Korea Focus

Korean Reality TV Shows on Netflix: Changes and Challenges of the Korean TV Industry

Dr. Sookeung Jung

KOREAN
STUDIES
FREIE
UNIVERSITÄT
BERLIN

Korean Reality TV shows on Netflix: Changes and Challenges of the Korean TV Industry

Sookeung Jung (PostDoc Research Fellow)
Freie Universität Berlin, Institute of Korean Studies

Abstract

Netflix, a leading global OTT platform has played a pivotal role in transforming the global television landscapes, holding a dominant position with numerous subscribers worldwide. The success of Netflix is attributed to its effective 'localization' strategy and exclusive IP ownership policy, particularly evident in the production of its original series by local producers, such as popular Korean dramas like Squid Game and Kingdom. Netflix's recent decision to extend its production investment to Korean reality TV shows marks a significant move. Due to the challenges posed by cultural disparities in humor and expressions, reality TV shows have traditionally been distributed through format adaptations to avoid a 'cultural discount.' However, Netflix's approach of presenting Korean reality programs with subtitles or dubbing raises vital questions in ongoing discussions about transnational consumption and cultural globalization. This study analyzes the changes in Korean reality TV production since Netflix's entry into South Korea, utilizing critical media industry studies. It explores the influence of Netflix's increasing investment on production strategies and practices, the modifications in content due to Netflix's quality controls, and the transformations observed in the projects of Korean producers collaborating with Netflix. The 'Netflix effect' is reshaping the structure of the Korean TV industry, impacting the methods and approaches of domestic broadcasters and producers and leading to a shift in local television culture.

Keywords: Netflix, Korean reality TV show, Korean TV industry, globalization, localization

Introduction

Over the past decade, the global media industry has witnessed a significant transformation marked by the rapid ascent of Over-The-Top (OTT) platforms. Fueled by consumer demand for convenient content access and video providers' pursuit of a larger subscriber base, the OTT industry has expanded globally. The COVID-19 pandemic, with increased homebound consumer time, further accelerated media viewing, contributing significantly to the growth of OTT platforms. As of the fourth quarter of 2023, Netflix, boasting over 260 million paid subscribers across 190 countries, holds the top position in the OTT industry, followed by Amazon Prime, with approximately 200 million subscribers, and Disney+, with 150 million subscribers (FlixPetrol, n.d.). Netflix's dominance is credited to its proactive 'localization' strategy, targeting consumers in non-English-speaking regions like Asia, the Middle East, and Africa (Shaw, 2023; Wakabayashi & Jin, 2023). The production of culturally resonant original content effectively attracts viewers when entering new markets. In 2019, popular titles on Netflix in countries such as India, Korea, Japan, Turkey, Thailand, Sweden, and the UK were all local originals (Alsan, 2023).

Notably, Korean content among Netflix's locally produced originals has played a significant role in driving the growth of the global OTT leader. According to FlixPatrol's statistics covering the entire year of 2022, the most popular content on Netflix was produced in the United States (59.92%), followed by Korea (6.63%), the UK (4.11%), and Spain (3.90%) (Moore, 2023). Since the release of the Korean series Kingdom in 2019 and the subsequent success of Squid Game in 2021, over 60% of Netflix subscribers worldwide have watched at least one TV show or movie in

Korean (Tran, 2023). In the first half of 2023, Netflix users spent 38.5% of their viewing time on Korean content among TV series from non-English-speaking countries. When considering the entire spectrum of TV series, including content from English-speaking countries, the viewing time for Korean content amounts to 14.6%. (Kang, 2023).

Thanks to the global popularity of Korean TV content, Don Kang, Netflix Korea Content Chief, announced plans to invest $2.5 billion over the next four years starting from 2023 (Wan, 2023). This investment is not limited to dramas and movies but extends to non-scripted shows like variety programs. The intention is clear – to expand beyond traditional genres and highlight the diversity of Korean entertainment TV shows. This strategic move gained momentum with the global success of Physical: 100, released in January 2023. The Netflix Korean original series occupied the top spot in non-English shows within two weeks of its release and maintained that position for another two weeks. Much like Squid Game demonstrated the influence of Korean dramas, Physical: 100 showcased the potential of Korean reality TV shows.

However, concluding that Korean reality shows will gain global popularity solely based on the success of one program would be premature. Comedy and variety programs often face a significant "cultural discount" in regions with different language and cultural norms (Hoskins & Mirus, 1988, p.500), as the codes of humor and expressions of emotions vary from country to country. Due to these barriers, reality TV shows have traditionally been distributed through format trades. TV formats traded with a 'bible,' encompassing the main ideas and narrative approaches, along with advice from flying producers, have gained attention as a new media product that minimizes cultural disparities through local adaptations. Instead, Netflix presents Korean reality programs with subtitles or dubbing. Excluding programs with minimal dialogue or humor, such as Physical: 100, there remains uncertainty about how many Korean reality shows can garner meaningful responses from global viewers.

Meanwhile, domestic broadcasters and streaming platforms in South Korea perceive Netflix's endeavor to broaden investments in Korean non-scripted shows as a threat. Operating under the principle of 'economies of scale,' the global video platform Netflix possesses the capacity to allocate capital significantly surpassing that of domestic broadcasters and platforms. Mainly, critics contend that Netflix's contractual model, characterized by substantial budgets and fees in exchange for exclusive rights to the intellectual property of original series, has relegated domestic broadcasters to subcontractors supplying content to Netflix (Kim, T., 2022). The 'Netflix effect' is undeniably reshaping the structure of the Korean TV industry.

This study examines changes in Korean reality TV production since the launch of Netflix in South Korea, utilizing the perspective of critical media industry studies. Through the analysis of media reports, interview data with Netflix representatives and Korean producers from previous studies, and textual analysis of Netflix original reality series, this research will explore how Netflix is influencing not only the format and content but also the production, distribution, and consumption practices of Korean reality shows. It will examine the implications of Korean reality shows' shifting production and distribution strategies through Netflix.

OTT platforms as a new mediator leading the post-TV era

The rise of digital media platforms has triggered discussions among television scholars about the 'post-TV' era. Academic attention mainly focused on how the new technology would transform the traditional processes and practices of television production, circulation and consumption (Lotz, 2007; Spigel & Olsson, 2004). The conversations surrounding the next stage of television have unfolded in two contrasting directions – broadcast pessimism and digital optimism, ultimately conversing into a discourse of the demise of television (Buonanno, 2016).

The proliferation of digital platforms has further fueled this discussion. As Helmond (2015) argues, platforms with specific technological architecture and ontological distinctiveness function as a dominant infrastructural and

economic model of the social web, enabling the separation of content and presentation, the modularization of content and features, and the interfacing with databases. Since platforms can operate on all connected devices, they directly link producers and consumers, achieving unprecedented scale and reaching beyond national boundaries (Chalaby, 2023a).

In particular, the mechanism of OTT platforms, equipped with personalized algorithms and multinational aggregation, wields a 'circulation power' unimaginably stronger than older television (Hesmondhalgh & Lotz, 2020). According to Hesmondhalgh and Lotz (2020), OTT platforms maximize their circulation power through two distinctive advantages of their screen interface: discoverability and prominence. The effective interface of OTT platforms not only attracts more consumers to producers but also empowers producers by providing various viewer information, including viewership scale and preferences based on data-driven cultural mediation (Hallinan & Striphas, 2016; Seaver, 2019).

Additionally, OTT platforms mediate between global and local cultures by simultaneously releasing content created in a specific nation to audiences worldwide. Significantly, Netflix, which has secured the highest number of subscribers globally through its local content supply strategy, has further intensified the speed and scope of the globalization of popular culture. This practice not only complicates the cultural and economic conditions of OTT content production and consumption but also demands a more sophisticated understanding of formulating strategies and policies to control or promote them. The substantial range of choice in types of stories, genres, and countries of origin also requires rethinking discourses around the transnational flows of media content (Lobato & Lotz, 2020; Lotz & Lobato, 2023).

In this way, OTT platforms have disrupted and reconstructed not only the operational practices of conventional television, such as regular scheduling, linear broadcasting, and domestic transmission but also the systems and methods of television production, including production organization and labor relations. Beyond these operational and production-related changes, OTT platforms extend their influence to transform crucial facets of the television landscape, including consumer viewing experiences, content genre and aesthetics, and industrial strategies and policies. Moreover, as Chalaby (2023b) points out, OTT platforms with different monetization strategies have developed their content demand-supply strategies to provide an exceptional content volume to innumerable subscribers.

Engaging with a vast global audience, OTT platform businesses inherently require massive budgets, leading to the concentration of capital in the hands of a few prominent companies like Netflix, Disney +, and Amazon Prime. On the contrary, the asymmetrical power relations between a handful of global OTT platforms and countless content providers and creators worldwide often give rise to governance issues, as the strike of the Writers Guild of America shows (Richwine & Chmielewski, 2023).

The dominant power of OTT platforms in the global television and film industry rekindles discussions surrounding cultural imperialism. The mechanism of digital platforms, rooted in computational data and AI, reinforces the hegemony of the US in the global cultural industry (Jin, 2015). While some cultural theorists highlight the contraflow generated by locally produced media content distributed worldwide through OTT platforms, resisting the U.S.-led mainstream popular culture (Lobato, 2019; Lotz et al., 2022), critics argue that the influence of these local media contents in the mainstream cultural market is marginal, allowing Western media giants to maintain their position (Jin, 2017; Park et al., 2022). Jin (2013, 2015, 2017) claims that global digital platforms accumulate capital and power through IP ownership, resulting in a monopolistic position of transnational corporations, a phenomenon he terms 'platform imperialism.' Particularly, a leading streaming platform, Netflix, has faced criticism for its 'Netflix imperialism,' overwhelming many regional television stations through economies of scale (David, 2019).

'Netflix effects' on Korean television production

South Korean players, who have supplied more content to Netflix than any other country in the world, excluding the U.S., often express concerns about Netflix's impact on the domestic TV and film industry. There has been a noticeable decline in drama production by domestic broadcasters and a weakening of their market power since the launch of Netflix Korea in 2016 (Kim T, 2022; Park et al., 2023). Netflix's ability to mobilize significant capital to acquire skilled production labor and content IP has allowed it to dominate Korean drama production in a short period. The platform respects creator autonomy, minimizing intervention in story and format, making it an appealing partner for Korean creators previously controlled by domestic broadcasters (Kim, T., 2022; Yu, 2020). Netflix's generous production budget enables Korean producers to create 'tentpole' content without relying on advertising sponsorships. For local actors, the simultaneous exposure to global audiences via Netflix presents an invaluable advantage.

However, Netflix's purchasing contract, which provides exclusive copyright to Netflix along with exclusive control of revenue, makes domestic producers hesitant to collaborate with the streaming platform. (Han, 2023; Lee & Kim, 2020; Min, Go & Song, 2020; Yu, 2020). Netflix's contracting strategy faces considerable criticism, particularly following the revelation that Squid Game, Netflix's mega-hit in 2021, generated $891.1 million in profit and attracted millions of new subscribers, while the Korean production company responsible for the show only received $21.4 million for production costs. The stark contrast, where Korean drama production costs are only a fraction (one-third to one-fifth) of those from a significant U.S. production company, underscores the reality of local production. This disparity primarily stems from the lower labor costs in the Korean TV production scene, leading to dissatisfaction and formulation of alternative strategies to Netflix's dominance (Kim, Y., 2022). In addition, the steep rise in production costs and the increasing dependence of the domestic production industry on foreign capital have also contributed to the negative perception of Netflix.

Netflix's impact on the landscape of Korean drama production extends beyond the industrial sphere. The streaming platform has instigated significant alterations in the genre diversity, viewership ratings, episode duration, and season length of Korean dramas (Auh & Limb, 2022). It has brought forth genres such as zombies and thrillers, infrequently explored on Korean television before Netflix's involvement. Additionally, it has catalyzed the introduction of audacious expressive styles and novel character archetypes (Lee, 2021). Notably, Netflix's initiatives have triggered comprehensive transformations in domestic broadcasters' programming and strategic planning.

Nonetheless, little research on unscripted programs, specifically reality shows, has been conducted compared to the extensive research on Netflix dramas. This discrepancy can partly be attributed to the predominant presence of scripted genres, such as dramas and movies, within Netflix's content library. Furthermore, the recent emergence of Korean reality shows, such as Netflix original series, contributes to the dearth of academic inquiry. Over the past three years, since Netflix's foray into Korean reality show investment in 2021, the landscape of Korean entertainment production has transformed in a manner parallel to that observed in dramas. Given that the success of entertainment TV genres, such as comedy and variety shows, hinges on a shared contextual understanding between producers and viewers, an examination of Netflix's original reality show series created by Korean producers holds the promise of furnishing valuable insights. Such an analysis illuminates the evolving nature of Korean reality shows and its implications for the broader shifts within the local TV industry and the reception of local audiences.

A concise history of Korean reality TV shows

Originating from a manifestation of candid camera programming in the late 1940s, reality television shows resurged in the 1990s as low-cost and high-efficiency content suitable for the multichannel environment facilitated by the advent of cable and satellite transmission. Reality shows that blend elements from various entertainment television genres, such as game shows, quiz shows, talk shows, documentaries, and dramas in real-life situations, have proven advantageous for broadcasters searching for innovative content. Primarily, reality shows have become a favored genre in the television format trade. Television format refers to an easily adaptable and replicable program package encompassing a licensing agreement and a bible containing production notes, history, schedule, ratings, and other pertinent information (Moran & Malbon, 2006). Free from language and cultural barriers, television format has resulted in a global proliferation of trades since the late 1990s. Noting its flexibility, hybridity, and saleability, Murray and Ouellette defined reality television as "an unabashedly commercial" form intermingling the traditions of factual-based genres and more populist and entertaining formats (2004, p.3)

In the early 2000s, Korean reality television formats emerged as a local version of global formats by cable networks. At that time, Korean cable broadcasters faced constraints in both capacity and capital for developing and producing original programs, making the adaptation of foreign television formats a more cost-effective alternative. The success of the locally adapted foreign formats prompted major terrestrial national networks to engage in the production of the novel type of television content. The confluence of neoliberal reform within the local media industry and the prolonged stagnation of the domestic advertising market since the Asian financial crisis 1997 compelled Korean producers and broadcasters to develop reality TV formats as a new business mode to diversify and enlarge their sources of revenue.

In contrast to global reality TV formats, Korean reality shows produced by national terrestrial networks exhibited distinct characteristics. These included a hybrid format that amalgamates elements of various shows with diverse genres, such as game shows, talk shows, and documentaries. The casting approach centered around celebrities, emphasizing entertainment within the context of reality. The formulae employed were unscripted and unfixed, incorporating spectacular imagery often linked to national and worldwide events. Furthermore, the narratives crafted aimed to promote public interest and national awareness (Cha & Park, 2012; Kim & Park, 2012; Park & Bae, 2010). These distinctive features resulted from various factors influencing the production of Korean national television networks, including media regulations, local audience expectations, financial constraints, and the prevailing production culture in the local industry. Also noteworthy is the scheduling strategies of the reality television shows. The weekend evening time zone, where reality show programs were predominantly scheduled, was considered as family-watching time. Consequently, it featured family-friendly elements that everyone could enjoy together (Kim, 2018).

The Korean reality show formats, possessing both commercial appeals and public values, began actively exporting to the Chinese market in the early 2010s. This coincided with China's efforts to modernize its cultural industry. The exported Korean reality show formats to China facilitated the production knowledge and skills transfer to Chinese entertainment program producers. The success of Korean formats adapted in China led many Korean production personnel to relocate to China, either producing programs directly or supplying them through collaborative ventures with Chinese partners. As a result, Korean professionals gained experience in transcultural storytelling and marketing strategies.

In terms of format exportation in the Great China region, Korean reality show formats have several advantages: cultural proximity, the Korean Wave craze with pop stars, and Chinese streaming platforms that rapidly distribute Korean television content almost in real-time (Chua & Iwabuchi, 2008; Kim, 2019). However, the favorable

atmosphere towards Korean reality shows did not last long. Due to the Chinese government's restrictions on foreign programs following the 2016 agreement between Korea and the US regarding the deployment of THAAD (Terminal High Altitude Area Defense), the distribution of Korean content and the activities of Hallyu stars were effectively banned in China. To reduce excessive reliance on the Chinese and East Asian markets, Korean players have sought to enter into other television markets such as the US, Europe, and South America. With the remarkable success of The Masked Singer and I Can See Your Voice, Korean reality show formats have garnered significant attention from global television broadcasters, expanding their reach by diversifying program themes to include cooking, travel, and more.

The recent emergence of global OTT platforms like Netflix poses another challenge for Korean reality show producers. Not only does it disrupt the existing format trading practices, but it also brings about a significant shift across the entire landscape of reality show production. The addition of reality show genres to Netflix's original series lineup leads to the production of Korean reality shows tailored to fit the Netflix formula for simultaneous global releases. Korean producers who have experienced collaboration with Netflix are observed making changes in themes and presentation styles to reach a broader global audience. This suggests a transformation in the characteristics of traditional Korean reality programs.

This study examines how Netflix has influenced Korean reality show production ecology. From the perspective of critical media industry studies, this research addresses the following questions:

1. What influence does Netflix's increased investment in the production of Korean reality shows exert on the production strategies and practices of the domestic TV industry?
2. In what ways does Netflix's set of production criteria alter the content, style, and format of Korean reality shows?
3. What transformations are observed among Korean producers collaborating with Netflix?

Methods

This study adopts critical media industry analysis primarily concentrating on producing entertainment programming. Critical media industry studies represent a meso-level approach aiming to comprehensively address the media's structure and agency while exploring power dynamics and resistance within media sectors (Cunningham et al., 2019). This framework underscores "the complex interplay of economic and cultural forces, as well as the forms of struggle and compliance that occur throughout society at large and within the media industries in particular" (Havens et al., 2009, p. 235). In essence, the critical media industry perspective directs its focus toward understanding the interrelationships between the agency of media workers negotiating within the macro-level structures of capitalism and the resultant power relations it engenders (Gray & Lotz, 2019).

In this regard, this study is based on the integrated media industry approach combining archival analysis on newspapers, industrial journals and reports, and existing interview collections and textual analysis on individual Netflix original reality series created by Korean producers to investigate the changed working conditions of television professionals and the transformation in the production practices of Korean reality shows. First, the archival analysis of existing research materials provides practical details of producers and outcomes in the production and business of reality shows. The research materials include news articles, professional magazines, periodicals, industrial reports and statistics, channels' on-air schedules, audience and press reviews, and interviews with several producers. Based on the preliminary research, this study chose the sample programs and traces the career and state of the producers of the shows.
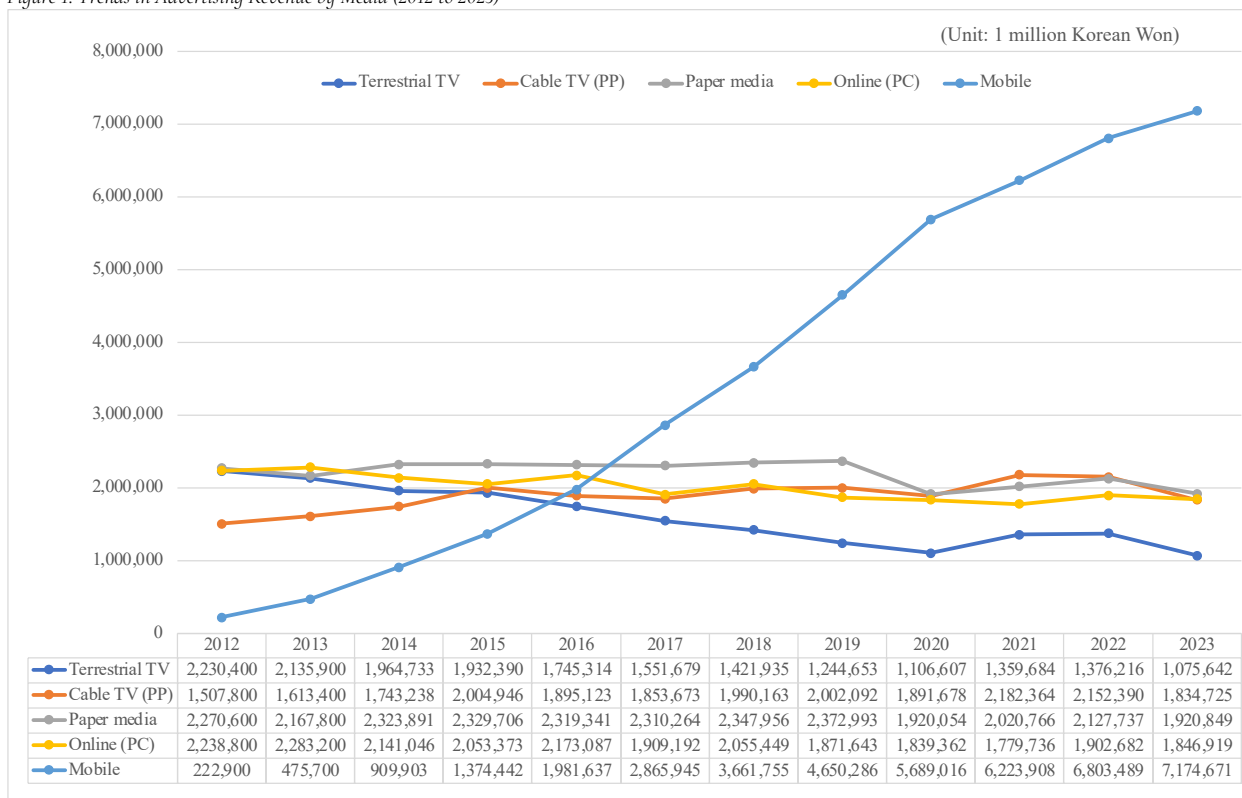
Second, this study conducts a textual analysis of sample Netflix original reality shows to figure out details of their formulae, characters, images on screen, narratives, sounds, and subtitles and compare them with those of domestically aired reality programs. Considering the hybrid features of the reality television genre, each case was assessed by the similarities and differences among subgenres and then classified into a particular formula. The identification and classification of the cases enabled us to understand what features a specific show has, what aspects of the program are appealing, and what the implications of the television text are.

In sum, through these multiple approaches, this study examines the dynamics of power relations in the transnational production and distribution of Netflix original reality shows and the roles of Korean television producers in the complex production conditions and process.

Netflix as a disruptor of the local television production system

Around the turn of the century, the South Korean TV industry experienced a gradual decline in its overall market share within the advertising sector, coinciding with the emergence of the Internet as a new medium and the structural transformation caused by globalization (refer to Figure 1). Particularly, terrestrial broadcasters heavily reliant on advertising revenue faced challenges in recovering from the impact of the advertising business contraction following the 1997 Asian financial crisis, leading to a continuous decline. Subsequently, around 2015 to 16 , a notable shift occurred as latecomers, specifically general programming cable networks (general PP) owned by Korean newspaper moguls, began to outpace traditional terrestrial broadcasters. Above all, since that time, mobile advertisement revenue has soared, overwhelmingly surpassing the revenue of any other medium. This shift led to challenges in obtaining funding for production, ultimately causing a contraction in the production of dramas, which require substantial financial resources.

Figure 1. Trends in Advertising Revenue by Media (2012 to 2023)

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Terrestrial TV	2,230,400	2,135,900	1,964,733	1,932,390	1,745,314	1,551,679	1,421,935	1,244,653	1,106,607	1,359,684	1,376,216	1,075,642
Cable TV (PP)	1,507,800	1,613,400	1,743,238	2,004,946	1,895,123	1,853,673	1,990,163	2,002,092	1,891,678	2,182,364	2,152,390	1,834,725
Paper media	2,270,600	2,167,800	2,323,891	2,329,706	2,319,341	2,310,264	2,347,956	2,372,993	1,920,054	2,020,766	2,127,737	1,920,849
Online (PC)	2,238,800	2,283,200	2,141,046	2,053,373	2,173,087	1,909,192	2,055,449	1,871,643	1,839,362	1,779,736	1,902,682	1,846,919
Mobile	222,900	475,700	909,903	1,374,442	1,981,637	2,865,945	3,661,755	4,650,286	5,689,016	6,223,908	6,803,489	7,174,671

Note: Author's reconstruction from the *Annual Survey of Korean Broadcasting and Communication Advertising Costs* by Korean Broadcast Advertising Corporation (2013 to 2023).

In 2019, three years after Netflix entered the Korean market, a reversal of hegemony in the Korean television industry became more evident (Kim, A., 2023). In stark contrast to the rapid growth of Netflix, which attracted many domestic subscribers through the success of locally produced Netflix original drama series, terrestrial broadcasters struggled with a vicious cycle of declining advertising revenue, loss of competitiveness, and decreasing viewership. Despite an overall increase in production budget investment by local terrestrial broadcasters, Netflix's substantial investment led to a significant rise in drama production costs, reducing the annual average number of drama productions from 15 to less than 10. Excluding KBS 1 TV, which operates through viewer fees, Korean terrestrial broadcasters sporadically schedule weekday dramas or concentrate solely on weekend dramas, thereby maintaining the legacy of drama production. This situation is consistent across general programming cable channels as well. As of November 30, among general programming cable channels, only MBN is airing a drama, while the rest have only announced plans for new drama releases starting in December (refer to Table 1). The heyday of Korean dramas, which used to produce nearly 200 annually, has now dwindled to fewer than 100 productions (Jang, S., 2023).

Table 1. Major TV Channels' Drama Schedule as of November 30th, 2023

		Mon.	Tue.	Wed.	Thr.	Fri.	Sat.	Sun.
Terrestrial	KBS1	20:30-21:00 *Unpredictable Family*						
	KBS2	19:50-20:30 *Elegant Empire*					20:05-21:25 *Hyoshim Family*	
		21:45-23:00 The Matchmakers					21:25-22:25 Korea-Khitan War	
							23:20-24:30 *Drama Special 2023*	
	MBC	19:05-19:40 *The Third Marriage*						
				21:00-22:10 *A Good Day to Be a Dog*			21:50-23:00 *Park's Marriage Contract*	
	SBS						22:00-22:10 *My Demon*	
General PP	JTBC						22:30-23:50 *Welcome to Samdal-ri* ** (Starting from 12.2)	
	TV Chosun						21:10-22:40 *My Happyend* ** (From 12.30)	
	Channel A		22:30-11:40 *Man and Woman** (From 12.26)					
	MBN						21:50- *A Perfect Marriage*	
Cable PP	tvN		20:50-22:10 *Marry My Husband** (From 1.1, '24)				21:20-22:30 *Castaway Diva*	
		22:30-23:40 *A Bloody Lucky Day*						
	ENA	21:00-22:10 *Tell me that you love me*	21:00-22:10 *Moon in The Day*					

Note: The asterisks indicate the broadcast announcement starting on the respective dates.

Table 2. Major TV Channels' Entertainment Program Schedule as of November 30th, 2023

		Mon.	Tue.	Wed.	Thr.	Fri.	Sat.	Sun.
Terrestrial	KBS1							
	KBS2						18:30 *Importal Songs* (Music competition)	16:45 *Boss in the Mirror* (Real-variety)
		20:30 *Dogs Are Incredible* (Reality)	20:30 *Returns of Superman* (Reality)	20:30 *Problem Child in House* (Game chat show)	20:30 *Beat Coin* (Reality)	20:30 *Stars' Top Recipe at Fun-Staurant* (Reality)		18:15 *2 Days & 1 Night* (Reality)
				21:45 *Mr. House Husband* (Reality)	21:45 *Search: Me* (Mystery variety)	22:00 *Golden Girls* (Reality)	23:20 *The Seasons* (Music talkshow)	22:25 *Gag Concert* (Comedy)
	MBC						18:30 *Hangout With Yoo* (Reality)	18:05 *King of Masked Singer* (Music game show)
		21:00 *Buddy Into the Wild* (Reality)	22:00 *Alumni Lovers* (Reality)	22:30 *Radio Star* (Chat show)	22:00 *Where is My Home* (Reality)	23:10 *I Live Alone* (Reality)	23:10 *Point of Omniscient Interfere* (Reality)	21:10 *Adventure by Accident 3* (Reality)
	SBS							16:45 *Body Size Survival: Meok-Jji-ppa* (Real-variety)
		22:15 *Same Bed, Different Dreams 2* (Romance reality)	21:00 *Dolsing Fourman* (Reality)	21:00 *Kick a Goal* (Sports reality)			24:15 *Matchup* (Sports reality)	18:15 *Running Man* (Real-variety)
			22:20 *Strong Heart VS* (Talk show)	22:40 *Universe Ticket* (Music competition)				21:05 *My Little Old Boy* (Reality)
General PP	JTBC	20:50 *Talk Pawon 25 O'clock* (Talk show)			22:00 *Sing Again 3* (Music audition)		20:50 *Men on a mission* (Chat show)	19:50 *The Gentlemen's League* (Sports reality)
		22:30 *A Clean Sweep* (Sports reality)						

TV Chosun	21:00 *Not Anyone Can Love* (Romance reality)	22:00 *I Like Tuesday Night* (Music game show)	22:00 *With Dad and Me* (Reality)	22:00 *Mr. Lotto* (Music game show)	22:00 *Semojib - All the houses in the world* (Reality)		
Channel A					20:00 *My Golden Kids* (Solution reality)		19:50 *Teachers, please care for my grades* (Solution reality)
Channel A		22:30 *Steel Troops* (Reality)	21:30 *Men's Life These Days: Groom's Class* (Reality)	21:25 *The Fisherman and the City* (Reality)	21:30 *Those Who Cross the Line* (Reality)		
MBN	22:00 *The Burning Roses* (Music game show)	21:10 *King of Active-Duty Singers* (Music competition)	22:20 *Teenager Parents* (Reality)		21:00 *Oppa's Era* (Music variety)	20:20 *Self-Funded, All On Me Tour* (Reality)	17:00 *Altoran, New Song Is Out* (Music Show)
MBN						23:00 *Dongchimi* (Talk show)	23:00 *Life Story in the Bag: Talk back* (Talk show)
tvN			17:30 *Golden Eleven: Unlimited* (Sports Reality)		22:40 *King of Karaoke VS* (Music competition)	19:30 *Doremi Market* (Game show)	19:40 *The Genius Paik* (Reality)
tvN	20:40 *Do I truly deserve such love?* (Reality)		20:45 *You Quiz on the Block* (Game talk show)	20:45 *Unexpected Business* (Reality)	20:40 *Green Bean, Red Bean* (Reality)		
Mnet		22:00 *Street Dance Girls Fighter 2* (Reality)			22:40 *King of Karaoke VS* (Music competition)		
ENA		22:30 *Steel Troops* (Reality)	22:30 *I Am Solo* (Dating Reality)	22:30 *I Am Solo: Then Love Continues* (Reality)	20:30 *Romantic Earth* (Talk show)	18:10 *In My Ears, Masterpieces* (Music variety)	
KBS-Joy	20:30 *Ask Us Anything Fortune Teller* (Talkshow)	20:30 *Romance Nagger* (Romance drama talk show)					

(Left grouping: upper channels — TV Chosun, Channel A, MBN; lower group — "Cable PP": tvN, Mnet, ENA, KBS-Joy)

				19:20 *Weekly Idol* (Variety)	20:10 *Welcome, First Time in Korea?* (Reality)			
MBC-every1				19:20 *Weekly Idol* (Variety)	20:10 *Welcome, First Time in Korea?* (Reality)			
IHQ		20:00 *Muk-Fia* (Food variety)				20:00 *Delicious Guys* (Food game show)		
Channel S					21:20 *Map Me to the World* (Reality)			
E-Channel							20:40 *Brave Detectives* (Reality)	17:00 *Toboblove* (Reality)

Note: Yellow is for reality shows, green is for games or talk shows, red is for music shows, and blue is for comedy shows.

The time slots previously allocated to mini-series dramas, daily soap operas, or weekend dramas in the programming schedules are now predominantly filled with entertainment TV shows (refer to Table 2). As illustrated in Table 2, entertainment programs are scheduled almost daily, and two episodes are not uncommon to be aired on weekdays. Among the total of 79 entertainment programs scheduled during the week covering the end of November and the beginning of December, 53 (67.08%) are classified as reality shows, 15 (18.98%) as game and talk shows, 10 (12.65%) as music shows, and 1 (1.27%) as comedy shows. As the proportion of reality shows has increased, the themes and formats have become more diverse. Beyond prominent reality show subgenres such as audition, parenting, cooking, traveling, and dating, there is a varied range of topics and formats, including sports reality, deduction game show, military reality, and fan-meeting reality. The affordability of production costs and the ability to rapidly create content have enabled reality shows to dominate South Korea's domestic television landscape compared to dramas.

Meanwhile, Netflix also schedules many Korean entertainment programs, including reality shows. As of November 30, 2023, a search on the Netflix website for "Titles in Korean reality, variety, & talk shows" yielded 25 programs (see Table 3). As observed in Table 3, Netflix features a mix of original series and programs from other broadcasters, for which Netflix has acquired broadcasting rights to showcase on its platform. Among the programs co-broadcast with other networks, it is evident that popular shows with high viewership or public interest, such as sports reality shows like A Clean Sweep, Jump Like A Witch, and The Gentlemen's League, as well as romance reality shows like Change Days, Love After Divorce, and Don't Be the First One, and renowned variety shows like Men on A Mission, have been scheduled (Jang, S., 2023). The significant presence of JTBC entertainment programs in this lineup suggests that the global broadcasting rights contract for major popular dramas and entertainment content between Netflix and JTBC has influenced this placement (Kim, 2017).

Table 3. Korean Reality Shows on Netflix as of November 30th, 2023

Title	Release Year	N series (Y/N)	No. of Episodes	Genres	Keywords	Running Time	Rating
A Clean Sweep Part 2	2023	N	42	Korean, Competition Reality TV, Reality TV	Inspiring, Exciting	120-130min	6+

Busted Season 3	2021	Y	8	Korean TV Mysteries, TV Comedians, Crime TV Shows, Variety TV	Suspenseful, Exciting	70min	16+
Change Days	2022	N	16	Korean, Wedding & Romance Reality TV, Reality TV		60-80min	12+
Comedy Royale (Upcoming)	2023	Y	6	Korean Competition Reality TV, Reality TV, TV Comedies	Goofy	30-40min	12+
Don't Be the First One!	2021	N	29	Korean, Reality TV		110-130min	6+
Jump Like A Witch	2022	N	14	Korean, Reality TV	Exciting	90-100min	6+
Korea No.1	2022	Y	8	Korean, Family Watch Together TV, Food & Travel TV, Korean Reality TV, Lifestyle		40-50min	6+
Love After Divorce Season 4	2023	N	14	Korean, Reality TV		90-100min	12+
Love Naggers	2021	N	30	Korean, Talk Show	Emotional	60-70min	6+
Men on A Mission Season 4	2023	N	53	Korean, TV Comedies, Variety TV	Goofy	80-90min	12+
New World	2021	Y	8	Korean, Competition Reality TV, Reality TV	Exciting	60-70min	6+
Nineteen to Twenty	2023	Y	12	Korean, Teen TV Shows, Wedding & Romance Reality TV, Reality TV	Swoonworthy	60-80min	6+
Paik's Spirit	2021	Y	6	Korean, Talk Shows, Food & Travel TV, Docuseries, Social & Cultural Docs		50-60min	12+
Physical:100	2023	Y	9	Korean, Competition Reality TV, Reality TV	Exciting	50-80min	12+
Risqué Business Japan	2023	Y	6	Korean, Talk Shows, Lifestyle		30-40min	16+
Risqué Business Taiwan	2023	Y	5	Korean, Talk Shows, Lifestyle		30-40min	16+
Single's Inferno Season 2	2023	Y	12	Korean, Competition Reality TV, Reality TV	Intimate, Romantic	50-90min	6+
Siren: Survive the Island	2023	Y	10	Competition Reality TV, Reality TV	Exciting	30-60min	12+

The Devil's Plan	2023	Y	12	Korean, Competition TV, Reality TV		60-70min	6+
The Gentlemen's League Season 3	2023	N	36	Korean, Competition TV, Reality TV	Exciting	100-110min	All
The Hungry and the Hairy	2021	Y	10	Korean, Food & Travel TV, Reality TV, Lifestyle	Feel-good	50-70min	6+
Twogether	2020	Y	8	Korean, Food & Travel TV, Reality TV	Feel-good	50-60min	6+
Wassupman Go	2020	N	10	Korean, Food & Travel TV, Reality TV, TV Comedies, Lifestyle	Goofy	10-20min	12+
Zombieverse	2023	Y	8	Korean, Reality TV, TV Comedies, TV Horror	Exciting	50-60min	16+

Note:
1. Blue for Netflix original reality series created by Korean producers.
2. The genre, keywords, ratings, etc., are classified by Netflix.

Compared to programs from other domestic broadcasters, Netflix's original series created by Korean producers often present somewhat unfamiliar modes of storytelling or contain high levels of explicit content that may not align with the sentiments of a broad spectrum of Korean television viewers. Notably, the first Netflix original series produced by Korean producers, Busted, is a variety game show where seven detectives solve ten mysterious cases. With its unique dramatic structure, starting as a situational drama and unfolding episodically as the team resolves quests step by step to uncover clues and identify the culprit, the program gained attention for its fresh concept upon its initial release. Another remarkable program in the realm of Netflix's original entertainment series is Single's Inferno, often referred to as the Korean version of Too Hot To Handle. Since its debut in 2021, the program has garnered international popularity, ranking within the Top 10 in global viewership. While its exposure level is not as explicit as some overseas dating shows, Single's Inferno captivates audiences with its participants' dazzling appearances, candid personalities, and dramatic emotional changes. The case of Physical: 100, which aimed to create a "never-before-seen reality program," is an example of a producer's intention being successfully realized in a highly-discussed program in 2023 (Kim, S., 2023). Additionally, the Netflix original reality series released in 2023 encompasses a zombie variety show, brain survival program, comedy competition, adult culture exploration talk show, and more – genres domestic broadcasters have not attempted.

Netflix also employs different rating standards from local broadcasters. For instance, the program Men on A Mission, broadcast on JTBC, is designated as a 15+ program, whereas Netflix rates it 12+. Similarly, The Gentlemen's League, rated 15+ on local cables, is categorized for all ages on Netflix. This discrepancy is due to the introduction of the OTT self-classification system in March 2023, enabling OTTs to establish their ratings and deliver content without undergoing the pre-classification process of the Korea Media Rating Board. The introduction of this system aims to address the issue wherein the rapid growth of OTT content causes delays in the mandatory classification review process before video release, disrupting the content supply chain. However, as OTT content adheres to weaker self-review standards than terrestrial content, concerns arise that exempting OTT content from external rating regulations may not only fail to prevent indiscriminate exposure of young audiences to sensual or violent content but also intensify the regulatory imbalance with domestic broadcasting.

Besides the content, the Netflix original reality series differs from domestic programs in their formulae. One noticeable distinction is the relatively shorter runtime of the Netflix original series. While domestically broadcasted

entertainment programs often exceed 100 minutes, Netflix's original series typically run for about 60 minutes. This aligns with the trend observed in many international TV shows, which generally do not exceed one hour in duration. Another characteristic of the Netflix original series is the significant variation in episode runtimes within the same program. For example, Physical: 100 maintained a runtime in the 50-60 minutes range but extended to 88 minutes in the final episode. The runtime of Single's Inferno Season 3 varies widely, ranging from a minimum of 56 minutes to a maximum of 90 minutes. In contrast, domestically broadcasted programs, apart from late-night slots with some flexibility, typically adhere to a consistent runtime. Due to compliance with scheduling regulations, Korean broadcasters may face penalties if they fail to adhere to the designated time, impacting both producers and the broadcasting company.

Another noteworthy aspect is that newly released Netflix original series in 2023, such as Comedy Royale or those delving into adult cultures in neighboring Asian countries like Risqué Business Japan and Risqué Business Taiwan, adopt a 'mid-form' formula with episodes running around 30 to 40 minutes. This reflects Netflix's endeavor to diversify its programming, breaking free from traditional network TV's linear scheduling constraints. According to a representative from Netflix Korea, unlike domestic broadcasters who continuously produce and broadcast entertainment programs almost every week, Netflix series are created by producing the entire season at once and releasing it sequentially (Yoon, 2023). Netflix entertainment series typically undergo production about a year before they are released. This approach poses a challenge in incorporating real-time viewer feedback, a drawback compared to the weekly episode releases by domestic broadcasters. To address this issue, they aimed to reduce the production period by creating shorter content that captures contemporary issues and viewers' sentiments. Thus, even though both domestic broadcasters' programs and Netflix original series are available on Netflix, their target audience, operational medium, and production strategies differ, leading to inevitable distinctions in themes, stories, and formulae.

Netflix as an inspector of the quality of local television content

Delivering content to global OTT platforms involves creating content tailored for international distribution and entails changes in the production process. According to Netflix, content providers should adhere to their firm technical standards to ensure that global audiences can consistently access high-quality content across various digital devices. Netflix's proposed quality standards include 4K (UHD), HDR (HDR10), and Netflix Recommended (Kang, 2016). This means all Netflix original content must be shot at the 4K and HDR quality levels. With a compatible screen set, subscribers worldwide can enjoy the highest-quality visuals offered by Netflix.

To achieve this goal, Netflix provides production guidelines that ensure consistent video and audio quality from the filming stage, demanding high-quality maintenance at every step throughout the post-production stage (Byun, 2023). Based on these guidelines, Netflix conducts a quality control (QC) phase to check for technical flaws throughout various post-production steps. This includes the 'Digital Lab' phase, where original data is backed up and archived, and subsequent processes involving video editing, image color correction, video effects (VFX), sound editing, mixing, and mastering (refer to Figure 2).

Figure 2. Netflix's Post-Production Workflow
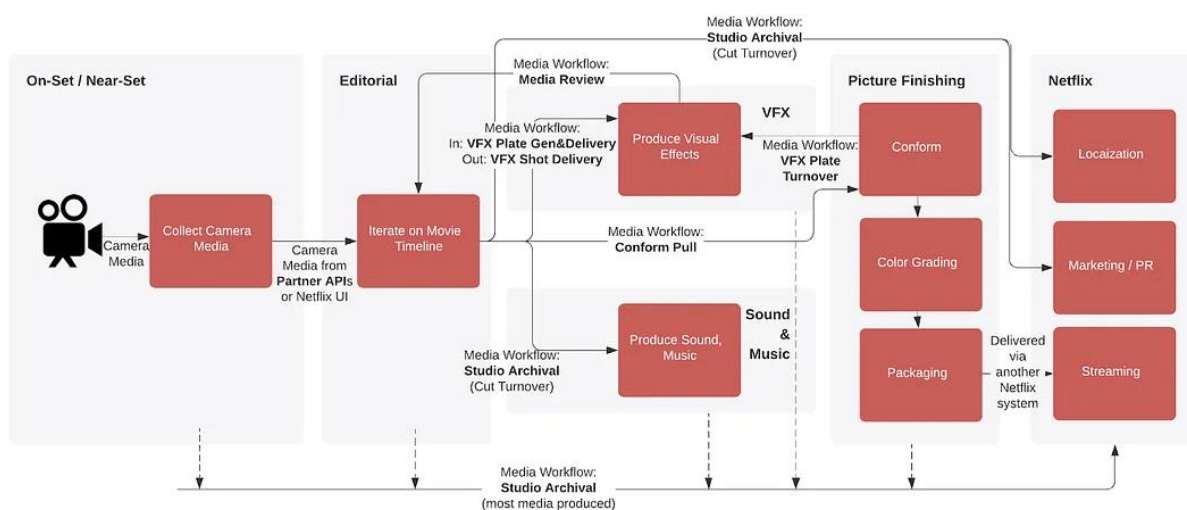
Source: Netflix Technology Blog (2021, May 13) Production media management: Transforming media workflows by leveraging the cloud. *Netflixtechblog.com.*

In the post-production stage, translation processes are integrated to facilitate global distribution. Subtitling transcends the mere conversion of dialogue into another language; it demands meticulous translation to ensure that viewers residing in diverse regions can comprehend a specific country's cultural and socio-contextual nuances. In pursuit of this objective, Netflix has developed its own translation testing and indexing program, HERMES, recruiting proficient multilingual translators and streamlining the subtitle translation process (Han, 2017).

Furthermore, scrutinizing scenes or expressions that may pose ethical concerns or cultural conflicts in each country is also imperative. Matters pertaining to cultural codes, such as explicit or violent scenes, religious beliefs, or cultural taboos – considerations that may not have been extensively contemplated in domestic broadcast content production – require thoughtful evaluation. A comprehensive quality control process, encompassing technical inspection and localization tasks tailored to the release countries, takes approximately 2 to 3 months before the content is made available on the platform.

However, the challenge lies in the fact that Korean reality programs have evolved into a large-scale production model deploying numerous cameras and personnel triggered by the introduction of non-linear digital editing technology. This approach does not align with Netflix's production standards. For instance, in the case of Korean reality shows it is expected to produce 2 to 3 episodes in two weeks. During a single shoot, an average of 30-40 cameras, including 6mm digital camcorders, stationary closed-circuit cameras operated by a remote-controlled device, Jimmy Jib cameras, and drone cameras, are utilized to capture various scenes from different angles. Each cast is assigned to a production unit consisting of at least one cameraman, sound engineer, lighting technician, and scriptwriter. This multi-camera system allows the production team to capture hidden scenes unnoticed by the crew and facilitates the effective preservation of the cast's individual personalities, capturing their facial expressions, gestures, and even whispers. Once filming finishes, all staff members gather to discuss how to weave the initial edits from each unit into scenes and narratives. During this meeting, the main story for each episode is determined. Subtitles are then crafted to effectively convey the established storyline and inserted during the final editing stage.

In Korean reality TV shows, subtitles play various roles, including providing appropriate information for viewers regarding scene descriptions and narrative development, as well as conveying the emotions and feelings of the cast (Kang & Kang, 2014). The expanded functions of subtitles can be traced back to the mid-1990s when kinetic

typography, an animation technique from Japan that combines moving text and graphics to express ideas, was introduced. Employing diverse colors, fonts, and moving subtitles, Korean producers have densely portrayed everyday life by capturing the linguistic humor and wordplay of the cast and revealing contemporary social contexts. This approach has garnered positive responses from domestic viewers.

To illustrate, Kim Tae-ho, a producer at the MBC network acclaimed for creating a typical model of Korean reality shows, garnered significant resonance among viewers through his iconic satirical subtitles in his flagship work Infinite Challenge. The series often lampooned the behaviors of politicians and the authoritarian attitude of the government and became popular for their clever portrayals of socially significant issues such as protests or demonstrations. However, in the Netflix's original reality series The Hungry and the Hairy that he produced, Kim added subtitles that showcase only the visual splendor of the screen. Most subtitles are verbatim transcriptions of the actors' lines, lacking the witty and incisive social satire that was a trademark of his previous works. Attempts to visualize dialogues vividly through subtitles seem motivated by an intention to provide visual enjoyment for overseas viewers unfamiliar with the Korean language.
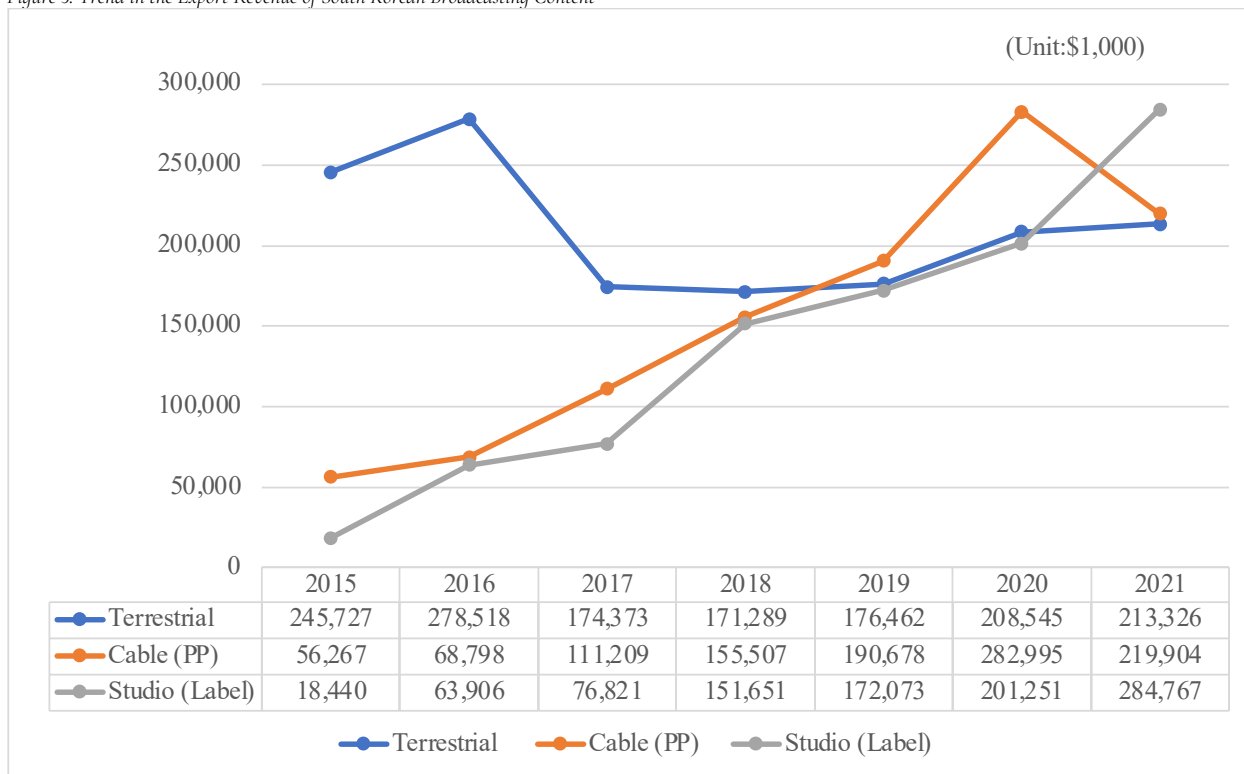
Content distributed on Netflix must be universally understandable across cultures, necessitating the removal of language-specific humor, wordplay, and cultural contexts typically conveyed through subtitles. Besides the dialogues of the cast, adding subtitles with a script function to convey the unfolding situations is practically challenging within the constraints of limited screen space. Consequently, Netflix's original series are compelled to minimize the use of subtitles. Netflix original reality series like Physical:100 and Single's Inferno, designed to be comprehensible without additional subtitles, have emerged under these conditions. The producers of these programs openly admitted in interviews with the media that they minimized subtitles for global release (Kim, S., 2023; Nam, 2022). This shift signifies the removal of subtitles and presentation styles that were conventionally employed in Korean reality TV shows. Korean entertainment programs, which typically incorporate contemporary cultural trends and social issues into programs, engaging in real-time communication with viewers and co-creating content, are losing their uniqueness as they assimilate into Netflix Entertainment's pursuit of the global market.

As a creative hub, Netflix is restructuring the Korean television production workforce.

Since Netflix entered South Korea, one of the most prominent phenomena observed in the domestic broadcasting industry has been the primary rush of local broadcasters to establish studios, altering their production systems to create and deliver content to OTT platforms. 2016 CJ E&M pioneered this trend by establishing Studio Dragon, a subsidiary dedicated to producing dramas. Significant broadcasters like JTBC, KBS, and SBS have set up their studios following this initiative. The studio system offers advantages in enhancing production and management efficiency. Content creation is autonomously led by writers and directors within label-centric structures while planning producers continually plan and manage these contents. By leveraging the acquired intellectual property rights, these studios expand their business across various dimensions, holding a dominant position in negotiating with other broadcasters and platforms (Lee, 2022). The newly emerging studio system functions as an intermediary between independent production companies and distribution entities in South Korea.

The establishment and growth of studios are distinctly reflected in statistics on content export. As illustrated in Figure 3, in 2016, when Studio Dragon officially started the Korean studio model, the studio sector recorded an annual export revenue of only $63.9 million. However, by 2021, this figure surged to $284.7 million, surpassing terrestrial broadcasters, which recorded $213.3 million, and cable operators, which exported $219.9 million in the same year. Studio content export revenues have outpaced traditional broadcasters in recent years.

Figure 3. Trend in the Export Revenue of South Korean Broadcasting Content

(Unit:$1,000)

	2015	2016	2017	2018	2019	2020	2021
Terrestrial	245,727	278,518	174,373	171,289	176,462	208,545	213,326
Cable (PP)	56,267	68,798	111,209	155,507	190,678	282,995	219,904
Studio (Label)	18,440	63,906	76,821	151,651	172,073	201,251	284,767

Note: Author's reconstruction from *the Annual Survey of Korean Broadcasting Industry* by Korean Broadcasting Commission (2016 to 2022).

One notable aspect of these changes is the high turnover of local producers participating in the production of Netflix's original series, moving from major local TV companies to subsidiary studios or establishing their production labels. From a producer's perspective, receiving ample production budgets from Netflix allows for a more favorable focus solely on content creation, relieving the burden of attracting advertisements. For the producers who successfully launched their season 1 on Netflix, securing a stable position that enables them to continue the production of subsequent seasons is significant. Additionally, the current Broadcasting Act, which classifies OTT platforms as not broadcasting but as additional telecommunication service providers, excludes the local producers from the broadcasting review process, providing more advantages for local producers collaborating with Netflix.

Conversely, collaboration with Netflix poses a risk for broadcasters, as it may lead to the departure of production talents. Another reason key production personnel leave their organizations and join studios is the hierarchical structure and pre-modern decision-making prevalent in domestic broadcasting companies (Kim, A., 2023). According to Jung (2014), the job movement of producers from significant broadcasting companies is influenced by the culture specific to a group of producers that prioritizes creativity and shuns the incompetence and bureaucratic tendencies of company management.

In fact, since the 1990s, the South Korean government has adopted outsourcing policies to promote the growth of independent production companies. This outsourcing policy aimed at loosening the vertical monopoly system of the three major terrestrial broadcasters that dominated the domestic TV industry at that time - KBS, MBC, and SBS and diversifying production entities, thus enhancing the production capabilities of the domestic broadcasting industry. However, until the end of the 2000s, the hegemony of terrestrial broadcasters remained influential, and controversies surrounding unfair contracts and inequitable profit distribution between broadcasters and

independent production companies persisted, hindering improvements in production conditions (Ju et al., 2017).

A decisive blow to the hegemony of terrestrial broadcasters occurred with the simultaneous launch of four general programming cable networks in 2011. Entertainment producers affiliated with terrestrial channels significantly moved to these new channels. The substantial production investments led by Netflix and other OTT platforms around 2020 triggered a second wave of producer exodus, which is noteworthy that producers associated with terrestrial and general cable channels are extensively shifting to studios. Netflix exerts a form of power by eliminating negative factors of the domestic broadcasters while drawing Korean producers more deeply into its orbit. This, in turn, accelerates the structural reorganization of the South Korean TV industry.

Furthermore, transactions with Netflix are reshaping the method of content export. Since the mid-2000s, Korean reality shows gradually expanded their presence in the TV format trade and license deals in line with the globalization of the television market. However, starting in 2019, format deals significantly decreased, while there was a sharp increase in the total transactions of studios (See Table 4). In 2021, finished products (a.k.a. canned programs) accounted for over half of the total export transactions. This shows a significant surge in content supply tailored for global platforms.

Table 4. Types of Content Export Deals by Korean Television Production Studios   (Unit: %)

Division	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Canned Program Export	10	14.3	15.8	11.4	14.9	6.5	3.8	5.2	16.7	13.4	53.4
License	79.5	75.7	73.7	78.7	78	71.9	83.3	84.3	83.3	86.3	46.4
OEM	0	4.3	0	3.2	0	0	0	0	0	-	-
Ideas, Techniques & Services	5.7	3.1	5.3	4.4	4.8	21.3	10.8	10.3	0.1	0.2	0
Others	4.8	2.6	5.3	2.3	2.3	0.3	2.1	0.2	0	0	0.2
Total	100	100	100	100	100	100	100	100	100	100	100

Note:
1. Canned Program Export: Exporting audiovisual content produced domestically.
2. License: Selling intellectual property rights such as broadcasting, transmission, replication/ distribution, and sales rights.
3. OEM (Original Equipment Manufacturing): Contract manufacturing with the client's trademark attached.
4. Ideas, Techniques, & Services: Exporting creative ideas, techniques, and services related to the planning and production of audiovisual content and programs, including formats.
Source: *2022 Broadcasting Industry White Paper* by KOCCA

For the domestic broadcasting industry, the increasing prevalence of canned program transactions can be viewed positively as a signal that domestic content production is active in meeting the demands of international distribution. Unlike merely trading licenses or formats, finished product transactions contribute to job creation for production personnel and enhance overall revenue in the production industry.

However, controversies persist regarding transactions with Netflix, as local producers have to relinquish the content intellectual property. Such contractual terms and conditions result in greater profits for Netflix as the distributor rather than the original content creators. Moreover, Netflix does not provide creators with customer data, which would offer insights into how their content is distributed globally and how audiences worldwide respond to the content. This lack of transparency aligns with Netflix's business principle of maintaining absolute negotiation leverage. To improve this unequal power relation, critics suggest that domestic producers should actively demand the sharing of viewer data, content, and intellectual property (Yu, 2020). They argue that this approach is a means to secure stable and ongoing content production.

Discussion and conclusion

This study examined the transformation of the Korean TV production system and practices through the influences of Netflix on the local reality show production. The complex conditions and structural distinctions of Korean reality TV production have been discussed in the context of digitalization and globalization. Responding to Netflix's strategies, Korean entertainment producers have exhibited patterns and characteristics in production practices and career management. Reflecting on the findings, this study has valuable implications for discussing global television production and consumption.

Regarding the industry, Netflix's expanded investment in Korean TV content production presents an opportunity for the Korean broadcasting industry to enhance its production capabilities. Netflix's substantial production budgets not only ensure creativity and autonomy for local producers but also prompt a rush of producers to studios in pursuit of an improved production environment, thereby catalyzing the restructuring of the domestic broadcasting industry. In response, domestic broadcasters establish their studios and attract independent labels into studio systems, transforming themselves into content providers.

Conversely, reshaping the domestic TV production base may heighten its dependence on the global OTT platforms. Significantly, the contractual practices employed by Netflix, which involve monopolizing content IP and viewer data, pose challenges for domestic producers regarding receiving fair compensation and engaging in autonomous content planning. This ultimately leads to a loss of competitiveness for the Korean TV industry. In highlighting these issues, some researchers criticize Netflix's dominance as platform imperialism or Netflix imperialism.

Nevertheless, considering the status of Korean content in the global television market, such criticism may be deemed premature. To comprehensively understand the dynamic interactions within the domestic broadcasting industry, one cannot solely evaluate the efforts of Korean players who have gradually secured their positions in the global content market in response to the popularity of the Korean Wave since the late 1990s from a dependent perspective. From Netflix's standpoint, which seeks to expand into emerging markets beyond the saturated regions like North America and Europe, Korean content is a significant driving force for popularity among viewers across Asia (Chalaby, 2023a).

Kim A-young (2023) diagnoses the current state of the Korean broadcasting industry as a transitional phase where internal crises and external opportunities coexist, leading to the emergence of a new order. She suggests that the Korean broadcasting industry is belatedly integrating into the global system and is becoming a key program provider for global OTT platforms. In the same vein, Chalaby (2023a), who explores the global broadcasting industry through the concept of the global value chain (GVC), notes that South Korea is undergoing a transformation beyond being a mere OEM (Original Equipment Manufacturer) to becoming an ODM (Original Design Manufacturer) and further evolving into an OBM (Original Brand Name Manufacturer). He emphasizes the necessity of policies incentivizing creativity by protecting producers' copyrights in the current global value chain landscape. Regional TV producers may be trapped in a vicious cycle of low investment and limited creativity without institutional safeguards.

Secondly, in the aspects of content, Netflix's increasing focus on Korean entertainment programs catalyzes the creation of new program formats. Programs incorporating elements from survival, dating, and zombie genres that have secured a stable viewership in the global television market are being creatively recrafted by Korean producers. The positive reception worldwide for the newly created programs gives a positive signal to Netflix, which wants to deliver high-quality content consistently, and to Korean producers who seek to produce more creative and entertaining projects.

However, the characteristics of Korean reality shows, which have developed and communicated with local viewers as 'regular programs' broadcast every week, face difficulties in overcoming the barriers of Netflix's quality standards, localization policies, and the pre-produced format. The nature of broadcasting as a medium that shares daily life with viewers underscores the interaction between producers and audiences. Still, due to the review and approval process required for integration into global platforms, the intertextuality generated through sharing information and knowledge that encapsulates the context of the local society is filtered out after the topicality or excitement of a specific issue mentioned during filming has subsided. This means that leveraging the inherent advantages of the broadcasting medium on the platform is challenging.

Furthermore, the phenomenon where high-budget dramas are drawn to Netflix, leaving relatively low-budget reality programs to fill almost all prime-time slots on domestic broadcasters or platforms, requires careful consideration. The platform's power and influence are becoming the criteria for distinguishing between domestic and international content, resulting in Korean reality shows being confined to the domestic broadcasting market. This phenomenon calls for reconsidering the assertion that Netflix enhances cultural diversity.

The significant decline in transactions involving TV format and the increasing trade of canned programs onto the global platform suggests another agenda to discuss global consumption of local television content. As Chalaby (2023a) clarifies, TV format transactions involve production and distribution on a transnational level. However, consumption is carried out through adaptation for local viewers to strengthen national, linguistic, and cultural ties. In contrast, production through a global OTT platform fills the entire catalog with content produced in major regional production bases, allowing viewers to access the catalog from anywhere. Despite differences in the range of choices for individual viewers depending on personalized algorithms, the subscribers are exposed to a greater variety of other language content than ever before. Thus, the content consumption of global OTT is more cosmopolitan, with less binding to national, cultural, and social contexts compared to TV content trades crossing borders. Therefore, more nuanced observation and discussion regarding the global consumption of local television culture are essential.

While this research attempted to investigate the dynamic interactions between Netflix and the local players, it has limitations to delve deeply into the concerns of producers and broadcasters and their alternative efforts and attempts due to the heavy reliance on archival analysis. Also, the possibility that personal information and specific locations influenced the search process on the Netflix site cannot be excluded. These limitations prompt the need for future field research, including interviews with producers and observation of studio production practices, to explore the process of producers' migration toward studios, the advantages and disadvantages experienced by local producers in collaboration with Netflix, and how the Korean studio structure is being formed and how it differs from traditional in-house production by broadcasters.

In conclusion, this research explores the rapid interactions between Netflix and the Korean TV industry by analyzing reality show production. As many scholars claim, Netflix's localization policies have expanded regional television content trades, accelerating Global South-South transactions more rapidly and widely than in the past. It is partly true that Netflix has contributed to the diversification of television content. Nevertheless, at the same time, it is crucial not to overlook that global consumption of local content does not apply to all content but is limited to specific genres and formats. As seen in the case of Korean reality shows on Netflix, content containing strong local characteristics is generally excluded from the Netflix library. Therefore, Netflix's effects on local television should be examined from various levels, considering the density, depth, and layers of the globalization of local television culture. Careful observation of the changes occurring in a local TV industry enables us to understand the dynamic interactions between the global and the local and effectively map its directions in the local/global matrix.

References

Alsan, M. (2023, October 24). Decoding Netflix's global success: The power of localization. *Weglot.* https://www.weglot.com/blog/netflixs-localization-strategy#:~:text=The%20initial%20Netflix%20model%20was,facilitate%20entry%20into%20new%20markets.

Auh, Y., & Limb, S. (2022). A comparative study on the compositional factors of OTT platform dramas and TV dramas: Focusing on Netflix original Korean dramas and simultaneous airing Korean TV dramas. *Journal of Arts and Cultural Management 15*(3), 57-87. https://www.earticle.net/Article/A422942

Buonanno, M. (2016). Thematic issue on the end of television (not yet): Editor's introduction. *Media and Communication 4*(3), 95–98. http://dx.doi.org/10.17645/mac.v4i3.661

Byun, I. (2023, May 31). Netflix "Helping to organize the K-content ecosystem...even if it's not Netflix." *IT Chosun.* https://it.chosun.com/news/articleView.html?idxno=2023053102384

Cha, C., & Park, J. (2012). A study on the component and the structure change in Korean TV entertainment programs formats: Focused on terrestrial broadcasting programs in 2000's. *Journal of Communication Science 12*(3), 526–564.

Chalaby, J. K. (2023a). *Television in the Streaming Era: The Global Shift.* Cambridge, UK: Cambridge University Press.

Chalaby, J. K. (2023b). The streaming industry and the platform economy: An analysis. *Media, Culture & Society, 0*(0), 1-20. https://doi.org/10.1177/01634437231210439

Chua, B. H., & Iwabuchi, K. (2008). *East Asian pop culture: Analyzing the Korean Wave.* Hong Kong: Hong Kong University Press.

Cunningham, S., Craig, D., & Lv, J. (2019). China's livestreaming industry: Platforms, politics, and precarity. *International Journal of Cultural Studies 22*(6), 719–736. doi:10.1177/1367877919834942

Davis, S. (2021). What is Netflix imperialism? Interrogating the monopoly aspirations of the 'World's largest television network.' *Information, Communication & Society.* Advance online publication.doi:10.1080/1369118X.2021.1993955

FlixPatrol (n.d.) Top Streaming Services by Subscribers. https://flixpatrol.com/streaming-services/subscribers/

Gray, H., & Lotz, A. (2019). *Short introductions: Television studies.* Cambridge, UK: Polity.

Hallinan, B., & Striphas, T. (2016). Recommended for you: The Netflix Prize and the production of algorithmic culture. *New media & society 18(1)*, 117-137. https://doi.org/10.1177/1461444814538646

Han, B. (2023). Is Netflix riding the Korean Wave or vice versa?: Netflix Korea and platform creativity. *International Journal Of Communication 17,* 18. https://ijoc.org/index.php/ijoc/article/view/20720

Han, J. (2017, March 31). Netflix introduces HERMES, a translation system for accurate local language delivery of content. *Aju Business Daily.* https://www.ajunews.com/view/20170331104544541

Havens, T., Lotz, A., & Tinic, S. (2009). Critical media industry studies: A research approach. *Communication, Culture & Critique 2,* 234–253. doi:10.1111/j.1753-9137.2009.01037.x

Helmond, A. (2015). The platformization of the web: Making web data platform ready. *Social media+ society 1(2),* https://doi.org/10.1177/2056305115603080

Hesmondhalgh, D., & Lotz, A. (2020). Video screen interfaces as new sites of media circulation power. *International Journal of Communication, 14,* 386-409. https://ijoc.org/index.php/ijoc/article/view/13261

Hoskins, C., & Mirus, R. (1988). Reasons for the US dominance of the international trades in television programmes. *Media, Culture & Society 10,* 499–515.

Jang, A. (2023, September 3). Big trouble without A Clean Sweep with 3% viewer rating and Men on A Mission with a 2%... JTBC variety shows struggling with a 1% rating. *New1.* https://www.news1.kr/articles/?5158269

Jang, S. (2023. November 17). Concerns growing over prolonged drought in domestic drama production, predicted to last over 2 years. *Dailian.* https://www.dailian.co.kr/news/view/1296318

Jin, D. Y. (2013). The construction of platform imperialism in the globalization era. *Triple C: Communication, Capitalism & Critique, 11*(1), 145–172. doi:10.31269/triplec.v11i1.458

Jin, D. Y. (2015). *Digital platforms, imperialism and political culture.* London, UK: Routledge.

Jin, D. Y. (2017). Rise of platform imperialism in the networked Korean society: A critical analysis of the corporate sphere. *Asiascape: Digital Asia 4*(3), 209–232. doi:10.1163/22142312-12340078

Ju, J., Han, J., & Yu, J. (2017). The accomplishment and evaluation of the policy of scheduling outsourcing broadcasting programs. *The Journal of the Korea Contents Association 17*(12), 289-298.

Jung, J. (2014). Emerging media conglomerates and producers' exodus : The dynamics of creativity relocations in the South Korean broadcasting production sector after the introduction of new general programming channels. *Korean Journal of Communication and Information 66,* 28–58.

Kang, I. (2016, July 1). Netflix's real competitive advantage? 4K, HDR, and Netflix certification. *Dong-A Ilbo.* https://www.donga.com/news/It/article/all/20160701/78973748/1

Kang, K. (2023, November 23). "15% of Korean content viewed on Netflix...expanding our influence in the production market". *Yonhap News.* https://www.yna.co.kr/view/AKR20231129038900017

Kang, M., & Kang, S. (2014). Visual attention on subtitles of CATV entertainment program: Focused on tvN's 'Grandpas Over Flowers.' *Journal of the Korea Contents Association 14*(9), 64-75.

Kim, A. (2023). *Global industrialization and proactive adaptation in the broadcasting Industry: Focusing on studio transformation and platform habitus in the era of Netflix.* PhD dissertation, Seoul, South Korea: Sogang University.

Kim, H. (2017, April 25). Netflix and JTBC sign global broadcasting rights deal for popular entertainment and drama series. *IT Chosun.* https://it.chosun.com/news/articleView.html?idxno=2017042585034

Kim, J. (2019). The storyteller who crosses boundaries in Korean reality television: Transmedia storytelling in New Journey to the West. *International Journal of Communication 13*, 2143–2160. https://ijoc.org/index.php/ijoc/article/view/10005/2649

Kim, J., & Park, J. (2012). A study on the primetime's format diversity change of Korean terrestrial broadcasting TV programming. *Korean Journal of Journalism & Communication Studies 56*(1), 289-313.

Kim, T. (2022). Cultural politics of Netflix in local contexts: A case of the Korean media industries. *Media, Culture & Society, 44(8)*, 1508–1522. https://doi.org/10.1177/01634437221111917

Kim, S. (2023, March 30). 'Physical: 100' PD Hogi Jang, "We added a story to the topic of perfect physicals." *Cine21.* http://m.cine21.com/news/view/?mag_id=102349

Kim, Y. (2018. September. 5). Interview with the executive producer of 'The Masked Singer': Casting big names and the designer of Lady GaGa. https://entertain.naver.com/read?oid=018&aid=0004191023

Kim, Y. (2022). Unspoken aspects of Squid Game's economic impact of one trillion won. In G. Jung et al. *Squid Games and the Content Revolution (pp209-246).* Seoul, Korea: History of People and Ideas.

Lee, D. (2021). A study on the Netflix original drama 'The School Nurse File'. *Journal of the Research Society of Language and Literature 108.* 172–194.

Lee, S. (2022). Changes in the content creation/distribution system due to OTT: Focusing on the studio system. Media Issue & Trend, 51. Naju, South Korea: Korea Communications Agency. https://www.kca.kr/Media_Issue_Trend/vol51/index.html

Lee, Y. S., & Kim, G. (2020). Contents IP strategy to enhance competitiveness of global OTT platform: Based on the cases of game platform market. Global Cultural Contents 43, 145–164. DOI: 10.32611/jgcc.2020.5.43.145

Lobato, R. (2019). *Netflix nations: Geography of digital distribution.* New York: New York University Press.

Lobato, R., & Lotz, A.D. (2020). Imagining Global Video: The Challenge of Netflix. *Journal of Cinema and Media Studies 59(3)*, 132-136. https://doi.org/10.1353/cj.2020.0034.

Lotz, A. D. (2007). *The television will be revolutionized.* New York: New York University Press.

Lotz, A. D., Eklund, O., & Soroka, S. (2022). Netflix, library analysis, and globalization: rethinking mass media flows, *Journal of Communication 72(4)*, 511–521. https://doi.org/10.1093/joc/jqac020

Lotz, A. D & Lobato, R. (2023). *Streaming video: Storytelling across borders.* New York: New York University Press.

Min, B., Go, J., & Song, J. (2020). Netflix's competitive strategy: Strategic combination of network effects, contents reselling and original contents. *Strategic Management Studies 23*(2), 25-45

Moore, K. (2023, January 8). What countries produce the most popular content for Netflix? *What's on Netflix.* https://www.whats-on-netflix.com/news/what-countries-produce-most-popular-content-for-netflix/

Moran, A., & Malbon, J. (2006). *Understanding the global TV format*. Intellect Books.

Murray, S., & Ouellette, L. (Eds.). (2004). *Reality TV: Remaking television culture*. New York: New York University Press.

Nam, Y. (2022, January 12). MZ Generation PDs united by Single's Inferno "I made the show I wanted to watch." Busan Il-bo, https://www.busan.com/view/biz/view.php?code=2022011114304674229

Park, J., & Bae, J. (2010). An analysis of current trends of TV format business in Korea: Through the in-depth interviews with the experts. *Korean Journal of Journalism & Communication Studies 54*(3), 124-145.

Park, J., Kim, K., & Lee, Y. (2022). Theorizing the Korean Wave| Netflix and Platform Imperialism: How Netflix Alters the Ecology of the Korean TV Drama Industry. *International Journal of Communication 17*, 20. https://ijoc.org/index.php/ijoc/article/view/18468

Richwine, L., & Chmielewski, D. (2023, August 17). Striking writers take antitrust aim at Disney+, Amazon, Netflix. Reuters.com. https://www.reuters.com/world/us/striking-writers-take-antitrust-aim-disney-amazon-netflix-2023-08-17/

Seaver, N. (2019). Captivating algorithms: Recommender systems as traps. *Journal of material culture 24(4)*, 421–436. https://doi.org/10.1177/1359183518820366

Shaw, L. (2023, June 11). The next phase of the global streaming wars. *Bloomberg.com.* https://www.bloomberg.com/news/newsletters/2023-06-11/what-netflix-s-local-programming-shift-means-for-streaming-platforms

Spigel, L., & Olsson, J. (Eds.). (2004). *Television after TV: Essays on a medium in transition.* Duke University Press.

Tran, E. T. (2023, June 26). Over 60% of Netflix users have watched a Korean title on the streaming service, CEO says. *NBC News.* https://www.nbcnews.com/news/asian-america/60-netflix-users-watched-korean-title-streaming-service-ceo-says-rcna91180#

Wakabayashi, D. & Jin, Y. Y. (2023, July 13). How Netflix plans total global domination, one Korean drama at a time. *New York Times*. https://www.nytimes.com/2023/07/13/business/media/netflix-korea-asia-drama.html

Wan, A. (2023, May 12). Netflix's $2.5 billion investment in Korean content appeals to audiences worldwide. *CNBC.* https://www.cnbc.com/2023/05/12/netflixs-2point5-billion-investment-in-korean-content-targets-global-audience.html#

Yoon, S. (2023, June 8). The Netflix K-TV craze started here. *ZDNET Korea.* https://zdnet.co.kr/view/?no=20230608141319

Yu, G. S. (2020). *How Netflix transformed the Korean drama market*. Seoul, Korea: Hanul Academy.