

Hallyu consumption in Central and Eastern Europe: Attributes, preferences and consumer behaviour of Korean culture fans in Central and Eastern Europe

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Abstract

The paper summarizes the first results of ongoing research about the fandom of Korean culture in Europe. The primary research was based on two similar research, implemented in Hungary in 2018 and 2022. The method of the research contained secondary research of online sites and fandom communication platforms, a series of interviews with Korean company representatives or experts of related organizations followed by a structured targeted questionnaire spread over 12 countries in Europe. The research was launched in February 2024 and the analysis of the results is in progress. In this paper, the author summarizes the first results of the interviews and the primary research results in four countries, where the number of respondents exceeded 100.

The results clearly show that the examined countries' fandom is diverse and have some specific characteristics in preferences and consumption.

Keywords: Hallyu, Korean culture, fandom, consumer preferences and behaviour

JEL classification: M31 Marketing, Z1 Cultural Economics

Introduction

Hallyu, literally meaning the 'Korean Wave' is a phenomenon referring to the global spreading and diffusion of South Korean (from now on Korean) creative and cultural industrial products and services. It is a term for the rise of Korean culture (Shim 2020) referring to the worldwide popularity of Korean cultural content. About 20-15 years ago, during its early stage, Hallyu was solely an Asian phenomenon as most Korean creative and cultural industrial (CCI) companies mainly targeted the markets of surrounding countries, such as China, Japan, and other Southeast Asian countries. Later, technological development, globalization, and the popularity of social media sites (e.g. Facebook, TikTok, Twitter, and YouTube) made Korean CCI products and content spread overseas and changed the focus of Hallyu content export to global markets (Messerlin and Shin, 2017; Ju, 2018; Parc and Moon, 2019).

Hallyu includes several types of CCI products, services, and content, but its core contents come from the music and film industry. The first spreading content was Korean TV series (K-dramas), and since the 1990s these CCI products gained global influence, together with the movie industry, Korean pop music (K-pop) performers, and bands (such as Psy, BTS, BlackPink or StrayKids) also conquered the world. Besides, Korean companies and the Korean government purposefully connected the CCI contents with other Korean products and services, which significantly increased the export revenue of the CCI sector. This significance can clearly be seen from the statistics of KOFICE (2021), which state that in 2019, Hallyu exports reached

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a revenue of \$ 9,350 million and increased by 8.8% till 2020. This increase is quite remarkable as the worldwide content market produced a 5.6% decrease in these years, due to the COVID-19 pandemic.

Literature analysis, the fans of Korean culture in Europe

The significance of the CCI, which includes the demand side of the creative economy industries that arise from the creativity, skills, and talents of individuals, the industries that are based on creativity and talent (Comunian et al., 2010) and which use culture as a 'raw material' input for their products and services (European Commission: Green Paper, 2010), increased in the last decade. According to UNCTAD (2024)¹, previously in 2002 this sector accounted for 3.1% of global export, increasing from US\$ 419 million in 2010 to US\$ 524 million in 2020, in 2022, due to COVID-19, this growth still reached 2.9%.

Several research mentions the consumers of creative and cultural industry, but only some of them examines the Korean culture fans and their consumer behaviour. The researchers, who analyse the Hallyu and its fandom, usually follow a sociologic or psychologic aspect, and only a few research examines fans in an economic or marketing point of view. Besides, there are more literature about Korean culture fandom in the countries surrounding Korea, such as Thailand, Vietnam, and Malaysia. The examined topics are similar in the literature related to European markets; only a few research includes a detailed analysis of the consumers of Korean cultural products and services.

The emergence of the Korean Wave can be traced back to the late 1990s, but the flow only reached Europe in the middle or late 2000s. The Western European countries were the firsts in the region, which welcome the elements of Hallyu. Balmain (2016) explains that Korean movies experienced a surge in popularity in the UK from 2008 to 2013. Regarding K-pop, the 2019 BTS concert at Wembley Stadium in London marked a significant milestone (Um 2019), as it not only increased the popularity of the band in the UK but solidified the presence of K-pop in the European and global music industry. In France, the SM Town Live concerts that took place in Paris in 2011 were the event, that influenced the growth of the fandom of Korean culture in that country. In the same year, in Barcelona, Spain, the first K-pop concert in the country was organized (Olmedo Señor 2017), which highly influenced Spanish fans who became passionate about Korean culture. In Germany, K-pop was not well-known until 2012 (Fuhr 2014), while Korean culture started to be popular in Sweden more than 10 years earlier, around 1997 (Hübinette 2012).

In several countries of Central and Eastern Europe, Korean culture contents were not able to spread due to political reasons. For instance, as Hungary belonged to the former soviet bloc, the country could establish a connection only with North Korea till 1989. However, in this year of the regime change, Hungary was the first country from the block to open to and implement official connections with South Korea. In the Central and Eastern European region, most of the fans met Hallyu through K-pop (for instance through the song of Psy in 2012), but in some countries – such as Hungary or Bulgaria – TV channels aired K-drama content since the late 2000s (Shim and Gajzágó, 2023).

Research methods

Our research used a multi-method approach, including secondary literature analysis, 18 structured interviews with representatives of Korean CCI organizations or companies, and surveys to gather information about the demographic attributes, fields of interest, and consumer behaviour of fans of Korean culture in 12 countries of Europe. We summarized the methods and results of the preliminary and ongoing research in Table 1. As this project has not finished yet, we can only include preliminary results in this paper. We explain some of the results of the interviews and the basic analysis of the questionnaires in countries (such as Austria, Hungary,

Romania, and the Czech Republic), where the number of respondents reached the minimum limit of 100 (see on Table 1).

Table 1 *Summary of the research methods*

Source: own editing

Phase	Type	Method	Time-frame
<i>Previous research (in Hungary)</i>			
First research	Primary	1. Online media analysis, 2. Personal interviews with Hallyu 7 experts	• October and November 2018 • October 2018 - May 2019
	Secondary	3. Printed and online questionnaires (Number of respondents: 1742)	• November 2018 – February 2019
Second research	Primary	4. Online media analysis	• March 2022
	Secondary	5. Online questionnaires (Number of respondents: 1414)	• April – July 2022
<i>Main research in 12 countries of Europe</i>			
Preliminary phase	Secondary	6. Literature analysis	• August 2023 – March 2024
		7. Reports and news analysis	• August 2023 – March 2024
First phase	Secondary	8. Personal interviews with 18 Korean company representatives	• May – June 2024
	Secondary	9. Online media analysis	• February 2024 – March 2024
Second phase	Secondary	10. Online questionnaires (Number of respondents: Austria: 450, Czech Rep.: 202, Hungary: 720, Romania: 365)	• June 2024 – October 2024

The research results are not representative, as the number of questionnaire respondents does not collide with the estimated size of the fandom. Besides, the questionnaire targeted only Korean culture fans, therefore does not represent the opinion or the preferences of the whole society. In this article, due to the lack of representativity, we avoid comparison of the results in the chosen countries and introduce the fandom's characteristics in the countries separately.

Research results – Consumers of Korean culture in four countries in Central and Eastern Europe

The fandom in Central and Eastern Europe is diverse. Despite the fact, that the fans of Korean culture have similar characteristics all over the world, we need to consider the differences in consumption due to specific factors. These factors vary, some of them are based on the culture, the economic situation, or the geographical location of the country where the fans live, while others are closely connected to the personal attributes and preferences of fans. Besides, the business activity and the marketing strategy of Korean companies – such as entertainment agencies, news agencies, and movie producers – can also influence the composition and spread of contents that affect the local fandom.

The result of the personal interviews of our research showed that, unfortunately, some of the Korean firms in the CCI do not have a practice of making thorough market research to analyse the local differences of fandom. Rather they analyse the sales results or online media data.

Instead of the sales and online data results, our research results explained in this paper, cover the attributes and the preferences of Korean culture fans in four Central and Eastern

European countries; Austria, the Czech Republic, Hungary, and Romania. Due to the ongoing status of the research process, only some of the most relevant and interesting results are explained above.

In Austria, previously, people were “ill-informed about East Asian societies and cultures” (Sung, 2014, p. 59) and they were not able to differentiate between Korean or Chinese content. The first boom of Hallyu reached the country in 2012, when due to the Gangnam Style craze the number of K-pop events - such as Austria’s Next K-pop Star and the K-pop Dance Festival Vienna - organized by small groups of fans increased. According to Korea Foundation statistics (2023), the possible number of fans of Korean culture in Austria was around 23,490 people.

The 450 respondents to our questionnaire, were first attracted to Korean culture by K-pop (27.7%) or K-drama (20.4%). The third influencing sector was the Korean movie industry; 17.9% of the fans met the culture through this. The Korean language is very popular in this country, most of the respondents (78.5%) like the culture because of the language. This is unique, as the language category received the highest rate of respondents in this country. The second and third reasons for liking the culture are the Korean history and traditions (70.6%), and the cultural difference from other – Western – cultures (61.2%). Interestingly, Austrian respondents like Korean food the most; 90.8% of the respondents chose this cultural field from the list we included in the questionnaire. The list contained the Korean language too, and the answers confirmed the previous statement that Austrian fans like the Korean language, as 86.2% are interested in it. The third important field that most of the respondents chose was K-dramas.

The fandom of K-pop and K-dramas tend to communicate intensively (...) with the stars and idols and with each other too. Austrian fans have the same characteristics, but the intensity of the communication is not as high as in other surrounding countries. Only 54.5% of the respondents communicate with other fans, but 17% more expressed, that they wish to do it in the future. The platform of communication is also specific, most Austrian respondents (74.4%) still prefer personal meetings for communication, while after COVID-19, this preference changed in many countries to online options (Gajzágó, 2023).

The research examined the purchasing preferences of the fandom and in Austria the rate of respondents who buy Korean culture-related products is high, reaching 84.9%. Their most preferred products and services include food items related to Korean cuisine (82.8%) and skincare and cosmetics products (69.9%). The third and fourth selected products were language-related books (65.9%) and K-pop albums or merchandise products (46.5%). The rate of respondents who not only buy culture-related products, but also other Korean products as well is the lowest in this country (14.7%). If they buy other Korean products, they usually choose IT products, electronics, or health and wellness products. However, the intent to buy travel services for trips to Korea is the highest here from the introduced countries, with 40% of the respondents (see on Figure 1).

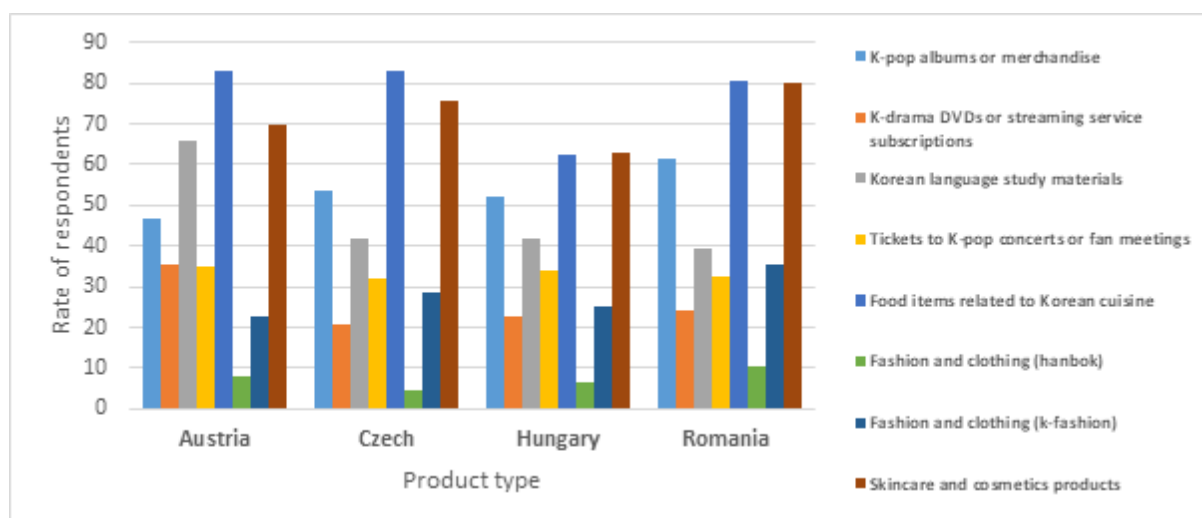


Figure 1 Consumer preferences of Korean culture related products in the fandom of the four examined country

Source: own editing (based on own research results)

In the Czech Republic, the Korean culture fandom was relatively small in the early 2010s, their number did not exceed 3,000 people (Mazaná, 2014). Similar to Austria, the members of the Czech society had biased views against Asian men, thus fans needed to gather in small self-organized associations and hold fan events, and flash mobs (Marinescu, 2014). As in many other European countries, K-dramas were not broadcast on public television channels, K-pop played a significant role in the Korean Wave. Recently, the possible size of the fandom in the Czech Republic has reached 36880 members (Korea Foundation statistics, 2023).

Regarding the method of how the Czech fans first met the Korean culture, the research had similar results as in the Austrian questionnaire. The first attractive fields for Czech fans were K-pop music and artists (33.8%), Korean dramas (25.4%), and Korean films (17.4%). The answers to the question of why the fans like Korean culture are also similar to the Austrian answers; the Korean language is the strongest reason (73.8%), the second most important factor is the difference of the culture (71.8%), and the third Korean history and traditions (69.3%). The pattern related to these favoured cultural fields in the Czech Republic is closer to the preference of the other countries' fans (Hungarian and Romanian) than to Austrian fandom.

The Czech fans of Korean culture seem to be more active in communication than the Austrian ones; 67.3% of the respondents contact with other frequently. In contrary to the Austrian fandom, Czech fans like online communication, especially Facebook more. 69.9% chose this platform, 58.1% communicates through Instagram, and only 39.0% prefer personal connection.

The purchasing intention of Czech fans for Korean cultural products and services is a bit higher than in Austria, 85.6% responded that they buy these goods. The preference of consumption is similar as in Austria; Czech fans tend to buy the same types of products the most– such as food items related to Korean cuisine (83.1%), and skincare and cosmetics products (75.8%). Their intent to purchase other Korean products is not so high – like in Austria –, only 23.4% of the respondents chose this answer. The most popular, non-Culture related goods they buy are the electronics (62.5%), health and wellness products (32.8%) and home appliances (31.3%).

Contrary to the Czech case, Hallyu in Romania possibly began when the local TV channels started broadcasting K-dramas in 2009 (Marinescu and Balica, 2013). Regarding K-pop, it reached the country after a Romanian music channel played the music video of BoA in 2011. The accessibility of Korean content significantly influenced the strength of the Korean

Wave in Romania (Buja, 2016). Korea Foundation statistics (2023) show that the fandom in Romania consists of around 42260 persons.

Regarding their preference patterns and consumer behaviour, Romanian fans are closer to Czech fandom, rather than Austrian one. Their influencing factor why to like Korean culture is the same, but the cultural field they like show some differences. Their most preferred field is Korean history and traditions (70.4%), and the rate of respondents who like the other two influencing factors (language and cultural differences) are lower than in the other introduced countries. Korean films and K-pop played a more significant role in Romania, as in the other three countries, as these categories received the highest number of respondents here (37.1 and 27.4%).

As other respondents, Romanian fans also like to communicate with each other. However, they tend to choose a different platform as other respondents the like Instagram the most (62.8%), and Facebook is only the second preferred channel (60.0%). Their intent to buy Korean culture related product is a bit lower than in the previously mentioned countries, only 79.2% of respondents buy these goods. Their choice is also similar, the most popular items are Korean cuisine related products (80.7%), K-pop albums and merchandise (61.4%) and beauty products (79.8%). This latter category is the most popular in Romania in the examined countries. Interestingly, only a few (17.6%) of the Romanian respondents purchase other Korean products and services. If they do, they tend to buy the same type of products as in the previously mentioned counties (see on Figure 2).

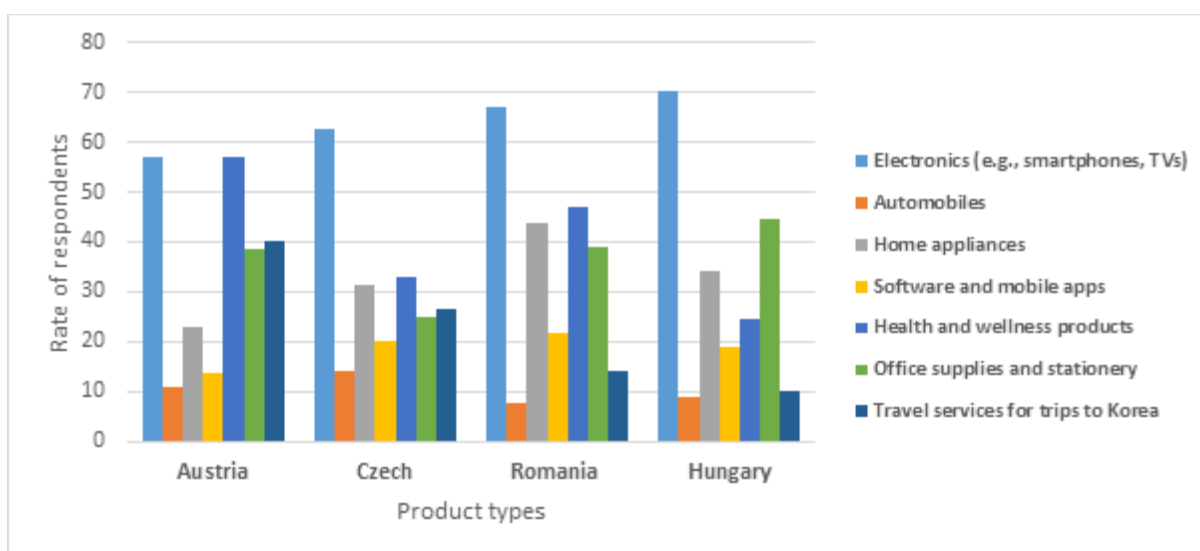


Figure 2 Customer preferences related to Korean non-cultural, other products

Source: own editing (based on own research results)

Similar to Romania, Hallyu first reached Hungary in 2008 when the Hungarian public TV channel M1 broadcast the historical drama *Te Csanggum* (대장금). Followed by seven other K-dramas, Hungarian fans had, and still have an opportunity to watch Korean TV series in public or commercial TV channels in this country. K-pop reached Hungary with the craze for Psy's Gangnam Style song in 2012 (Shim and Gajzágó, 2023). Till then, K-pop has played a significant part in the Hungarian fandom's preference, and several self-organized events are related to this sector – such as cover dance camps, concerts, and festivals. The fandom size in Hungary is the second largest in Central and Eastern Europe, exceeding 140100 members (Korea Foundation statistics, 2023).

Hungarian fans had the similar factors which influenced them to start liking Korean culture. However, when we examine the results of the question related to the reason why they

like Korean culture, an interesting, very specific aspect is also highlighted; 56.2% of Hungarian respondents like the culture because it helps them to escape the reality the everyday struggles. About the fields of interest, Hungarian respondents are not only like K-pop and K-dramas, but the Korean language is also an important for their interest.

The rate of respondents who communicate with other fans is the highest in Hungary, reaching 78.4%. The most preferred channel for Hungarians is the Facebook (76.0% chooses it), the second one is the personal meeting (49.3%), and the third is Instagram (40.2%).

The purchasing intent for Korean culture related products is the lowest in Hungary, only 75% of the respondents buy these, however, it is the opposite for non-culture related items. The number of respondent buying other products is the highest in Hungary (41.1%). The types of products they usually buy are the same as in the other examined counties; they usually purchase food related items and beauty products. According to non-culture related categories, Hungarians usually buy electronics (70.4%) and home appliances (34.1%), but office supplies and stationery (44.6%) is also popular here.

Summary and conclusion

The preliminary results of our research show that the fandom of Korean culture has specific preferences and customer behaviour. In Central and Eastern Europe, the purchasing intent and patters are almost similar, but there are some specific characteristics, which might be important for Korean companies to understand this market. These characteristics are the followings:

In some European counties, the society is closed and sometimes were not opened to Asian cultures. For the fandom, it caused difficulties to be accepted, or even to communicate with each other.

The Korean Wave spread differently in the examined countries. In some of them, no K-dramas were screened in public or commercial TV channels, which hindered, slowed down the acceptance and the popularity of the content. However, without public TV screening, films and dramas are still important for the fans, and most of them were attracted to the Korean culture due to this sector.

In spite of the fact, that Korean language was not the triggering factor of Hallyu, its importance significant. Most of the fans are attracted to it and it plays an important part for catching the interest of the European fandom.

There are significant differences in the purchase patterns of the examined fans. For instance, while Hungarians do not tend to buy Korean culture related products, they are eager to purchase other, non-cultural items. The purchase of K-pop albums ranked on the third place almost in every examined country, but in Romania 10% more fans chose to buy it than in the other countries. While electronic devices are very popular in each countries, only less than 15% of the respondents buys Korean cars. The purchase of cars is the highest in Czechia, maybe due to the existence of Korean car producer company.

It is difficult to measure the intent to buy travel services after COVID-, however, in Austria, 40.0% of the respondents purchase it. On the contrary, in Hungary this ratio is only 10.1%.

The above-mentioned statistics clearly show the differences and the similarities in the Central and Eastern European market for Korean products and services. As more and more companies – some of them established by fans – appear to serve the needs of the fandom, the examination of these markets, the preferences and purchasing behaviour of the consumers should be examined thoroughly. The data gained from this research can help companies in this sector to plan their marketing activity and can even give them information about hindering factors and opportunities which they can avoid or use in their operation.

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