
Monthly Hallyu Report

Global Hallyu Trend

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Hallyu Monthly Point

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Monthly Hallyu Report

Global Hallyu Trends

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Hallyu Monthly Point

130th Summary of Global Hallyu Trends

✓ We took a closer look at three topics:

- <MCN experiencing growth pains>
- <Fandom becoming a new cultural clout>
- <Gender code trends brought by Hallyu content>.

Point 1

Hallyu sanctions worsening in all directions



Hallyu sanctions are growing stronger after THAAD's site was determined. The upload of Korean content online is not officially prohibited, but scheduled events with Korean stars in Hong Kong are being cancelled. Not just the content market is affected: we examine the effects that the Hallyu sanctions are having on tourism, games, beauty, and webtoons.

Point 2

Using big data to see the amount of buzz for major Hallyu content by region



We've tried analyzing the search buzz for K-Pop, K-dramas, and K-films. The concentration of buzz in Southeast Asia and the increase of buzz in the Americas were most prominent. The increase of Hallyu communities abroad is significantly raising the buzz for Korean content.

Point 3

Evolved fandom and fan-gagement



Due to the advancement in media technology, such as real-time video streaming services, image clustering etc., the distance between fans and celebrities is narrowing. This has led to a sense of increased intimacy, with fans and celebrities sharing “tributes” with each other. We now have this phenomenon of 'fan-gagement', in which fans support and manage their celebrities. We focus on the evolution of fandom.

Issue Focus

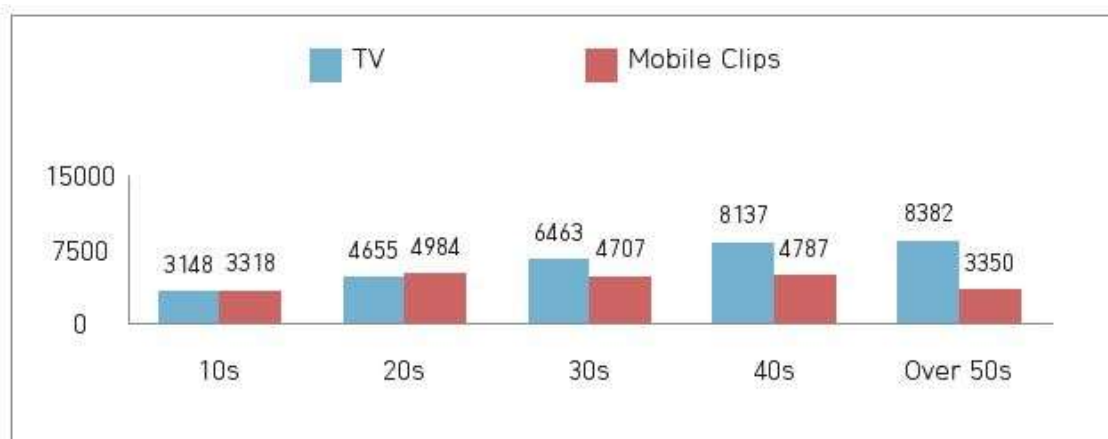
MCN experiencing growth pains

■ Next Generation Hallyu Platform MCN

○ Increased consumption of snack culture content and the growth of MCN industry

- **(Increase in usage of mobile content)** The popularization of mobile devices which have the advantage of “mobility” and “openness” allowed easy consumption of content through the web or apps. This led to the rise of a new cultural trend called “snack culture,” which is the convenient enjoyment of cultural content.
- The average smartphone usage per day in 2016 in Korea was 3 hours and 44 minutes. Among the respondents, 89.1% responded that they used smartphones to enjoy videos, web cartoons, electronic books, etc.
- **(Consumption of mobile content centered around teens to twenties)** Looking at media content consumption by age group in 2016, people in their fifties still accessed video content through television. Teens and people in their twenties watched more videos through mobile devices.

[Graph 1] Consumption of mobile content by ages (unit: 1000 person)



- **(MCN, the representative snack culture platform)** The rise of short content—within 15 minutes of play time—and the rise of mobile content usage centered around teens and twenty-

some things led to a rise in demand for MCN. MCNs are attracting users because they offer three key elements: variety, speed, and bilateralness.

- MCNs can provide various content such as videos about eating (mukbang), cooking, makeup, playing, or game streaming in real time.
 - This continuous communication between creators and users has developed into a new form of entertainment for content users.
 - **(Steep rise of MCN in a short period)** The increase in mobile content demand is leading to the increase in supply of MCN industry as well as MCN businesses. In addition to existing major players such as CJ E&M's Dia TV, Afreeca TV, and Treasurehunter, broadcasting and communications companies and media companies including KBS, KT, and Kakao are entering the market.
- **Strengthening of the global distribution platform function**
- **(High rate of foreign user subscription)** MCN channels that are rapidly growing share a similarity: their foreign subscription rate has also jumped recently. According to the “Top 20 Channels from Korea that grew the most in 2016,” 16 of these channels had more than 80% new users from abroad.
 - The most representative channels would be kids animation channel “Pinkfong! Kids Songs&Stories,” which captured the minds of 100 million children worldwide, and “KBS World TV” and “Mnet K-POP,” which are the official YouTube channels for KBS and Mnet.

Representative YouTube Channels that saw increase in foreign subscription



* Source: YouTube

- **(Increase of K-Pop content created by foreigners)** As the popularity of foreign creators who make content that introduce K-Pop, beauty, food, and other Korean culture rises, they are becoming active creators of Hallyu.

- Typical examples from the Americas that gained popularity through Hallyu content would be “Megan Bowen,” who has more than 500 thousand English-speaking subscribers, and “Nardi Santana,” who is the leading distributor of Hallyu in Spanish to South American users.
 - “MariAnnUlara” has created content that shows the daily life and culture of Seoul in French, helping Hallyu spread across Europe with 220 thousand views monthly.
 - “Let's eat & Happy” shows various aspects of Korea in English through food, travel, makeup, and challenges by a British man called “Let's eat” and Hong Kong Chinese-Canadian called “Happy.”
- **(Strengthening of translating function breaking language barriers)** Translation of subtitles and other materials through online platforms positively impacts the global distribution of Hallyu content. “YouTube” and “Naver” are offering various translation functions for foreign viewers and other Hallyu fans.
- YouTube is offering a “multi-language metadata” function that translates video subtitles to a language that foreign viewers can understand, as well as “community created subtitles,” which are made by volunteers in the YouTube community.
 - * “Toy Monster,” whose viewership is 98% composed of people from abroad, admitted that the translation tool that allowed the content to be translated into Spanish and Portuguese helped the service become a truly global channel.
 - Naver applied the “V subtitle system” to “V friends.” Creators can receive feedback from Hallyu fans across the globe in 9 languages including English, Chinese, Japanese, etc. Recently, it submitted three patents that include tools that allow the efficient syncing of live video and subtitles.

※ KOFICE NOTE

“Fire Chicken Noodles” has spread across the world through MCN

- ✓ Fire Chicken Noodles from Sam Yang Foods is a representative example that shows the spread of Hallyu through MCN. As Fire Chicken Noodles was established as the prime example of spicy food, challenges, and reaction content that features these noodles became popular through MCN.
- ✓ YouTube's “Fire Noodle Challenge” has recorded 7.56 million viewers (March 2017), and related videos from the U.S., Europe, Middle East, Southeast Asia, and China total almost 360 thousand videos.
- ✓ The challenges and reactions related to Fire Chicken Noodles are becoming tangible as the global popularity is turning into sales. The sales revenue of the 4th quarter in 2016 is expected to be 42 billion won, and the sales revenue of the first quarter of 2017 is expected to be more than 50 billion won (400% increase compared to last year).



Scene from “London Fire Noodle Challenge” – source : youtube

■ MCN Hallyu celebrities that work in various genres

○ Music content field

- The increasing popularity of MCN content is leading to the entrance of artists, dancers and other professionals, drawing entertainment and broadcasting companies to them and creating profits for all involved parties.

[Table 1] Characteristics and Representative Channels of MCN Content in the Music industry

Characteristics		Channels	Creators	Details
K-Pop Stars and Content Creators		V Star	Various Idol Groups	Many popular idols communicate with fans through live streaming service.
		1MILLION Dance Studio	Lia Kim and 10 others	Lia Kim, choreographer from JYP, and other 10 people create high quality dance videos.
Fusion and Collaboration	Collaboration between creators	Raon Lee	Raon Lee	, Sings Japanese animation cover songs , Collaborated with music cover creator “Fellec” and Naruto’s opening song
	Fusion between music genres	Violinist Jenny Yun	Jenny Yun (Eun Kyeong Yun)	Uploads K-Pop and dance-olin videos remade with violin
Entertainment companies entering MCN	Opening of YouTube Channels	Wonder K	Loen Entertainment	Distribution of web content to a total of 8 online channels.

- **(K Pop celebrities and professionals as content creators)** More K-Pop stars or professional choreographers who lead K-Pop are now creating content as creators.
- **(Celebrities and professionals enter)** MCNs that previously were an outlet for skilled but unknown singers and amateurs are now becoming a place where major Hallyu stars are acting as major creators.
- The “V Star” channel that emphasizes celebrity content is the representative example. Hallyu stars including BTS, Big Bang, Exo, and GOT7 have transformed into creators, offering live streaming services to many fans.

* The accumulated downloads is over 20 million, and monthly users reach up to 16 million (July 2016).

Representative popular channels of Naver's "V Star"



* Source: Naver

- **(Dance professionals to Hallyu celebrities)** Professional creators who simply used to follow the original dances and songs are now adding marketability and differentiation to the videos, turning them into “dance videos” that attract fandom
- “One Million Dance Studio” is led by “Lia Kim,” who used to be the choreographer for JYP. It is a YouTube channel for dance videos that has 4.52 million subscribers and up to one billion accumulated views, quickly growing into a popular channel (February 2017).
- **(Fusion and collaboration)** Various forms of collaboration that were difficult in traditional media are active. As professionals and artists enter the scene, the hype for collaboration is also rising
- **(Collaboration between creators)** As foreign viewership of popular videos reaches 60 to 70 percent, popular Korean creators and popular foreign creators often work in collaboration to increase foreign fans.
- Korean music creator “Raon Lee” and global cover video creator “Fellec” has collaborated for the opening song for “Naruto” over five to six times, gaining attention.
- **(Fusion between music genres)** Fusion between music genres is occurring, as well as the collaboration between creators. “Jenny Yun,” who fused classic music with K-Pop, is one of the most representative creators.
- She created “dance-olin” videos that combined violin and dance, remaking Twice and Red Velvet choreography as well as boy band Exo's “Monster.” Her YouTube subscribers have reached 220 thousand (February 2017)
- **(Entertainment companies entering MCN)** Aside from ordinary people and K-Pop stars creating content, original content from entertainment productions such as live shows is being distributed throughout the web.

- Loen Entertainment's YouTube channel “WonderK” has made around 20 videos of original content recently, distributing their content through 8 channels including YouTube, Facebook, YouKou, Weibo, and Todou.

* The total number of subscribers reached almost 9.3 million, and the total views reach 6 billion views. First-time viewers from Middle African Republic and Falkland Islands have emerged, increasing the total number of countries with subscribers to 231.

○ **Kid's Content Sector**

- Reflecting the positive interest on Korean education due to the spread of Hallyu, foreign viewership into kid's content is increasing. With the increase of foreign viewership, creators from various age groups are emerging, and genres are becoming more specialized.

[Table 2] Characteristics and Representative Channels of MCN Kids Content

Trend	Channel	Creator	Details and characteristics
Creators that suit different age groups emerge	Seo Eun Story	Seo Eun Shin	This channel features 3-year-old Seo Eun and her parents playing together.
	Lime Tube	Lime Kim	6-year-old Lime is the main star who plays with toys, draws pictures, and does other content that helps foster creativity. Through a connected channel called “LimePop,” Lime also provides English education content.
	My Lynn TV	Lynn Choi	11-year-old Lynn Choi interviews popular creators who appeal to teens. The channel introduces various games and entertainment such as kids challenges.
Expansion and specialization of content genre	Malyiya and friends	Malyiya and four others	An uncle, aunt, and their three children provide various content through related channels (friends, game, kid's channel)
	Toy Monster	Toy Monster	Creates kids content such as using mud Play-Doh in various colors, making candies or chocolate, etc.

- **(High possibility of global expansion)** Due to the increased interest in Korean education and content that does not focus on language, such content has an advantage compared to other content in global expansion.
- **(The positive perception of Korean education)** Through the Hallyu fever, the increased interest on Korean education is leading to increased usage of kids’ content from Southeast Asian countries. “Pororo” and “Tayo” are provided in 10 languages and in 22 channels, reaching annual viewership of 2 billion. Sales through YouTube have soared from 16 percent in 2013 to 40% in 2016.

- **(Non-language element and low language barrier)** As the content is mostly non-verbal, a separate translation for subtitles usually isn't required. This means that it's not very difficult to spread this content around the globe. "Sandbox Network," due to the increased foreign traffic of its kids' channels, is planning to provide a subscriber-friendly subtitle service by partnering with "Flitto," a crowdsourced translation platform.
- **(Creators that suit the age groups expand)** Enjoying video content has become a norm for children today, so much that the term "More Mobile" was coined. To accommodate the child audiences, the age groups of creators are diversifying as well. There are 3-year-old kids working as creators, not just older children.
 - The youngest creator is 3-year-old Seo Eun Shin, who belongs to Dia TV. She uploads content in the channel "Seo Eun Story" that shows her playing with her parents.
 - The popular channel "Maliya and friends" creates "family variety" content that shares videos of a family playing with toys or playing games. It features an uncle (Malyiya), aunt (Kiya), and three cousins (Ddohi, Rogi, and Mini).
- **(Evolution of kids content genre)** Content genres are expanding or specializing according to the age groups of kids' content consumers and target groups. The initial content simply introduced toys or showed the process of assembly, but now content is including more complexity and story elements, such as board games or experiments.
 - **(Focus on toy unboxing channels)** Initially, "Toy Unboxing Channels" constituted most of these channels, showing content about how to unbox toys and how to use them for parents.
 - **(Expansion to board game content)** Recently, content that centered around board games are becoming prevalent in YouTube. Carrie and Toy Friends started with the "Hally Gally" video to show "Hally Gally Cubs Delux" and "Tumbling Monkey." Lime Tube is also servicing "Heart pounding hand roulette," "Cookie box," and more.
 - **(Specialization of existing creator's channels)** Due to the expansion of content and the diversification of user age groups, the trend of supplying content that is tailored for each viewer is emerging. "Malyiya and Friends," who is a representative kids' content creator, has divided its channels to "Malyiya and kids" that focuses on little children and "Malyiya and friends" that targets elementary school children, showing different content on each channel.

○ **Game Content**

- Game content tends to feature an ordinary gamer with humorous personalities, videos of game competitions, or professional gamers who are also content creators. Due to the expansion of fandom, the collaborative marketing between game companies and creators is increasing.

[Table 3] Characteristics and representative channels of game industry MCN content

Category	Channel	Creator	Details and Characteristics
Broadcasting by professional gamers	TEAM KONGDOO	Several professional gamers	Former and current professional gamers work as creators to broadcast live game shows.
Game content featuring ordinary people	DotiTV	Doti	Gaining popularity through broadcasting games including “Minecraft” and other mobile games.
	JamddeulTV	Jamddeul	Gaining popularity together with Doti through Minecraft broadcasting. Participated in the world's biggest online video conference, “Vidcon 2016.”
	Daedosugwan TV	Daedosugwan	Broadcasts a broad variety of games, pets, and other content with humor.
	Yangdding YouTube	Yangdding	Despite not being a professional gamer, Yandding is the first Korean game creator to surpass 1 million subscribers.
Collaboration with game company	Seven Knights TV	Baeryong	Baeryong from “Insil Crew” works together with “Netmarble Games” to create content about “Seven Knights.”

- **(Expansion of internet broadcasting for professional gamers)** Due to the dismantling of the “StarCraft 1” pro-league, which was the core of the past eSports scene, professional gamers moved to “Afreeca TV” and other internet broadcasting sites. In 2016, the discontinuation of “StarCraft 2” was announced, making the migration of professional gamers more active. The fact that the best game players are directly involved in broadcasting and the low language barrier are attracting many foreign fans.
- Kongdoo company, which is a game-focused MCN company, has expanded its business into former and current professional gamer management. It plans to show interesting content through various video platforms including China's LongZhou, YouTube, and Twitch.
- **(Ordinary people are leading game content)** Although game content was mostly started by professional gamers, it has expanded to include content created by general users who share their

enjoyment of games through video.

- Popular game video creators such as “Doti,” “Jamddeul,” and “Yangdding” all gained popularity through broadcasting “Minecraft.” Animax has gained high popularity by broadcasting “Doti & Jamddeul TV,” which focuses on the two broadcasters.

- **(Collaboration between game company and creator)** There are cases where game companies create story-based broadcasting content by collaborating with famous creators. This movement utilizes the creator's fandom to increase awareness about the game.

- Netmarble games, through collaborating with “Insil Crew,” which has Baeryong and Beojoon, created content that centers on popular games such as “Seven Knights.” It has uploaded the content onto YouTube, Official Game Cafes, Netmarble's Facebook page, etc. to actively promote their games.

* In only four months after the first opening, the channel has garnered sixty thousand subscribers and a total of 7.3 million views, earning a place among the “Top 5 YouTube Game Broadcasters.”

○ **Beauty Content**

- Was previously led by female creators, but now a new domain is being built after male creators are being introduced. Celebrities are also directly becoming creators. This has led to new trends such as diversification of creator groups, creation of beauty content by Hallyu stars, and various forms of collaboration with cosmetic companies.

[Table 4] Characteristics and representative channels of beauty MCN

Category	Channel	Creator	Details and characteristics
Introduction of male creators to mainstream	LeoJ Makeup	LeoJ	Provides performance-based content including Idol cover makeup and Ninja Turtle Makeup
	miss ohmona	miss ohmona	A famous makeup artists collaborates with nearby crews to show high quality transformations
	Patrick Starr	Patrick Starr	Half-half makeup and various nail art skills that draw attention
	Manny Mua	Manny Gutierrez	Shows mainly contouring makeup, and was recently selected as the first male cover model for Maybelline.
Celebrity and idol makeup	ssin nim	ssin nim	Boyish character and skilled at talking, ssin nim shows unique makeup and male idol cover makeup
	Kisoo Kim	Kisoo Kim	A celebrity as well as a male beauty creator, Kim creates “Men's beauty” content such as how to use curler, burgundy contouring makeup etc.

	PONY Makeup	Pony	Has garnered popularity through the most recent trends, idol makeup methods, and new beauty product reviews. Has 2.33 million subscribers.
Collaboration with cosmetics companies	Yoon Charmi	Yoon Charmi	Cosmetics company “Apeu” released “Yoon Charmi edition” that has 5 kinds and 13 products in collaboration with “Yoon Charmi” who has 720 thousand subscribers.
	ssin nim	ssin nim	Cosmetics brand “Peripera” conducted beauty classes by collaborating with representative beauty creator, “ssin nim.”

- **(Males enter beauty industry, and one even becomes a Maybelline model)** Male creators have entered the beauty industry that was previously considered a place solely for women. Within Korea, LeoJ and Miss Ohmona are the most popular. Foreign creators Patrick Starr and Manny Gutierrez are also popular.
 - “LeoJ,” who has the most subscribers among Korean male beauty creators, has a total 70 thousand subscribers and 1.7 million total views. His content includes idol cover makeup, such as the styles of CL and Big Bang, and Ninja Turtle makeup, which is a kind of performance-type content.
 - Bumsuk Kim, who is known for “Miss Ohmona,” is a famous makeup artist in the magazine and advertisement field who collaborates with skilled hair stylists and video crews to show his transformations into Audrey Hepburn, Amy Winehouse, a geisha, etc.
 - “Patrick Starr” is famous for a Before & After video called “The power of makeup.” He has established his presence against the prejudice of being Filipino, plus size, and male. With his great nail art skills, he was selected as one of the nail color developers for a famous international nail brand “Formula x,” and has launched a limited edition nail product.
 - In America, famous beauty YouTuber “Manny Gutierrez” has two million subscribers and garnered popularity through contouring makeup. Recently, “Maybelline New York,” a famous global beauty brand, has selected him as a Maybelline model for its “boss life” campaign.
- **(The means of K beauty's spread)** With the popularity of beauty content that deals with Hallyu star's makeup methods and fashion, comedian Kisoo Kim, ex-member of “Banana Girls” Saeun Kim, and other celebrities are turning into star beauty creators that help the spread of Hallyu.
 - “Ssin nim,” who is a 1st generation beauty creator and famous for makeup broadcasts, creates review videos for Korean cosmetics as well as cosmetics from Japan, Germany, America, and

other countries. She tries various makeup methods for students, shows makeup methods used by male idol stars, and has a total of 1.23 million YouTube subscribers.

- Comedian Kisoo Kim is a celebrity beauty creator who provides content such as how to use eyelash curlers, girl crush makeup, etc. that transcends gender stereotypes, earning more than thirty thousand subscribers in just 75 days of activity after the channel was founded last November.
- **(Expansion of collaboration with cosmetics industry)** The high influence as well as cheaper fee compared to celebrities makes beauty creators a popular source for advertisement or collaboration.
- **(Production of marketing videos)** Cosmetic brands utilize Before & After videos created by creators using their products for promotion.
- **(Beauty product collaboration)** There are cases where cosmetics and beauty creators conduct collaboration promotions. Apeu released the “Yoon Charmi edition” that has 5 kinds and 13 products that comprise cushion, tint, shadow, etc. by collaborating with Yoon Charmi.
- **(Hosting beauty creator invitation events)** Beauty creators are often invited to various cosmetics brand events. Amorepacific is holding “Beauty Week” annually since 2014, when it invited twenty creators from Korea and China. Peripera is conducting the “Peripera X ssinnim Ink beauty class” collaboration promotion with creator ssin in conjunction with its 2016 F/W new arrivals launching.

■ Major issues in Korean MCN industry

MCN industry major issues

Category	Details and characteristics
Telecommunications company and broadcasting company's entrance of MCN market	<ul style="list-style-type: none"> · Online based telecommunications companies are competing for dominance in MCN. · Broadcasting companies' launching of their own MCN · Solidarity formation for market expansion
1-man creator incubating very active	CJ E&M, Naver, and Kakao are starting various projects to discover and train 1-man creators
creator branding	The rising popularity of certain content and creators has led to a trend of creators and home shopping businesses working together.

○ **Telecommunications and broadcasting companies enter the MCN market**

- In addition to Dia TV, who is the leader and Korea's most representative MCN, AfreecaTV, PandoraTV, Treasurehunter, and MCNs created by telecommunications and broadcasting companies are entering the MCN market, heightening competition.
- **(Competition for preoccupancy among online based telecommunications company)** In a bid for dominance of the MCN market, SK Telecom, KT, and LG U+ have launched specialized platform services to actively attract users.
- **(SKT utilizes celebrity-made content)** SK Telecom has given mobile video services such as “HOTZIL” and “5Ducks” to SM Mobile communications to show celebrity led video services.
- **(KT targets the commerce market)** KT partners with “Korea Mall,” which is an ecommerce business, and launched “dovido,” a platform where 1-man creators are linked with commerce to create revenue.
- **(Channel diversification and YouTube broadcasting service)** LG U+ has started a curation service where MCN content can be watched on TV through “Power YouTuber” in the LTE video portal. It also launched IPTV service “U+tv YouTube Channel” to make popular YouTuber's videos into channels.
- **(MCNs launched by broadcasting companies)** There are efforts from not only major broadcasting companies but also from cable TVs and other channels to create their own platforms for MCN.
- MBC has launched a web content-focused MCN through MBC Plus “Coconut.” It also started a mobile exclusive theatre, “MBig TV,” with the slogan “MBC's PD-produced high quality content.” <Beautiful Men Bromance>, which has garnered great popularity on mobile devices, has moved to TV for broadcast.
- SBS has launched mobile brand “Mobydick” to enter the MCN market. After last year, <Sehyung Yang's short-terviews> is its most representative content with comedian Sehyung Yang's humorous talks, funny subtitles, and various guests.
- * <Sehyung Yang's short-terviews>, despite being only distributed through the mobile platform, has garnered 35 million views from last June's first premiere until January 2017. Popular guests include Dok2&TheQuiet (3.7 million), Ha Yeon Woo (3.7 million), Democratic Party's Senator Pyo Chang Won (3.4 million), Seongnam Mayor Jaemyeong Lee (2.4 million), and Choongnam governor Heejung Ahn.

- For KBS, the company utilized a differentiation strategy by launching “Yeti Studio” and <Yeti TV> that features famous creators “Yangdding” and “Crocodile,” initially broadcasting live online and then broadcasting on major television channels after editing.
- JTBC has utilized its own announcer and created MCN content called “Seong Gyu Jang's JjangTBC” and distributed it through AfreecaTV, DaumPot live, and Facebook live. It is also uploading the edited content to various platforms including YouTube, Facebook, Naver, Kakao Tv, and Gom TV.
- Animation cable channel Animax has broadcasted <Doti and JamddeulTV> led by “Doti” and “Jamddeul.” This broadcasts recorded viewership of 2.6% (Research institute AGB Nielson), figures that are similar to famous cable entertainment shows “Jibbab Dr. Baek” or “Show Me the Money.”
- **(Solidarity for market expansion)** The number of creators who enter the MCN market is increasing, but the revenues are being focused on the few top creators, increasing the earnings gap between creators. To resolve this situation, solidarity between individual MCN businesses and creators are increasing.
- In the beginning, famous game creator “Doti” and “Jamddeul” simply ran the program together, but as the market suppliers increased, the importance of scale expansion rose, leading to collaboration between existing MCN businesses.

* Jaeek Ahn, Seop Cho, and Junho Yoo who are representative creators of Dia TV, have created a collaboration channel, “Eok Seop Ho,” marking the beginning of collaboration between creators.

○ **1-man creator management era**

- In the past, MCN businesses tended to cast famous creators that had garnered popularity through their own content, but as competition heightens and as the MCN market grew, the movement to acquire next generation creators by related companies has become prevalent. Companies are not only making efforts to discover 1-man creators but are evolving into management companies that train and support the creators.

Company	Detail
CJ E&M	<ul style="list-style-type: none"> · (Discovery and support of new writers) Selected 40 new writers for debut support of drama and film and confirmed a 13 billion won investment for “Open Program.” · (Music creator support and training) Popular rapper “Microdot” has started a partnership with Dia TV that supports him in creating content.
Treasurehunter	<ul style="list-style-type: none"> · (Discovering digital content creators) “SNS 3 minute video competition” to find talented producers who can create unique content
Sandbox Network	<ul style="list-style-type: none"> · (Audition format creator training system introduced) “2017 Sandbox audition” is planned for four weeks for the first time in 1-man content history in Korea.
Google	<ul style="list-style-type: none"> · (Support and benefits according to level and stage) If the number of subscribers surpass ten thousand, tailored services are offered through partner manager assignment. · (Conduct new creator training) Various training programs are conducted for new creators selected as YouTube ambassadors.
Naver	<ul style="list-style-type: none"> · (Musician support) “Open Studio” project helps studio record mastering and promotion of musicians.
Kakao	<ul style="list-style-type: none"> · (Project and artwork support) Crowdfunding support offered for “Storyfunding” project and artwork · (Creator support) Host “people funding” which directly funds creators through crowdfunding.

○ **“1-man creators,” the most wanted people for advertisements and “industrialization”**

- As MCN creators are growing by targeting niche markets in different fields, certain near-celebrity creators are rising as the most wanted promotion models.
- Star creators have direct marketing effects. In their videos, they try the products and create review content for the brand. They may then move on to ecommerce by collaborating with open markets or home shopping.
- DiaTV, through collaboration with Gmarket(Openmarket), showed 12 different “shoppingavenGs” videos that featured popular creators like “Daedosugwan” and “Benz.” This resulted in more than 6 ~ 12 times the usual sales.
- “Moongun,” who is the first male creator in Korea to belong to a beauty MCN company, “Leferi,” participates in Lotte Homeshopping's new beauty corner, “Bad Girl Show” as the only male panelist.
- Web content users tend to have less negativity against branded content. Marketing that utilizes creators is thus being regarded as the solution to reduce negativity from consumers in promotions

- As MCN is regarded as a fast growing and highly profitable business, various problems are emerging. Typical examples would be “MCN's mistreatment of creators,” “lack of verification methods for content,” and “limited content genre.”
- **(Soaring number of creator victimized cases)** Due to the mistreatment by several bad MCNs that take away most of the creator's revenue or request the content to be done in a certain manner, more creators are being victimized. Speedy investigations for the harm done and the development of a system or platform for content planning and production is necessary.
- **(Creation of sensational content)** Because the viewers can directly communicate with the creators without any censorship or editing, many worry that pre-verification is lacking. As “number of subscribers” and “number of views” are often used as the creator influence measurement index, creators often broadcast topics that are too sexual or sensational. Some kind of plan to judge the appropriateness of content and state-wide regulator measures are required.
- **(Content that lean towards certain areas)** Compared to existing legacy media, MCNs provide a wide variety of content. Because viewership is mostly people in their teens to twenties, content tends to be mostly focused on gamebang (game shows), mukbang (eating shows), cookbang (cooking shows), and beauty content. To maintain the strength of MCN, which is variety in content, we are at a stage where we require plans to incentivize the creation of various content, such as giving incentives for creators who create good and wholesome content.

Fandom Becoming New Cultural Clout

■ The evolution of global fandom

○ The evolution of media technology and the change in fandom

- **(Closer distance between fans and celebrities)** The development of media technology such as live video streaming technology and image clustering technology has narrowed the gap between the star and fans. The activities of fans have surpassed the physical boundaries as they become more active online.
 - Naver “V Live” that streams the activities of famous idol artists and stars live allows live communication between Hallyu stars and fans.
 - Performance direct video service “Seesaw” is used for easier access of indie band musicians and music that cannot easily be accessed through mass media.
 - Application “Mydol” allows virtual conversations with celebrities you like and a moving image lock screen feature. It now provides a mobile fan letter feature that actually allows communication with celebrities.
 - “Image specialized search services” that sort high quality scene photos according to date of upload like Naver's “image timeline” and Kakao's “Live Pick” add to the convenience for Hallyu fans.
- **(Consumers change to prosumers)** Fans are allotting a lot of time and effort for their celebrities. As media technology develops, activities that create celebrity related content or translate subtitles are increasing.
 - “Bbasoonyi” or “Dukhoo” are terms that refer to fans that know everything about the celebrity and those who take action to aid promotion. Creating video content for their stars is part of these efforts.
 - The fans either recreate related videos of celebrities or create their own, adding to the star's popularity
 - From the pure fandom targeted at the stars, the fans translate the subtitles on shows featuring the celebrities, helping the spread of Hallyu content all around the globe. There are cases of “crowdsourcing” knowledge that show the fans’ passion when foreign fans who translate major languages into different languages.

○ **A loving relationship: fan and celebrity's "tributes" and "reply tributes"**

- **(Fans who offer "tributes" to stars)** "Tributes," which refer to gifts to celebrities offered by fans, started with the 1st generation idol singers such as H.O.T. and JacksKiss.
- Fans used to voluntarily amass money to send food, clothing, and accessories to stars, but as the gifts expanded into limited edition goods, expensive electronics, and luxury brands, concerns emerged.
- Aside from delivering monetary gifts, fans sent food trucks to drama and film shooting sets to aid the staff and coworkers or post happy-birthday advertisements on subways and bus advertisement posters.
- As the scale and methods of tributes diversify, services that deal with "celebrity tributes" are emerging quickly.
- **(The change in celebrity tribute culture)** Hallyu stars such as Big Bang's G-Dragon and Taeyang, as well as Shinee Taemin, have announced their refusal of gifts from fans. Due to the "Yeong Ran Kim Law" (legislation regarding receiving and giving illegal gifts for favors), the management companies are controlling the support from fans.
- Celebrities that burdened by these "tributes," the "Yeong Ran Kim Law," and celebrity management companies that seek to change the overheated fan's support culture are leading to new movements that seek to improve the images of celebrities through volunteering and donations.
- JacksKiss's fans within Korea and abroad have delivered more than 13 tons of rice for the less privileged class to express their love for the stars.
- Fans of singer Chi Yeol Hwang has visited children's protection shelters as volunteer work and has supported anti-smoking campaigns with about 25 million won support
- Certain fans create forests named after the celebrity's name or make donations through smartphone applications in the name of the idol member or group.
- Starting with the "2NE1 forest" that was created by the fan club of 2NE1, which was recently disbanded, there is "Shinee forest," "Infinite forest," "Seo In Kook forest," "Yoon Ah (member of SNSD) forest" and "Sooho (member of EXO) forest." There are around 50 forests inside and outside of Korea that were grown from fans' love.
- "Choi Ae Dol," which started its service in January 2015 and established itself as a major fandom community, provides a campaign where monthly donations of 2 million are made in the name of the idol that received the most hearts from fans.

* After the app was made, a total of thirty million won was donated in the name of EXO, BTS, A-Pink (January 2017)

- (**“Reply tribute” for the fans by celebrities**) The trend of “reply tributes” has become a trend that is different from the previous fandom culture of “tributes.”
 - “IU,” who is very well known for her reply tributes, has delivered handwritten letters and polaroid pictures, and she even gave transportation cards to support the fans’ transportation fees.
 - An online article that compared the reply tributes of food by idols appearing on MBC's <Idol Star Track & Field, Archery, Rhythm gymnastics and Aerobics>, which is enjoying constant popularity, was a controversial issue.

■ Enlarging “fandom economy” and “fan-gagement”

○ “Fandom economy” has powerful purchasing power

- (**A major force in cultural industry**) Due to a prolonged recession, “price efficiency” is the main concern for purchase. But fans purchase anything for their stars, and content for “one's own satisfaction” appeals to businesses as key consumers.
- The high record sales in the music industry, where the market structure changed into downloads and online streaming, proves this.
 - For the case of popular male artist EXO, the second album “EXODUS” was released in Korean and Chinese in 10 different packages, totaling 20 albums. Many enthusiastic fans purchased all 20 albums.
 - Thanks to the love of fans, album sales reached up to 450 thousand copies in two days. In 2 months, a repackage album with 4 additional songs was released. It reached total sales of 1.12 million copies, earning the title of a million seller.
- (**Expansion of fandom marketing**) The purchasing power of fans is leading to company marketing, forming a “goods market.” “Goods” refer to products related to the celebrity. As the service and consumer goods are combined, the market size is increasing.
 - SM Entertainment, through “SM Coex Artium” which is a cultural complex, sells affiliated celebrities’ signature items, products, and beauty brand items.
 - YG Entertainment created the “YGZone,” selling records, goods, and related goods of its artists. Through partnering with Woori Bank, it has launched financial products such as savings and debit card programs.

○ **Fan-gagement: “Passionate supporter” to “trusted sponsor”**

- **(Fandom that is heard by stars)** Fandom that used to blindly support celebrities voices concerns about celebrities’ wrongdoing or wrong thinking.
- Yoo Cheon Park was investigated for a sexual abuse charge in June 2016, and was proved innocent. However, “DC Inside JYJ Gallery,” which is one of the internet fan clubs, expressed the end of their support for Yoo Cheon Park due to the social controversy.
- Last July, the fans of “BTS” criticized the misogynic lyrics in “Joke” released in March 2015 by “Rap Monster (member of BTS).” The fans created a twitter account “Publicize BTS Misogyny on Twitter” and requested “Big Hit Entertainment,” which is the management company of BTS, to announce its position. The company apologized and promised to prevent any reoccurrences.
- **(Trusted sponsorship of celebrities)** Fan support has surpassed celebrity fanfiction and editing or creating content about celebrities. It has now evolved into directly supporting celebrities’ albums or pictorials through crowdfunding.
- “Astro,” whose debut hasn't even been more than a year ago, conducted a crowdfunding project of the group's pictorial for fans all around the world to reach 343.3% of target funding.
 - * “Astro pictorial making project” has gathered more than 100 thousand dollars from fans all around the world including Korea, Japan, China, Philippines, and Indonesia from Asia as well as the U.S., England, France and Germany.
- Girl group “Stella” conducted a mini album-making project through crowdfunding. It has garnered more than 40 million won, which was 400% of the target investment. Girl group “LaBoom” also attracted 10 million won in only 4 hours after their music video making project was announced.

Gender code trends brought by Hallyu content

■ The popularity of Hallyu content that contains bromance and womance

- Gender codes such as friendship and love between the same gender or the motif of a woman dressed as a man are genre-blind topics that are often used in movies, drama, entertainment, and web cartoons
- Korean content that garnered high popularity abroad such as the drama <The Goblin> or the movie <The Handmaiden> used a new type of gender code.
- The TV show <The Goblin> recorded high view counts in regional streaming platforms after gaining high popularity in Korea and has earned 1st place in content ranking. The license is sold to not only Asia, but also the Americas, Europe, and Oceania, and the show is available through broadcasting and VOD services.
 - * The total view counts from the Taiwanese video site “Ai Chi Yi” surpassed 1 million, and the show also took 1st place for the drama content genre on “Viki,” a European video streaming platform, and “DramaFever,” a streaming platform for the Americas, Canada, and Latin America.
- The gender code used in <Goblin> was “bromance” that dealt with strong friendship between men. The bromance in Korean content uniquely features beautiful men and is referred to as “Korean bromance.”
- <The Handmaiden> by director Chan Wook Park, who represents Korea's cinema scene, was well received in Korean as well as foreign film festivals. It captured the eyes of many countries' audiences, elevating Korean films' reputation.
- <The Handmaiden> discussed the friendship between women that is deeper than love, containing the gender code of “womance.” “Hideko (Kim Min Hee)” and “Sook Hee (Kim Tae Rhee)” were instrumental in this movie's skillful mixture of unprecedented show of homosexuality, the culture of east and west that differed from the usual portrayal of 1930s Japanese occupation of Korea, hierarchical society and capitalism, and a transitional period between the past and modern times.

“Bromance” in the drama <Goblin> and “Womance” in the movie <The Handmaiden>



* Source: tvN



* Source: CJ E&M

■ Popular culture content shown in gender code types

- The most typical gender codes used in content can be categorized into love between the same sex, friendship between the same sex, gender role swaps, and the augmentation of the female gender role.

Category	Gender code	Details
Love between the same sex	BL (Boys Love)	Homosexuality between men
	GL (Girls Love)	Homosexuality between women
Friendship between the same sex	Bromance	Strong friendship between men
	Womance	Friendship between women deeper than love
	Girl Crush	Women feeling impressed or worshipping other women
Changing role of gender	Gender Swap	Swapping the gender role between men and women
	Augmentation of women's social status	<ul style="list-style-type: none"> · Changing dimensions of women's characters · Progression into traditionally men's characters · Female protagonists

- In 2016, there were many movements such as “bromance,” “womance,” and “girl crushes” that featured friendships between the same sex as well as “gender swaps,” “female related issues,” and “augmentation of the female character” that showed changes and variations in gender roles.

○ **Love between the same sex: BL in web content, and GL in movies**

- Gender codes that deal with homosexuality are shown in web content and movies. Web content reflects the most recent trends, and it shows BL, which is love between pretty men. Movies tend to feature GL, which is love between women.

Category	Gender code	Characteristics and example
Love between the same sex	BL (Boys Love)	· (Web Content) Korea's BL novel app "Bookpal BL Novels," Ah Ra Cho's BL web cartoons and the planned release of MM novel web cartoons
	GL (Girls Love)	, (Movie) <The handmaiden> (2016), <Love story> (2016) etc.

- **(BL code within web content)** BL, which is female-oriented content, is gaining popularity through web novels and web cartoons. The only BL novel app in Korea was introduced, and a famous web novel platform is planning to launch a web cartoon that features BL.
- "Bookpal BL Novels" was launched in June 2016 and surpassed ten thousand downloads (January 2017)
 - Through the special featured section within the app, star writers' new novels or popular novels are serviced for free, such as "official serial publication section" or "free even tomorrow section."
 - A search feature that can search according to the user's preferences for BL topics such as "shifting dimensions," "two top and one bottom," and "reverse growth love"
 - Bookpal has hosted the largest BL novel competition, "First Killer Whale Literature Prize," for three months in Korea from October 2016, and is planning for the second competition soon
- "Ah Ra Cho," which is a popular Korean web novel platform, plans to service various BL and romance web cartoons through collaboration with "Tall Guy ENT," which specializes in web content.
 - Ah Ra Cho plans to launch a web cartoon based on a foreign MM Novel (Male/Male Romance) and is attracting attention. Whether it can synergize with its other operations remains to be seen.
- **(GL code inside the screen)** Movies that were released in 2016 such as <The Handmaiden and <Love Story> are the most representative GL content that deals with love between women.
 - The movie <The Handmaiden> showed an explicit love scene between two actresses, breaking the taboo of homosexuality. It attracted 4.29 million viewers within Korea, and was invited to the Cannes Film Festival and other various film festivals in recognition for its artistic value
 - <Love Story>, which contains a realistic love story between two actresses, won the best Korean film prize in the 17th International Film Festival in Jeonju, won another award from the 35th Vancouver International Film Festival. It was invited to the 32nd Warsaw International Film Festival for the new director division, as well as to the 17th Tokyo Filmex Film Festival.

○ **Friendship between the same sexes: Bromance in movies, girl crushes in entertainment shows, and womance in dramas**

- Friendship between the same sexes is better accepted than homosexuality, making it the gender code that is used most often today. Because of this, it's used not only in movies, but also on television, specifically entertainment shows and dramas. Bromance, girl crushes, and womance are the most representative gender codes.

Category	Gender Code	Characteristics and examples
Friendship between the same gender	Bromance	· (Movie) <A Violent Prosecutor>, <The Age of Shadows>, <Battle of Incheon>, <Lucky>, <The Wailing>, <Master> (2016), etc.
	Womance	· (Drama) KBS2 <The Perfect Wife>, MBC <You Are Too Much>, <The Elegant Lady> with no specific broadcasting company yet, etc.
	Girl Crush	· (Entertainment shows) JTBC <With You>, KBS <Slam Dunk with the Ladies>, MBC Everyone <Video Star>, etc.

- **(Bromance that took over the Korean screen)** Most of the movies in 2016 that reached the top charts were movies that utilized “bromance.” This trend is also shown in the movies that are about to be released by the four major film distributors in Korea: CJ Entertainment, Lotte Entertainment, Showbox, and NEW.

- Half of the top 10 movies in 2016 were male-focused movies. 2nd place was <A Violent Prosecutor>, 3rd was <The Age of Shadows>, followed by <Battle of Incheon>, <Lucky> and <The Wailing> which took 5th to 7th places.
- CJ, which is one of the four major film distributors in Korea, released 8 movies that had male protagonists out of 11. All of Lotte's 5 movies dealt with bromance. 5 out of 6 for Showbox and 6 out of 9 for NEW were movies that had male protagonists, showing that the bromance hype in movies will continue this year.

- **(Girl crushes took over entertainment shows)** In Korean entertainment shows, there are trends that try to show female MCs instead of male MCs or female characters that transcend the traditional female character.

- JTBC <With You> shows a “matriarchal” character where the comedian “Sook Kim” says phrases like “How dare a man?” or “Men should handle the house chores!” to elicit fresh fun that is different from the existing male-female relationship.
- KBS <Slam Dunk with the Ladies> is centered around six strong ladies, leading a female trend in

the entertainment show industry, which was traditionally male-led. Season 2 and its new members is airing now.

- <Video Star> from MBC Everyone is similar to <Radio Star> in the major television channel that has male MCs. It has four female MCs—So Hyun Park, Sook Kim, Na Rae Park, and Chao Lu—that host a playful talk show.

- **(Female trends that will strike home theater in 2017) Unlike “bromance” movies with many actors in the film industry, the television industry's trend is to have two actresses with popularity and talent serve as main protagonists in a “womance”**

- TV dramas that are planned for broadcast are KBS2's <The Perfect Wife>, MBC's <You Are Too Much>, and <An Elegant Lady>, which has no specific broadcasting company yet. Whether the charms and acting of the actresses can attract the viewers' attention is of high interest.

○ **Changing gender roles: gender swaps and the advent of strong female characters**

- Gender code related to the changes in gender roles is connected to social equality, and it's been in various contents for a long time.

- Gender code is shown in various methods, including the advent of a strong female character, increase in number of female-centered movies, putting women in different vocations, and interpretation of the story from a female perspective.

Category	Gender code	Characteristics and example
Changing gender roles	Gender Swap	<ul style="list-style-type: none"> · (Web Cartoon) <Cassandra>, <Female Zhuge Liang>, <Americano Exodus>, <Cashero>, <My ID is Gangnam Beauty>, <Female Game Company Employees>, etc. · (Performances) Musical <Sherlock Holmes>, Play <Hamlet> etc.
	Expansion of female roles	<ul style="list-style-type: none"> · (Movie) <A Great Tale> (2016), <Contractual Special Agent>, <The Table>, <Evil Lady>, <May and June> (not yet released) etc. · (Drama) SBS <Jealousy Incarnate>, tvN <Good Wife>, JTBC <The Age of Youth> (2016), etc.

- **(The world of web cartoons interpreted from a female perspective)** For web cartoons that have an advantage of being able to experiment with new ideas, many works are trying to show interpretations shown from the female perspective. This new movement is gaining popularity.

- <Cassandra> is a reinterpretation of <Iliad>, story about the war between Troy and Greece, from the perspective of the female prophet Cassandra. It depicts female protagonists, who were previously not very well known, as key makers of the strategy in that war.

- <Female Zhuge Liang> starts with the premise that the advisors of the Three Kingdoms of China—Sun Wook, Gwak Ka, Zhuge Liang, and Qi Hu—were all women. The story starts with the gender of the advisors changing to women. This also changes the strategies and relationships between the heroes.
- **(Changing the gender of original characters)** In musicals and plays, “gender swaps” that change the character in the work are often used.
 - In the musical <Sherlock Holmes>, “Watson” is portrayed by actress Hyena Park, and in the play <Hamlet>, male characters such as “Flonius,” “Horatio,” and “Logencrants” are portrayed by actresses (Jeong Ja Park, Seong Nyu Kim, Bong Sook Son). However, limitations exist in the roles that are gender swapped.
- **(Changing gender roles on screen)** The change in women's roles is most prevalent on screen. From movies that star women as the only protagonists to women depicted as active and strong, there are changes in women's gender roles in all aspects. There are more women producers, greater usage of women's role evaluation, as well as topics, production environment, and evaluation that are centered on women.
- **(Increase of female-centered movies and diversification of characters)** Many works that have female actresses as central characters or various actresses will be shown to the audience, and the appearance of these actresses on screen is highly anticipated.
 - Notable movies that have actresses as main protagonists include the comedy action film <Contractual Special Agent>, starring Ye Won Kang and Chae Ah Han, and <The Table>, starring four actresses including Soo Jung Lim and Yoo Mi Jeong.
 - <Good Bye Single> revolves around a teen single mom and a woman in her forties. The film covers a serious topic in a comedic light and was well received.
 - Actress Yeong Yoon played an unprecedented female character, an “elderly prostitute,” in the movie <Killer Lady>.
 - <Evil Lady> is a film that has a strong female character, and it stars actress Ok Bin Kim. The melodramatic action film <May to June>, starring See Yeon Lee, is a female version of the movie <The Man from Nowhere>.
- **(Increase in female producers)** Among the <2016 key trends in Korean film industry> announced by the Korean film promotion committee, “rapid progress of female producers” was selected as one of the key words, reflecting the great accomplishments made by female producers last year

- In fact, Kyeong Mi Lee's <There's No Secret, <Us> by Ka Eun Yoon, <Love Story> by Lee Hyun Joo, <Missing Girl> by Eon Hee Lee, etc. received good ratings from evaluators. This was a sign that these female producers hold strong clout and are held in high esteem in the entertainment industry.

- (**F-rating** is a female role evaluation standard) As bromance movies take up most of the top charts, there are cases where “F-Rating” is applied in foreign countries.

- “F-Rating” was first introduced in Bath Film Festival in 2014. It is a rating that is given according to the amount of influence women have in the movie.

- * “F-rating” is given when women aren't in roles that are subordinate to the male characters, when the movie is produced by a female director, and/or when the movie deals with a female theme.

- After the F-rating was attempted in the performance division in the February 2015 Bath Comedy Festival, almost 40 theaters and film festivals introduced the adoption of the F-rating. The world's biggest movie database IMDb also followed this trend.

- The F-Rating’s usage in theatres is even more encouraging. UK's Genesis cinema plans to show F-rating movies at least once a week this year and Barbicon Cinema also decided to adopt F-rating.

- (**Female protagonists who broke the stereotype**) Active and aggressive women are shown on television the audiences.

- In SBS’s <Jealousy Incarnate>, “Hwa Sin Lee (Jeong Seok Cho)” is diagnosed as sterile after his breast cancer surgery and tries to break up with his girlfriend “Na Ri Pyo (Hyo Jin Kong).” She reacts by saying, “Let's not care about sterility,” or “Let's sleep together,” changing the existing perception between men and women.

- Another interesting feature is that all the professional characters on the show are women. The male lead’s mother (Jeong Soo Park), who worries that her son won’t be able to marry, the newscaster shown primetime television, and the male lead’s doctor.

- tvN's <Good Wife>, which is a remake of an American TV show, expands on women’s character roles. “Hye Kyeong Kim (Do Yeon Jeon)” chooses to act as a happy wife to the outside world, even though her husband cheated on her, while “Dan Kim (Na Na Kim)” doesn't hesitate to sleep with men to achieve the things she wants.

- In JTBC's <Generation of Youth>, “Yi Na Kang (Hwa Young Ryu)” is condemned for selling herself to affluent men for money, but she shows no embarrassment about her lifestyle, portraying a different image from traditional female characters.