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South Korea

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The Current Episode

For over a decade, South Korea has been working towards its current status as the world's most connected and mobile country. Its government pulled off a masterstroke back in 1995 when they invested €1.1bn (\$1.56) in a lightning-speed broadband network, ten years ahead of anything in the West. Koreans are the tech-richest consumers who demand the fastest and most evolved content.

Korean Wave

Korean consumers' digital confidence stems from the 'Korean Wave'; the surge in popularity of South Korean culture. National films, TV shows and digital flair are highly sought-after by residents and foreigners alike and seem to resonate with the broader Asian consumer. Uniquely, domestic film dominates over Hollywood imports. The impact of the Korean Wave is evident in consumers' pride in home-grown brands and entertainment.

Olympic Gaming

Gaming is like an Olympic sport in South Korea. Whilst online gaming is the preferred mode, live and mobile gaming are increasingly popular. Dedicated cable channels air live gaming matches; friends often hang out by staging mini Starcraft leagues at home, the country's hit game; and the world's first e-sport stadium, Yongsan E-Sports, has been built in Seoul.

Purse Power

'Kosmo Girls' are a sassy class of teen and 20something females who make up 66% of South Korean consumers, according to our quant survey, and wield enormous purse power. Michael Steel, a technology writer and former consultant for GoPets, an interactive 3D online world for virtual pets, says that in Korea, teenage girls are the prized demographic for technology brands. Girls have surpassed boys as game addicts with 50% of females compared to 40% of males playing MPORPG games.

Cliffhanger Culture

South Korea is pioneering gripping micromedia. Advertisements are being designed to resemble branded short films to be watched in instalments across a variety of platforms. As Sung Soo Chang, an account executive at Cheil Communications, the country's largest advertising agency, says, "We use celebrities for impact, to tease the consumer so they'll have to finish the story on other media."

Anycall's branded drama, starring Korea's queen of pop Hiyori Lee, has led to the advertised mobile phone being referred to simply as the 'Hiyori phone'. This form of advertising is also being used to break new pop acts, such as Park Bom. In the future, it is likely that advertising will be regarded as a legitimate route to fame and become entertainment in itself in order to survive in today's ad-skipping culture. We're spotting this globally, particularly in Italy.

Background Music

Downloading is the norm in South Korea when it comes to music. In 2003, Korea became the first place in the world for legally downloaded digital music to outperform CD sales. South Koreans have started a craze and a booming business for downloading background music for social network sites and PCs, which has made Cyworld the second most popular digital music seller after iTunes.



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South Korea

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The Next Episode

We are seeing some key trends coming out of South Korea that will infiltrate through the rest of the world influencing the future of entertainment.

G Tech

The feminisation of technology is driving the female-skewed South Korean consumer and the 'Kosmo Girl' in particular. 'G Tech' has arisen as a result of growing gender equality and the Conceptual Age, identified by authors such as Daniel H Pink who say the **world economy is now about right-brain (female) thinking rather than left-brain (male) with traits such as emotion and collaboration coming to the forefront**. Brands such as Apple, Nokia and the Nintendo Wii perfectly capture this and in turn, 'G Tech'.


'G Tech' is also about understanding that girls are driving the digital revolution and are more tech-savvy than they are given credit for. The 2006 *Girls Gone Wired* survey by Teenage Research Unlimited found that today's generation of teenage girls would rather have the latest mobile phone than a pair of designer shoes – a third describe themselves as a 'techie'. This trend is one that is a key driver for 'Circular Entertainment'.

Notorious Translators

Their love of US dramas ('Mee-d') means that TV has been replaced by the PC with Koreans **illegally downloading their favorite shows and translating them through open-source sites**. Volunteer translators race to upload the most accurate translation; their reward seems simply to be notoriety. We have noticed a similar trend emerging in Spain.

Young Parazzi

South Korean entertainment looks more solo or cliquy because of cultural factors restricting youth subcultures. We believe as **Korean youth Westernizes, we will start to see them become more rebellious and taking over public spaces**. They will also start rebelling against the monopolizing effect of SK Telecom.



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STATISTICS

Out of the South Korean consumers we surveyed:

99%	aged 18 – 24 listen to music for entertainment.
64 %	watch TV on the internet
40%	watch TV on a mobile device for entertainment
25%	download films to their mobile device.
27%	go to nightclubs and bars
25%	go to festivals
15%	to live music events
87%	own an MP3 player
18%	regularly access social networking sites
50%	female respondents play MPORPG
40%	of male respondents play MPORPG
38%	regularly send emails from a mobile device
52%	rip films through BitTorrent and sharing sites
40%	download films from online stores
13%	purchase films from high street stores
83%	would like all of their entertainment platforms in the one device

Through our survey and correspondents, we have identified some of the exciting names in the field of entertainment and media that is inspiring South Korean consumers.

Top websites
Social network site: Cyworld (84%)
Video-sharing website: YouTube (52%)
VoIP and IM Services: MSN Instant Messaging (52%)
Photo-sharing website: ImageStation (8%)
Aggregator websites: MyYahoo! (22%)

Top magazines
Bling Magazine
Cine 21
Film 2.0

Websites to watch
gamemeca.com
playforum.net
koreapopwars
blogspot.com

Festival watch
Resfest Seoul
Pentaport Rock Festival
R16 B-Boy Masters Tournament

Artist watch
Drunken Tiger
Claziquai
Pia

Top clubs
M2, Seoul
Matmata, Seoul
Harlem, Seoul