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## Miscellaneous

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## Megaphone and Signpost: The Role of Netflix in the Internationalization of Korean Film and Television Productions

### Abstract

In recent years, several South Korean film and television productions have captured worldwide attention, notably exemplified by the 2019 film *Parasite*, which clinched the Academy Award for Best Picture as the first non-English-language work. Among them, the original Netflix series *Squid Game* stands out as a representative example, reaching No. 1 on Netflix's Top 10 lists in 94 countries. The internationalization of these works has led to further enhancement of this country's cultural diplomacy capabilities. As one of the creators of *Squid Game*, Netflix seems to impact this process. However, how much of a role it has played is still up for discussion. The principal objective of this article is to evaluate Netflix's role in the internationalization of South Korean film and television productions, because on this basis, there will be a possibility to explore the potential replicability of this successful experience in other contexts and regions. Through a combination of quantitative and qualitative research methodologies, we investigated the development of its film and television industry since 1997. Our findings highlight Netflix's role as a "megaphone" and a "signpost" for South Korean content on the global stage. Otherwise, it's also necessary to recognize that the well-established and mature development of the Korean film and television industry itself is also an important reason for Netflix's surprising success in South Korean content.

### Keywords

South Korea, film and television, cultural diplomacy, Netflix, Squid Game.

## 1. Introduction

In 2021, the South Korean television series *Squid Game* was released, triggering a sensational effect. According to Netflix, even now, nearly 3 years later, it remains the most-watched Netflix series (2024), as described by Planes and García, “the global phenomenon” (2024, p. 1). According to *Netflix’s most popular list*, released March 17, 2024, only 7 television shows have surpassed 100 million views within 91 days of launch, 5 of which are English-language TV shows originating in the United States. Among them, *Squid Game* not only has the highest views but is also one of the only two to exceed 200 million views. This makes this series stand out as an anomaly in the list.

Its success is a microcosm of the internationalization of Korean film and television productions. Apart from that, the 2019 movie *Parasite* also achieved significant international impact, becoming the first non-English-language film to win the Academy Award for Best Picture. South Korean film and television productions seemed to boom and realize internationalization in a flash.

As one of the creators of *Squid Game*, Netflix seems to impact this process. However, according to Ning Ding and Jianxiang Diao, since expanding its overseas business in 2015, Netflix has achieved impressive results in Europe, Brazil, Japan, South Korea, and Southeast Asia (2022, p. 50). In other words, over these years, Netflix has not just expanded its business in South Korea but has made similar attempts in numerous regions worldwide. However, only South Korea, represented by *Squid Game*, could be considered the most successful.

Such a phenomenon raises the thought-provoking question of why, around the same time, Netflix has achieved surprising success just in South Korea. Furthermore, as South Korea’s success in recent years hasn’t been limited to Netflix collaborations, the extent of Netflix’s influence in this internationalization process remains unclear and is up for discussion.

## 2. Objectives and Methodology

The principal objective of this study is to find out the role of Netflix in the internationalization of the South Korean film and television industry. To archive this, several vital pieces of information need to be obtained, including the state of the industry before Netflix’s entry, Netflix’s specific strategies in South Korea, and the changes observed since Netflix’s involvement.

In order to obtain answers to these questions, this study adopts a vertical framework, tracing the development of the South Korean film and television industry from 1997 to 2024. By examining the trends and key events over nearly three decades, the research identifies how the industry evolved before and after Netflix’s entry. For analytical clarity, we have artificially divided its development into three phases:

1. 1990s to 2000s: winning back the domestic audience.
2. 2000s to 2010s: the prosperity within the Sinosphere,
3. 2010s to the present: breaking into the global market.

Therefore, both quantitative and qualitative research will be used to obtain the required information. The research will follow a chronological order.

Beginning in the 1990s, we explore the history of the development of the Korean film and television industry and the status of its dissemination within the Sinosphere to understand the foundation of the sector before Netflix’s entry. As its development is a long process and the relevant studies are well documented, the literature research will be used as a method, by summarizing the existing research in academic databases in English, Chinese, and Korean. In addition, official Korean websites and databases will also be used, in order to obtain relevant laws and policy documents.

This global impact of Korean popular culture [caused by the export of its audiovisual works] is referred to as Hallyu or the “Korean Wave” (Parc, 2022). Researchers have used “Hallyu 1.0” to refer to the initial popularity of Korean pop culture (especially K-drama) within many Asian countries (Ju, 2018). To be precise, it was spreading within the Sinosphere, the cultural community of North Korea, South Korea, Japan, Vietnam, and other countries surrounding China (Chen & Chen, 2022). We therefore adopt the widely used concept of “Hallyu 1.0” to refer to this second phase.

As previously mentioned, we have divided artificially the international dissemination of South Korean works into two phases: within the Sinosphere and outside the cultural community. In fact, there are various theories as to the phasing of the Korean Wave, or the exact time when Korean audiovisual productions really broke through the barriers of the cultural community and expanded to a broader part of the world; for example, Hyejung Ju divided the Korean Wave into two phases in 2018, Hallyu 1.0 and 2.0, and considered that the second phase is from 2008 to the present (p. 11), with the symbol that K-pop had superseded K-drama's popularity in the global media for trendy pop content, thanks to YouTube (p. 7). However, based on the opinion from the book *Hallyu 2.0: The Korean Wave in the Age of Social Media*, the new Hallyu movement [...] came with [...] an international hit song [...] in 2009 (Kwak & Ryu, 2015, p. 15). There are also opinions that the trend started in 2006 (Kim, 2015, p. 158), etc. As the concept refers to the trend of another expansion of Korean audiovisual products, it's not unusual to not have a precise, consensus start time. But the vast majority of researchers agree that the works involved in Hallyu 2.0 are mainly pop music. Considering that the main subject of this study is the Korean film and television industry rather than music, the categorization of Hallyu 1.0 and 2.0 does not facilitate the research.

Therefore, we choose not to use the concept of "Hallyu 2.0," and only call the third phase the dissemination of South Korean movies and series out of the Sinosphere. Netflix's involvement occurred in this phase. In order to understand what strategies Netflix has adopted and what results it has gained in this market, we summarize press articles related to Netflix's entry in chronological sequence. As Netflix entered South Korea in 2016, which is recent to the present time, there is still a lack of relevant research. Therefore, it will also be necessary to study articles from Korean newspapers and online media, such as The Korea Herald, The Korea Times, Yonhap News Agency etc., as well as multinational news media, such as BBC, CNN, etc.

To complement qualitative research, quantitative data is analyzed to reveal specific trends. By comparing vertically data for about 10 years from the *Korean Film Yearbook* published by the Korean Film Council (Kofic), on the number of productions of Korean films, the number of imported films, the market share of films, we analyze the development of South Korean audiovisual industry in the domestic market before Netflix's entry between 1997 and 2007.

*Broadcasting Industry Survey Report*, published by the Ministry of Science and ICT and the Korea Communications Commission, will also be investigated. By comparing vertically data for about 10 years, between 2013 and 2022, on the export value of broadcasting programs, the export volume to specific countries, we try to understand what changes Netflix's entry has brought to the Korean audiovisual industry, specifically, in order to grasp the internationalization of Korean film and television productions in a more objective way.

Also, this study addresses the thematic shifts in South Korean film and television productions since Netflix's involvement, referencing recent scholarly analyses to discuss opportunities and challenges arising from these changes. This multi-method approach ensures a comprehensive understanding of Netflix's influence in the internationalization of South Korean film and television productions.

### 3. The rise of the Korean film and television industry

According to the article Korea's Cultural State Strategy from the Angle of Soft Power:

The development of the Korean culture industry can be broadly divided into the following three phases: the "early period," from the early days of the founding of the Republic of Korea until the 1988 Seoul Olympics; the "developing period," from the late 1980s until 1997, before the impact of the Asian financial crisis; and the "mature period," from the formulation of the national culture-based strategy in 1998 to the present day (Zhang, Piao & Wang, 2017, pp. 44-45).

In detail, in the "early period," its main achievements were industrialization and comprehensive development, which is described as "Korean economic miracle." In the "development period,"

through the Olympic Games, South Korea has managed to improve its national image and cultural self-confidence. Both phases served as solid foundations for the further development of its cultural industry.

The prosperity of its audiovisual sector began in 1998. Kim Dae-jung mentioned the following content in his inaugural address as the 15th-term President of the Republic of Korea:

We must pour our energy into globalizing Korean culture. We must embrace and develop the high values contained in traditional culture. The culture industry is one of the basic industries of the 21st century. Tourism, the convention industry, the visual industry, and special cultural commodities are treasure troves for which a limitless market is waiting (1998).

With this speech as a signal, the government supported the development of the national cultural industry from all perspectives, as reflected in the following aspects.

In legal terms, a series of laws on cultural industries have been enacted or substantially amended, for example, Basic Law for the Promotion of Cultural Industries (in Korean: 문화산업진흥기본법) (1999) and Film Promotion Law (in Korean: 영화진흥법) (1999). These laws have reduced governmental restrictions on cultural creativity and, at the same time, protected the legitimate rights and interests of creators.

In terms of administration, governmental organizations and departments such as the Cultural Industry Support Center<sup>1</sup> (in Korean: 문화산업지원센터) (2000) have been established. This initiative has harmonized the decentralized work, thus improving the efficiency of the Government's service in this area.

Otherwise, the cultural censorship that has been in place since the country's founding is also gradually being banished. Although it was banned by the 9<sup>th</sup> Constitutional Amendment in 1987<sup>2</sup>, it still existed until the mid-1990s under the mace of the Constitutional Court, which made it disappear gradually.

In terms of economic support, the Korean government's financial budget for culture has been increasing, exceeding 1% of the total national budget for the first time in 2000, and then increasing by 9.1% in 2001, entering the "1 trillion won era" (Xie, 2011). Economic support enables cultural programs to run smoothly, and senior talents in movies, games, and other areas have sufficient funds and resources to be trained.

Overall, the strategy adopted by the Korean government at this stage was to give sufficient resources and services, liberalize past restrictions, and hand over the lead in development to the market. This initiative has also produced positive results. According to the article Art as a New Paradigm for Cultural Industry Development, in 2002, the size of the Korean cultural industry was about 1.5% of the global market, ranking among the top 10 in the world. The Korean cultural industry has been growing at a steady rate of about 20% per year, which is three to four times faster than the global market (Choi, 2004). Over the next decade or so, based on this strategy, the government continued to support the cultural industry, led by the audiovisual sector, which gradually became Korea's second largest export earner after the automobile industry (Xie, 2011).

With this promising start, South Korean audiovisual industry began to flourish and expand its influence. The first sign of its rise was to win back its own audience. Taking the movie industry as an example, the data in the following tables are taken from several *Korean Film Yearbooks*. Through Tables 1 and 2, it can be clearly seen how local Korean movies gradually rose to win the domestic market between 1997 and 2007.

<sup>1</sup> The organization is now called "Korean Creative Content Agency" (KOCCA). Source: <https://www.kocca.kr/en/main.do>.

<sup>2</sup> According to article 9 of the *Reasons for enactment/amendment: new provisions prohibiting licensing or censorship of press and publication and prohibiting licensing of assembly and association* (Article 21 of the Constitution the Republic of Korea).

**Table 1.** 1997-2007 Korean and Foreign Films Produced and Imported by years.

|                                 | 1997 | 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 |
|---------------------------------|------|------|------|------|------|------|------|------|------|------|------|
| <b>Korean Films (produced)</b>  | 59   | 43   | 49   | 59   | 65   | 78   | 80   | 82   | 87   | 110  | 124  |
| <b>Foreign Films (imported)</b> | 431  | 296  | 348  | 404  | 339  | 262  | 271  | 285  | 253  | 288  | 404  |

Source: The data on this table are a combination of Table 2.1 Production and revenue by year (p. 49) and Table 2.3 Foreign Movie Imports by year (P.52) from *2002 Korean Film Yearbook* (Kim, 2003), and Table VI-2 Korean and Foreign Films Produced, Imported and Released by years (p. 309) from *2008 Korean Film Yearbook* (Kim, 2009).

**Table 2.** Market Share in Admissions by year.

|  | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 |
|--|------|------|------|------|------|------|------|------|------|
| <b>Market Share of Korean Films (%)</b>  | 39.7 | 35.1 | 50.1 | 48.3 | 53.5 | 59.3 | 58.7 | 63.8 | 50.0 |
| <b>Market Share of Foreign Films (%)</b> | 60.3 | 64.9 | 49.9 | 51.7 | 46.5 | 40.7 | 41.3 | 36.2 | 50.0 |

Source: The data in this table are from Table VI-5 Market Share in Admissions by Year from the *2008 Korean Film Yearbook* (Kim, 2009, p. 311).

Table 1 shows the change in the number of local movies produced and foreign movies imported into South Korea between 1997 and 2007. On the one hand, there is no clear trend in the number of foreign films imported into Korea between these ten years. This can be interpreted to mean that there is no apparent artificial control over the number of imported movies. On the other hand, the number of local Korean films, however, showed a clear upward trend. From 43 movies in 1998 to 124 movies in 2007, it has almost tripled in terms of quantity. This reflects a significant increase in productivity.

If the data in Table 1 could be interpreted as an increase in the production capacity, the data in Table 2 shows how these Korean films won back their own audiences. As we can see, during these nine years, the market share of Korean films in the local market increased from 35.1% to 63.8% in 2006. Although there are certain oscillations, the overall trend is upward. This is also a side effect that shows that the industry has not only improved its productivity but also its quality, and the South Korean film industry has reversed its dominance of foreign productions to a dominance of local productions.

Inevitably, one milestone in this trend needs to be mentioned, the movie *Swiri* (in Korean: *쉬리*) (1999), which redirected the Korean people's preference for Hollywood movies to local movies (Wang, 2016, P.29). The movie made Korean history by breaking the box office record of *Titanic*, which at the time was the highest box office of all time in Korean cinemas (Kim, 2008). The film was seen as one of the turning points in the rise of Korean movies, and led to a massive investment by Korean companies to revitalize Korean films (Wenxia, 2005). With this movie as a symbol, Korean movies gradually beat Hollywood and win back domestic movie market. In the case of music and series, although there are differences, their trends are generally similar to those of movies. Music idol groups<sup>3</sup> and romance-themed and sitcom-type series<sup>4</sup>, which became influential later, also emerged in the 1990s.

<sup>3</sup> Represented by H.O.T. (Highfive Of Teenagers), that was created in 1996. *Arguably the first K-Pop boy band to emerge and a forerunner to the "idol group" trend in the South Korean music scene.* (Omar, 2018)

<sup>4</sup> Represented by Jealousy (질투) and Professor Oh's Family (오박사네 사람들), that were created respectively in 1992 and 1993. They are credited with pioneering these two types of TV series.

After winning back their own market, the next step is to expand the influence beyond their borders. This was urgent for Korea during that time.

On the one hand, after entering the 21<sup>st</sup> century, advancements in technology have led to an increase in production costs for audiovisual works. Taking the movie industry as an example, according to KOFIC (Korean Film Council), In the five years from 2006 to 2011, the number of audiences in South Korea has been around 150 million<sup>5</sup> per year, while the country's population has remained 49 million<sup>6</sup>, meaning that on average, every South Korean has gone to see more than three movies per year. In other words, while there is still space for South Korea's own movie audience to rise, and it has indeed started to make significant strides since 2012, its improvement is limited by the constraints of its population size. This means that if Korean audiovisual industry practitioners want to produce big-budget productions, they must look beyond their national borders, as this is the only way to strive for more profitability.

On the other hand, in 1997, South Korea entered the so-called "IMF era"<sup>7</sup> after the worst "financial crisis" [1997 Asian financial crisis] in its history (Zhang, Piao & Wang, 2017). The government has learned from its bitter experience and determined to restructure its economy, [deciding that] the export of cultural industries should be regarded as an important source of national income (Ligeng, 2022).

#### 4. Hallyu 1.0: the prosperity within the Sinosphere

The timing of the beginning and end of this phase is complicated to determine precisely. However, we can still get a general idea by looking at representative works' release time, reach and popularity. China was the first country where appreciation for Korean products was recorded, a few years after the two countries had resumed diplomatic relations [1992] (Cicchelli & Octubre, 2021, p. 13). Its landmark event was the TV series *Jealousy* (in Korean: 질투) introduced by China Central Television (CCTV) Drama Channel in 1993, which became the first South Korean drama introduced to mainland China. Still, the ratings were poor, and it did not attract widespread attention (Zheng, 2016). Because of this, most researchers agree that the Korean Wave... started in China with the broadcast of *What Is Love* (in Korean: 사랑이 뭐길래). In 1997, CCTV aired it, where it became a massive hit (Shim, 2008, P.25). The first pinnacle of the Korean Wave was arguably the airing of the TV series *Jewel in the Palace* (in Korean: 대장금), which has been credited for having the greatest impact on the popularity of Korean television programs in Chinese-speaking regions, including Taiwan, Hong Kong, Singapore, and [mainland] China (Huat & Iwabuchi, 2008, pp. 5-6). Generally speaking, between 1997 and 2007, television exports from South Korea increased from \$8.3 million to \$151 million, mostly to other Asian markets (Jin, 2016, p. 24).

The popularity of Korean television series in the Sinosphere has led to the popularity of related industries in Korea, such as films, music, games, comics, and other products in the audiovisual field. In addition, it has also led to the prosperity of many other industries that are not directly related:

Korean products and culture, from films, dramas, and K-pop to clothing and food, are all sought after by young people. In addition, the Korean Wave has also boosted the sales of Korean products in affected countries and regions, and the enthusiasm for traveling and studying in Korea has always been high. Those affected by the Korean Wave are more inclined to choose Korea in terms of purchasing and traveling, and also have a higher opinion

<sup>5</sup> The number of audiences between 2006 and 2011 are respectively 144,256,035, 152,022,992, 147,428,639, 155,398,654 and 147,759,214. Source: <https://www.kobis.or.kr/kobis/business/stat/them/findYearlyTotalList.do>.

<sup>6</sup> According to The World Bank, the population of South Korea between 2006 and 2011 are respectively 48,438,292, 48,683,638, 49,054,708, 49,307,835, 49,554,112 and 49,936,638. Source: <https://datos.bancomundial.org/pais/corea-republica-de?view=chart>.

<sup>7</sup> This refers to the difficult period after the South Korean government borrowed from the International Monetary Fund (IMF) in 1997 due to the economic crisis that hit Korea.

of this country. The economic development and cultural industries of South Korea are mutually reinforcing, and the Korean Wave, as a form of cultural expression, not only contributes to economic growth, but also plays a vital role in enhancing the country's image (Zhang, Piao & Wang, 2017).

For example, the 2002 series *Winter Sonata*<sup>8</sup> (in Korean: 겨울연가) was a massive success in Japan. The Japan Broadcasting Corporation (NHK) made \$3.5 million from selling *Winter Sonata*-related products, while selling 330,000 DVD sets and 1,220,000 “*Winter Sonata*” novels [...] and then-Japanese Prime Minister Junichiro Koizumi, who famously said in 2004, “Bae Yong-joon [The lead actor in the drama *Winter Sonata*] is more popular than I am in Japan” (Lee, 2011).

In summary, the South Korean export strategy for cultural products can be considered successful within the Sinosphere. Firstly, many direct and indirect economic benefits have been gained. Secondly, the popularity of South Korea has been improved, and the country's image has become more positive; in other words, the power of cultural diplomacy has been enhanced. In addition, with the massive population of the Sinosphere as viewers, Korean audiovisual products were able to obtain higher budgets for producing higher quality products, creating a positive cycle.

### 5. The entry of Netflix and the breaking out of the cultural community

Generally speaking, the dissemination of South Korean movies and series outside the cultural community occurred during the same period as its realization of profitability within the Sinosphere, as the following two press articles show: Korean period dramas, *Jumong* [in Korean: 주몽] [...] has become the most popular TV drama representing Korea here [in Iran], with its viewer ratings hovering around 80 to 90 percent (Song, 2011). Also, Daniela Predut of Romanian Korean Intercultural Association (RKIA) said “[...] the hit Korean drama *Jumong* was broadcast in Romania earlier this year [2011], attracting some 800,000 viewers to the small screen” (Kwon, 2011). As mentioned earlier, these two events were reported when the Korean TV shows were booming in the Sinosphere. It can be seen that at this period, there were already individual Korean works that had made an impact in individual countries. Because there were only several cases, they could hardly be called a “trend.”

It is unreasonable to regard that the diffusion of film and television and the spread of popular music are unrelated. They are actually a mutually reinforcing relationship. The popularity of Korean pop music stems from Psy's music video for *Gangnam Style* in 2012, which has become the first video to clock up more than one billion views on YouTube (Cellan Jones, 2012). And the influence was later developed by South Korean boy bands and girl groups.

All of these works played an outpost role for the later Korean movies and series to break through the cultural community. On the one hand, this helps Korean content producers gain experience in exporting to culturally diverse regions in terms of procedures and content creation. On the other hand, this helps viewers in these regions develop a sense of familiarity with Korean items, which include style, language, and faces. This fits a psychological phenomenon, the mere-exposure effect, that the mere repeated exposure of a stimulus is entirely sufficient for the enhancement of preference for that stimulus... that we like familiar objects because we enjoy recognizing familiar objects (Zajonc, 2001, p.225) While this study focuses on general psychological mechanisms, the same principle can be applied to many areas. Therefore, extending this to audiovisual works, at a certain early stage, people tend to develop a “liking” for things merely because they are familiar with them. In other words, their works in international dissemination have created a sense of familiarity and a “liking” for Korean works among a wider audience, thus laying the groundwork for the success of subsequent works.

According to Yushu Liu, since 2010 Netflix has started to lay its groundwork in overseas markets, and after accumulating experience in Asia-Pacific countries such as Japan and India, it turned its attention to South Korea in 2016 (2023, p. 221). Another critical point in time has to

<sup>8</sup> When it was broadcast in Japan, it was translated as 冬のソナタ.

be mentioned here, which is 2013 when Netflix shifted its market position from content channel to content provider (p. 222). This can be interpreted to mean that when Netflix entered the Korean market, it already included both aspects of the business. And its expansion into South Korea has also followed the process from channeler to producer. To begin with, Netflix focused on purchasing global streaming exclusivity and distribution rights for Korean-based content; for example, JoongAng Tongyong Broadcasting Company (JTBC), a South Korean nationwide pay television network, signed with Netflix in 2017 a licensing agreement to provide 600 hours of JTBC's drama and non-drama TV shows (Netflix, 2019).

After familiarizing itself with the audiovisual habits of Korean viewers, Netflix began to develop original content in cooperation with local companies. In January 2019, Netflix's first original Korean drama *Kingdom* was unveiled to the media (Boram, 2019). On September 17, 2021, *Squid Game* was released on Netflix. Although it was made by a Korean team and filmed in Korean, the series is No. 1 on Netflix's Top 10 lists in 94 countries around the world. It's the platform's first-ever Korean series to reach No. 1 in the United States (Pallotta & Kang, 2021). This production is not only a sign of Netflix's success in South Korea, but also a sign that Korean films and series become successful on a broader scale, after breaking through the barriers of the cultural community. As Netflix co-CEO Ted Sarandos mentioned, a staggering 60 percent of our members have now watched one Korean title –with viewing of K-content up sixfold globally in the last four years (Park, 2023).

According to *Netflix Korean Slate*, released at the beginning of each year, Netflix had planned to launch 13 Korean TV series, films, and unscripted shows in 2021, 25 in 2022, 34 in 2023, and 31 in 2024. Netflix did not release production plans for Korean content in 2019 and 2020, but based on the data from IMDb, in those 2 years, Netflix's Korean originals would have been mainly *Kingdom* (2019), *Love Alarm* (2019), and *Sweet Home* (2020). This shows a clear upward trend in Netflix's attention and investment in South Korea.

## 6. Changes with the entry of Netflix

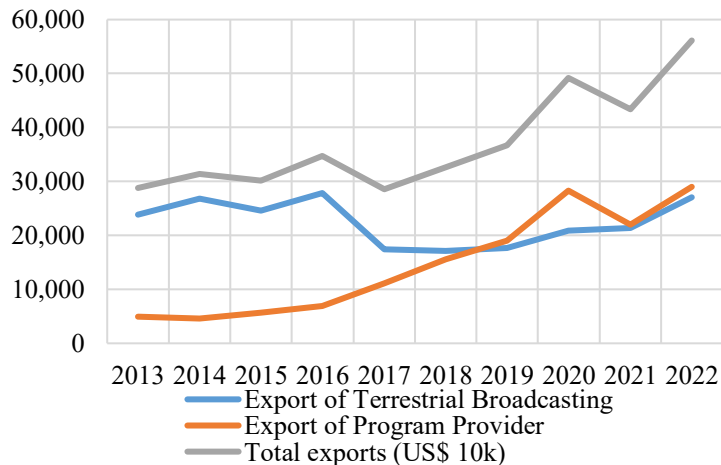
As mentioned above, since Netflix entered the South Korean market, it has been involved in the production of at least 106 film and television works, especially *Squid Game*, that has created a worldwide sensation, an achievement that has never been seen in the South Korean film and television industry. In addition, Netflix has purchased global streaming exclusivity and distribution rights for countless Korean content. In this part, we will focus on how the Korean film and television industry has changed due to this intervention, mainly in terms of the exports and the selection of themes.

In order to know how the situation has changed since then, we collected export-related data from 10 *Broadcasting Industry Survey Reports* published by the Ministry of Science and ICT and the Korea Communications Commission between 2014 and 2023, in order to analyze industry changes between these years. The data for this decade were chosen for two reasons. On the one hand, Netflix entered the Korean market in 2016, and the Survey reports released from 2014 to 2023 include data from 2013 to 2022 that could cover precisely before and after Netflix's entry and permit the visualization of the changes more intuitively. On the other hand, *Broadcasting Industry Survey Reports* are released once a year, and although the contents are similar, the statistics, especially on exports, are slightly adjusted every few years. Reports released before 2012 lack statistics on total export volume. This leads to the fact that it is only possible to study the reports published after this year.

**Table 3.** Total exports of broadcasts of South Korea, 2013-2022 (US\$ 10k).

| Year                         | 2013   | 2014   | 2015   | 2016   | 2017   | 2018   | 2019   | 2020   | 2021   | 2022   |
|------------------------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| <b>Terrestrial Broadcast</b> | 23,891 | 26,785 | 24,573 | 27,852 | 17,437 | 17,129 | 17,646 | 20,854 | 21,333 | 27,124 |
| <b>Program Provider</b>      | 4,884  | 4,596  | 5,627  | 6,879  | 11,121 | 15,551 | 19,068 | 28,299 | 21,990 | 29,005 |
| <b>Total exports</b>         | 28,775 | 31,381 | 30,200 | 34,731 | 28,558 | 32,680 | 36,714 | 49,153 | 43,323 | 56,129 |

Source: Data on this table are a combination of 2014 *Broadcasting Industry Survey Report* (p. 48), 2015 *Broadcasting Industry Survey Report* (p. 41), 2016 *Broadcasting Industry Survey Report* (p. 46), 2017 *Broadcasting Industry Survey Report* (p. 46), 2018 *Broadcasting Industry Survey Report* (p. 47), 2019 *Broadcasting Industry Survey Report* (p. 47), 2020 *Broadcasting Industry Survey Report* (p. 47), 2021 *Broadcasting Industry Survey Report* (p. 47), 2022 *Broadcasting Industry Survey Report* (p. 47) and 2023 *Broadcasting Industry Survey Report* (p. 48).

**Graph 1.** Total exports of broadcast of South Korea, 2013-2022 (US\$ 10k).

Source: Own elaboration based on data from Table 3.

Firstly, with these data, it can be reflected the apparent rise in the total amount of exports, that includes foreign language broadcasting, video/DVD sales, time blocks, formats, and programs (Ministry of Science and ICT & Korea Communications Commission, 2016, p. 46). This change is reflected in a sustained rise in total exports after 2017, especially in 2020 and 2022.

There is a connection between the increase in total exports and Netflix's involvement. These two upward trends correspond precisely to 2016, when Netflix entered the Korean market, and 2021, when the iconic *Squid Game* was released, with just a lag in the reflection of total exports. The pullback in exports in 2021 may be due to two factors. On the one hand, there is a lack of production capacity due to Covid-19, resulting in fewer works between 2020 and 2021. On the other hand, a large number of programs that have been released for several years but have not yet been exported were exported before 2020, leading to an insufficient amount of exportable content in 2021. Therefore, the decline in 2021 did not affect the overall upward trend, which is also reflected through the rebound in 2022. In sum, the export volume of Korean broadcast content started to show an upward trend in 2017 after several years of oscillation.

The other is the difference in the share of exports, i.e., the increasingly important role of Program Providers in the export of broadcast programs. In South Korea, there are two dominant modes of program production and broadcasting, one of which is the production and broadcasting of programs only by the TV stations themselves. The other is that TV stations entrust the production of programs to independent companies, or that companies co-produce with TV

stations (Liu, 2023, p. 222). Corresponding to the data in Table 3, the first production mode is from the terrestrial broadcast, while the second is from the program provider. It is clear from the data in the table that the program provider's exports have shown a clear upward trend since 2017, while terrestrial broadcast exports have been oscillating.

There is also a certain connection with Netflix's intervention because Netflix would not choose to partner with a Korean TV station (i.e., Terrestrial Broadcast) in content creation in order to ensure the exclusivity of its original productions. It's also for this reason that Netflix's original works in the Korean market are basically based on partnerships with program providers. From 2019, the export of program providers exceeds terrestrial broadcast, which just proves Yushu Liu's opinion that outstanding independent production companies have been releasing high-quality and well-received series in recent years, affecting the monopoly of the three mainstream Korean TV stations [refers to KBS (Korean Broadcasting System), MBC (Munhwa Broadcasting Corporation) and SBS (Seoul Broadcasting System)] in the market (2023, p. 222).

From this, a significant change can be seen in program provider exports after Netflix's entry into the Korean market, but the data above has not yet reflected exactly which regions it has influenced. It is therefore necessary to gain a better understanding of this trend by looking at the changes in the volume of exports from different regions over the decade (2013-2022). The data in the table below are also from 10 *Broadcasting Industry Survey Reports* between 2014 and 2023. It is worth mentioning that there are gaps in the table because of the absence of information, for example, the reports released after 2021 only label the export volume of the countries that account for the top 5 exports, while the Reports before 2019 label the top 10. This leads to the fact that the exports to some countries are missing in individual years. It could probably be due to the huge changes in export volume and structure in recent years, which have led to constant adjustments in the statistical methods. But the absence of individual data is not crucial to the grasp of the overall trend. It is also for this reason that the data for several regions have been omitted from this table, as data are available for these regions for only individual years, which is neither indicative of trends nor representative.

**Table 4.** Export of Program Provider by Region, 2013-2022 (US\$ 10k).

| Year               | 2013  | 2014  | 2015  | 2016  | 2017  | 2018  | 2019  | 2020  | 2021  | 2022   |
|--------------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|--------|
| Japan              | 2,791 | 1,114 | 1,305 | 1,937 | 3,362 | 3,715 | 4,333 | 4,077 | 3,430 | 4,649  |
| Mainland of China  | 426   | 1,372 | 992   | 1,952 | 248   | 448   | 995   | 1,302 | 1,996 | 1,344  |
| Taiwan of China    | 474   | 153   | 358   | 355   | 1,159 | 1,149 | 1,209 | 1,178 | 906   | 926    |
| Hong Kong of China |       | 392   | 416   | 598   | 1,171 | 988   | 825   |       |       | 426    |
| Singapore          | 49    | 78    | 106   | 166   | 1,132 | 454   | 995   | 1,419 | 331   | 334    |
| USA                | 98    | 376   | 861   | 677   | 939   | 5,316 | 6,035 | 7,700 | 1,156 |        |
| Other              |       |       |       |       |       | 1,489 | 1,651 | 4,394 | 6,975 | 14,512 |

Source: The data on this table are a combination of 2014 *Broadcasting Industry Survey Report* (p. 50), 2015 *Broadcasting Industry Survey Report* (p. 43), 2016 *Broadcasting Industry Survey Report* (p. 48), 2017 *Broadcasting Industry Survey Report* (p. 48), 2018 *Broadcasting Industry Survey Report* (p. 49), 2019 *Broadcasting Industry Survey Report* (p. 49), 2020 *Broadcasting Industry Survey Report* (p. 49), 2021 *Broadcasting Industry Survey Report* (p.49), 2022 *Broadcasting Industry Survey Report* (p. 49) and 2023 *Broadcasting Industry Survey Report* (p. 50).

Two apparent phenomena can be seen in the table. The first is that the region within the Sinosphere has always been an important area of export for South Korean program providers.

Before 2017, even the vast majority of content was exported to the Sinosphere. In 2015, for example, when Netflix had not yet entered the South Korean market, program provider exports amounted to \$5,627,000. In the table, these regions in the Sinosphere alone amounted to \$31,770,000, or about 56% of the total.

Another phenomenon is the large fluctuations in exports to the United States and the exponential rise in exports to the “other” regions. Based on the report, “other” in the table includes bundled sales across multiple countries rather than a specific country (2020, p.50). In other words, works purchased by international streaming platforms, such as Netflix, and served in more than one country are classified in the “other” category. It is clear from the data in the table that while the Program Provider’s exports have increased significantly, the main exporting region has changed from the Sinosphere to the United States and “other” areas.

In summary, after Netflix entered the South Korean market, the total exports of broadcast, the export share of different production modes, and the share of exporting regions have all shown significant changes. Since not only did the timing of the changes coincide with Netflix’s considerable progress in South Korea, but also the areas of substantial development overlapped to some extent with Netflix’s activities, it can be seen through this data that some of the notable developments in South Korean film and television industry after 2016 are related to Netflix’s involvement. However, the relevance here is not only the direct benefit to the industry of Netflix’s activities, but also the impact of Netflix’s activities, results and influence that contributes to the activities of other streaming platforms, TV stations and other related companies.

In addition to the above, Netflix has also brought other changes to the Korean film and television industry, the most obvious of which is the content. Before Netflix’s entry, most of the genres that Korea mainly exported were fantasy, historical, or urban romance, but they all centered around the keyword “love” (Xia, 2023, p. 105). The choice of keyword can be traced back to the time when Korean film and television productions were beginning to expand within the Sinosphere. As mentioned earlier, the works that were successful around 2000, such as *What is Love* and *Winter Sonata*, were all themed-on love.

While several researchers agree that there has been a change in creative themes since Netflix’s entry, there are a variety of opinions on the specific trends that have changed. Xin Xia considered the emerging theme of new works to be *neo-noir* and sees *Squid Game* as an example (2023, p. 106). But Ning Ding and Jianxiong Diao believed that Korean series produced with Netflix’s involvement have similar characteristics to American TV series in the following ways: firstly, it focuses on sensory aspects such as images and sound effects, giving the audience the most direct stimulation; secondly, its narrative structure and editing techniques are highly attuned to the marching pattern of regular American series (2022, p. 51). Both points of view have their own basis, in order to facilitate the research, we tend to adopt the latter because of the following reasons. According to Minghua Xu, *Neo-noir* usually refers to works that take on a darker tone both visually and thematically and involve crime in their content (2021, p. 119). While many Netflix-produced Korean series share these characteristics, it would be arbitrary to refer to all of them as *neo-noir*; for example, Netflix’s first original Korean series, *Kingdom* (2019), with its ancient zombie catastrophe theme, is a stretch to say it has a crime element. However, since the “zombie disaster” theme is so common in American series, it would be more appropriate to call these series “American series style” because it is a broader concept.

As evidenced by the upward trend in total exports in Table 3 after 2017, such a stylistic shift yields considerable economic benefits. The causes of this phenomenon may be diverse. On the one hand, zombies, survival games, and crime are popular subjects for film and television writing in recent years, as works like *The Walking Dead* and *The Hunger Games* have achieved spectacular results and attracted a loyal audience. From this perspective, new works created using these popular subjects are more likely to attract the interest of audiences from a wider geographical area. On the other hand, many of the South Korean films and series that were successful in the Sinosphere in the first decade of the 21st century require some knowledge of

its historical and cultural background to be fully understood and enjoyed, such as *Jewel in the Palace* (2003), that tells a story of a female Royal Physician in early 16<sup>th</sup> century. Because of this, most of them have only been disseminated in the cultural community. However, works with “American series style” tend not to deal with complex cultural and historical contexts. As a result, viewers in other cultural communities can enjoy the story in its entirety without prior knowledge of the context. The reduction of learning costs has a positive effect on the expansion of the audience base.

The success of these has also encouraged other creators to choose a similar theme. This phenomenon of homogenization of South Korean TV series satisfies the narrative expectations of large-scale audiences as a primary goal (Qian, 2022, p. 42). In the present day, many of these works have done well, resulting in an exponential increase in the export value of Korean productions. However, every coin has two sides. The desire of most creators to pursue this new creative direction also brings new risks. On the one hand, the success of an individual work created with globally popular subjects does not mean that other subsequent productions will achieve the same results; the flip side of the reduced cost of learning for the audience is the lack of cultural uniqueness. On the other hand, as more creators tend to choose new creative directions, the number of works on the theme of “love,” a well-established direction for South Korea and has a broad audience in the Sinosphere, has been declining yearly. As Korean movies and television productions have been popular within the cultural community for more than 20 years, the absence of this type of work could lead to a decline in its sticky viewers. Otherwise, excessive homogenization can lead to the stifling of creativity [...]. A prolonged homogenization is a potential obstacle to future innovations in the genre and scripts of future TV productions (Xia, 2023, p. 107).

## 7. Conclusions

The internationalization of Korean film and television productions has been a process spanning over 25 years until now. This journey can be divided into three distinct phases: regaining the national market, gaining popularity within the Sinosphere, and spreading in more regions of the world. For the majority of these years, South Korean content was primarily consumed within its cultural community. The turning point, where its influence expanded to a broader range of the world occurred around 2018, coinciding with Netflix’s third year of operation in South Korea.

By analyzing the literature in academic databases and analyzing vertically data of Korean films for about 10 years, we have already gotten a clear message that South Korean film and television industry had already achieved significant development and regional internationalization within the Sinosphere before the intervention of international platforms such as Netflix.

However, data on South Korean broadcasting exports reveal a notable upward trend after Netflix’s entry, particularly in 2017 and 2022, years following Netflix’s key moves in South Korean market. Netflix’s main partner in South Korea, program providers, which previously accounted for less than 17% of the export value, emerged as the major contributor after Netflix’s entry. Additionally, export destinations shifted from the Sinosphere to the USA and other regions (based on the original report, which is a concept closely related to international streaming platforms). These changes in South Korean film and television industry all show a strong connection with Netflix’s involvement.

Therefore, the basic conclusion can be drawn that Netflix has played an important role in the internationalization of Korean film and television productions, which can be summarized as “megaphone” and “signpost.”

On the one hand, it serves as a “megaphone” that amplifies the reach of South Korean movies and series. Netflix has subtitled, dubbed and distributed a range of Korean works, making it accessible to audiences from more geographical areas. This distribution model is significantly more efficient than traditional methods, such as relying on regional television stations or cinema chains. Furthermore, Netflix’s results in South Korea have spurred similar

efforts by competing streaming platforms, TV networks, and other related companies. In this sense, South Korean productions conform to the trend of the rise of streaming media. A win-win situation for creators and platforms has been realized.

On the other hand, Netflix also functions as a “signpost,” guiding South Korean film and television production toward new creative directions. After years of Korean productions indulging in the theme of romantic love, which primarily caters to the audiences’ needs within the Sinosphere, the globalized market encouraged South Korean creators to adopt a new creative direction, “American series style.” This shift has enabled Korean films and TV productions to be accepted by viewers across a broader range of cultural backgrounds.

However, the “signpost” that Netflix brings to South Korea also presents potential risks. Over-reliance on Netflix-driven trends or prioritizing “globalized” themes could limit the diversity of South Korean content. As this signpost offers just new possibilities, while embracing new creative directions, it is crucial for the industry to maintain a balance by producing works that cater to both global and regional audiences. With South Korea’s abundant output of film and television content, equalizing thematic diversity and fostering creativity in new productions may prove to be a more sustainable strategy.

Based on the investigation, we have also discovered that Netflix’s success in South Korea is also rooted in the robust and mature foundations of the local industry. Government policies, economic support and a relatively free creative environment have enabled industry to flourish in the first decade of the 21<sup>st</sup> century. Both the year-on-year increase in film production and the upward trend in TV series exported within the Sinosphere reflect its ability to produce high volume and quality of work before 2016.

In other words, by the time of Netflix’s entry, it was actually able to produce full-fledged movies and television productions that satisfy Netflix’s requirements without having to invest a large number of resources in developing infrastructure and training personnel. As mentioned in an interview of The Hollywood Reporter with the creator-writer-director of *Squid Game*, Hwang Dong-hyuk, *Squid Game* was initially conceived in 2008, and then Hwang wrote a script for a feature-length film version throughout 2009 [...] Korean studios passed on *Squid Game* over the years, and Hwang waited about a decade to get it made (Brzeski, 2021).

In summary, the success of the internationalization of South Korean film and television productions is a result of the combination of a well-established local industry and the opportunities offered by Netflix. While Netflix has undoubtedly accelerated the global dissemination of South Korean content and introduced new creative directions, the industry’s preexisting strengths and infrastructure played a crucial role in this success. Ultimately, the combination of a strong domestic foundation and strategic global partnerships has enabled South Korean productions to achieve unprecedented success of internationalization.

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