

Introduction

Korean cinema, like any other cultural product has naturally been influenced and conditioned by the environment that surrounds its creators, contributors, regulators and consumers.

However, due to the geopolitical dynamics of its foreign relations and the socio-political climate of its internal history, perhaps it can be said that a distinctive aspect that defines Korea and its cultural consciousness is the constant struggle with INSTABILITY and also a RESTLESSNESS which became the inspiration and force of a CULTURAL DYNAMISM.

Here is a brief introduction of such cultural characteristics of 'Koreanness' through an overview of the evolution of Korean cinema and where it stands now.

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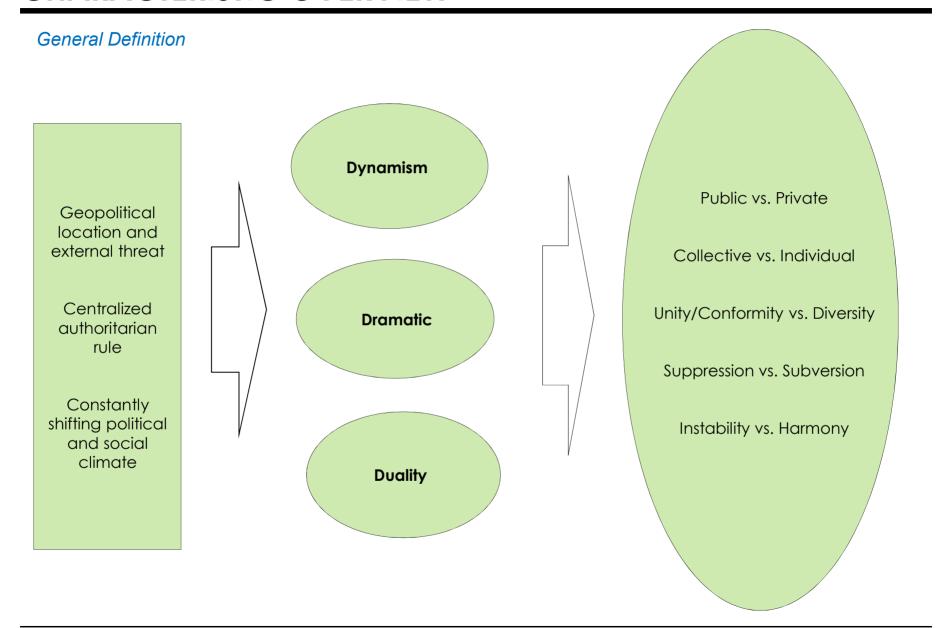
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CHARACTERISTIC OVERVIEW



CHARACTERISTIC OVERVIEW

Koreanness = Bibimbap? Arirang?



Meaning

- Bibim = mixing, Bap = rice, rice bowl
- Mixed rice bowl
- Rice bowl with mixed condiments

Other terms

- · Goldongban: a rice bowl mixed in disorder
- Hwaban: flower rice bowl

> Cultural connotations

- Each ingredient independently stands on its own
- · Harmoniously balanced and aesthetic
- Subversive
- Taking on new flavors

Mixing a bowl of Bibimbap

CHARACTERISTIC OVERVIEW

Koreanness = Bibimbap? Arirang?

- > Habitual sadness vs. Dynamic subversion
- > Lyrics

아리랑 아리랑 아라리요 아리랑 고개로 넘어간다

Arirang, arirang, arariyo, he crosses the arirang hills

나를 버리고 가시는 님은 십리도 못가서 발병난다

My dearest who is leaving me will not make it far before his feet takes sore

Arirang

- 1. The Advent of Korean Cinema under Japanese Imperialism
 - > Screenings for Japanese residents
 - > Public screenings started to be held after 1903
 - > Theaters started to appear in 1910
 - > The first Chosun-made film, HONORABLE VOMIT was screened October 27, 1919
 - Theatrical influence
 - Familial or romantic tragedies with simple storyline and exaggerated emotional performance.

- 2. The Silent Film Period (1924 ~ 1934)
 - > The advent of Korean film production companies
 - The commercial success of two period pieces based on classic literature: CHOONHYANG and JANGHWA AND HONGRYEON (first all Chosun-made feature-length film)
 - > The birth of a Korean national cinema
 - NA Ungyu's 1926 ARIRANG
 - Non-Japanese funding, human resources, foreign epic style with metaphors of 'resistance.'





> KAPF(Korea Arista Proleta Federatio) : Film as Weapon

- 3. The Talkie Film Period and Government PR Films (1935 ~ 1945)
 - > The talkie film period
 - THE TALE OF CHOONHYANG(1935) opens the talkie film period
 - > Shift in paradigm
 - Expansion: exit small independent productions and enter bigger scale production companies
 - Sophistication: a new flow of young directors and technical crew trained in Japan
 - > Colonial government PR films
 - 1937 Chino-Japan War
 - Colonial government controlled content and system

4. Independence and the Korean War (1945 ~ 1953)

- > U.S. military occupational policy and a flow of foreign(Hollywood) films
 - · Monopoly on collective consciousness and the distribution of foreign films
 - Local film community joining forces: pro-colonial film community and KAPF

> The Korean War

- · The local film community joins the military film team
- Serving the public (refugees): actors create collective drama companies or musical troupes

> Foreign film screenings

Westerns (STAGECOACH), melodramas(WATERLOO BRIDGE), French films and Italian Neo-Realism films (THE BICYCLE THIEF, OPEN CITY), news films

> Film productions

- · Relocating film productions: Busan, Masan and Daegu
- Enlightenment films focused on anti-communism and pro-military subject matters, melodrama, spy a
 nd crime thrillers as well as hybrid formats which mixed fiction and non-fiction were prevalent genres
- A total of 17 films were made

5. Growth and Restoration (1954~ 1961)

- > Commercial viability and moving towards industrialization
 - The commercial success of THE TALE OF CHOONHYANG(1954) Local film community joining forces: p
 ro-colonial film community and KAPF
 - · Growth in the number of productions, new film studios and films shot in cinemascope
 - The term for the equivalent of Hollywood started during this period: Chungmuro

> Diversity

- The diversification of genres: melodrama, anti-communism thrillers, detective, comedy, international co-productions with Hong Kong's Shaw Brothers
- SHIN Sangok and SHIN Film: leader of the 60s renaissance



SHIN Sangok's MOTHER AND A GUEST (1961) is a delicate portrait of female conflict against conservative ethics of a feudal society

5. Growth and Restoration (1954~ 1961)

- > Cultural openness and auteurism
 - The rise of modern period films were geared by the success of controversial MADAME FREEDOM(1956)
 which dealt with the extramarital affairs of a university professor and his wife
 - KIM Kiyoung's THE HOUSEMAID is a anxiety-ridden grotesque portrait of a middle class family
 - YU Hyunmo's AN AIMLESS BULLET shifts between realism and expressionism to portray the absurd reality of post-war South Korea





THE HOUSEMAID (1960)



MADAME FREEDOM

6. Renaissance (1962~ 1969)

- > Military dictatorship and protectionism
 - A new Film Law: Only State registered film companies could import and distribute foreign films with an obligation to fulfill a quota of 15 films per year
 - In order to acquire this quota, major registered productions sub-contracted film productions to indep endent film productions and by 1968, over 200 films were made
 - Melodrama, thriller/action, comedy, period pieces, horror, godzilla-esque sci-fi moster and literary film
 s became dominant genres as well as co-productions with Hong Kong.
- > Rubber shoes audience vs. the young audience
 - Melodramas dealing with public despair, economic and social alienation catered to the established generation: JEON Soyoung's LOVE ME ONCE AGAIN (1968)
 - Stylish and fast-paced youth films dealing with love, confusion, ambition and despair of the urban you
 th catered to the younger generation: KIM Kiduk's THE BAREFOOTED YOUNG (1964)

6. Renaissance (1962~ 1969)



LOVE ME ONCE AGAIN(1968)



THE BAREFOOTED YOUNG (1964)

- > The advent of TV and new technology
 - New TV stations (KBS, TBC, MBC) and nationwide broadcasting and new technological advances introduced through foreign films threatened the local film industry
 - The local film industry embraces new technological challenges: cinemascope, color films, 3-D and 70 mm films.

- 7. Control and Depression (1970~ 1979)
 - > The Revitalizing Reform and State control
 - Hands-on State policy and KOFIC
 - > Hero films vs. the discourse of the body
 - State produced hero period pieces
 - A surge of 'hostess films' with the success of LEE Jangho's HEAVENLY HOMECOMING TO STARS (별들의 고향, 74) and KIM Hosun's YEONG-JA'S HEYDAYS (영자의 전성시대, 1975)
 - · Action films: urban gangster, spy and martial arms films inspired by HK martial arts films



HEAVENLY HOMECOMING TO STARS(1974)



YEONG-JA'S HEYDAYS(1975)

- 7. Control and Depression (1970~ 1979)
 - > The baby boom generation and teen films
 - > Youth culture, youth films and film collectives
 - Films with new style and sensibilities which also adopted 3rd generation popular novels representing the resistance and despair of youth culture
 - Renown pop novelist CHOI Inho and UCLA-trained HA Giljong's collaboration: THE MARCH OF THE FOOLS (바보들의 행진, 1975)



THE MARCH OF FOOLS (1975)

• Film collective activities: KIM Hosun, LEE Jangho, H A Giljong, HONG Pa, LEE Wonse, BYUN Inshik groupin g up in the name of 'Korean Cinema as Art', 'New Films made by a New Generation' and 'New Cinem a Movement' and adopted critical realism into their aesthetical realm.: open call for new actors, training potential directors and issuing a film magazine (영상 시대)

7. Control and Depression (1970~ 1979)

왜 불러 왜 불러 돌아서서 가는 사람을
Why call me, why call me when I have alre
ady turned away
왜 불러 왜 불러 토라질땐 무정하더니
Why call me, why call me when you were
so heartless when I was sulking
왜 왜 자꾸자꾸 불러 설레게 해
Why, why, why do you keep calling me to
cause my heart to flutter

아니 안되지 들어서는 안되지
No, never, I won't listen
아니 안되지 돌아보면 안되지
No, never, I won't turn to look
그냥 한번 불러보는 그 목소리에
That voice which calls for me without muc
h cause
다시 또 속아선 안되지
I refuse to be tricked once again

안들려 안들려 마음 없이 부르는 소리는
I cannot hear, I cannot hear that voice which calls me without much heart 안들려 안들려 아무리 소리쳐 불러도
I cannot hear, I cannot hear as much as you call out for me
아 아 아 이제 다시는 나를 부르지도 마
Ah, ah, ah, do not call for me ever again

왜 불러 왜 불러 돌아서서 가는 사람을 Why call me, why call me when I have already turned a

way 왜 불러 왜 불러 토라질땐 무정하더니

Why call me, why call me when you were so heartless w hen I was sulking

왜 왜 왜 이제 다시는 나를 부르지도 마

Why, why, why, do not call for me every again

가던 발걸음 멈춰선 안되지 I won't stop walking away 애절하게 부르는 소리에 The sad voice that desperately calls me 자꾸만 약해지는 나의 마음을 Causing my heart to weaken 이대로 돌이켜선 안되지 But I cannot go back like this

왜 불러 왜 불러 돌아서서 가는 사람을

Why call me, why call me when I have already turned a way

왜 불러 왜 불러 토라질땐 무정하더니

Why call me, why call me when you were so heartless when I was sulking

왜 왜 왜 이제 다시는 나를 부르지도 마

Why, why, why, do not call for me every again

8. The Dark Ages and Hope (1980 ~ 1989)

- > Another military dictatorship and another revision in the Film Law
 - · New film production options for filmmakers, screenplay writers, actors and producers
 - 3S policy (Sex, Screen, Sports) as a means to divert public attention from politics
 - Eroticism teams up with period pieces while more modern romantic and rather naïve love stories become popular



LEE Dooyong's BBONG/ MULBERRY (1985)



IM Kwontaek's THE SURROGATE MOTHER (1986)



KWAK Jikyun's WINTER WANDERER (겨울나그네, 1986)

- > New dynamics in distribution
 - US trade pressures and market open to Hollywood majors
 - The popularization of VTFs and color TV restructuring the film and video market: price rise in purchasin g video rights
 - Rising number of small size local theaters

8. The Dark Ages and Hope (1980 ~ 1989)

- > New dynamics in distribution
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Korean New Wave

- College film groups/collectives and sophistication of the film movement
- Lightweight video cameras and the Gwangj
 u Citizen's Fight for Democracy footage sho
 t by the foreign press exposes the power of
 video and film as a powerful weapon for fil
 m activism
- A new cinephile culture inspired by foreign cultural center screenings
- Independent films and a new cinema (critical realism, awareness of cinematic gramm ar and aesthetic experimentation)



PARK Gwangsu's (CHIL-SU AND MAN-SU, 1988)

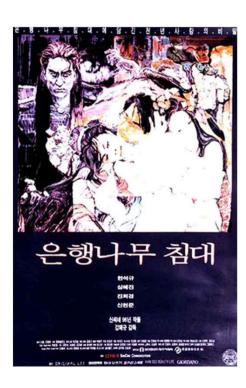
CHIL-SU AND MAN-SU (1988)

장산곶매'S BEFORE THE STRIKE (파업전야, 1990)

BEFORE THE STRIKE (1990)

9. A New Generation (1990 ~ 1999)

- > Major companies and venture capital join the race
- Hollywood majors' direct distribution depresses local productions as well as the Home Video market
- Large-scaled enterprises such as Samsung, Daewoo joins the film production arena to acquire video rights
- New opportunities and demands for film-savy upcoming producers
- Venture capital companies join the race



KANG Jekyu's (THE GINKO BED, 1996)

- Sophistication of the industry and market
 - The advent of major production-distribution companies:
 Cinema Service and CJ Entertainment
 - New producers, new production companies, new films
 - More commercial, upgraded production qualities, investment and production becomes separate entities
 - Genre diversification: romantic comedies, melodramas, actio
 n, hybrid action(comic action, action melodrama, macho mel
 odrama) fantasy and the sophistication of computer graphics,
 horror, comic horror etc.
 - Korean blockbusters: the success of SWIRI(1998) raised product ion costs, marketing costs and changed distribution paradigm into wide-release

9. A New Generation (1990 ~ 1999)

- > The Screen Quota movement
- When the economic crisis hit Asia in general around 1997, the government during the Korea-US invest ment treaty talks, offered to reduce the quota days thus inciting an uproar within the film community between 1998-99. Finally during the Korea-US FTA talks, the quota was reduced to 73 days in 2007.
- > Auteur films
- HONG Sangsoo, KIM Kiduk, LEE Gwangmo, LEE Changdong, IM Kwontaek
- International exposure
- > International film festivals
- Busan International Film Festival (BIFF, 1996)
- Pucheon Fantastic Film Festival (PIFAN, 1997)
- Cinematheque and art house cinemas
- > Film magazines
- · Cine 21, Premiere, Kino
- > Lifting of censorship (1996)
 - Shift to rating system

10. And the Story Continues (2000 ~

KOREAN FILM INDUSTRY STATISTICS 2011 AT A GLANCE.docx

KOREAN CINEMA AT A GLANCE

- → Bubble Effect
 - Rise of Korean cinema during the late 90s to mid 2000: Korean films took more than 60% of the market in 2006 ca using an excessive 'bubble effect' during the mid 2000s. (backdoor listing 우회상장)

→Crisis

- Excessive supply: more than 100 films publicly released were made per year.
- Increase in the budget
- Increase in P&A budget
- Disintegration of ancillary market due to illegal downloading
 - Polarization of the industry: Blockbuster size, high budget films vs. small budget films (decrease of medium size budget films)
- → Rising need to reinforce and diversify content development
 - Recent trend is the rise of buying rights to 'original stories' both local and international.
- → Branching out to the international market
 - Stable ancillary market and potential market expansion
 - Rejuvenating the creative market
 - Talent export (creative and technical)

Korean best 35

Korean Top 10 List (2000-2011)

KOREAN TOP 10 (2000-2011)

2000	2001	2002	2003	2004	2005
반칙왕(The Foul King)	친구 (Friends)	가문의 영광(Marry the Mafia)	살인의 추억 (Memories of Murder)	태극기 휘날리며 (Taeguki)	웰컴 투 동막골 (Welcome to Dongmakgol)
글래디에이터 (The Gladiator)	엽기적인 그녀 (My Sassy Girl)	집으로 (The Way Home)	동갑내기 과외하기 (My Tutor Friend)	실미도(Silmido)	말아톤 (Marathon)
미션임파서블 2 (Mission Impossible 2)	신라의 달밤(Kick the Moon)	마이너리티 리포트 (Minority Report)	매트릭스 2 리로디드 (Matrix Reloaded)	트로이 (Troy)	가문의 위기 -가문의 영광 2 (Marrying the Mafia 2 : Enemy- in-Law)
스튜어트 리틀 (Stewart Little)	조폭마누라 (My Wife is a Gangster)	반지의 제왕-반지원정대	스캔들-조선남녀상열지사 (Untold Scandal)	슈렉 2 (Shrek 2)	친절한 금자씨 (Sympathy to Lady Vengence)
007 언리미티드 (007 Unlimited)	달마야 놀자(Hi, Dharma!)	해리포터와 비밀의 방	반지의 제왕: 왕의 귀환	말숙거리 산옥사 (Spirit of Jeet Keun Do - Once Upon a Time in High School)	아일랜드
아메리칸 뷰티 (American Beauty)	슈렉 (Shrek)	공공의 적 (Public Enemy)	올드보이 (Old Boy)	투모로우 (Tomorrow)	미스터 & 미세스 스미스 (Mr. and Mrs. Smith)
거짓말(Lies)	해리포터와 마법사의 돌	스파이더맨 (Spiderman)	장화 홍련 (The Tale of Two Sisters)	패션 오브 크라이스트 (Passion of Christ)	해리포터와 불의 잔
박하사탕(Peppermint Candy)	진주만 (Pearl Harbor)	반지의 제왕 - 두개의 탑	황산벌 (Once Upon a Time in a Battlefield)	해리포터와 아즈카반의 죄수	공공의 적 2 (Another Public Enemy)
동감 (Ditto)	미이라 2 (The Mummy 2)	센과 치히로의 행방불명	오! 브라더스 (Oh! Brothers)	어린신부 (My Little Bride)	태풍 (Typhoon)
나인야드 (Nine Yards)	킬러들의 수다(Guns and Talks)	광복절 특사 (Jail Breakers)	매트릭스 3 레볼루션 (The Matrix 2 Revolution)	내 머리 속의 지우개 (A Moment to Remember)	너는 내 운명 (You Are My Sunshine)
춘향뎐 (Choonhyang)	무사 (Musa-The Warrior)	2009 로스트 메모리즈 (2009 Lost Memories)	싱글즈(Singles)	범죄의 재구성 (The Big Swindle)	마파도 (Mapado: Island of Fortunes)
오수정 (Virgin Stripped Bare by her Bachelors)	두사부일체 (My Boss, My Hero)	색즉시공 (Sex is Zero)	선생 김봉두 (My Teacher, Mr. Kim)	아라한 장풍대작전 (Arahan)	내 생애 가장 아름다운 일주일 (All For Love)
철도원 (Popoya)	화산고 (Volcano High)	폰 (Phone)	첫사랑사수궐기대회 (Crazy First Love)	귀신이 산다 (Ghost House)	박수칠 때 떠나라 (Murder, Take One)
사무리아 픽션 (Samurai Fiction)	번지점프를 하다 (Bungee Jumping of Their Own)	몽정기 (Wet Dreams)		우리 형 (My Brother)	
쉘 위 댄스 (Shall we Dance)		YMCA 야구단 (YMCA Baseball Team)		효자동 이발사 (The President's Barber)	
		연애소설 (Lover's Concerto)			

KOREAN TOP 10 (2000-2011)

2006	2007	2008	2009	2010	2011
괴물 (The Host)	디워 (D-War)	좋은 놈, 나쁜 놈, 이상한 놈 (The Good, The Bad And the Weird)	해운대 (Haeundae)	아바타 (Avatar)	트랜스포머 3 (The Transformers 3)
왕의 남자 (King and the Clown)	트랜스포머 (The Transformers)	추격자 (The Chaser)	국가대표 (Take Off)	아저씨 (The Man From Nowhere)	최종병기 활 (War of the Arrows)
타짜 (Tazza: The High Rollers)	화려한 휴가 (May 18)	쿵푸팬더 (Kungfu Panda)	트랜스포머: 패자의 역습	인셉션 (Inception)	써니 (Sunny)
미션 임파서블 3 (Mission Impossible 3)	캐리비안의 해적: 세상의 끝에서	맘마미아 (Mama Mia!)	2012	의형제 (Secret Reunion)	완득이 (Punch)
캐리비안의 해적 : 망자의 한	스파이더맨 3 (Spiderman 3)	과속스캔들 (Scandal Makers)	아버트 (Avatar)	아이언맨 2 (The Iron Man 2)	쿵푸팬더 2 (Kungfu Panda 2)
투사부일체 (My Boss, My Teacher)	해리포터와 불사조 기사단	아이언맨 (The Iron Man)	터미네이터: 미래전쟁의 시작	전우치 (Woochi)	미션임파서블-고스트 프로토콜 (Mission Impossible - Ghost Protocol)
다빈치 코드 (The Davinci Code)	다이하드 4: 죽어도 산다 (Die Hard 4)	강철중 (Public Enemy Returns)	7급 공무원 (My Girlfriend is an Agent)	이끼 (Moss)	조선명탐정: 각시투구꽃의 비밀 (Detective K : Secret of Virtuous Widow)
한반도 (Hanbando)	그놈 목소리 (Voice of a Murderer)	인디아나 존스 4: 크리스탈 해골의 왕 국 (Indiana Jones 4)	과속스캔들 (Scandal Makers)	포화속으로 (71-Into the Fire)	도가니 (Silenced)
우리들의 행복한 시간 (Maundy Thursday)	미녀는 괴로워 (200 Pound Beauty)	미이라 3: 황제의 무덤 (The Mummy 3)	쌍화점 (Broken Flower)	하모니 (Harmony)	해리포터와 죽음의 성물 2
미녀는 괴로워 (200 Pound Beauty)	식객 (Le Grand Chef)	다크나이트 (Dark Knight)	거북이 달린다 (Running Turtle)	방자전 (The Servant)	리얼스틸
음란서생 (Forbidden Quest)	세븐데이즈 (Seven Days)	우리생애 최고의 순간 (Forever the Moment)	마더 (Mother)	부당거래 (The Unjust)	퀵 (Quick)
가문의 부활-가문의 영광 3 (Marrying the Mafia 3: Family Hustle)	1번가의 기적 (Miracle on 1st Street)	신기전 (The Divine Weapon)	워낭소리 (Old Partner)	시라노 연애조작단 (Cyrano Agency)	고지전 (Frontline)
달콤, 살벌한 연인 (My Scary Girl)	바르게 살자 (Going By the Book)	미인도 (Portrait of a Beauty)	굿모닝 프레지던트 (Good Morning President)	하녀 (The Housemaid)	오싹한 연애 (Spellbound)
	극락도 살인사건 (Paradise Murdered)	눈에는 눈 이에는 이 (Eye For An Eye)	전우치 (Woochi)		위험한 상견례 (Meet the In- Laws)
	바람피기 좋은 날 (A Day for An Affair)	아내가 결혼했다 (My Wife Got Married)			의뢰인 (The Client)

KOREAN FILM INDUSTRY STATISTICS 2011 AT A GLANCE

Attendance: 159,790,000 (8.7% increase)

Revenue: 1,236,200,000,0001.23 trillion

Korean film market shares: 52%

No. of admissions per person: 3.15

No. of theaters: 292 (decrease from 2010)

No. of multiplexes: 240(82.2% of overall theaters)

No. of screens: 1,982 (fallen below 2,000 screens in 4 years)

No. of multiplex screens: 1,844 (93.4% of overall screens)

Box office shares

→ CJE& M(37.5%), Lotte Entertainment (14.7%), NEW(next entertainment world, 8.8%), Korea Sony Pictures, Releasing Buenavista (8.9%), Showbox (8.1%)

Korean box office shares

- → CJE&M(41.5%): SUNNY, PUNCH, SILENCED, QUICK, SPELLBOUND(오싹한 연애),SECTOR 7(7광구)
- → Lotte Entertainment(25.9%): WAR OF THE ARROWS, MEET THE IN-LAWS(위험한 상견례)
- → Showbox(15.6%): DETECTIVE K: SECRET OF VIRTUOUS WIDOW(조선명탐정),
 THE FRONTLINE(고지전)
- → NEW(12.4%): LATE BLOSSOM(그대를 사랑합니다), BLIND, UNSTOPPABLE FAMILY(가문의 영광 4)

Box office hits→ social and retro dramas were the popular trend for Korean films

- 1. TRANSFORMER 3
- 2. WAR OF THE ARROWS (7.47 million ticket sales)
- 3. SUNNY(7.36)
- 4. PUNCH(5.30)
- 5. KUNG FU PANDA 2
- 6. MISSION IMPOSSIBLE: GHOST PROTOCAL
- 7. DETECTIVE K: SECRET OF VIRTUOUS WIDOW(조선명탐정) (4.78)
- 8. SILENCED (도가니)(4.66)
- 9. HARRY POTTER
- 10. REAL STEEL

Online market has become the primary ancillary market

→ IPTV(64%) VOD(downloading & streaming, 31%), Mobile service(4%)

Korean films to break even: 16 (9 were hits)

No. of Korean film publicly released made: 146

Average film budget(production + P&A): 2.27 billion KRW (approx. 2 million USD) 4.16 billion KRW in 2003-2004

- → 1.55 billion KRW for production, 700 million KRW for P&A
- → 3.25 billion KRW: 1.56 billion KRW (commercial films over 1 billion KRW)

Increase in low-budget films below 10million KRW (900,000 USD)

Increase in films budgeted between 3-7 billion KRW (2.6 – 6.6 million USD)

Rise in export of Korean films (increased 16.5% than 2010)

Average price for Korean films: 40,470 USD (although no. of films have increased, prices have dropped)

No. of exported Korean films: 366 (highest rate up to date)

→ Asian regions take 56.9% (rise in the Japan(23.1%) and China(6.3%, however the increase rate jumped 94.8%) market)

Increase in remake rights sale: remake rights for 6 Korean films have been sold to the US, China and India. (increase 10 times more than 2010)
Service exports

- → Technical service export: VFX/DI (85.64%) Hong Kong & China (79%, 9 million USD, CG), Japan (17.06%, 2 million USD), US (5.97%, 706 thousand USD, martial arts)
- → Location service(37.91%): Japan (82.14%, 5.9 million USD), China (14.59%, 1 million USD), Malaysia (2.56%)
- → Talent service: China & US (film directors), Japan (K-pop starts, actors)

Multiplex business expansion: CGV, Lotte Cinema in China and Vietnam.