



Webtoons Go Viral?: *The Globalization Processes of Korean Digital Comics*

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Abstract

This article explores the social, global, and technological conjuncture exemplified by the globalization processes of Korean webtoons—a portmanteau of Web and cartoon. Based on 12 interviews with a variety of actors working in the Korean webtoon industry, including publishers, agencies, and platform providers, this article discusses diverse global and local factors that articulate and complicate transnational media flows in the new media ecology. In this paper, I explain the driving forces behind the global expansion of Korean webtoons in terms of Korea’s small-scale domestic market, the growth of smartphone penetration, the emergence of a paid service model, and the rise of China’s pan-entertainment strategy. Focusing on the mutually constitutive relation between global and local, I also suggest interpreting Korean webtoons’ overseas expansion as an example of the disjunctive globalization process and decentralized transnational cultural power.

Keywords: webtoons, digital comics, comics globalization, disjunctive flows, decentralization

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Introduction

In 2014, fifteen Korean webtoon creators formed the cooperative group Toonion in a bid for the global market. One member of the group, Tae-ho Yoon, perhaps one of the most well-known Korean webtoonists, remarked, “Nobody know[s] what point we’re at in the history of webtoons right now, but I personally thought it was time to explore all the possibilities” (Nam 2014). As Yoon noted, it is difficult to determine the particular historical stage in which Korean webtoons are situated because they are still developing in accordance with current global and technological conditions. What is clear is that this new form of cartoon, driven by the development of digital technologies, has made a major impact on the Korean comics industry, and has also complicated the discussion on comics globalization, which has previously been limited to Japanese manga and American comics.

Boosted in the early 2000s by large Korean Web portals such as Naver and Daum, webtoons have grown rapidly in Korea over the past two decades (Jin 2015). For example, the number of annual webtoon productions increased from 163 to 1,817 between 2010 and 2016, with the cumulative number of webtoons reaching 5,892 by July 2017 (NIPA 2017). Webtoons’ market breadth also exceeded ₩150 billion (approximately US\$130 million) in 2013 and is estimated to expand beyond ₩1,000 billion (\$862 million) by 2020 (KT Economic Management Research Institute 2015). As of December 26, 2018, 1,523 webtoons were being serviced; webtoon platforms numbered 61; 1,767 artists were running their works; and monthly user visits reached 203.4 million (*Webtoonguide* 2018). Upon this domestic growth, the Korean webtoon industry began its overseas expansion in 2013, showing an 18.3 percent annual average increase in comics exports between 2013 and 2015 (KOCCA 2016a). Although the success of Korean webtoons in the global market has been hampered by several factors, including piracy, translation, regulation, and technological infrastructure, they have been exported not only to East Asian countries, but also to Southeast Asia, Europe, and North America, forging a solid readership to varying degrees (KOMACON 2017a; NIPA 2017). It is also noteworthy that webtoon globalization involves the export of media contents and artists, as well as that of platforms and business

models, which takes place through interactions with distinctive local cultural, economic, and technological contexts. Thus, the case of webtoon globalization can reveal recent forms of media globalization occurring in the era of digital technologies.

This article aims to explore this social, global, and technological conjuncture exemplified by the globalization processes of Korean webtoons. Based on 12 interviews with a variety of actors working in the Korean webtoon industry, it discusses the diverse global and local factors that articulate and complicate transnational media flows in the new media ecology. In order to avoid the risk of assuming a single voice as “one-to-one correspondence with social facts” (T. Jenkins 1994, 444), I recruited interviewees from different sectors of the webtoon industry, including publishers, agencies, and platform providers. After two early interviews with the international PR/marketing manager and the international business general manager (of the Webtoon divisions) of two large Korean online companies—LINE and Daum—in 2015 and 2016, respectively, I took a research trip to Korea in 2018 to gather more interviewees. With the help of my key informant—the CEO of the comics publishing and agency company, C&C Revolution, I participated in the 3rd anniversary of the Korean Webtoon Industry Association (Hanguk weptun saneop hyeophoe, KWIA), where I arranged four interviews with KWIA members. A snowball sampling method helped me find more interviewees, ranging from a traditional comics publisher to a webtoon translator. Ultimately, I ended up with 12 interviewees: three from large Internet/mobile companies (Daum, LINE, and Kakao Page); three from comics publishing companies (BookCube Networks, Seoul Media Comics, and Image Frame); one from a webtoon portal (Lezhin Comics); two from webtoon data service companies (Webtoon Guide and Webtoon Insight); one from a comics publishing and agency company (C&C Revolution); one from a content production/distribution company (Kidari ENT); and lastly, an individual English translator who works with Korean webtoonists. In order to supplement and verify the interview data, I analyzed various secondary resources, such as industrial reports, white papers, and statistics, particularly those provided by the Korea Manhwa Contents Agency (Hanguk manhwa yeongsang

jinheungwon; KOMACON), Korea Creative Content Agency (Hanguk kontencheu jinheungwon; KOCCA), and Korean Statistical Information Service (Gukga tonggye poteol; KOSIS).

In the following section, I briefly review the literature on comics globalization to situate this research, and delineate the history of Korean webtoons. I then describe the global expansion of Korean webtoons and analyze the crucial elements that have facilitated webtoon globalization. Finally, I examine the implications of webtoon globalization for comics globalization, and more broadly, media globalization.

Beyond Cultural Imperialism and Cultural Odorlessness

Comics are mainly rooted in subcultural communities in many countries, but they are also intrinsically transcultural. Various comics across the globe, such as American graphic novels, Franco-Belgian *bande dessinée* (comics created in the French language for a Francophone readership), Japanese *manga*, Chinese *manhua* (comics), and Korean *manhwa* (all sharing the Chinese characters 漫画, to mean 'comics'), have become increasingly transcultural in various ways (Berndt 2010). To name a few examples, the American superhero genre could not be fully developed without immigrants; the modernization of Franco-Belgian *bande dessinée* was largely influenced by American comic books of the 1950s and 1960s; Japanese manga and anime are still prominent in most East and Southeast Asian countries; the influence of American comics on Hong Kong comics can be traced back to the 1920s; and many Southeast Asian artists have worked for DC and Marvel Comics since the 1970s (Berndt 2010; Lim 2016; Lo 2005). Notwithstanding these transnational production and consumption experiences, much of the discussion regarding comics has tended to nationalize its subject to secure a nation-state's cultural status and market shares within the globalized world. Indeed, American superhero comics have often been associated with American exceptionalism, while Japanese manga has been identified with a unique Japanese *national* style (Soares 2015; Suzuki 2010).

In particular, the discussion of comics globalization has been limited

to American comics and Japanese manga due to their central position in the global comics and culture industry. Like other American media genres, such as Hollywood films and TV shows, American comics and their global penetration have been seen through the cultural imperialism thesis. In their seminal essay, *How to Read Donald Duck*, Dorfman and Mattelart (1975) assert that Disney comics function as a vehicle for American cultural imperialism. They continue to say that Disney comics not only dominate local culture industries but also imprint their lifestyles and ideologies on receiving minds. The recent surge in comics-based transmedia storytelling and its great success in the global culture industry make us revisit this old thesis. Specifically, Schiller's (1991) idea of *total package*, by means of which he refutes the belief in an active audience and notes the totalizing force of multinational media corporations, seems to effectively account for the current cultural domination, especially in the comics field, led by a small number of American conglomerates, such as the Walt Disney Company, DC Comics, and Marvel Comics.

The emergence of new centers of media production, however, supposedly demolishes the core tenets of cultural imperialism—involving a single center of cultural domination and a largely one-directional flow of information from the core to the periphery. Whether or not we agree with the claim of *reverse media imperialism* brought up by Rogers and Antola (1985), we at least cannot dismiss the rise of new centers in the sphere of media, which leads to the decentralization of transnational cultural power (Iwabuchi 2002). Of course, the notion of decentralization does not mean that there are no centers; rather, it refers to restructured transnational alliances in the era of accelerated globalization (Iwabuchi 2002). As far as comics are concerned, the United States and Japan still dominate world media sales and flows, but there is also a worldwide tendency to adapt dominant commercial media models and cultural forms (Straubhaar 1991). For instance, Hong Kong comic artists have developed their own genres and styles by integrating American and Japanese influences; additionally, American values and exceptionalism inherent in superhero comics are challenged or appropriated quite a bit by global consumers (Lo 2005; Soares 2015).

The global expansion of Japanese manga has often been discussed from the perspective of *cultural proximity* and/or *cultural odorlessness* (Iwabuchi 2002, 27). First, its impacts on adjacent countries, including Korea, China, Taiwan, and Hong Kong, can be interpreted via the notion of cultural proximity. Although we should avoid the essentialist approach, audiences in many countries express their preferences for either national or intraregional cultural products, which are relatively closer to their racial, ethnic, linguistic, religious, and other cultural aspects (Straubhaar 1991). Perhaps the success of Nigerian films, Bollywood films, and Brazilian telenovelas can be explained by this concept to a certain degree. However, the idea of audiences searching for cultural proximity in cultural goods does not satisfactorily illustrate the outflow of Japanese manga to Western markets. Indeed, the influence of Japanese manga can be found not only in East and Southeast Asia, but also in Europe and the United States. The global success of Japanese manga has been attributed to the *culturally odorless* characteristics of Japanese products, which encompass consumer technologies, comics/cartoons, and computer/video games. Indeed, such *mukokuseki* 無国籍 (absence of nationality), which implies “the erasure of racial or ethnic characteristics,” has facilitated Japan’s cultural presence on the global scene (Iwabuchi 2002, 28), especially in the late 1980s and 1990s. As Iwabuchi (2002) rightly claims, however, the concept of cultural odorlessness is also misleading because any cultural product has the *cultural imprint* of its country of origin. It is also important to note that Japanese manga and anime became associated with Japanese odor in a positive manner in the 1990s, in both Western and non-Western countries.

Moreover, we must take into consideration the industrial context of the so-called receiving countries. Needless to say, audiences consume cultural products to produce their own meanings that connect with their social experience. The notion of an *active audience* aside, we still need to involve the distinctive local industrial conditions and practices with respect to comics globalization, and more generally, media globalization. For instance, the market for Japanese manga in the United States grew at an unprecedented rate in the early 2000s. This phenomenon has been discussed under such expressions as the “Japanese invasion,” “Japanization

of America,” or “Japan’s Gross National Cool” (Kelts 2007; McGray 2002). Yet, manga in the United States is considered as a specific *genre* within a larger comics category (Suzuki 2010). Its phenomenal growth in the United States also cannot be separated from the specificities of the American print industry, as well as the reception of books and comics in the American domestic market (Brienza 2009). As Brienza (2009) demonstrates, the enhanced visibility of Japanese manga in the US market is largely associated with its migration from the comics field to the book market driven by the American publishing industry.

For this reason, aforementioned theoretical frameworks, such as cultural imperialism, cultural proximity, and cultural odorlessness do not provide an adequate interpretation of current comics globalization, as they either overlook shifts in transnational interdependence or neglect structural push factors. The emphasis on a unique *national* style also cannot explain the transcultural characteristics of comics, as noted above. Then, how can we understand the recent global expansion of Korean webtoons, which has transcended the boundary of East Asia? The globalization of Korean webtoons has been materialized in various forms and to various degrees according to existing cultural relations, as well as each local’s distinctive comics culture and economic conditions. Moreover, due to their digital nature, the discussion of Korean webtoons’ global penetration cannot be saturated without a consideration of technological contexts in hosted areas. For this reason, I suggest understanding Korean webtoon globalization as an outcome of complex disjunctive flows and multivalent connections, which are not determined by one single master plan, as Appadurai (1996) notes. This article, as an empirical case study, explicates this complexity by presenting the most commonly observed factors among the research participants. It will help us move beyond the culture-oriented and nation-bound understanding of media globalization and comprehend the structural and technological conjuncture occurring in transnational media flows.

A Brief History of Korean Webtoons: Comics in the Digital Era

The history of Korean digital comics can be traced back to the late 1990s, when personal webpages became accessible to the public due to the development of information technologies (DMC Media 2014). At that time, cartoonists and illustrators distributed their character-based cartoon essays via personal webpages or blogs, and generated revenue through book publications and related merchandise (KT Economic Management Research Institute 2013). The term webtoon, a portmanteau of Web and cartoon, was first used in the Korean comics industry in 2000 to refer to online cartoons that employed diverse multimedia effects (DMC Media 2014). For example, an old form of the online service engine Chollian launched its comics platform Webtoon (webtoon.chollian.net) in 2000, providing cartoonists with free server and webpage management (*Maeil Business Newspaper*, August 8, 2000).

However, it was not until the mid-2000s that the term gained widespread recognition in Korea. Since 2002, major Korean Web portals have competitively started free webtoon services in order to generate more traffic and gather more active users. Examples include Yahoo Korea's Cartoon Sesang (Cartoon World) (2002), Daum's Manhwa-sok Sesang (World Within Cartoons) (2003), Paran's Entamin (2004), and Naver's Naver Webtoon (2005) (J. Park 2017). In particular, the rapid growth of Korean webtoons in the mid-2000s should be attributed to the two largest portals—Daum and Naver. Based on their huge numbers of monthly active users, they motivated professional cartoonists to publish their works on a regular basis; in addition, their incubating systems allowed amateurs and unknown comics artists to enter the field of comics production without the assistance of agencies or publishers (Jang and Song 2017; KT Economic Management Research Institute 2013). The large-scale migration of both professional and amateur cartoonists fostered genre diversity in the Korean webtoon industry, which in turn, expanded the viewership of Korean webtoons. The success of several webtoons repackaged into television shows and movies, such as Kang Full's *Babo* (Fool), Yoon Tae-ho's *Misaeng* (Incomplete Life), and Hun's *Eunmilhage widaehage* (Secretly, Greatly)—all published by Daum—

also became a growth engine for the Korean webtoon industry, and allowed people to see webtoons as a key to the intellectual property (IP) business.¹ Specifically, webtoons' abundant original stories, solid fan bases, and colorful visual images largely attracted filmmakers and television producers, and soon after, webtoons became an important source for transmedia storytelling² in the Korean entertainment industry (Jin 2019).

It was also in this period that the current forms of webtoon were developed and became an industrial *standard*. Though Korean webtoons have gone through various changes over the past two decades, they have several unique characteristics that are recognized both domestically and globally. In print comics, the story is developed through panel-to-panel transitions, and gutters between each panel create a sense of time flow (McCloud 1994). Yet, the ways in which panels and gutters are organized are limited by physical space, namely the page size; as such, they should be deployed within the page system. Due to its digital nature, webtoon did not need to follow this traditional convention, and Korean webtoonists came up with a new way to create sequences in the Internet environment—a long vertical strip format (80 to 200 cuts) for scroll-down viewing (Jin 2015). Color drawings, fast-paced panel transitions, and producer-consumer interactions, among others, also began to characterize Korean webtoons from this period and forward.³

Here, it is important to revisit the definition of webtoons. As Jang and

1. It was not until the early 2010s that webtoon-based films achieved financial successes. However, the mid-2000s marks the beginning of webtoons' journey to big-screen culture (Jin 2019).

2. The discussion of transmedia requires an extensive investigation. Introduced by Marsha Kinder in the early 1990s and later expanded by Henry Jenkins (H. Jenkins 2003; Kinder 1991), this concept has become one of the most popular words in media and communication conversation. Yet, it is quite an elusive concept, as it is often confused with other terms, such as media convergence, media mix, and one-source-multi-use (hereafter, OSMU). For a better understanding of Korean webtoons and transmedia storytelling, see Jin's works (2015, 2019). In this paper, I use the term transmedia in a broad sense, which encompasses media convergence, media mix, cross-media, OSMU, and transmedia storytelling, following my interviewees' observations.

3. Jang and Song (2017); Tae-yeop Oh, personal communication with author, November 5, 2018.

Song (2017) note, several terms, including webtoons, mobile cartoons, web comics, online comics, and digital comics, are often used without clear distinctions. In addition, the term webtoon is not common in other countries because of its Korean origin, as well as each country's distinctive comics culture and technological infrastructure.⁴ Most of my interviewees from the Korean comics industry also acknowledged the mixed use of the above-mentioned expressions. Tracing each term's cultural, industrial, and academic usage requires an extensive investigation. In this paper, I view webtoons as one form of digital comics, as the latter has a broader boundary from the industrial perspective, as observed by my interviewee from the comics publishing business:

Webtoons are digital comics... but traditional comics publishers, such as Daewon, Seoul, and Haksan, have digitized their print comics, and have made huge revenue through digital services...Korean comics, particularly those published via comics magazines, showed global competitiveness in the late 1990s...Now, the digital form of these comics is globally consumed through various platforms.⁵

As quoted above, digital comics involve both webtoons and a scanned version of print comics, although webtoons have become representative of digital comics due to their growing popularity in Korea. It is also noteworthy that the term digital comics often refers to a digitized form of print comics in Japan and the United States, which have been at the center of the global comics industry. Indeed, the emphasis of the American digital comics platform ComiXology is on the digital *distribution* of printed comic books and graphic novels (*Webtoonguide* 2018). Thus, I use the term webtoon separately from digital comics in order to indicate cartoons that are strategically planned for both digital production and distribution.

It is also important to add another layer to the history of Korean webtoons. Given the critical roles played by Web portals and smartphones,

4. Hyeong-jo Kim, personal communication with author, November 5, 2018; KOMACON (2017a).

5. Tae-yeop Oh, personal communication with author, November 5, 2018.

Jin (2015) divides the history of Korean webtoons into three phases: 1) the first generation in the late 1990s, 2) the second generation from the early 2000s to 2009, and 3) the third generation after 2009. I agree with his periodization, in that the growth of Korean webtoons has taken place in line with technological developments. For a better understanding of the recent upsurge in Korean webtoons' market breadth, however, we need to pay attention to the year 2013, when a paid webtoon service model was led by Lezhin Comics. Because Naver and Daum serviced webtoons with no charge to attract more users, they could not generate strong revenue returns. Though Daum started its revenue model Dasibogi (Read Again), where users could purchase already finished webtoons, in 2011, it could not generate steady, consistent long-term revenue (J. Park 2017). With a nuanced understanding of specific demographics, Lezhin Comics launched a paid webtoon service model in 2013, making ₩10 billion in annual sales during the first year and between 2015 and 2016 tripled its active monthly users in Korea on Android phones (*App Annie* 2016). The success of Lezhin Comics challenged the widespread social and industrial perception that webtoons were free, which had hindered small- and mid-sized agencies, publishers, and platforms from entering the webtoon business. In other words, the emergence of a paid service model had a considerable impact on the Korean webtoon industry, both quantitatively and qualitatively, by diversifying the profit models and major actors (KOMACON 2017b), which in turn, contributed to the overseas expansion of Korean webtoons, as will be fully discussed later.

Korean Webtoons Go Abroad

Since 2013, when a paid service model was introduced by Lezhin Comics, the Korean webtoon industry has achieved considerable growth: the year-over-year webtoon production has rapidly increased (see Fig. 1), and a variety of actors, such as platform providers, agencies, and production studios, have newly emerged over the past five years. In particular, the diversity of webtoon platforms, which constitute 66 percent of the Korean

weboon industry (J. Park 2017), has been much enhanced. Although the two Web portals—Naver and Daum⁶—still dominate the domestic market, the competition among platform providers has largely intensified.

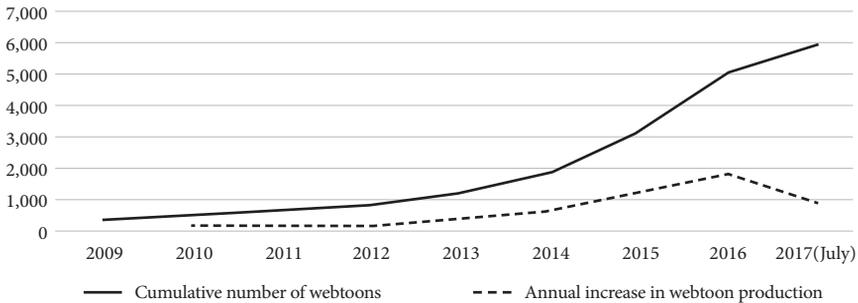


Figure 1. The increasing production of webtoons
 Source: Adopted from KOMACON (2017b).

More importantly, the year 2013 marks a turning point in the history of Korean webtoons' global expansion. The Korean webtoon industry's efforts to open overseas markets became more visible in 2014. Yet, its global initiative started a year earlier, as Seong-suk Han, then general director of Naver, stated at the 2014 Private-Public Joint Forum for Information Communication Technology: "We have prepared the overseas expansion of webtoons since last year. [Webtoons] will be the core content of the Korean Wave in the next 10 years" (*Yonhap News*, March 23, 2014). Declaring 2014 as the year of webtoon globalization, she proposed a four-step plan for Naver, as follows: 1) raise the global profile of Korean webtoons and artists by 2015, 2) expand global readership by 2017, 3) enter mainstream popular culture by 2020, and 4) make webtoons the primary content for transmedia storytelling (*Yonhap News*, March 23, 2014.). The success of this plan is still

6. Daum merged with a large Korean mobile company, Kakao, in 2014. Webtoons are serviced by both Kakao's subsidiary company Kakao Page and Daum's webtoon platform Manhwa-sok Sesang to create synergy.

in question, but Naver has reported that its global webtoon service platform, LINE Webtoon,⁷ attained 3 million monthly active users (hereafter, MAU) in North America and 18 million MAU globally, becoming the first-ranked webtoon platform in Taiwan, Indonesia, and Thailand (NIPA 2017).

Broadly speaking, the initiation of webtoon globalization was implemented based upon the rapid growth of and the subsequent saturation of the domestic market. Korea ranks sixth globally in terms of the size of its comics industry, preceded by Japan, the United States, Germany, France, and the United Kingdom (KOCCA 2017). However, Korea's relatively small population has been an obstacle to its content industries, including the webtoon industry, in terms of securing sustainability and enjoying the advantages of economy of scale (NIPA 2017). In this light, it was inevitable that the Korean webtoon industry would turn its attention to overseas markets. Admittedly, there are many diverse factors that have facilitated Korean webtoons' global expansion, as will be discussed in detail later. Yet, it is undeniable that the small-scale domestic market, along with issues of overproduction and decreased profit, encouraged the Korean webtoon industry to pursue the expansion of markets, audiences, revenues, and revenue models through global penetration (KOMACON 2017a).

Globally, the market for digital comics has slowly, but steadily expanded within the past ten years. Although print comics still constitute the major part of the global comics industry, the growth rate of digital comics is quite noticeable (see Table 1). In the United States, digital comics are expected to represent 32.5% of the domestic comics market in 2019; Japan, 15.6% in the same year; France, 13.6%; the United Kingdom, 18.5%; Germany, 10.4%; and China, 8.1% (KOCCA 2017).

7. Naver started its global service with the name of Naver Webtoon. Due to its underestimated name value in the global market and the huge success of LINE Corporation in Japan, Naver borrowed LINE's name and began its global service under the name LINE Webtoon (NIPA 2017).

Table 1. Scale of the Global Comics Industry (Print/Digital) from 2010 to 2019

	2010	2011	2012	2013	2014	2015	2016 ^a	2017	2018	2019
Print Comics	6,664 ^b	7,201	7,108	6,479	6,351	6,197	6,036	5,865	5,687	5,497
	96.70%	95.60%	94.30%	93.40%	92.20%	91.30%	90.30%	89.20%	88.10%	86.70%
Digital Comics	229	330	426	457	538	591	647	707	771	840
	3.30%	4.40%	5.70%	6.60%	7.80%	8.70%	9.70%	10.80%	11.90%	13.30%

Source: Adopted from KOCCA (2017).

^a The statistics for 2016 to 2019 are estimated data.

^b The unit of numeric value is 1 million USD.

The term webtoon remains strange to global audiences (NIPA 2017). Digital comics in the United States, Japan, and France are largely circulated in the form of scanned print comics, and Korean-style webtoons are still struggling for cultural recognition in these countries. However, the cultural presence of Korean webtoons on the global scene has increased steadily since the mid-2010s. Indeed, Korean webtoons have become a standard model of digital comics in several countries, including China, Thailand, and Indonesia. As of 2017, Korean webtoons and webtoon platforms have been exported to 9-10 countries to varying degrees. While it is difficult to find Korean webtoons in Germany, Italy, and Spain, Naver's global webtoon platform, LINE Webtoon, provides its service in the United Kingdom, and a few Korean webtoon platforms/studios operate in France, with examples being Jaedam Media's partnership with the French digital comics platform Izneo and Kidari ENT's investment in the French webtoon service platform, Delitooon. As far as Latin America, there are few noticeable cases except for Brazil, where the Korean platform Friday services webtoons via a partnership with the Korean game company FHL Games. Also, as LINE developed a partnership with the Brazilian telecommunications group, Telefônica Vivo, Korean webtoons came to gain more attention in Brazil (KOMACON 2017a).

Korean webtoons and platforms have shown more conspicuous success in East and Southeast Asian countries, as well as in the United States. As Table 2 demonstrates, a variety of Korean webtoon platforms, ranging from

Naver’s LINE Webtoon and Daum Kakao’s Picoma to mid- and small-scale platforms, such as Lezhin Comics, Comica, Tappytoon, and Toptoon, have consolidated their leading positions in Japan, Thailand, Taiwan, Indonesia, and the United States. Due to government regulations, Korean platforms have not been able to enter the Chinese market. However, they have serviced a large number of webtoons as a publisher or through joint venues with Chinese companies. Major Chinese platforms that have incorporated Korean webtoons include Tencent Dongman, Weibo Manhua, Kuaikan, U17, and Mgzhan (NIPA 2017).

Table 2. Major Overseas Penetration of Korean Webtoon Platforms

Country	Platform	Parent Company	Feature
Japan	LINE Manga	NHN>LINE	Ranks in third place due to the success of LINE Messenger
	Comico	NHN>NHN Play Art	Top-ranked in Japanese digital comics
	Picoma	Daum Kakao>Kakao Japan	Provides a paid webtoon service, second-ranked
United States	Tapas	-	The first webtoon platform in the U.S.
	LINE Webtoon	Naver>Naver Webtoon	Provides webtoons in five languages, 3 million MAU
	Lezhin Comics	-	Provided 116 webtoons in 2017, forging a solid fandom
	Tappytoon	-	Provides app-based services and good quality of translation
Taiwan	LINE Webtoon	Naver>Naver Webtoon	Top-ranked in Taiwanese digital comics
	Toptoon	-	Second-ranked platform with 2.2 million users
	Comico	NHN>NHN Play Art	Expanded to Taiwan, Thailand, and Spain
	Toomix	-	Redesigned its service for Taiwanese contexts
Thailand	Line Webtoon	Naver>Naver Webtoon	Top-ranked in Thai digital comics
	Ookbee Comics	-	Second-ranked digital comics platform
	Comico	-	Expanded to Taiwan, Thailand, and Spain
Indonesia	LINE Webtoon	Naver>Naver Webtoon	Top-ranked in Indonesian digital comics
	Comica	Panorama>Comica	A subsidiary of the drama/film studio Panorama Entertainment, second-ranked
France	Delitoon	Dau>Kidari ENT	The first webtoon platform in France

Source: Adopted from NIPA (2017).

Starting its global service in July 2014, as of 2017, Naver's LINE Webtoon has provided 1,033 webtoons in five different languages, and it has become a top-ranked digital comics platform in Taiwan, Thailand, and Indonesia. Although Daum Kakao's Picoma launched its Japanese service a bit late, in April 2016, it attained 2.5 million MAU by September 2017 by adopting a Korean paid service model, *Gidamu* ('Free after Wait'), through which users can gain access to the next episodes after waiting 12–24 hours. *Lezhin Comics*, which developed and first adopted paid business models, including *Gidamu* (which was later transferred to Naver and Daum Kakao), expanded to Japan and the United States in 2015 through the "one-build" system, where multi-language services are provided on one platform located in Korea. As of 2017, *Lezhin Comics* was servicing 116 webtoons in the United States by adding two new works every week. Besides the above-listed cases, a variety of platforms, publishers, and agencies, including *Toptoon*, *Comica*, and *C&C Revolution*, have endeavored to globalize their platforms, business models, and/or contents since the mid-2010s. Compared to other content industries, such as gaming and music, the total sales and exports of Korean webtoons are still small in scale (KOCCA 2016a). However, Korean webtoons and their globalization processes have generated new intra- and interregional media flows, as well as global interdependence. They are also closely related to several spotlighted issues in the global content industry, such as the platform economy, IP business, and transmedia storytelling. Thus, the analysis of Korean webtoons' global diffusion will help us understand the current social, global, and technological conjuncture.

Social, Global, and Technological Conjuncture

Despite the recent acceleration of Korean webtoons' global expansion, no academic research is yet able to account for this phenomenon in a manner that is both socially situated and medium-specific. Instead, most studies of webtoons focus on their intrinsic features, such as their *unique* storytelling, forms of expression, user interaction, educational efficiency, and kitschy characteristics (Choi 2016; Han and Hong 2011; Jeong and Yoon 2009;

Lee, Choi, and Kim 2015; Lee and Jeon 2015; Yoon, Kwon, and Lee 2015). Though a few studies offer meaningful discussions with respect to Korean webtoons' global diffusion, they tend to see it as a mere constituent or byproduct of the Korean Wave (Jang and Song 2017; Nam 2014). Of course, the increasing global popularity of K-pop, K-drama, and K-film is not irrelevant to the global spread of Korean webtoons and webtoon platforms. However, webtoons' overseas expansion arose from more diverse internal and external factors, including the growth of smartphones, the emergence of a paid service model, and the rise of China's pan-entertainment strategy.

As discussed above, the small-scale domestic market led the Korean media/content industries to turn their attention to the global market in order to extend and diversify their revenues and revenue models (KOMACON 2017a). The Korean webtoon industry was no exception. Although the domestic webtoon market showed noticeable growth throughout the 2000s, there was a general consensus among platform providers, agencies, and publishers that the scale of the domestic market was not large enough to create a sustainable webtoon ecology. The Executive Director of E-Contents Business at Kidari ENT, which invested in the French webtoon platform, Delitoon, explained the linkage between the scale of the domestic market and the pursuit of overseas market in the following terms:

The KT Economic Management Research Institute announced an industrial report on the Korean webtoon industry. Even if we fully believed it, the expected market breadth of webtoons would be too small...for us [Kidari ENT] to start a webtoon business. Without the overseas market in mind, we might not have started our webtoon business.⁸

Paradoxically, global expansion must be preceded by sufficient growth of the domestic market and the accumulation of a large volume of original contents.⁹ That being said, it is not coincidental that the mid-2010s (when

8. Hyeong-jo Kim, personal communication with author, November 5, 2018.

9. Hyeong-jo Kim, personal communication with author, November 5, 2018.

the globalization of the Korean webtoon was proactively pursued by Web portals and other webtoon-devoted platforms) was also the time in which the growth of the domestic market reached a critical point, and overproduction became an important issue in the Korean webtoon industry (KOMACON 2017a). One of my interviewees, who has worked in the webtoon industry as both cartoonist and webtoon editor for more than 15 years, described this relationship between the saturation of the domestic market and the overseas expansion as follows: “The domestic market for webtoons exceeded its maximum capacity in 2014. It is the time when portals, such as Naver, Daum, and Kakao, showed significant movement toward the global market.”¹⁰

As Jin (2015) rightly observes, the growth of Korean webtoons is largely attributed to advanced smartphone technologies. Initiated in 2009, the high penetration rate of smart devices generated a new cultural phenomenon, namely the *snack culture* in Korea. Digital users began to consume cultural contents in a short time rather than engaging in deeper reading (Chung 2014). Within this context, webtoons, which require a small amount of data and time for their consumption, became representative of the Korean cultural scene, fulfilling a growing social demand for short cultural contents (DMC Media 2014). Not surprisingly, the dominant form of webtoon service changed from Web-based to mobile-based, and emphasis was given to images rather than text to meet the technological features and consumption behaviors of smart devices and their users. Here, it is important to note that this technological shift is not Korea-specific. Though Korea boasts the fastest Internet speed and the highest smartphone penetration rate, smartphone ownership and Internet usage continue to climb, both in developed and developing countries (Poushter 2016). This global trend toward smart devices and digital environments not only created a global desire for bite-sized digital content, but also established a favorable condition for the global diffusion of Korean webtoons, as my interviewee from a cultural content-specialized company recognized:

10. Han-sang Jo, personal communication with author, October 30, 2018.

Once the technological infrastructure is established, a corresponding consumer culture is created. Games always come first, followed by news stories and videos. Comics come next. I believe this pattern is kind of universal. [Kidari ENT made inroads into the French market] because the technological infrastructure in France is quite developed, and because we expected a quick spread of the snack culture there.¹¹

In a similar vein, the Vice President and Chief Operating Officer of Kakao Page, which is one of the largest Korean content platforms optimized for mobile devices, attributed Korean webtoons' global penetration to the smartphone-centered technological environment:

A new technological environment requires new contents to be consumed. Comics also needed to reshape their form to fit into this new environment. I believe that Korean webtoons adapted well to new circumstances. Basically, Japanese [digital] manga lack color, as it is transferred from print comics. Though Japanese manga has its own creativity, it is not universally accepted. Colorful and image-centered Korean webtoons, and their unique way of reading—a vertical scroll-down—fit the smartphone-based environment perfectly.¹²

Indeed, Korean Web portals and other webtoon platforms made successful inroads into the global market through the mobile-first strategy (Kwon 2014). In China, Korean webtoons are largely distributed and consumed on Chinese mobile apps, such as Wei Manhua, Kuaikan, Dajiaochong Manhua, and Comi Cool; they are also distributed and consumed in Japan through Comico and Picoma; and Comica embedded its service within BlackBerry Messenger in Indonesia.¹³

Earlier, I proposed the necessity of adding another dimension to the history of Korean webtoons, with an emphasis on the emergence of a paid service model. The two large Web portals, Naver and Daum, which led the

11. Hyeong-jo Kim, personal communication with author, November 5, 2018.

12. Jong-cheol Park, personal communication with author, October 24, 2018.

13. Jeong-yun Han, personal communication with author, July 15, 2016; KOCCA (2016b); NIPA (2017).

early industrialization of Korean webtoons, offered free webtoon service to increase their website traffic. Due to this industrial *standard*, the Korean webtoon industry suffered from a lack of established revenue models, which in turn, hindered the inflow of prominent cartoonists and traditional publishers, as well as the extension of the market scale (KOMACON 2017a). Led by Lezhin Comics and Kakao Page, the rise of a paid service model in 2013 significantly restructured the Korean webtoon industry, generating fierce competition among webtoon platforms and attracting external capital investments, as attested by my interviewee who was in charge of global IP business at Lezhin Comics:

When I worked for Lezhin, many investors contacted me at least twice a week. As Lezhin had successfully received a series of investments, they wanted to know more about Lezhin and other similar platforms.¹⁴

Considering the interviewee's working history at Lezhin, her statement should not be accepted at face value. Yet, other interviewees also acknowledged the crucial role of a paid service model in the Korean webtoon industry:

- (1) Unlike Naver and Daum, Lezhin came up with a strong revenue model, like a sellout model...The success of Kakao Page further enhanced the growth of paid service models. A number of similar platforms, such as Toptoon and Toonix, emerged due to Lezhin and Kakao Page.¹⁵
- (2) Many agencies and publishers did not enter the webtoon industry because MG [the prepaid writer's fee] was terrible. The minimum MG [per episode] was around ₩100,000 [approximately US\$90]...We were quite discouraged, and often blamed [Naver and Daum]...The impact of a paid service model was enormous. First of all, platform providers became more relieved from their concerns about MG.¹⁶

14. Jeong-jin Ahn, personal communication with author, November 5, 2018.

15. Hyeong-jo Kim, personal communication with author, November 5, 2018.

16. Jae-sik Lee, personal communication with author, October 24, 2018.

More importantly, the success of paid service models encouraged global IT companies to import Korean webtoons and service models at an unprecedented rate. Due to high investment costs and unguaranteed monetary returns, early webtoon service models of Naver and Daum were not attractive to foreign platform business operators (KOMACON 2017a). As Lezhin and Kakao Page achieved huge success, however, their monetization models received a great deal of attention from the overseas market. In particular, several Chinese comics platforms, such as Kuaikan, directly adopted Korean business models and became an important venue for Korean webtoon exports. Further, the rapid success of these platforms intensified competition among Chinese IT companies and webtoon platforms, which subsequently spurred the demand for Korean webtoons. One of my interviewees, whose major duty was developing partnerships with Chinese companies, recalled her experience as follows:

Lezhin made first contract with Kuaikan, which was a small startup company in China...Kuaikan was pretty positive about our business model, and thus, offered quite a good deal to us...As Kuaikan achieved huge success very shortly thereafter, the large IT companies, such as Tencent and NetEase, began to contact us.¹⁷

As the comics critic Seok-hwan Park (2017) points out, several Korean webtoon publishers and platforms attempted to make inroads into the Chinese market early in the mid-2000s. However, these efforts ended in failure because of the poor prepaid writer's fee and insecure distribution channels.¹⁸ Even until the mid-2010s, large Chinese IT corporations, including Tencent, NetEase, and Sina Weibo, took advantage of their monopolistic position when importing Korean webtoons. The success of a paid service model, both in the Korean and Chinese markets, considerably changed these circumstances, motivating a variety of Chinese IT companies to import more Korean webtoons and creating favorable conditions for

17. Jeong-jin Ahn, personal communication with author, November 5, 2018.

18. Jae-sik Lee, personal communication with author, October 24, 2018.

Korean webtoon platforms and publishers.¹⁹

The case of China also informs us that the country of origin is not a determinant of transnational media flows. Since Tencent launched its pan-entertainment strategy in 2012, in which it strove to link diverse content industries, there has been soaring demand for original content IPs in China (KOCCA 2016b). Extending beyond the animation-comics-game paradigm, Chinese IT conglomerates, such as Tencent, Baidu, Alibaba, and Weibo, have endeavored to create a new media ecology, where viewers and content creators are connected across a variety of platforms (KOMACON 2017a). With heavy investment, Tencent, for example, has established its own production and distribution system, through which it can make maximum use of a single original IP, encompassing novels, comics, animation, games, television, and film. Due to this ecological shift, the significance of original content IPs has become much more widely recognized in the Chinese media/entertainment scene. Within this context, the major IT and content corporations began to see webtoons as valuable resources for both the snack culture²⁰ and pan-entertainment strategy (KOMACON 2017a). For instance, Tencent started its subsidiary Tencent Dongman in 2013; the Chinese online video platform, iQIYI, which was founded by China's largest online search engine, Baidu, in 2010, launched its webtoon category in 2016; in addition, the Chinese version of Kindle, iReader, added a new feature for digital comics in 2015 (KOCCA 2016b; KOMACON 2017a).

Because of the delayed transition from print to digital comics, however, there was a shortage of supplies in the mid-2010s, when webtoon platforms proliferated in China. In order to meet the growing demand, Chinese platforms scrambled to obtain Korean webtoons, as observed by my interviewee, who was in charge of international IP business of webtoons at Daum:

19. Jae-sik Lee, personal communication with author, October 24, 2018.

20. In China, the smartphone penetration rate reached 48.1% in 2014, and it is expected to increase to 63.3% by 2019. With the widespread use of the 4G network system, the daily mobile Internet usage time exceeded 3.03 hours in 2017, preceded only by Brazil's 4.48 hours (KOMACON 2017a).

They [Chinese platforms] were hesitant to create original contents from the bottom up because it would take a long time. Instead, they preferred to import successful Korean webtoons... The lack of domestic IPs created a strong need for overseas original contents. As they got to know about Korean webtoons and their success in Korea, they began to vie for them, particularly because of the imbalance between supply and demand [in China].²¹

Additionally, the success of a paid service model in Korea allowed Chinese platforms to import not only Korean webtoon titles, but also Korea's production system, marketing strategy, revenue model, and business model (KOMACON 2017a). Stimulated by the successful example of Kuaikan, other Chinese webtoon platforms competitively transplanted Korean models to the Chinese market, a process accelerated by the widespread use of the mobile payment system and the establishment of paid digital content services in China (KOMACON 2017a). It is within this context that Korean publishers and platforms have been able to export more webtoons to China on good terms, and China has become the biggest export market of the Korean webtoon industry.

Conclusion

This article has explained the driving forces of Korean webtoons' global expansion in terms of the small-scale domestic Korean market, the growth of smartphone penetration, the emergence of a paid service model, and the rise of China's pan-entertainment strategy. Of course, the discussion of Korean webtoon globalization cannot be saturated by these findings. For a better understanding of this subject, we also need to take into consideration other factors, such as its relevance to the Korean Wave, Korean government policies on K-content exports, and other countries' regulations on foreign content imports and exports, among others. In order to extend the

21. Jeong-yun Han, personal communication with author, June 15, 2016.

discussion to the global level, we should also acknowledge that China's pan-entertainment strategy is a part of the broader global trend towards media convergence and IP business, and that the emergence of webtoon platforms (either paid or unpaid) is closely related to the global emphasis on the platform economy, represented by iTunes, Netflix, and YouTube.

However, by elucidating the overarching conditions of Korean webtoon globalization, which have commonly been observed by a variety of actors working in the Korean webtoon industry, this article demonstrates the disjunctive and non-identical characteristics of transnational media flows. It also shows how the development of digital technologies has accelerated the global interdependence and has facilitated the transnational media consumption. As the Chinese case exemplifies, without a growing local demand for content IPs and bite-sized digital content, Korean webtoons could not make inroads into the global market. I also suggest interpreting the presence of Korean webtoons on the global scene as an example of decentralized transnational cultural power, to borrow a term from Iwabuchi (2002). In the comics field, we have witnessed the relative decline of an *absolute* center and the emergence of new global players. Indeed, the American way of life inherent in American comics has lost its global appeal, and the central position of Japanese manga in the global culture industry has weakened, even though their influences continue via inertia. On the other hand, Korean webtoons have redefined the meaning of (digital) comics and have expanded its global power in a relatively short period. Further, they have restructured asymmetrical interdependence, promoting both the local adoption and adaptation.

The case of Korean webtoon globalization allows us to dismiss the binary distinction between global and local, as well as the center-periphery model; instead, it helps us look at the mutually constitutive relations between them. Yet, it is premature to celebrate the formative power of local adaptations. The globalization of Korean webtoons has not been implemented by a well-planned strategy of the Korean webtoon industry; rather, it has been driven by the social, global, and technological conjuncture. However, this does not mean there is no global homogenizing power. Indeed, Korean platforms foster local artists and works to extend

their power as a global platform provider in the age of the platform economy and IP business.²² In particular, the goal of large Korean Internet/mobile companies is to establish both production and distribution systems, which would set the necessary conditions for their sustainable dominance in multiple markets (Morley and Robins 1995). Thus, we should acknowledge both the shifting nature of transnational cultural power and the global power of newly emerged transnational corporations in the digital era. I hope this research will facilitate empirical studies on this matter.

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22. Tae-jin Kang, personal communication with author, November 3, 2018.

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