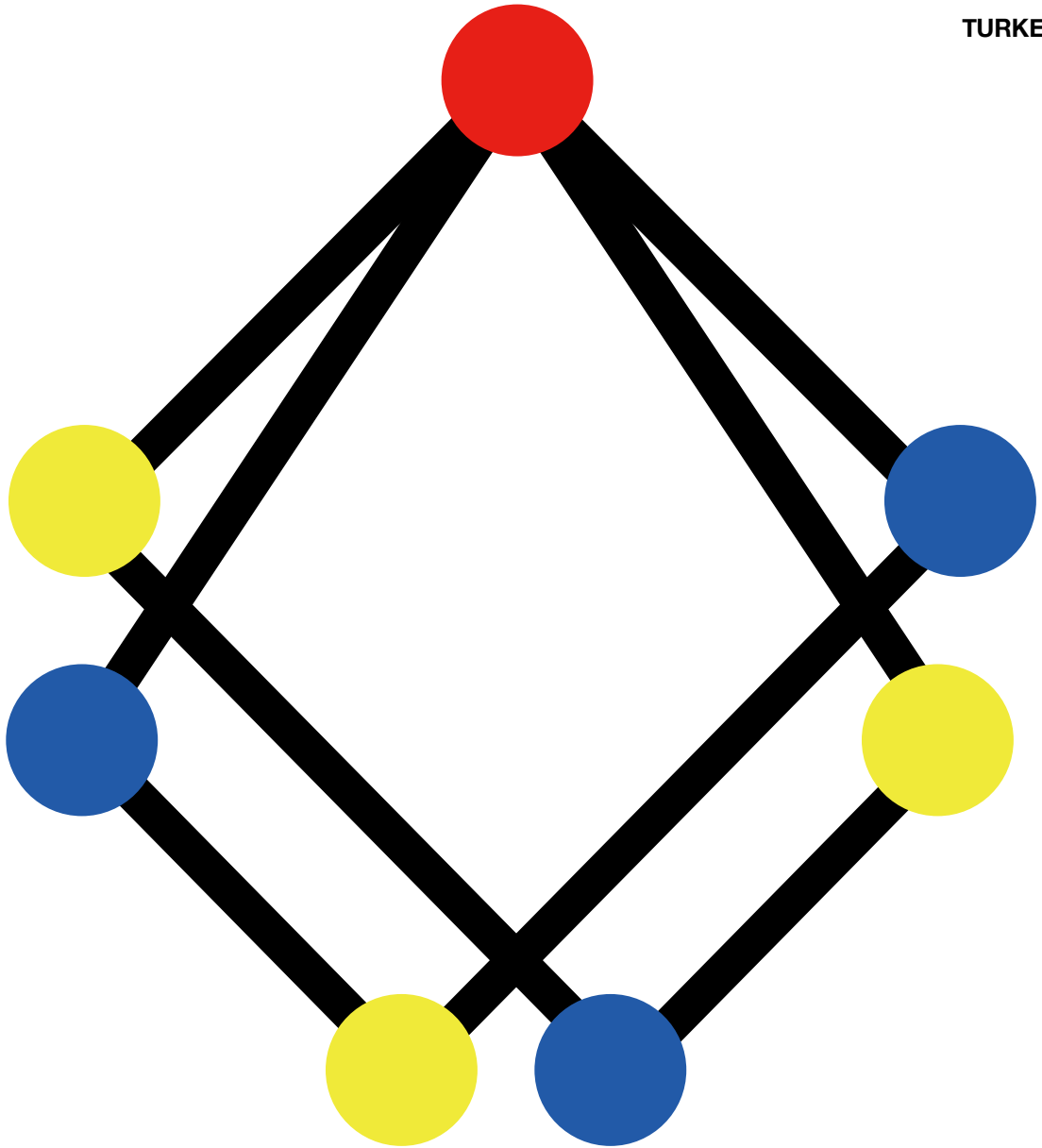


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HALLYU NOW

HALLYU STORY
WITH STATISTICS
TURKEY



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HALLYU NOW

GLOBAL HALLYU ISSUE MAGAZINE

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2021 SURVEY ON OVERSEAS HALLYU STATUS: TURKISH AFFECTION FOR KOREA, THE BROTHER COUNTRY

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Turkish Affection for Korea, The Brother Country



Turkey has shown strong affection and positive liking for Korea based on the historical relationship that goes back for centuries. Against this backdrop, Hallyu has gained strong popularity in diverse cultural genres including games, film, music, cuisine, fashion and beauty, mainly driven by those in their 30s. Nevertheless, there is a need to address negative perception caused by the quality of translation, awkwardness of dubbing, limitation of channels for understanding via publications. In addition, in terms of mutual exchange, measures to alleviate the relative shortfall of opportunities for Turkey to introduce Turkish culture to Korea need to be developed.

Hee-Soo Lee, Ph.D.

Endowed Chair Professor at SungKongHoe University, Director of Institute for Islamic Culture Studies

1. Elevating the “Brother Country” Discourse to a True Cultural Partner

Located at the crossroads of Eastern and Western culture, Turkey has always been somewhat equivocal, dressing Asian spirit with European fashion. However, there is much in common in the nature of the people and culture of Korea and Turkey. One nested in the far-west and the other in the far-east of Asia, each has developed its own unique cultural traditions, but the common themes that cut across both countries are cultural legitimacy and the succession of a proud cultural heritage. In fact, the Turkish people have shown strong affection, more than any other country, for Koreans, are much like Koreans themselves, and feel a strong attachment to Korea. These feelings of affection are based on historical factors; that Koreans and Turkish people shared the same bloodline once upon a time in Central Asia and the proud from a large number of troops that were deployed to Korea during the Korean War, contributing to the development of Korea.

Coming in to 2000’s, when Hallyu visibly started to spread overseas, many thought that it would be a short-lived trend geographically limited to Southeast Asia. However, today, Hallyu has gone beyond a mere trend and has taken root as a global cultural phenomenon that continues to evolve with interactions with local culture. To the bewilderment of Koreans, the global DNA accumulated by Korean culture for centuries seems to be what is powering the continued proliferation of Hallyu. Since ancient times, Korean culture has been open to “different thoughts and values”, and has served as a cultural hotspot, absorbing other cultures to innovate its own. Along with frequent exchanges with neighboring countries such as China and Japan,



1. Koreans cheering both the Turkish and Korean national squads at the semifinals of the 2002 Korea–Japan World Cup. (Source: Choong Hyung Lee (2006. 6. 21.). “Turkey, This Time We Are Red Devils, Too”. *Joongang Daily*.)

Korea culturally interacted with Western Asia, Arab, Persia and Central Asia via the Silk Road since A.D. times. The cultural foundation of Korea flourished as cutting-edge technology, civilization, ideas and stories of the world flooded into Korea.

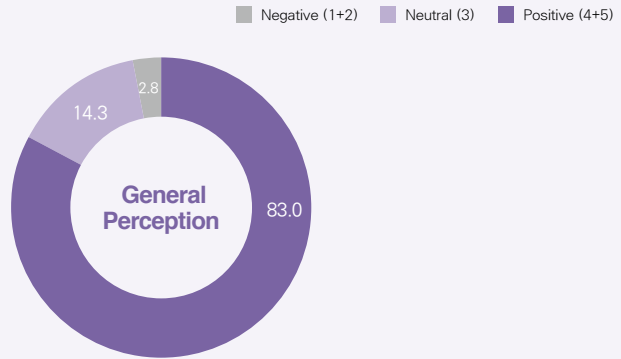
The direct ancestors of Turkey, the Turks of Central Asia, were also partners of communication and exchange of Korea. In Turkish history textbooks, the sequence of history is laid out as follows; the Hun - Turk - Uyghur - the Seljuk Empire - the Osman Empire - and the modern day Republic of Turkey. The Hun - Turk - Uyghur period matches the Ancient Josun - Goguryeo - Balhae period of Korea in the Manchuria region of Northeast Asia. Contact and exchange were abundant; at times, the two cooperated and at other times, the two were in conflict. For example, Goguryeo and Turk were military allies to join forces against a common threat - China. Diplomatic missions were exchanged to strengthen diplomatic ties. In addition, the languages of Turk and Korea are members of the same Altaic family, implying language and cultural familiarity. The cultural proximity is probably closer than any other ethnic group in the world. This is why the Turkish people are not hesitant to refer to Korea as a “brother country” or as an “an alliance forged by blood”. The reference to “blood alliance”, of course, is well known. It stems from the sacrifice and dedication shown by Turkish troops during the Korean War, as Turkey dispatched more than 15,000 soldiers to Korea, which was the 3rd largest following just the US and the UK, to protect the freedom and peace of the Korean people. However, in Korea at least, the longer, deeper historical relationship is relatively less known. Unlike Korea, Turkish students have learned about the long-standing historical background which generated the strong interest in Korea. In particular, at the semi-finals of the 2002 Korea-Japan World Cup, Korean football fans held a parade with the Turkish national flag and the exemplary fair play displayed by the Korean national squad touched the hearts of the Turkish people. The match definitely became a source continuously fueling Hallyu in Turkey.

2. The Perception of Korea in Turkey

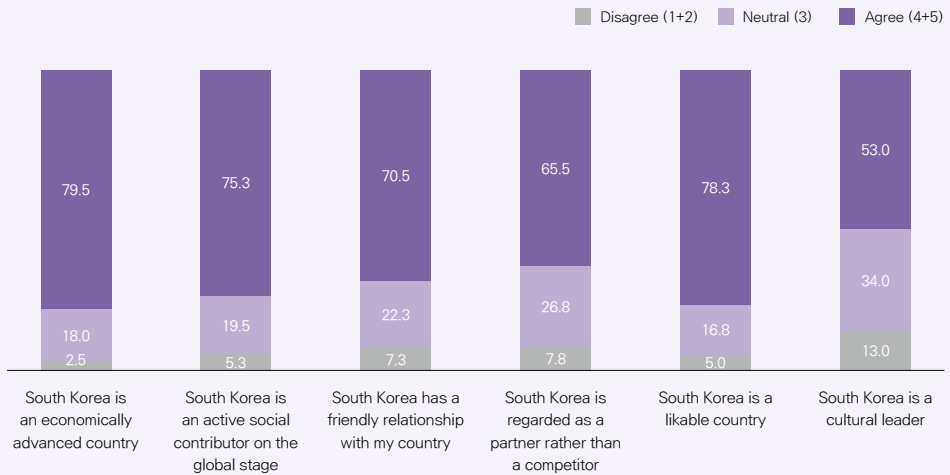
Perception of Korea

Base: Turkey total, n=(400), Unit: %

Q. What do you think about South Korea?



Q. Please read each of the following descriptions of Korea and select how much you agree/disagree with each statement.



According to *The 2021 Survey on Overseas Hallyu Status*, 83.0% of Turkish participants answered that they have a positive perception of Korea, which was higher than any other country. Negative answers were only 2.8%, which was one of the lowest. While the alliance during the Korean War is the foundation of such positivity, the “rags to riches” economic development

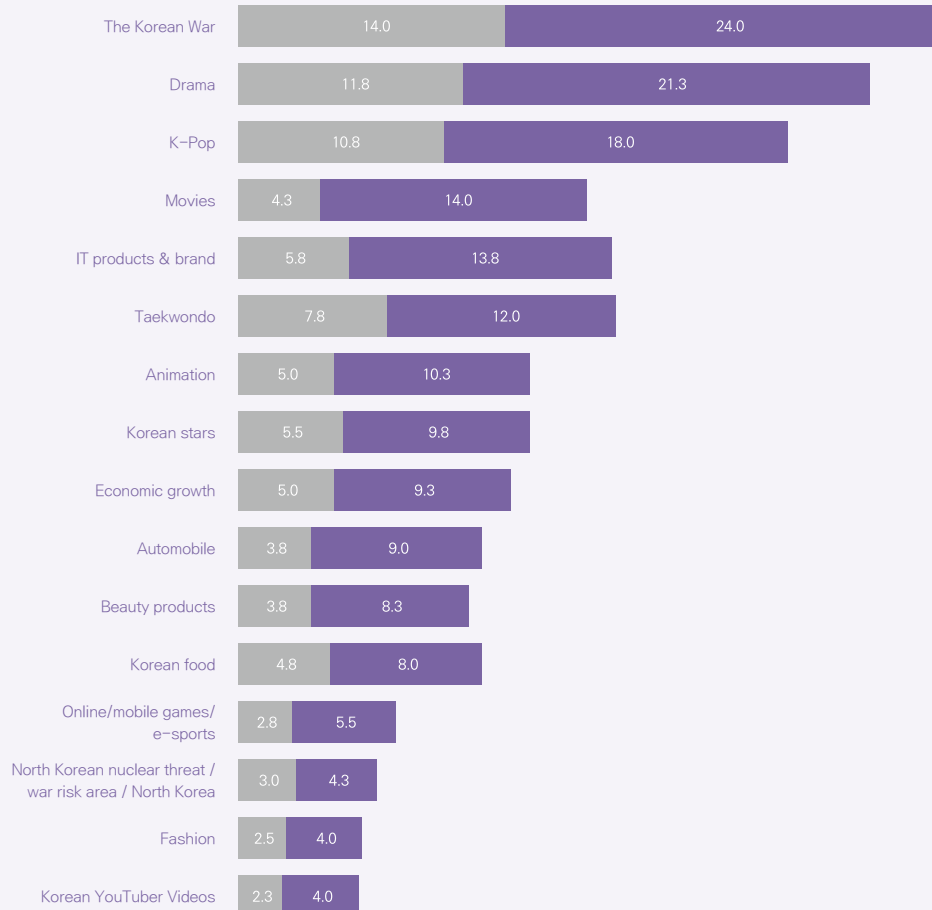
story of Korea, building an advanced economy on the ruins of war, is also considered to have contributed to the survey results. This is evidenced by 79.5% responding that “South Korea is an economically advanced country”, and 78.3% responding that they found Korea “likable”. Positive perception of Korea was especially evident in older age groups, who are more influenced by the historical relationship that stretches back half a century since the Korean War, while being weakest amongst teenagers. Likability exceeded 90% in the 40s and 50s age groups but was only 61% amongst teenagers, the lowest amongst all age groups. Such results raise the need to strengthen programs and activities that highlight the historically cooperative and special relationship and the cultural familiarity between Korea and Turkey for the next generation.

Images of Korea

BASE: 1+2+3 in order, Items that received more than 4.0% presented only

Q. When you think of South Korea, what is the first thing that comes to mind? What's next?

Top 1+2 (multiple answers)/ Top 1 (single answer)



When asked “When you think of South Korea, what is the first thing that comes to mind?”, the Korean War ranked the highest, receiving three times more answers than Korean cuisine, beauty, and games, genres that are considered to be propelling global Hallyu. This shows that the Korean War is one of the key images of Korea stamped in the minds of the Turkish people. The Korean War was followed by drama, K-pop, cinema and IT products, largely in line with global trends.

3. Turkish Preference of Korean Culture by Type of Cultural Content

Popular Foreign Content

Base: Respondents with experience of using Korean cultural content in Turkey, Unit: 1+2+3 in order, multiple answers

Q. Please choose the 3 countries, in order, that are creating popular foreign content in your country?

	Drama	Variety shows	Movies	Music	Animation	Publication	Games	Fashion	Beauty	Food
Sample size	(239)	(184)	(260)	(195)	(216)	(153)	(158)	(169)	(172)	(163)
US	72.4	66.8	76.9	81.0	56.5	52.9	79.1	60.4	45.3	50.9
Korea	60.3	32.0	47.7	49.2	68.5	62.7	60.8	53.8	65.7	37.4
UK	41.0	28.3	45.0	56.4	22.2	32.0	24.7	33.1	26.7	-
India	31.4	15.8	26.5	-	9.7	17.6	-	-	-	11.7
Germany	16.7	12.5	18.5	18.5	9.7	22.2	20.9	21.9	20.9	-
Brazil	9.2	10.9	5.8	-	3.2	9.2	-	-	-	9.2
Italy	7.5	13.0	7.7	7.7	7.9	13.7	6.3	36.1	21.5	58.9
China	5.4	6.0	6.2	2.1	9.7	4.6	25.9	15.4	9.3	23.3
France	5.0	6.5	12.7	19.0	4.2	15.0	2.5	25.4	32.0	23.9
Japan	4.2	11.4	6.9	7.7	40.7	19.0	34.2	10.7	16.9	14.1
Thailand	-	-	-	-	-	-	-	-	-	7.4
Vietnam	-	-	-	-	-	-	-	-	-	3.7
Others	5.4	4.3	2.3	3.1	0.9	0.0	0.0	1.2	2.9	3.1

In “animation” (68.5%), “beauty” (65.7%) and “publications” (62.7%), Korean content topped the list, followed by the US. In contrast, Korea ranked 2nd following the US in the remaining areas including “drama” (60.3%), “variety shows” (62.0%), “cinema” (47.7%), “music” (49.2%), “games” (60.8%), and “fashion” (53.8%). As a cultural powerhouse, the strength of American content is a global trend and seems to be closely related to preference for American culture in Turkey, which is unusual given that 98% of the Turkish people are Islamic and anti-American sentiment is widespread in Middle Eastern Islamic societies. Western-friendly policies by the Turkish government and the positive perception of American culture amongst the Turkish people would explain why. Since Turkey adopted secularism in its constitution after the Second World War, Turkey has become a key member of NATO, an international defense treaty of the West, and is pursuing EU membership. Against this backdrop, the fact that Korea was at the top in 3 areas and second in 6 areas following the US implies that Korean cultural content has a special place in Turkey. It is also notable that Korean cuisine came 3rd after Italy, a country that boasts exceptional food culture, and the US. It is evident that Hallyu has gained significant popularity and has become a part of the daily lives of the Turkish people.

Change of Perception of Korea after Experiencing Korean Cultural Content by Demographic

Base: Turkey total, n=(400), Unit: %

Q. How has your overall perception of Korea changed since you experienced Korean cultural content?

*5 point scale: 1, 2 negative change / 3 no change / 4, 5 positive change

	Total	Gender		Age				
		Male	Female	10s	20s	30s	40s	50s
Sample size	(400)	(200)	(200)	(100)	(100)	(100)	(66)	(34)
Positive (④+⑤)	68.3	62.0	74.5	47.0	75.0	78.0	79.7	58.1
④ Slightly positive	38.5	45.0	32.0	34.0	45.0	33.0	44.9	35.5
⑤ Very positive	29.8	17.0	42.5	13.0	30.0	45.0	34.8	22.6
No change (③)	26.8	31.5	22.0	45.0	21.0	17.0	18.8	35.5
Negative (①+②)	5.0	6.5	3.5	8.0	4.0	5.0	1.4	6.5

Brand Power Index by Korean Cultural Content by Demographic

Base: Turkey total, n=(400), Unit: %

Content	Total	Gender		Age				
		Male	Female	10s	20s	30s	40s	50s
Sample size	(400)	(200)	(200)	(100)	(100)	(100)	(66)	(34)
Movies	60.7	54.5	66.9	53.9	64.6	67.0	58.0	56.1
Music	63.1	58.9	67.2	57.2	67.0	68.7	66.4	58.7
Games	62.8	60.4	65.3	59.0	65.7	67.1	61.0	56.1
Food	62.8	57.1	68.6	57.0	68.4	67.9	58.7	56.5
Beauty	61.9	51.3	72.6	57.7	65.0	68.1	56.5	57.7
Fashion	61.2	51.7	70.7	55.7	63.8	68.3	56.5	57.7
Animations	60.7	56.3	65.1	52.6	64.3	66.7	59.3	58.4
Drama	60.2	53.6	66.9	53.5	64.9	65.3	57.7	55.8
Books/ Cartoons/ E-books	57.3	50.8	63.8	48.9	60.1	66.5	52.9	54.8
Variety shows	56.9	50.3	63.6	48.3	61.0	64.5	53.8	54.2
Webtoons	56.1	48.8	63.4	46.8	60.1	64.1	53.5	52.6

Let's take a deeper look into the details of the preference of each content type. Korean beauty products were by far the most popular content, at 82.0%, supported by Hallyu drama and extensive product reviews. Cuisine, variety shows, publications, film, fashion and animation scored over 70% while games, music and dramas received more than 60%. The diverse array of products, high quality, design and brand image were found to be driving the popularity of beauty and fashion products.

3-1. The Success Story of Korean Drama

The main drivers of Korean drama, films and animation were found to be the uniqueness of Korean culture and closely woven story lines, reaffirming that upgrading the most Korean themes to global standard is the best way to secure competitiveness. Foremost, the landing of Korean drama in Turkey and its success since then, is truly extraordinary. In 2005, Turkey's national public broadcaster *TRT* aired Korean historical epics such as *Emperor of the Sea* (2006), *Jewel in the Palace* (2003), *Princess Hours* (2006), *Jumong* (2006), *Yi San* (2007), and *Sangdo Merchants of Joseon* (2001) which were well received by viewers. Korean dramas soon appealed to commercial broadcasters as well, as they jumped on the bandwagon and connected to

many different genres of Hallyu. Hallyu that began with dramas expanded into food, beauty, K-pop, cinema and animation, eventually leading to a solid fandom and a strong demand for learning the Korean language. The most coveted Korean drama in Turkey was *The King: Eternal Monarch* (2020) (6.3%) and *The K2* (2016)(5.9%). In cinema, *Parasite* (2019), which won the the Best Picture, Best Director, Best Original Screenplay and Best International Feature Film at the 92nd Academy Awards received dominant backing with a preference of 30%, driven by its global success. Although not yet included in the statistics, *Minari* (2020), a film that successfully sends a global message rooted in Korean themes, should also score high once it is included in the list. The dramas that were huge hits in Turkey profess that the key success factor of Korean drama and cinema is the global interpretation of “Koreanness”.

Given the competitive landscape and the international presence of the Turkish drama market as the second largest drama exporter following the US, the popularity of Korean drama in Turkey deserves additional commentary. The cultural familiarity and the similarity of drama composition stemming from sharing the history of Central Asia and being members of the Altai family, would be factors that can explain its success. For example, the societal and cultural contradictions portrayed in Korean drama largely mimics the situation in Turkey. On one side, there is the traditional Turkey; conflicts between mother and daughter-in-laws, birth secrets and family issues including generational conflicts. On the other side, as Turkey advances into a new era, there is the modern Turkey; societal contradictions and conflicts between social classes and generations. The similarity has been analyzed to be the reason behind the success of all of the Turkish remakes of Korean drama. *Autumn in My Heart* (2000), *Full House* (2004), *My Husband Got a Family* (2012), *Bread, Love and Dream* (2010), *The Innocent Man* (2012), *A*

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2. 3.
 Korean dramas *My Husband Got a Family* (2012) and *A Gentleman's Dignity* (2012) that aired in Turkey and Turkish remake versions
 (Source: Onedio.com/ KOFICE Inhwan Kang, Turkey correspondent)

Gentleman's Dignity (2012), *The Heirs* (2013), *High Society* (2015), and *She Was Pretty* (2015) are all Korean dramas that have been purchased by Turkish production companies and successfully either remade or adapted. Turkish versions of Korean dramas have been so successful that the two are competing fiercely against each other in the Middle East and Central Asia because of the repetition of theme, plot and overlapping viewership.

Then what is the competitiveness and appeal of Korean drama? While Turkish viewers are used to typical Turkish male characters with thick hair, a mustache and natural toughness, the “gentleman” image of Korean protagonists, who are polite, considerate and attractive with crystal clear skin have been appealing to Turkish women. Turkish women have mentioned that “The main characters with close to perfect looks seem unreal as if they are living in a fairy tale”. Turkish fans are also mesmerized by the unique screen layout, a watercolor-like subtle visual style and the romantic and captivating natural expression of color. A Korean drama series is usually composed of 16 to 20 episodes, which makes episodes more condense and competitive than Turkish drama episodes that last for 1.5 to 2 hours. Korean dramas have gone beyond competing with the composition of the drama itself. The fashion, food, restaurants, and background music used, enjoyed and visited by the main characters are driving overall demand and consumption of Korean content.

General Perception of Korean Cultural Content by Demographic

Base: Participants with experience of using Korean cultural content in Turkey, Unit: % of respondents replying very good

Q. What is your overall satisfaction of the Korean cultural content that you have recently consumed?

* 5 point scale: 1,2 Negative/ 3 Neutral/ 4,5 Positive

Content	Total	Gender		Age				
		Male	Female	10s	20s	30s	40s	50s
Beauty	39.5	19.4	44.9	28.1	44.7	48.3	27.3	27.3
Cuisine	32.5	17.9	45.9	27.8	40.0	41.5	10.0	45.5
Variety Shows	38.6	16.4	51.3	17.2	42.3	53.1	31.8	17.6
Publication	43.8	24.5	52.9	15.4	45.5	58.8	43.5	33.3
Movies	23.1	15.9	32.2	7.7	31.3	33.9	21.8	11.1
Fashion	34.3	12.5	45.1	8.0	41.7	43.1	30.4	26.7
Animation	28.2	15.0	42.7	9.6	47.2	36.8	15.4	26.7
Games	28.5	21.1	39.7	18.0	28.6	37.8	33.3	40.0
Music	23.1	14.4	33.0	12.0	18.6	37.5	24.4	23.1
Drama	20.9	8.6	32.5	5.2	28.8	28.8	21.7	17.6

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- 4 The first K-pop concert held in Turkey in 2013 (Source: *ycinews* (2013. 9. 8.). "First K-Pop Concert In Turkey, Fanatic Hallyu Fans".)
- 5 Fans welcoming K-pop stars at Ataturk International Airport (Source: *ycinews* (2013. 9. 8.). "First K-Pop Concert In Turkey, Fanatic Hallyu Fans".)
- 6 K-pop magazine *KPop&Drama* launched in 2018 thanks to the strong support for K-pop and Korean drama in Turkey (Source: English webpage of Ministry of Culture, Sports and Tourism/ Hazan Aköz)

In music, the addictive chorus and the charm and popularity of K-pop stars were found to have had impact on likability. Korean food was also popular. The Turkish put high importance on taste and the cultural experience of enjoying Korean food. Likability toward Korean culture was highest in the 20s and 30s age groups, followed by 40s and 50s and then teenagers. The high likability in the 30s and 40s age groups was visible across all areas including beauty, cuisine, variety shows, publications, cinema, fashion and drama. In games and music, the 20s and 50s age groups showed higher likability. Teenagers scored lower in the beauty area than the 20s and 30s age groups but higher than the 40s and 50s age groups. The gender breakdown of likability of Korean content was similar to other geographies; the portion of females was significantly higher than males. The likability expressed by females were more than double than that of males in all areas.

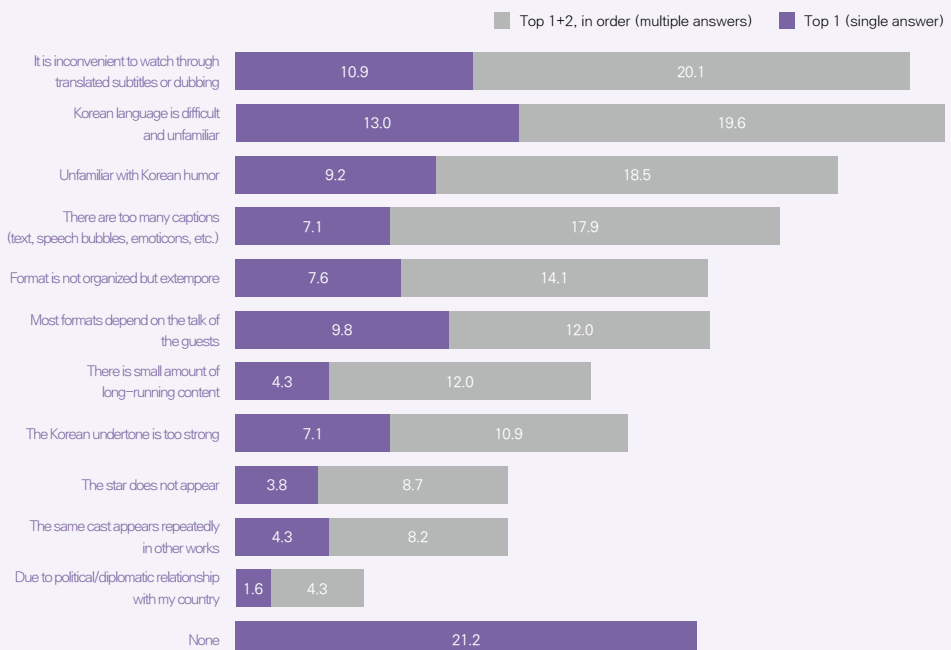
4. Reducing Unlikability and Future Challenges

Efforts to address negativity and reduce unlikable factors are important to sustain the diffusion of Hallyu and to maintain popularity of customized products by developing creative cultural content. While the general awareness of Korean content amongst Turkish consumers is high, it is noteworthy that there were factors that generate negativity. The lack of accuracy of translated subtitles, unfamiliar Korean expressions and awkwardness of dubbed programs in visual pop arts such as drama, variety shows, movies and animation were commonly noted features. Providing high quality translated subtitles that reflect the local cultural and linguistic subtlety and addressing the awkwardness of dubbed programs are crucial for the mid/long-term spread of Hallyu. Support for and systematic development of professional Korean translators who are fluent in the local language or local experts who are fluent in Korean is essential to reduce the cultural gap and conflict in the process of translating Korean into English and then into the local language again.

Factors Undermining Likability: Variety Shows

Base: Respondents with experience of watching Korean variety shows in Turkey, n=(184), Unit: %

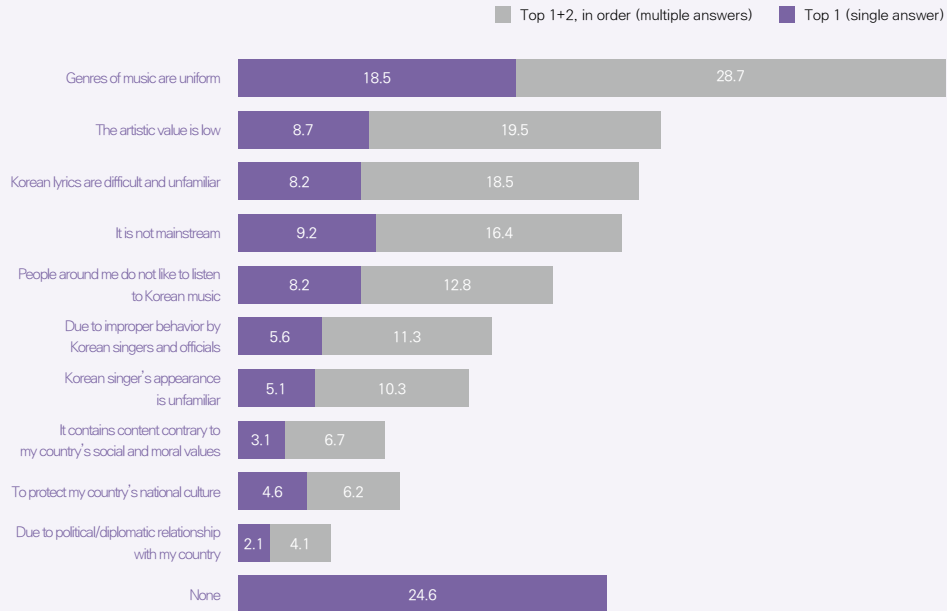
Q. Some negative opinions on the “Korean Wave (Hallyu)” appeared recently. How much do you agree with this negative perception?



Factors Undermining Likability: Music

Base: Respondents with experience of listening to Korean music in Turkey, n=(184), Unit: %

**Q. Which factors hinder good feelings toward Korean music in your country?
Choose your top two reasons.**



In the globally popular K-pop, similar to the video content sector, it is important to note that uniform music genres, low artistic value, excessive display of “Koreanness”, along with unfamiliarity of the Korean language, were noted to undermine likability. Uniform storylines have been blamed as a common factor of negativity in all areas including drama, animation, publications, and games. In this regard, a dynamic approach that appropriately reflects diverse global trends of the time, based on Korean themes, can be a solution. Dissatisfaction of Korean products were driven by high price compared to quality, which has been commonly pointed out in the areas with the highest likability such as fashion, beauty and food.

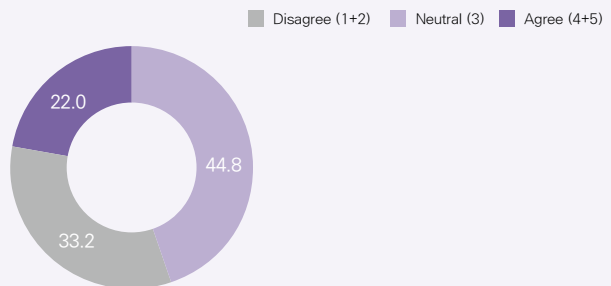
The second factor undermining likability was lack of diversity, in terms of size, menu and products. Low value-for-money, unaccustomed taste and smell, and foreign dining utensils kept people from enjoying Korean cuisine. For example, in countries like Turkey, strong spices and seasonings are not prevalent, even in meat menus featuring lamb. A localization strategy to develop menus that can captivate local taste while preserving the uniqueness of Korean cuisine to enhance customer satisfaction can help solve the problem.

Negative perception of Hallyu can deepen if these negative factors are not addressed quickly. 22% of the Turkish people share feelings of negativity toward Hallyu. The negativity is mainly based on protection of national industries, promotion of national content and the excessive commercialization of Hallyu. It should be noted that there are prevalent concerns in Turkey that the influx of the Korean cultural industry can undermine Turkish industries. While such concerns are common in countries where Hallyu is visibly strong, it would be essential to develop a thorough and meticulous strategic approach to prevent the image of cultural imperialism in the process of the dissemination of Hallyu.

Negative Perception of Hallyu

Base: Turkey total, Unit: %

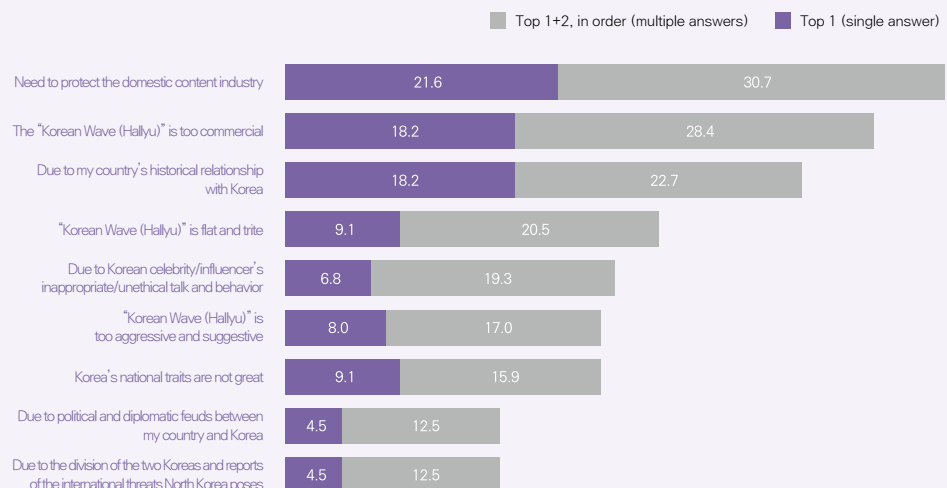
Q. Some negative opinions on the “Korean Wave (Hallyu)” appeared recently. How much to you agree with this negative perception?



Negative Perception of Hallyu

Base: Participants who agreed with negative perception, n=(88), Unit: %

Q. Why do you agree with the negative perception of the “Korean Wave (Hallyu)?” Please select two in order.



5. Conclusion

The Hallyu boom in Turkey has been expressed as strong likability for Korean cultural content. The main driver is the quality of the content itself, equipped with a wide spectrum of entertaining elements including humor, attractive genres, cutting-edge technology, a robust story line, empathetic themes, and value for money. But it should be recognized that the innate affection for Korea and Korean culture of the Turkish people is the solid bedrock that is supporting Hallyu. This signifies the cultural similarity that stems from sharing the Altai culture for 2,000 years and the special relationship between the two countries that has developed over many events that took place in the 20th and 21st century, including the Korean War, the warm hearted support that came from Korea right after the massive earthquake in 1999 and the outstanding sportsmanship displayed at the semi-finals of the 2002 World Cup by both teams. Such results are in line with the findings of *The Survey on the Image of Hallyu and Korean Culture* conducted by the Istanbul office of the Korean Tourism Organization in September 2015. The in-person survey included 392 women in their 20s up to 40s in the 8 largest cities of Turkey. The images of Korea that came up to the minds of participants were in the order of electronics, Korean food, the Korean War, economic development and pop culture. In the art genre, the main images were drama, cinema, traditional culture, and K-pop, in order. The popular Hallyu stars were Psy, Lee Min-ho, Kim Bum, Kim Hyun-joong, Park Shin-hye, Exo and Girls' Generation. After 5 years in 2021, according to *The 2021 Survey on Overseas Hallyu Status*, the list of favorite celebrities changed as new popular programs emerged and BTS took center stage. However, Lee Min-ho remains to be one of the most popular stars thanks to the drama *Boys over Flowers* (2009) which was a mega hit back in 2012.

Hallyu dramas are special in Turkey. Korean dramas started to gain popularity in mid-2000's when Korean historical dramas aired in Turkey. What seemed like a short-term vogue continued to gather steam, especially amongst the 30s and 40s age groups, to the extent that more than 40 remakes of Korean dramas were produced by major Turkish TV channels. The competitiveness of Korean cultural content strengthened considerably in the recent decade, evidenced by Korean dramas and films receiving global recognition. The results of the survey implies that novel and fresh scenarios and locally tailored content development based on reinterpretations that sympathizes with local consumers

are required for Hallyu to sustain global demand and expand market share in the global content market. To this end, local adaptations of script and accelerating shift from a global strategy to a localization strategy should be top priorities. Moreover, high quality translation and dubbing technology are essential for smooth communication. At the same time, it is important to be careful and considerate of the affordability factor in countries with weaker spending power and to reflect cultural sensitivities to minimize the image of excessive commercialism and cultural imperialism. 📌