Japanese (Kyeong-mi Shin 2006, p. 236-42; Yoon and Na 2005a, 2005b). Each of these reasons may have contributed to the rise of *Hallyu* in Japan to a certain extent. But the major factor for Korean dramas' appeal in Japan seems to be the nostalgia of the middle-aged Japanese audience who found the social and cultural atmosphere of 20 to 30 years ago in Korean dramas (Chae and Yoon 2006). In fact, according to Iwabuchi, the Japanese audience in general tends to view popular culture of other Asian countries with a sense of nostalgia arising from the attitude that Japan is at a higher level of development than the rest of Asia which is regarded as being culturally and historically backward vis-à-vis Japan (Iwabuchi 2008, pp. 245-49).

The People's Republic of China had been a secluded communist country since 1949, but it made a drastic transformation of its communist economy into a market economy under Deng Xiao Ping's "four modernization policy" in the 1980s. The drive towards more liberalized economic reforms has not only geared to a great expansion of mass media but also has been translated into a gradual commercial view on media policy. Competition among mass media in attracting audiences has become keen, which has led them to adopt such measures as making more of entertaining and profit-making products, importing them from abroad, and co-producing with non-Chinese finance (Stockman 2000, pp. 169-70).

In the early 1990, the film and television industries were liberalized, and cable and satellite television networks grew rapidly, due in part to the development of media technologies and also in part to popular demand for leisure from economically improved audiences. Satellite television networks have made broadcasts from Taiwan and Hong Kong available to Chinese viewers, which resulted in the state losing its monopoly over broadcasting. Subsequently, the state changed its policy on television production from "literature and arts" to "entertainment," and the media industry took profit maximization as its prime motive (Leung 2008, p. 58).

The burgeoning of local television stations and the scarcity of local programs due to low production capacity have made Chinese television

stations turn to foreign programs which are cheaper than local productions and which often provide ideas and formats to be adopted by local producers (Leung 2008). In fact, there have been a flow of media contents among ethnic Chinese countries, i.e., Singapore, Hong Kong, Taiwan, and China. As well, a study reports that Japanese television programs were popular among Chinese television viewers in the 1970s and 1980s, but Japanese programs have become less popular and consumed by only a fragmented young audience in the 1990s (Iwabuchi 2002, pp. 123-37).

However, liberalization of media in China does not mean total freedom of speech such as enjoyed by the media in the West. Television production is still heavily regulated and censored by such government agencies as the State Administration of Radio, Film and Television.⁶ Chinese government is especially sensitive towards “foreign elements,” which is regulated by such policy measures as the quota system that limits foreign programs to less than 20 percent of the total broadcasting time and restriction on broadcasting foreign programs during prime time (Leung 2008).

Thus, *Hallyu* in China should be examined in the context of “balancing between market-driven modernization on the one hand, and social conservatism and political (and ideological) dictatorship on the other” (Leung 2008, p. 58). The case of Korean television drama “Dae Jang Geum” (Jewel in the Palace), which was a phenomenal hit in China, is a good example of this complex situation. “Dae Jang Geum” was imported first by a provincial satellite television station, Hunan TV, from a Taiwanese television station who had copyright ownership of the drama. One of the major reasons Hunan TV imported “Dae Jang Geum” is that the drama had already proven to be extremely popular in Taiwan and Hong Kong. Because local stations are not allowed to approach foreign distributors directly, however, Hunan TV had to buy the right to broadcast from a Taiwanese TV station instead of the original Korean producer. In order to promote this Korean drama, Hunan TV employed various publicity programs paralleling the content of the drama, published booklets depicting its story, cast, historical background, and so on, and indigenized it through dubbing and subtitling (Leung 2008; Chua and Iwabuchi 2008). Other reasons for the success of “Dae Jang Geum” include its “depoliticized, culturally correct nature” in the sense that the

⁶ This agency recently sent out directives to all major television stations not to broadcast entertainment programs for three months but to broadcast only those dramas and documentaries which depict or propagate Chinese Communist revolution and socialist ideology in order to commemorate the 90th anniversary of the foundation of the Chinese Communist Party (*Chosun ilbo*, May 6, 2011).

drama focuses on family values and commercial competition which are culturally proximate and politically neutral (Leung 2008, p. 64), unlike Western and Japanese popular culture which is ideologically threatening and emotionally unacceptable (Yun 2009).

In Taiwan, cable channels make up a major part of the television industry from the start, supplementing the three free-to-air stations whose signals could not be received by some of the country's population. Since the late 1970s, illegal cable television stations have burgeoned rapidly to meet the audiences' demand for entertainment programs which the three terrestrial television stations cannot provide due to the authoritarian government's strict control over them. Since Taiwan became an independent state that seceded from mainland China in 1949, the KMT (The Nationalist Party) government had run the country under martial law, and every aspect of society was tightly controlled by it.

The government tried to stop the illegal cable channels, but in vain. Or it may be better a description to say that the Taiwanese government took a hands-off policy on television, imposing loose restrictions on ownership, number of channels, number of foreign programs, and so on. Since the 1980s, democratic and liberal movements have sprung up as a result of strong economic growth and market liberalization, and the government finally lifted martial law in 1987. Under pressure from the US, a new copyright law was passed in 1992 and a new cable television law in 1993, which legalized the cable television stations and allowed them to broadcast foreign programs up to 80 percent of the air time. It was estimated that more than 80 percent of the Taiwanese audience watched cable television channels, which numbered more than 120 as of the early 2000s (Lin 2006; Kim 2003).

As a result of these changes in the media industry, Taiwanese cable television stations began to import a large number of foreign programs in the 1990s. The increased number of channels demanded equally large number of programs, while the share of each channel in the market decreased. For example, a study reported that the share of the top ten programs in the viewership ratings amounted to only 4 percent. Thus, in order to make a profit, channel providers had to resort to importation of foreign programs that are relatively cheaper than domestic production, but of high quality. During the period of illegal cable system, imported television programs were mostly from Hong Kong, China, and Japan, from which 62, 54, and 61 dramas were imported, respectively, for the period of 1993-1999 (Lin 2006). Broadcasting of Japanese dramas increased rapidly after the Taiwanese government lifted the ban on importation of Japanese cultural products in

1993, which was imposed due to its colonial history. The audiences of Japanese television dramas were mostly young people who seemed to have cultural tastes of a modern flavor. According to an expert on Asian popular culture, “Taiwanese consumption of Japanese TV dramas ... is due in part to an emerging sense...of coevalness with the Japanese, that is, the feeling that Taiwanese share a modern temporality with Japan” (Iwabuchi 2002, p. 122).

Even after the deregulation of the media industry, however, Taiwanese cable television providers showed little interest in Korean dramas due to a couple of factors in addition to language and cultural barriers. One factor is political: The long-standing friendly relationship between the two countries was abruptly ended in 1992 when Korea established formal diplomatic relationship with People’s Republic of China (PRC). The other is cultural: Taiwanese consumers perceived Korean cultural products as backward (Lin 2006; Kim 2003). This situation changed since the late 1990s, when GTV, a cable channel which specialize in domestic programs mainly for older rural housewives, began to import Korean dramas because the latter were much cheaper than domestic ones and of high quality. The imported Korean dramas were “domesticated” before broadcasting, with Chinese dubbing and subtitling, inserting Taiwanese pop songs at the beginning, replacing OSTs with Taiwanese songs, and adapted translation (i.e., the original version of the drama was reconstituted in accordance with Taiwanese cultural system) (Hwang 2007; Kim 2003). GTV did not even label these imported Korean dramas as Korean dramas.

It was in 2000 that *Hallyu* took off in Taiwan, when a Korean drama entitled *Fireworks* became an immense success. Other channel providers soon followed suit and Korean dramas began to replace Japanese ones in Taiwanese television, at least in part. It should be noted, however, that Taiwanese television stations imported only certain types of Korean programs, mostly romantic love stories, avoiding complicated historical or social ones, which mainly targeted female audiences. This can be a limiting factor, according to an observer, for continuing success of *Hallyu* in Taiwan (Lin 2006).

The Growth of *Hallyu*

Due to these changes in the neighboring countries as well as in its own structural and institutional conditions, Korean culture industry grew rapidly. Total sales of the Korean culture industry had grown 21 percent per annum

TABLE 2
ANNUAL EXPORT OF KOREAN CULTURAL PRODUCTS BY SECTOR
 (Unit: million US\$, %)

| Sector | 2004 | 2005 | 2006 | 2007 | 2008 |
|---------------|------------------|-------------------|-------------------|-------------------|-------------------|
| Publishing | 182.2 (19.4) | 191.3 (15.5) | 184.9 (13.5) | 213.1 (13.7) | 260.0 (13.8) |
| Cartoon | 1.9 (0.2) | 3.3 (0.3) | 3.9 (0.3) | 4.0 (0.3) | 4.1 (0.2) |
| Music | 34.2 (3.6) | 22.3 (1.8) | 16.7 (1.2) | 13.9 (0.9) | 16.5 (0.9) |
| Game | 387.7 (41.3) | 564.7 (45.7) | 672.0 (48.9) | 781.0 (50.2) | 1093.9 (58.0) |
| Movie | 58.3 (6.2) | 76.0 (6.1) | 24.5 (1.8) | 24.4 (1.6) | 21.0 (1.1) |
| Animation | 61.8 (6.6) | 78.4 (6.3) | 66.8 (4.9) | 72.8 (4.7) | 80.6 (4.3) |
| Broadcasting | 70.3 (7.5) | 121.8 (9.9) | 133.9 (9.7) | 151.0 (9.7) | 160.1 (8.5) |
| Advertisement | 20.8 (2.2) | 9.4 (0.8) | 76.0 (5.5) | 87.2 (5.6) | 14.2 (0.8) |
| Character | 117.3 (12.5) | 163.7 (13.2) | 189.5 (13.8) | 202.9 (13.0) | 228.3 (12.1) |
| Edutainment | 4.9 (0.5) | 5.2 (0.4) | 5.0 (0.4) | 5.2 (0.3) | 5.7 (0.3) |
| Total | 939.4 (100.0) | 1236.0 (100.0) | 1373.2 (100.0) | 1555.4 (100.0) | 1884.4 (100.0) |

SOURCE.—MCT (2008) p. 46 for the period from 2004 to 2006; MCST (2010*b*) p. 79 for the years 2007 and 2008.

for the period of 1999-2003, compared with the GDP growth rate of 6.1 percent for the same period. The industry's growth rate has slowed down since 2003, with an average of 4.2 percent per year for the period of 2004-2008, due primarily to the recent world-wide economic recession (MCT 2003, p. 28; MCST 2010*a*, p. 19). The publishing industry was the largest in terms of its share in the total sales (35.7 percent) in 2008, followed by broadcasting (18.6 percent), advertisement (15.8 percent), and game (9.5 percent).

As globalization swept throughout the world, many of the Asian national markets began, from the early 1990s, to open their doors to foreign cultural flows. The Korean culture industry has gradually participated in the international market, exporting its products in increasingly large numbers firstly to such East Asian countries as China, Taiwan, and Japan and subsequently to the regions beyond East Asia. For example, the total value of exportation of the Korean culture industry was 413 million dollars in 1998, but increased more than twice to 939 million dollars in 2004. It took only four years for the total amount of export to double to 1,884 million dollars in 2008 (see table 2). The digital game industry has led the export drive, comprising 58 percent of total export in 2008, followed by publishing (13.8 percent), character (12.1 percent), and broadcasting (8.5 percent). These four

TABLE 3
ANNUAL EXPORT OF KOREAN CULTURAL PRODUCTS BY DESTINATION
 (Unit: million US\$, %)

| Year | China | Japan | Southeast Asia | North America | Europe | Others | Total |
|------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-------------------|
| 2006 | 233.2 (18.5) | 343.9 (27.2) | 109.6 (8.7) | 340.4 (27.0) | 98.0 (7.8) | 136.9 (10.8) | 1262.1 (100.0) |
| 2007 | 306.8 (21.7) | 356.6 (25.3) | 173.8 (12.3) | 356.2 (25.3) | 121.8 (8.6) | 95.3 (6.8) | 1410.5 (100.0) |
| 2008 | 362.8 (20.1) | 371.9 (20.6) | 355.4 (19.7) | 407.1 (22.6) | 183.6 (10.2) | 123.2 (6.8) | 1804.0 (100.0) |

SOURCE.—MCT (2008) p. 101 for the year 2006; MCST (2009*b*) p. 97 for the year 2007; MCST (2010*b*) p. 81 for the year 2008.

sectors combined account for more than 90 percent of export and have been leading exporters for the past decade, with little variations among them in terms of relative weight. The game industry has always been the leading exporter with its weight increasing, while the share taken up by the publishing industry has been decreasing considerably. The other two sectors seem to remain stable, while the total amount of export by these industries has been steadily increasing.

In terms of destination, more than half of the Korean culture industry export goes to Asian countries, with the distant second being North America. Japan has been the leading importer of Korean cultural products, but China and Southeast Asia are rapidly closing the gap with Japan. As seen in table 3, Japan's share of Korean export in 2006 was 27.2 percent, while China and Southeast Asia took up 18.5 percent and 8.7 percent, respectively. But these shares changed to 20.6 percent, 20.1 percent, and 19.7 percent, respectively, in 2008. There are also considerable variations among the countries in terms of importation of cultural products. More than 80 percent of China's total import from the Korean culture industry was from the game industry in 2008, followed by 10.6 percent from the character industry, 5.4 percent from the publishing industry, and 2.2 percent from the broadcasting industry. The figures for Japan were 61.2, 3.4, 6.7, and 17.6, whereas those for Southeast Asia were 68.0, 5.9, 19.5, and 4.8, respectively. Thus, character was the second major import for China besides game, broadcasting for Japan, and publishing for Southeast Asia.

Since *Hallyu* started with the export of Korean television dramas, and since media industry is the most influential in affecting people's attitudes and

TABLE 4
ANNUAL EXPORT AND IMPORT OF KOREAN BROADCASTING PROGRAMS

(Unit: million US\$, %)

| | 1996 | 1997 | 1998 | 1999 | 2000 | 2001 | 2002 | 2003 |
|--------------------|----------------|-----------------|-----------------|----------------|---------------|----------------|----------------|----------------|
| Export growth rate | 6.0 (8.3) | 8.3 (38.7) | 10.0 (20.4) | 12.7 (27.1) | 13.1 (2.9) | 18.9 (44.3) | 28.8 (52.3) | 42.1 (46.2) |
| Import growth rate | 63.9 (49.3) | 57.3 (-10.4) | 27.0 (-52.8) | 28.7 (6.2) | 29.1 (1.3) | 20.4 (29.7) | 25.1 (22.8) | 28.1 (11.8) |

| | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 |
|--------------------|----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|
| Export growth rate | 71.5 (69.6) | 123.5 (72.8) | 147.7 (19.6) | 162.6 (10.1) | 180.2 (10.8) | 183.6 (1.9) | 187.0 (1.9) |
| Import growth rate | 31.1 (10.8) | 37.0 (18.9) | 31.7 (-14.6) | 32.3 (1.9) | 21.8 (-32.3) | 65.9 (201.8) | 10.4 (-84.2) |

SOURCE.—MCT (2005) p. 255 for the period from 1996 to 2003.

MCST (2009) p. 329 for the period from 2004 to 2008.

KOCCA (2011) p. 5 for the years 2009 and 2010.

tastes, I will look more closely at the performance of the broadcasting industry. In 1996, Korea exported 6 million dollars' worth of broadcasting programs, while importing 63.9 million dollars of broadcasting programs. Within 5 years, however, broadcasting export grew threefold to 18.9 million dollars in 2001, which contrasts with the threefold reduction of import. For the first ten years of the new millennium, export of media programs increased ten times from 18.9 million dollars to 187 million dollars in 2010. The growth rate peaked during the five-year period from 2001 to 2005, with an average annual growth rate of 57 percent. Since then, growth rate has much slowed down a lot, obviously reflecting the recent stagnation in the world economy (table 4).

Among the programs exported, drama stands out, accounting for about 90 percent of the total broadcasting export in the past five years. Among other programs, entertainment, animation, and documentary each account for more than 1 percent of the total program export. Export of documentary programs in particular jumped from 0.9 million dollars (0.8% of the total export) in 2009 to 9.8 million dollars (6.5%) in 2010 (table 5). In terms of destination of broadcasting export, Japan is the biggest importer (81.6 million dollars, or 53.9%, of the total in 2010), followed by Taiwan (20.0 million dollars, 13.2%), and China (18.2 million dollars, 12%). But the share of total

TABLE 5
EXPORT OF KOREAN BROADCASTING PROGRAMS BY GENRE, 2005-2010

(Unit: 1,000 US\$, %)

| Genre | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 |
|---------------|--------------------|-------------------|--------------------|--------------------|--------------------|--------------------|
| Drama | 98,913 (93.4) | 90,131 (91.2) | 96,391 (89.7) | 105,369 (91.0) | 107,496 (90.7) | 132,677 (87.6) |
| Documentary | 222 (0.2) | 688 (0.7) | 1,645 (1.5) | 627 (0.5) | 949 (0.8) | 9,786 (6.5) |
| Animation | 121 (0.1) | 292 (0.3) | 2,436 (2.3) | 6,111 (5.3) | 3,074 (2.6) | 1,979 (1.3) |
| Music | 37 (0.0) | 234 (0.2) | - - | 26 (0.0) | 51 (0.4) | 11 (0.0) |
| Entertainment | 2,658 (2.5) | 4,443 (4.5) | 3,640 (3.4) | 1,864 (1.6) | 5,128 (4.3) | 4,043 (2.7) |
| Education | 360 (0.4) | 441 (0.4) | 1,323 (1.2) | 963 (0.8) | 724 (0.6) | 232 (0.2) |
| Others | 3,424 (3.3) | 2,615 (2.6) | 2,026 (1.9) | 834 (0.7) | 612 (0.5) | 2,670 (1.8) |
| Total | 105,885 (100.0) | 98,844 (100.0) | 107,461 (100.0) | 115,694 (100.0) | 118,496 (100.0) | 151,397 (100.0) |

SOURCE.—MCST (2010*b*) p. 335 for the period from 2005 to 2008; KOCCA 2010 p. 8 for the period from 2007 to 2009; KOCCA (2011) p. 11 for the year 2010.

export for Japan has been decreasing while those for China and Taiwan have been increasing. These three East Asian countries have imported more than 80 percent of the total Korean broadcasting export in the past five years (table 6). Again, drama accounts for more than 90 percent of program import for these three countries, followed by entertainment and documentary in 2009 (table 7).

From the above analysis of aggregate data, we may conclude that the international flow of Korean cultural products has expanded continuously for the past decade, with some fluctuations due to external factors such as economic recession, policy changes, and anti-*Hallyu* movement. The main actor of *Hallyu*, that is, TV drama, has especially fared well, with its export growing more than 30 percent for the period of 2006-2010. *Hallyu* has recently spread widely beyond East Asia, but Japan, China, and Taiwan are still its main destinations. However, it should be noted that the three countries differ in the favored contents and forms of Korean popular culture and in the process of its reception, as shown here and documented in many

TABLE 6
EXPORT OF KOREAN BROADCASTING PROGRAMS BY DESTINATION, 2005-2010
 (Unit: 1,000 US\$, %)

| Destination | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 |
|-----------------|--------------------|-------------------|-------------------|--------------------|--------------------|--------------------|
| Japan | 65,511 (61.9) | 47,632 (48.2) | 53,494 (57.4) | 79,113 (68.7) | 74,791 (63.1) | 81,615 (53.9) |
| China | 12,822 (12.1) | 12,442 (12.6) | 8,328 (8.9) | 9,300 (8.0) | 12,171 (10.0) | 18,216 (12.0) |
| Taiwan | 11,942 (11.3) | 20,473 (20.7) | 17,131 (18.4) | 7,769 (6.7) | 11,616 (9.9) | 20,011 (13.2) |
| Southeast Asia* | 8,584 (8.1) | 12,686 (12.8) | 8,271 (8.9) | 4,533 (8.2) | 11,857 (10.6) | 13,771 (9.1) |
| U.S.A. | 2,281 (2.2) | 733 (0.7) | 792 (0.8) | 6,025 (4.8) | 3,996 (3.4) | 1,996 (1.3) |
| Others | 4,745 (4.5) | 4,878 (4.9) | 5,249 (5.6) | 3,954 (3.4) | 4,065 (3.4) | 15,789 (10.4) |
| Total | 105,885 (100.0) | 98,844 (100.0) | 93,265 (100.0) | 115,694 (100.0) | 118,496 (100.0) | 151,398 (100.0) |

SOURCE.—MCST (2010*b*). p. 335 for the period from 2005 to 2007; KBI (2009) p. 17 for the year 2008; KOCCA (2010) p. 15 for the year 2009.

* Southeast Asia includes Singapore, Thailand, Vietnam, Malaysia, and the Philippines.

TABLE 7
2009 EXPORT OF BROADCASTING PROGRAMS BY GENRE FOR CHINA, JAPAN, AND TAIWAN
 (Unit: 1,000 US\$, %)

| | Drama | Documentary | Animation | Entertainment | Education | Total |
|--------|------------------|-------------|------------|----------------|--------------|-------------------|
| Japan | 61,686 (95.9) | 86 (0.1) | 0 | 2,031 (3.2) | 506 (0.8) | 64,309 (100.0) |
| China | 9,480 (92.0) | 27 (0.3) | 0 | 796 (7.7) | 0 | 10,303 (100.0) |
| Taiwan | 11,433 (98.9) | 40 (0.3) | 5 (0.0) | 88 (0.8) | 0 | 11,565 (100.0) |

SOURCE.—KCC (2010) p. 117.

other studies.

It should also be pointed out that expansion of export of Korean cultural products or broadcasting programs is only partial evidence for the continuing and increasing presence of *Hallyu* in these countries. As a cultural

phenomenon involving people's attitudes and perceptions, *Hallyu* does not necessarily require massive consumption of Korean cultural goods; it has usually been induced more often by widespread cultural reception such as watching TV or listening to music. Thus, a single TV drama such as *Winter Sonata* in Japan or "Dae Jang Geum" in Taiwan and China was enough to spur public interest in Korean cultural products and to start the Korean Wave. What really matters in discussions and explanations on *Hallyu* is how many people favor and actually watch or listen to Korean cultural contents, to what extent they do it, and why they do. The next section is devoted to exploring these aspects of *Hallyu* through analysis of survey data.

Size and Demographic Characteristics of *Hallyu* Audiences

The *Hallyu* phenomenon has usually been described by either the viewership ratings of Korean television dramas, media events such as fan meetings or media reports regarding *Hallyu*-related news and events. But the scope and breadth of *Hallyu* in a country or a region as a whole have rarely been investigated in earnest, except for speculative reports or impressive descriptions. The 2008 EASS data may provide a reliable set of data at this juncture for this purpose.

Table 8 shows how many people watch Korean television dramas and how often they watch in the three East Asian countries of China, Japan, and Taiwan. Among the three countries, Chinese audiences watch Korean television dramas most, followed by Taiwan and Japan. According to the same table, 11.1 percent of the Chinese sample view Korean dramas often, 28.8 percent sometimes, and 28.8 percent seldom, while 31.3 percent do not watch them at all. Thus, it is safe to say that about 40 percent of the Chinese people are *Hallyu* fans. For the Taiwanese sample, almost the same proportion (31.8 percent) as that of the Chinese sample does not watch Korean dramas at all. But a little more than 30 percent of the Taiwanese sample may be regarded as part of *Hallyu*, fewer than the Chinese counterpart. Even fewer Japanese turn out to be fans of Korean television dramas. More than half of the Japanese sample responded that they do not watch Korean television dramas at all. Only 4.1 percent of them watch them often and 19.2 percent sometimes.

Thus, if we define *Hallyu* fans as people who watch Korean television dramas often or sometimes, about one third of the East Asian population may be dubbed *Hallyu* fans. This survey data also reveal that there are clear

differences among the three countries in terms of the scope and breadth of *Hallyu*. *Hallyu* seems to be the most widespread and visible in China, followed by Taiwan and Japan. The distance between Japan on the one hand and China and Taiwan on the other hand is greater than that between China and Taiwan. This is, of course, only partial evidence for *Hallyu* in East Asia, but data clearly indicate that *Hallyu* is alive in East Asia and that there are visible variations among receiving countries.

The survey data analyzed here cannot answer the question of whether *Hallyu* has grown or withered in East Asia since its inception in the late 1990s. Increase in export of Korean broadcasting programs as shown in table 4 does provide a partial answer to this question: *Hallyu* has indeed grown, but the growth rate has shrunk considerably in recent period, cautioning us against expecting an overly optimistic future for *Hallyu* in East Asia.

Who are the audiences of Korean television dramas? Cultural theories suggest that demographic variables are usually related to cultural tastes. In the case of *Hallyu*, women, more than men, in general are more likely drawn to Korean dramas, according to previous studies. On the other hand, ages of audiences vary, depending on the characteristics of a particular drama; they also vary among countries. In fact, the 2008 EASS survey reveals that there are more female audiences of Korean television dramas than male audiences in all three East Asian countries (see table 8). In China, a little more than half of the female sample watches Korean dramas often or sometimes, in contrast to 28 percent of the male sample. Likewise, the proportion of Taiwanese female audience is about twice that of male (44.3 percent versus 21.6 percent). Japan is not an exception; 28.3 percent of the female respondents turned out to be *Hallyu* fans, as compared to 17.4 percent of their male counterpart.

Unlike gender, the age pattern of Korean drama fans is not uniform among the three countries. In China, for example, a clear age pattern can be detected; the younger a Chinese, the more likely s/he is a consumer of Korean popular culture. As seen in table 8, 59.4 percent of Chinese who are younger than 30 watch Korean dramas often or sometimes, in contrast to 21 percent of those over 60. In contrast, more than half of older Chinese who are 60 or over never watch Korean television dramas, while the same is true of only 14.8 percent of young Chinese under 30. Taiwanese fans of Korean dramas are little older than those in China. More than 38 percent of the Taiwanese sample in their 30s and 40s and 36 percent of those under 30 may be classified as *Hallyu* fans, whereas only 19.7 percent of older Taiwanese aged 60 or over watch Korean dramas often or sometimes.

TABLE 8
FREQUENCY OF WATCHING KOREAN DRAMA BY GENDER AND AGE GROUP

China

| Watching K. D. | Male | Female | Total | 18-29 | 30-39 | 40-49 | 50-59 | 60-69 | 70+ | Total |
|----------------|-------|--------|-------|-------|-------|-------|-------|-------|------|-------|
| Often | 77 | 257 | 334 | 134 | 84 | 61 | 40 | 11 | 4 | 334 |
| (%) | 5.4 | 16.4 | 11.1 | 23.1 | 11.4 | 8.8 | 7.2 | 3.1 | 4.5 | 11.1 |
| Sometimes | 323 | 544 | 867 | 211 | 273 | 188 | 117 | 66 | 12 | 867 |
| (%) | 22.5 | 34.6 | 28.8 | 36.3 | 37.0 | 27.2 | 21.2 | 18.6 | 13.6 | 28.8 |
| Seldom | 477 | 387 | 866 | 150 | 211 | 226 | 168 | 90 | 21 | 866 |
| (%) | 33.2 | 24.8 | 28.8 | 25.8 | 28.6 | 32.7 | 30.4 | 25.4 | 23.9 | 28.8 |
| Not at all | 560 | 380 | 940 | 86 | 170 | 217 | 228 | 188 | 51 | 940 |
| (%) | 39.0 | 24.2 | 31.3 | 14.8 | 23.0 | 31.4 | 41.2 | 53.0 | 58.0 | 31.3 |
| Total | 1,437 | 1,570 | 3,007 | 581 | 738 | 692 | 553 | 355 | 88 | 3,007 |

Japan

| Watching K. D. | Male | Female | Total | 18-29 | 30-39 | 40-49 | 50-59 | 60-69 | 70+ | Total |
|----------------|------|--------|-------|-------|-------|-------|-------|-------|------|-------|
| Often | 24 | 63 | 87 | 4 | 9 | 13 | 25 | 24 | 12 | 87 |
| (%) | 2.4 | 5.5 | 4.1 | 1.6 | 2.6 | 4.0 | 6.2 | 5.4 | 3.2 | 4.1 |
| Sometimes | 150 | 261 | 411 | 33 | 58 | 56 | 111 | 98 | 55 | 411 |
| (%) | 15.0 | 22.8 | 19.2 | 13.4 | 16.7 | 17.1 | 27.5 | 22.0 | 14.7 | 19.2 |
| Seldom | 251 | 291 | 542 | 55 | 82 | 95 | 111 | 119 | 80 | 542 |
| (%) | 25.2 | 25.4 | 25.3 | 22.4 | 23.6 | 27.0 | 27.5 | 26.7 | 21.4 | 25.3 |
| Not at all | 572 | 532 | 1,104 | 154 | 199 | 164 | 156 | 204 | 227 | 1,104 |
| (%) | 57.4 | 46.4 | 51.5 | 62.6 | 57.2 | 50.0 | 38.7 | 45.8 | 60.7 | 51.5 |
| Total | 997 | 1,147 | 2,144 | 246 | 348 | 328 | 403 | 445 | 374 | 2,144 |

Taiwan

| Watching K. D. | Male | Female | Total | 18-29 | 30-39 | 40-49 | 50-59 | 60-69 | 70+ | Total |
|----------------|-------|--------|-------|-------|-------|-------|-------|-------|------|-------|
| Often | 46 | 185 | 231 | 59 | 51 | 53 | 44 | 18 | 6 | 231 |
| (%) | 4.5 | 17.9 | 11.2 | 12.2 | 13.2 | 13.1 | 11.5 | 8.4 | 3.0 | 11.2 |
| Sometimes | 176 | 273 | 449 | 115 | 96 | 104 | 77 | 34 | 23 | 449 |
| (%) | 17.1 | 26.4 | 21.7 | 23.8 | 24.9 | 25.6 | 20.2 | 15.9 | 11.7 | 21.7 |
| Seldom | 385 | 345 | 730 | 216 | 152 | 139 | 124 | 59 | 40 | 730 |
| (%) | 37.4 | 33.3 | 35.3 | 44.7 | 39.5 | 34.2 | 32.5 | 27.6 | 20.3 | 35.3 |
| Not at all | 423 | 233 | 656 | 93 | 86 | 110 | 136 | 103 | 128 | 656 |
| (%) | 41.1 | 22.5 | 31.8 | 19.3 | 22.3 | 27.1 | 35.7 | 48.1 | 65.0 | 31.8 |
| Total | 1,030 | 1,036 | 2,066 | 483 | 385 | 406 | 381 | 214 | 197 | 2,066 |

Age pattern is not as clear in the Japanese respondents as in the Chinese and Taiwanese sample, however. That is, Japanese fans of Korean popular culture are relatively evenly distributed across age groups. But a slightly larger proportion of older Japanese respondents views Korean television dramas than their younger counterparts. Especially a higher proportion of *Hallyu* fans are in their 50s and 60s in Japan than in other age groups. For example, 33.7 percent of the age group between 50-59 and 27.4 percent of the 60-69 age group watch Korean dramas often or sometimes, contrasted to 15 percent of those under 30 and 19.3 percent of those in their 30s.

The above analysis of the 2008 EASS survey data demonstrates that the three East Asian countries differ in terms of the demographic characteristics of Korean television drama fans. While female respondents tend to watch Korean dramas more often than their male counterparts in all countries, age groups of *Hallyu* fans differ among the three countries. For example, while those less than 30 years of age are the most ardent *Hallyu* fans in China, those in Taiwan are 30-39 and 40-49 age groups, and 50-59 age group in Japan.

Factors for *Hallyu*

Two-way Analyses

Theoretical and empirical reviews of *Hallyu* reveal three major factors for *Hallyu* in East Asia: globalization, modernity, and proximity. These factors are converted into variable of globalism-nationalism, social proximity, and modernity-tradition for the sample survey, as described in the methodology section.

The globalism-nationalism scale measures the degree to which respondents are open to outside or foreign political, economical, and social influence. It is hypothesized that the more global a person is, the more s/he accepts or subscribes to *Hallyu*. The mean scores of this scale for the three East Asian countries are 11.715 for Japan, 11.673 for Taiwan, and 9.750 for China, meaning that Japanese people are the most global, followed by Taiwan and China in that order. A series of two-way correlation analyses were conducted to see whether this globalism-nationalism scale is indeed related to the dependent variable, i.e., degree of watching Korean television dramas. Table 9 shows the results of these analyses. For China and Taiwan, these two variables turn out to be significantly related to each other, implying that globalization contributes significantly to the spread of *Hallyu* in these

countries. As previous studies indicate, audiences in China and Taiwan prefer modern, advanced, but “culturally proximate and politically neutral” TV programs (Leung 2008, p. 64) but avoid Western or Japanese popular culture which they feel are “ideologically threatening and emotionally unacceptable” (Yun 2009). Under such circumstances, Korean cultural products seem to meet these conditions in these countries. But for Japan, no relationship is found between these two variables.

The social proximity variable measures social distance to Korea and is used as a proxy for cultural proximity. This variable is also a composite variable in the form of a scale from 0 to 3. Survey data indicate that Japanese people feel closest to Korea (mean = 1.979), followed by Taiwan (1.934) and China (1.460). Japan and Taiwan are close on this measure, while China is far from the other two countries. Correlation analyses between this variable and the dependent variable shows that they are significant in all three countries. This result may be interpreted as supporting the cultural proximity thesis regarding *Hallyu* with two caveats. One is that this variable is a proxy and hence does not exactly measure cultural proximity; the other is the possibility that exposure to *Hallyu* could have affected social distance to Korea, rather than the other way around. Still, social proximity can promote *Hallyu* in two ways in these countries. First, as many previous studies suggest, social proximity can be an initial factor for East Asian audiences to choose Korean products for the first time. Second, social proximity and consuming Korean cultural products can reinforce each other over time. In other words, exposure to *Hallyu* augments social proximity, which, in turn, increases consumption of Korean cultural products.

The modernity thesis is also a powerful approach to the rise of *Hallyu*, especially in explaining *Hallyu*'s attraction to young Asian audiences. Existing studies usually emphasize the hybrid nature of Korean popular culture, whose forms are mainly Western but whose contents are mostly traditional. This particular hybrid quality of Korean popular cultural products, according to previous studies, appeals to young Asian audiences who have a taste for modern Western cultural products. But modernity and tradition are relative terms; one's own popular culture could be more modern than the imported Korean popular culture. Thus, the relationship between the modernity variable and *Hallyu* was expected to differ among the countries with differing degrees of modernity. A simple correlation analysis between the two variables indeed supports this hypothesis. As seen in table 9, the modernity-tradition scale is significantly associated with the frequency of watching Korean television dramas in China and Taiwan, but not in Japan which is regarded to

TABLE 9
CORRELATION BETWEEN WATCHING KOREAN DRAMAS AND EACH OF THE THREE
INDEPENDENT VARIABLES, GLOBALISM, MODERNITY, AND PROXIMITY

| | China | Japan | Taiwan |
|-----------------------|----------------|----------------|----------------|
| Modernity-tradition | .050** (3,005) | .017 (2,131) | .067** (2,037) |
| Globalism-nationalism | .079** (3,005) | -.001 (2128) | .079** (2,025) |
| Social proximity | .125** (3,005) | .155** (1,994) | .152** (1,959) |

NOTE.—* $p < .05$, ** $p < .01$, *** $p < .001$.

Numbers in parentheses are the size of sample analyzed.

be more modernized than Korea.

The two-way correlation analyses between the dependent variable and the three independent variables clearly indicate cross-national variations; all three independent variables turn out to be significant predictors of *Hallyu* in China and Taiwan, but not in Japan where only the social proximity variable has a significant relationship with viewership of Korean television dramas.

Multivariate Analyses

Since independent variables in this study cannot be assumed to be independent from one another, multivariate analyses are necessary in order to detect spurious relationships. For multivariate analyses, dependent variable is converted into a dummy variable by combining (1) often and (2) sometimes into 1 and combining (3) seldom and (4) not at all into 0. A logistic regression analysis for the relationship between the dependent variable and the three independent variables, that is, globalism-nationalism, social proximity, and modernity-tradition, is conducted for each country, the results of which are shown in table 10. Among the three independent variables, only the social proximity variable is significantly related to viewership of Korean television dramas in all three countries, meaning that the closer one feels to Korea, the more likely s/he watches Korean television dramas. The globalism-nationalism variable is proved to be a significant predictor for *Hallyu* only in China and Taiwan. However, the effect of the modernity-tradition variable on the popularity of Korean dramas disappears completely in all three countries when the other two independent variables are controlled for. Thus, the two-way relationship between the modernity variable and the indicator of *Hallyu* turns out to be spurious.

Since demographic variables are proven to be significantly related to

TABLE 10
LOGISTIC REGRESSION RESULTS FOR WATCHING KOREAN DRAMAS
(3 INDEPENDENT VARIABLES)

| | China | Japan | Taiwan |
|-----------------------|-----------|-----------|-----------|
| | b | b | b |
| Modernity-tradition | .006 | -.003 | .002 |
| Globalism-nationalism | .029* | -.011 | .019 |
| Distance to Korea | -.186*** | .282*** | .212*** |
| (constant) | -1.070*** | -1.579*** | -1.344*** |
| Cox & Snell's R | .018 | .018 | .016 |
| Nagelkerke's R | .024 | .027 | .022 |

NOTE.—b = unstandardized regression coefficient
 : * $p < .05$, ** $p < .01$, *** $p < .001$.

Hallyu, respondents' gender and age are included in another logistic multiple regression analysis as control variables (table 11). This inclusion of demographic variables in the analysis effectively removes the globalism-nationalism variable and the modernity-tradition variable from the pool of significant independent variables in all three countries, leaving only the social proximity variable in the pool in addition to the two demographic variables which turn out to be very strong predictors of *Hallyu*, even after controlling for other independent variables. According to an estimate by Cox and Snell, only 4.4 percent of the total variance in the dependent variable is explained by the five independent variables in Japan, 13.1 percent in China, and 7.9 percent in Taiwan.

Finally, three more variables representing respondents' socio-economic status, that is, respondents' education, working status, and subjective social status, are included in the regression analyses as control variables. Table 12 reports the results of the logistic regression analysis involving eight independent variables. According to the table, respondents' gender, age, education, working status, subjective social status, and the social proximity variable are all statistically significantly related to viewership of Korean television dramas in China. Thus, a young female Chinese who is highly educated, non-working, high in the subjectively evaluated status scale, and feels close to Korea is likely to be a *Hallyu* fan. The two independent variables of globalism-nationalism and modernity-tradition turn out to be not significant in accounting for *Hallyu* in China.

The two demographic variables are also prominent in Japan and Taiwan.

TABLE 11
LOGISTIC REGRESSION RESULTS FOR WATCHING KOREAN DRAMAS
(5 INDEPENDENT VARIABLES)

| | China | Japan | Taiwan |
|-----------------------|-----------|-----------|-----------|
| | b | b | b |
| Gender (dummy) | -1.050*** | -.674*** | -1.054*** |
| Age | -.419*** | .144*** | -.145*** |
| Modernity-tradition | -.006 | .009 | -.009 |
| Globalism-nationalism | .011 | .004 | .005 |
| Distance to Korea | .169*** | .324*** | .182*** |
| (constant) | .970*** | -2.377*** | -.022 |
| Cox and Snell's R | .131 | .044 | .079 |
| Negelkerke's R | .177 | .066 | .110 |

NOTE.—b = unstandardized regression coefficient
: * $p < .05$, ** $p < .01$, *** $p < .001$.

TABLE 12
LOGISTIC REGRESSION RESULTS FOR WATCHING KOREAN DRAMAS
(8 INDEPENDENT VARIABLES)

| Variables | China | Japan | Taiwan |
|-----------------------|-----------|-----------|-----------|
| | b | b | b |
| Gender (dummy) | -1.096*** | -.726*** | -1.058*** |
| Age | -.372*** | .165*** | -.137** |
| Education | .186*** | -.041 | .016 |
| Working status | -.241** | .256* | -.029 |
| Subjective status | .086*** | -.027 | .042 |
| Modernity-tradition | -.013 | .011 | -.012 |
| Globalism-nationalism | .004 | .006 | .003 |
| Distance to Korea | .179*** | .323*** | .182*** |
| (constant) | .386 | -2.374*** | -.213 |
| Cox and Snell's R | .150 | .045 | .081 |
| Negelkerke's R | .202 | .068 | .112 |

NOTE.—b = unstandardized regression coefficient
: * $p < .05$, ** $p < .01$, *** $p < .001$.

But in Japan, social proximity turns out to be the most important in accounting for *Hallyu*. Other independent variables which are significantly

TABLE 13
SUMMARY OF MULTIVARIATE REGRESSION ANALYSES: SIGNIFICANT FACTORS FOR
HALLYU

| | China | Japan | Taiwan |
|-----------------------|-------------|---------|---------|
| Gender | Female | Female | Female |
| Age | Younger | Older | Younger |
| Education | Higher | x | x |
| Working status | Non-working | Working | x |
| Subjective status | Higher | x | x |
| Modernity-tradition | x | x | x |
| Globalism-nationalism | x | x | x |
| Social proximity | Closer | Closer | Closer |

NOTE.—X = insignificant factor.

related to the dependent variables include respondents' gender, age, and working status. In addition to the globalism-nationalism variable and the modernity-tradition variable, respondents' working status and subjective social status do not significantly affect *Hallyu* in Japan. Unlike a typical Chinese fan of *Hallyu*, a Japanese *Hallyu* fan is likely to be an older working female who feels close to Korea. A similar pattern can be found in the regression analysis for Taiwan. Aside from respondents' gender and age, only the social proximity variable has been proven to be significant as a variable. Thus, it is most likely that a typical Taiwanese who regularly watches Korean television dramas is a young female who feels close to Korea.

To sum up, the social proximity variable and the two demographic variables turn out to be significant factors for viewership of Korean television dramas in all three East Asian countries. Indicators of socio-economic status are also proven to be important in China, but not as much in Taiwan or Japan. There are other variations among the three countries. Demographic variables turn out to be important in all three countries. This is evident in the comparison of the three coefficients of determination (R^2) in tables 10 to 12. For example, Cox and Snell's R^2 for China in table 10 is 0.018, which means that the three independent variables explain 1.8 percent of the total variance in the dependent variable. But R^2 increases to 0.131 when gender and age are included in the equation (table 11), indicating that the two demographic variables alone contribute to the increase of R^2 by 0.113. When three socio-economic status variables are added, the increment of R^2 is only .019 (table 12). For Taiwan, corresponding R^2 's are 0.016, 0.079, and 0.081, which proves that demographic variables have the largest share of R^2 increment (0.063),

followed by the three independent variables (0.016) and socio-economic variables (0.002). A similar result can be seen for Japan: Cox and Snell's R^2 for the three independent variables is 0.018, as compared to 0.026, the increment made by the two demographic variables. Korean television dramas seem to attract mostly female audiences—young females in China and Taiwan, and older females in Japan (table 13). The explanatory power of these eight variables is weak in Japan (Cox and Snell's R^2 , coefficient of determination, is .045), as compared to that of China (0.150) and Taiwan (0.081).

Summary and Conclusion

Hallyu is certainly not a premeditated event; nor did it arise merely by chance. First of all, *Hallyu* would not have existed without the structural and institutional changes of the 1990s in Korea and other East Asian countries. Neo-liberal reforms in Korea in the 1990s led to opening its popular cultural market to the outside and to the participation of big corporations in the culture industry, which transformed the industry from a small and old-fashioned one to a modern and competitive one. Since then, Korean popular culture industry has produced high-quality cultural products that have attracted not only domestic audiences but also foreign consumers.

At the same time, other East Asian countries opened their domestic cultural markets to outside inputs. The uncomfortable relationship between Japan and Korea due to the former's colonization of the latter for 35 years has recently eased, and the inward-looking Japanese culture industry began to look to outside, especially to East Asia, for possible markets. China, the largest socialist country, transformed its economy to a market economy in the 1980s and liberalized the media industry in the 1990s. Intense competition among the numerous television networks forced them to import cheap but high-quality ideologically acceptable foreign programs, of which Korean television programs were one of the most suitable candidates. Taiwan, sharing contemporary historical events with Korea such as Japanese colonization, ideological division of the country, military dictatorship, and late development, escaped from the firm grips of a dictatorial Nationalist government in the late 1980s and saw burgeoning television networks, especially cable television channels, the keen competition among which led to a search for cheaper and well-made programs from overseas. In addition, these East Asian countries share the Confucian cultural tradition, which originated from China, in varying degrees.

Against this backdrop, a few Korean television drama series such as “Dae Jang Geum” in China, *Fire Works* in Taiwan, and *Winter Sonata* in Japan ignited an explosion of popularity of Korean dramas and other popular cultural products in the late 1990s and early 2000s. Statistics show that exportation of Korean broadcasting programs has increased dramatically since 1996 despite the growth rate slowing down in recent years. The majority of the export goes to the three East Asian countries, with more than half going to Japan. And television dramas comprise about 90 percent of the total broadcasting programs. *Hallyu*, at least in terms of export of Korean broadcasting programs to East Asian countries, is well under way as late as 2010.

However, analyses of audiences in the three East Asian countries reveal that there are some common factors as well as differences among them. Among the three factors suggested by previous studies, only social proximity turns out to be important for the rise of *Hallyu* in all three countries. The other two variables, globalism-nationalism and modernity-tradition, have no significant effect on *Hallyu*. As well, demographic variables (that is, gender and age) are closely related to viewership of Korean dramas in all of these East Asian countries.

But there are differences among the countries. Females are more attracted to Korean popular culture than male audiences in all sample countries; typically, China has the youngest *Hallyu* fans, followed by Taiwan, and Japan the oldest. In addition, indicators of social status are effective in China in predicting *Hallyu* audiences, but less so in Taiwan and Japan.

Thus, although individual indicators of globalism and modernity variables turn out to be spurious in accounting for *Hallyu*, societal levels of development or modernization seem to have worked at this juncture. Japanese fans of *Hallyu* are mostly middle-aged women who are attracted to Korean cultural products mainly because of a sense of nostalgia, not because these products represent the latest fashion or the most advanced style. On the other hand, young Chinese audiences and those with high socio-economic status find in Korean popular culture some elements of modern Western culture that they are eager to emulate and consume. *Hallyu* fans in Taiwan seem to be in-between Japan and China. They probably see Korean popular culture as being on par with theirs, and find certain cultural commonality between the two countries. Indeed, cultural and social commonalities seem to be crucial for the rise of *Hallyu* in these countries.

It should not be overlooked that the Korean popular cultural products exported to these countries are well-made and of high-quality, however. I

think the quality of the products itself is important in accounting for the success of *Hallyu*, because, unlike economic or material goods that are necessary for survival, cultural products are a kind of luxury goods, i.e., goods for leisure that people can live without. Cheap, low-quality programs may be easier to import, but they cannot survive for long. Korean popular culture produced recently, at least after the mid-1990s, differ greatly in terms of quality to the ones produced before then.

This is evident in the recent evolution of *Hallyu*. Beginning from the second decade of the new millennium, *Hallyu* is expanding or evolving into a new or second stage, where Korean pop songs (so-called K-pop) are gaining explosive popularity not only in East Asia but also in Europe and America. The episode of May 2011 in Paris, described in footnote 3, is a good example. Since then, K-pop stars are performing all over the world,⁷ and their songs rank among the top in international markets.

Compared to the first stage in which Korean television dramas were the chief promoter of *Hallyu*, this second stage distinguishes itself in several respects.⁸ First of all, most K-pop stars including the so-called idol groups are not accidentally discovered; they have been systematically selected and trained for a long time, sometimes for more than 10 years, by entertainment management firms. Secondly, their training and songs target international audiences from the first, not just the domestic market. In the course of their training, they learn foreign languages and dancing from international trainers, and their songs are composed by a group of international composers. Thirdly, management firms that are responsible for the initial selection, training, and marketing of stars adopt a systematic and scientific management system with careful planning in order to reduce the uncertainty of the cultural market. Finally, new communication networks, such as social networking services, become more effective and efficient in disseminating information, knowledge, and news on popular culture than the traditional media such as television, newspaper, and radio. This is because the latter is mostly controlled by commercial interests as opposed to the former representing mostly personal tastes and interests.

⁷ A group of Korean singers belonging to SM Entertainment recently completed a successful world-wide tour, performing in Seoul, Shanghai, Tokyo, Los Angeles, Paris, and New York. The Last performance was on October 23, 2011 in New York. Madison Square Garden; its 15,000 seats were sold out within two weeks (*Chosun ilbo*, October 25, 2011).

⁸ The following characteristics are evident in an interview with Mr. Sooman Lee, CEO of SM Entertainment Inc., the largest and most successful in this field in Korea (*Chosun ilbo*, October 16, 2011).

The initial stage of *Hallyu* may be a product of circumstantial factors, at least in part; but more and more, it is becoming a planned one, deliberately geared to the tastes of international audiences. Factors found to be effective in East Asia in the first stage of *Hallyu* such as social proximity may no longer be effective in the second stage or in the future due to *Hallyu*'s wider reception beyond East Asia, different contents, and different media of dissemination.

In a sense, *Hallyu* can be viewed as a product of recent capitalist development. It seems to be obvious that cultural approach alone cannot do justice to the widespread flow of Korean popular culture. Structural and institutional changes following neo-liberalism have lain the founding block. The contents of *Hallyu* may not be wholly traditional or uniquely Korean; it could be a kind of hybridity. It may have contributed to reinforcing the identity of East Asian popular culture, and thus, to East Asian regionalization. But *Hallyu* has not stopped at the borders of East Asia. Instead, it is spreading farther to other parts of the world, including Europe and America. In any case, its flow clearly represents a case of alternative globalization, from the periphery to the center, signaling a new phase in the recent history of globalization.

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Appendix: Factor Analyses for Two Composite Variables

Modernity-Tradition (Principal component analysis)

| Component | China | Japan | Taiwan | |
|------------------------------|--------|--------|--------|--------|
| | 1 | 1 | 1 | 2 |
| v19 | .710 | .705 | .612 | -.429 |
| v20 | .668 | .641 | .691 | -.361 |
| v21 | .595 | .591 | .429 | .476 |
| v22 | .542 | .332 | .252 | .713 |
| v23 | .650 | .676 | .590 | .072 |
| v24 | .649 | .654 | .663 | .129 |
| Total variance explained (%) | 40.691 | 37.553 | 31.459 | 17.850 |

v19. It is not desirable to oppose an idea which the majority of people accept, even if it is different from one's own.

(1) Strongly agree (2) Agree (3) Somewhat agree (4) Neither agree nor disagree (5) Somewhat disagree (6) Disagree (7) Strongly disagree

v20. One should not express one's complaints about others in order to have a good relationship with them.

v21. When hiring someone at a private company, it would still be better to give the opportunity to relatives or friends even if an unacquainted person is more qualified.

v22. I feel honored when people from the same hometown play an important role in society.

v23. A subordinate should obey superiors' instructions, even if s/he does not agree with them.

v24. It is better to let capable leaders decide everything.

Globalization-Nationalism (Principal component analysis)

| | China | Japan | Taiwan |
|------------------------------|--------|--------|--------|
| v85 | .833 | .763 | .781 |
| v86 | .584 | .724 | .667 |
| v87 | .695 | .674 | .678 |
| Total variance explained (%) | 50.600 | 51.992 | 50.485 |

v85. (Country) should limit the import of foreign products in order to protect its national economy.

(1) Strongly agree (2) Agree (3) Somewhat agree (4) Neither agree nor disagree (5) Somewhat disagree

(6) Disagree (7) Strongly disagree

v86. (Country) should follow its national interests even if these would lead to conflicts with other nations.

v87. Increased exposure to foreign films, music, and books is damaging our own culture.

