

2025 SUMMARY

MUSIC

INDUSTRY
WHITE PAPER

Part 1. Music Usage Trends in 2024

1. Purpose of the Survey

The purpose of this survey is to provide necessary information to music content users and producers through the compilation of user statistical data, and to serve as a foundational resource for policy development aimed at promoting the music industry.

This survey was conducted using a questionnaire on the overall music usage behavior and perceptions of the population aged 10 to 69 from 2024 to 2025.

The detailed survey content include music usage methods and listening frequency, usage experience of music streaming and download services, the current status of music album (physical/platform) purchases, experiences of attending music performances, usage of music-related online videos, experiences of purchase experience of music goods/merchandise, fandom activity experiences, consumption of music-technology convergence content (AI utilization, virtual idols), perceptions and usage behaviors related to IP expansion, and anticipated changes in music usage.

2. Survey Design

The subjects of this survey are citizens aged 10 to 69 residing nationwide who have used music content at least once every 2 to 3 months in the past year. The sampling frame for the survey was set to 940,000 panel members maintained by the survey agency (Hankook Research). Based on the "Content Usage Rate Survey" conducted in 2024, the population was allocated by region, gender, and age group. Survey invitations were then sent to target

panel members via various methods, including email, SMS, and Alimtalk. The target sample was secured based on whether the recipients had used music content.

The survey cycle is once per year. Unless otherwise specified, the response period for the content usage survey is from May 2024 to May 2025 (the most recent year). Data collection was conducted through an online survey method from May to June 2025 (from May 29, 2025, to June 13, 2025). The collected data underwent editing and cleaning processes according to a professional verification process, and if the reliability of the data was questioned during this process, the response data was supplemented or excluded.

Table 1-1 Online Survey Design for Music User Status Survey

Category	Content
Target Population	All citizens aged 10 to 69
Survey Population	- Users who have used music content in the past year - Users who have used it at least once every 2 to 3 months
Survey Area	Nationwide
Data Collection Methods	Online survey using a structured questionnaire
Sampling Frame	Utilizing the 940,000-member panel maintained by the survey conducting agency
Sample Extraction Method	Proportional allocation by gender/age/region
Sampling Error	± 1.8 percentage points at a 95% confidence level
Valid Sample	3,000 people
Data Collection Period	May–June 2025 (May 29, 2025–June 13, 2025)
Survey Administration	Korea Creative Content Agency
Conducting the Survey	Hankook Research

3. Key Survey Results

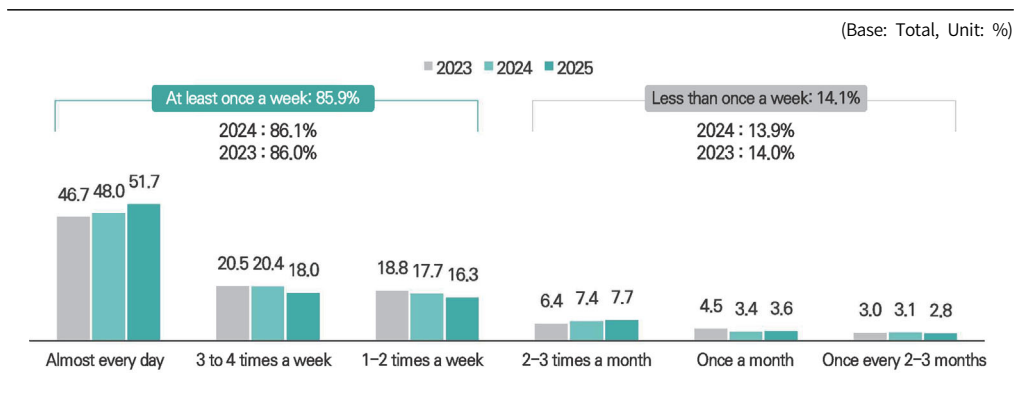
3-1. Music Usage Overview

(1) Music Usage Frequency

85.9% of all respondents used music at least once a week, with a relatively higher proportion of women than men in the "once a week or more" category.

In detail, "almost every day" had the highest percentage at 51.7%, followed by "three to four times a week" (18.0%) and "once or twice a week" (16.3%).

Figure 1-1 Music Usage Frequency



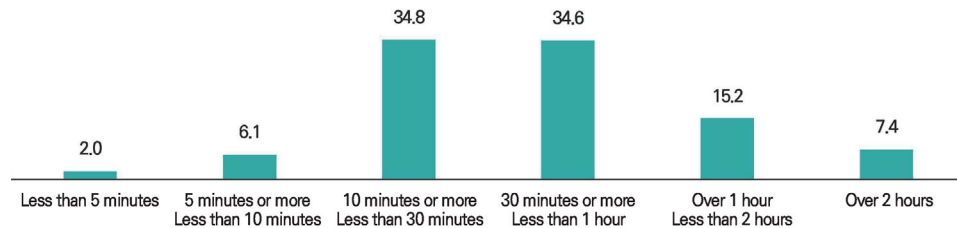
(2) Music Listening Time (per session)

For music listening time per session, "30 minutes or more but less than 1 hour" was 34.8%, and "10 minutes or more but less than 30 minutes" was 34.6%, followed by "1 hour or more but less than 2 hours" (15.2%).

By respondent characteristics, those who listened for "more than 2 hours" tended to be relatively higher among those in their 20s and 30s.

Figure 1-2 Music Listening Time (per session)

(Base: Total, Unit: %)



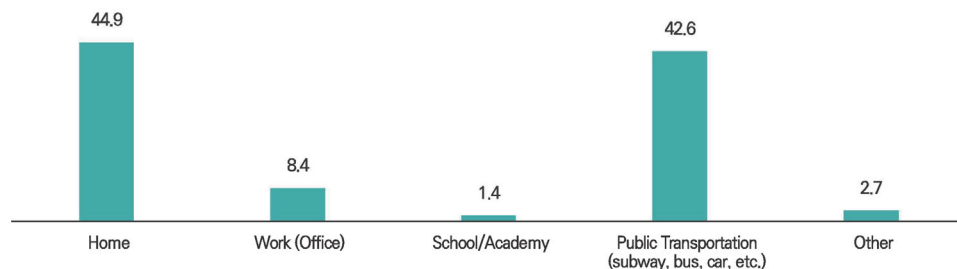
(3) Music Listening Locations

The most common music listening location was "home" at 44.9%, followed by "public transportation (subway, bus, car, etc.)".

By respondent characteristics, "home" was relatively higher among teenagers, while "public transportation" was relatively high among those in their 20s to 40s.

Figure 1-3 Music Listening Locations

(Base: Total, Unit: %)



Note: In the 2025 survey, questions and response options will be limited to locations.

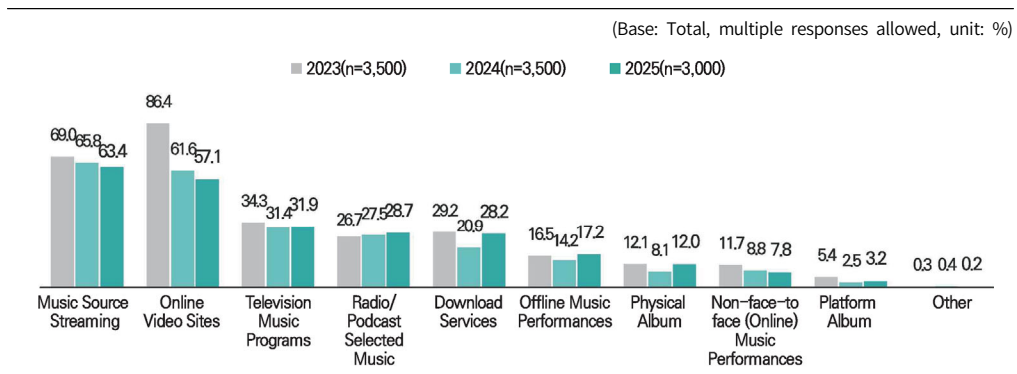
3-2. Music Usage Methods

(1) Music Usage Platforms and Services

Among the platforms and services used for music listening, "music streaming" was the highest at 63.4%, followed by "online video platforms" (57.1%) and "television music programs" (31.9%).

By respondent characteristics, "music streaming" and "online video platforms" were relatively high among those in their teens to 30s, while "television music programs" were relatively higher among women and those in their 60s.

Figure 1-4 Music Usage Platforms and Services



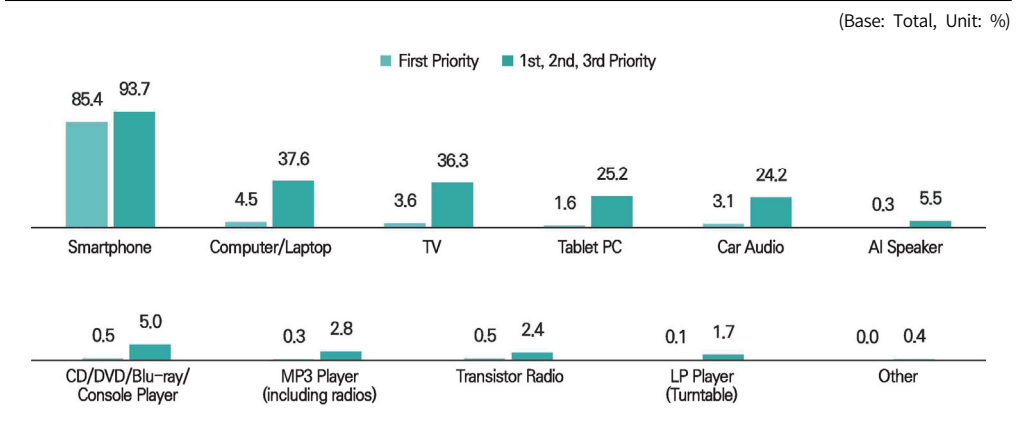
Note: In 2023, the previously included "platform albums" have been separated, therefore, caution is required when making comparisons.

(2) Music Listening Devices

When looking at the devices used to listen to music (first to third choices) "smartphones" accounted for 93.7%, followed by "computers/laptops" (37.6%) and "TV" (36.3%).

By respondent characteristics, "smartphones" were relatively higher among women and those in their teens to 20s, while "computers/laptops" were higher among men in their 20s, and "TV" was higher among women and those aged 50 and above. Meanwhile, the top choice was also "smartphones" with a high percentage of 85.4%.

Figure 1-5 Music Listening Devices

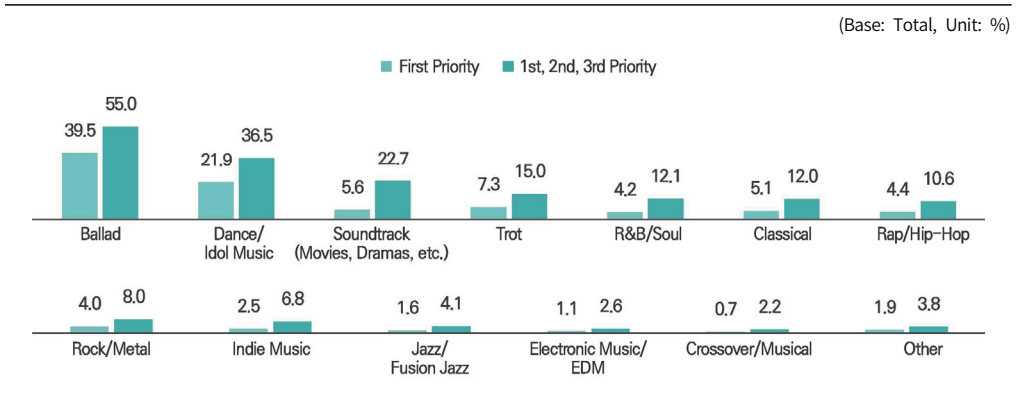


(3) Preferred Music Genres

The preferred music genres (first and second choices) was "Ballad" at 55.0%, followed by "Dance/Idol Music" (36.5%) and "Soundtrack (movies, dramas, etc.)" (22.7%).

By respondent characteristics, "Ballad" was higher among those in their 40s to 60s, "Dance/Idol Music" was higher among women and teenagers, and "Soundtrack (movies, dramas, etc.)" was relatively higher among women. Meanwhile, the top choice was "Ballad" at 39.5%, followed by "Dance/Idol Music" (21.9%) and "Trot" (7.3%).

Figure 1-6 Preferred Music Genres

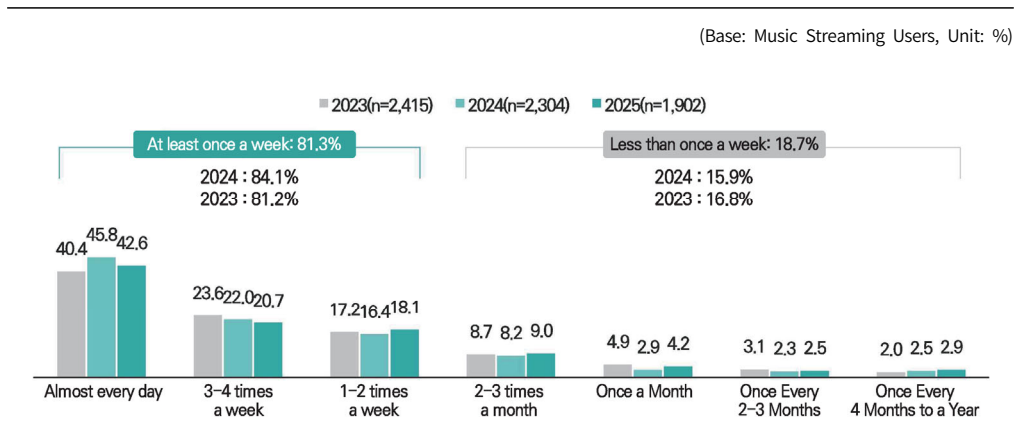


3-3. Music Streaming and Download Service Usage

(1) Music Streaming Service Usage Frequency

Music streaming users (n=1,902) showed that 81.3% use it "at least once a week", and 18.7% use it "less than once a week." In detail, "almost every day" (42.6%), "3-4 times a week" (20.7%), and "1-2 times a week" (18.1%) accounted for the highest shares.

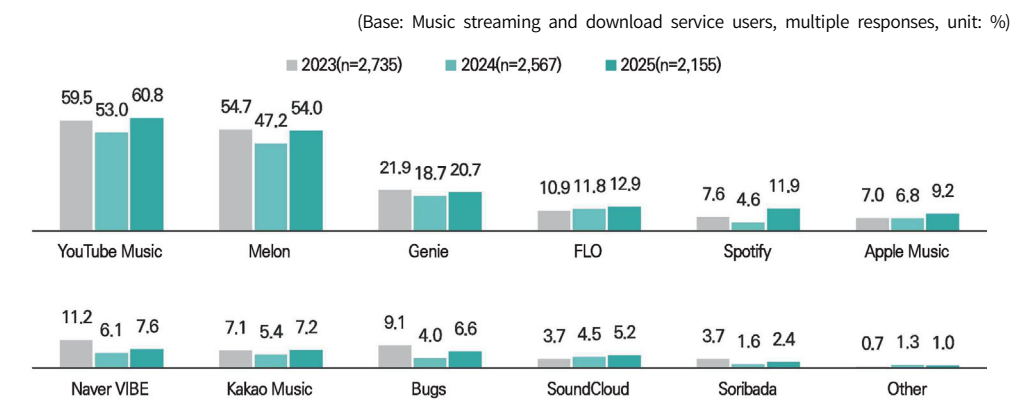
Figure 1-7 Music Streaming Service Usage Frequency



(2) Music Streaming and Download Services

Among music streaming and download service users (n=2,155), "YouTube Music" was the most used at 60.8%, followed by "Melon" at 54.0%.

By respondent characteristics, "YouTube Music" was relatively higher among those in their 20s and 60s, while "Melon" was higher among those aged 50 and above.

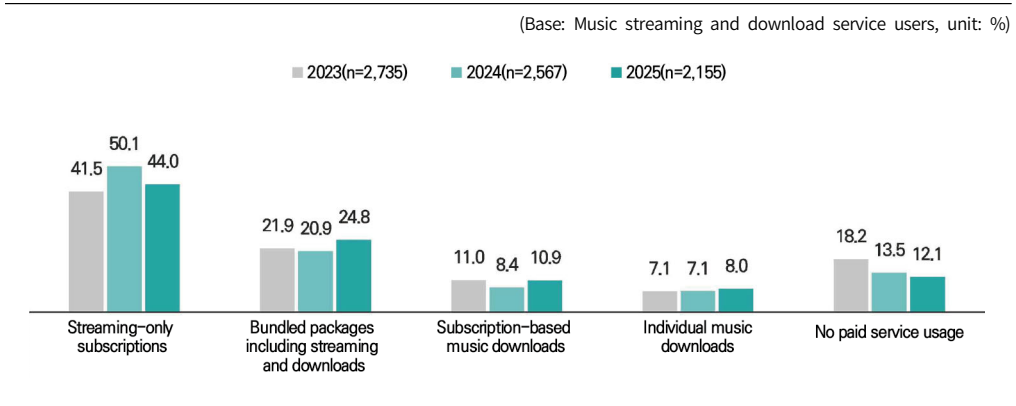
Figure 1-8 Music Streaming and Download Services

Note: In 2025, "YouTube (free)" and "YouTube Music (paid)" were integrated into "YouTube Music."

(3) Paid Usage Methods for Music Streaming and Download Services

Among music streaming and download service users (n=2,155), the most common paid methods were "streaming-only subscriptions" (44.0%) and "bundled packages including streaming and downloads" (24.8%).

Looking at the characteristics of respondents, "streaming-only subscriptions" was relatively higher among women and those aged 30 and under.

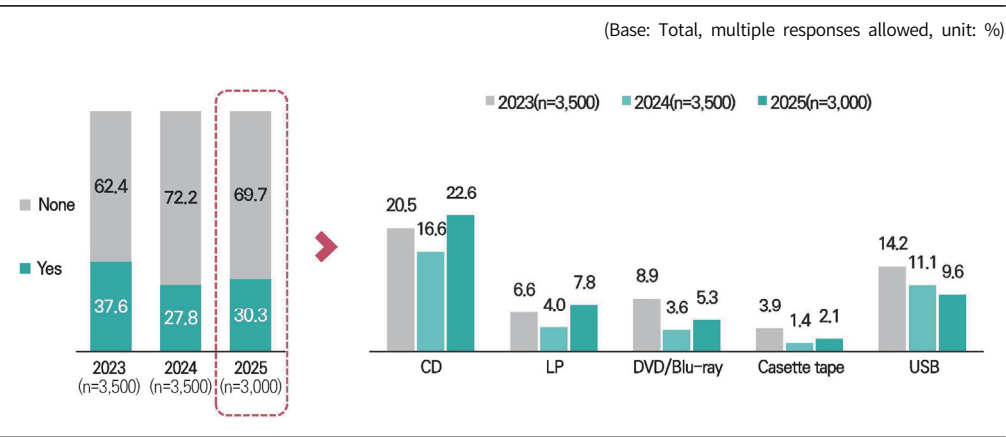
Figure 1-9 Paid Usage Methods for music streaming and download services

3-4. Status of physical and platform album purchases

(1) Physical Album Purchase Rate

30.3% of all respondents reported purchasing physical albums, with a particularly high purchase rate among those in their 20s. The types of physical albums purchased were predominantly "CD" (22.6%), "USB" (9.6%), and "LP" (7.8%).

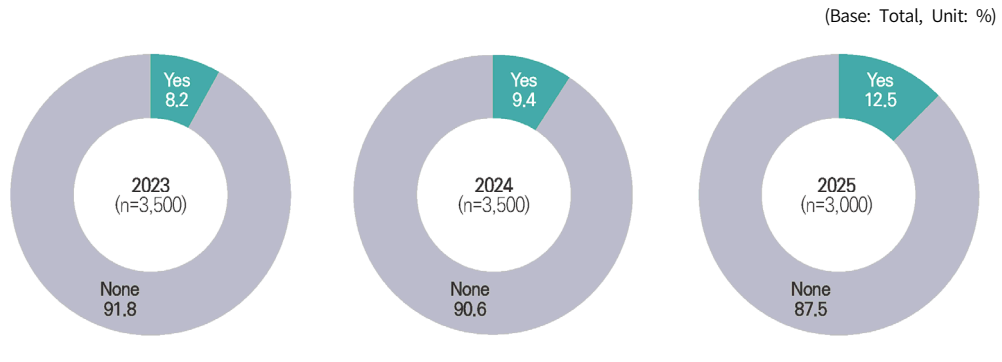
Figure 1-10 Physical Album Purchase Rate



Note: In 2025, the categories "DVD" and "Blu-ray/4K Blu-ray" were integrated into "DVD/Blu-ray."

(2) Platform Album Purchase Experience

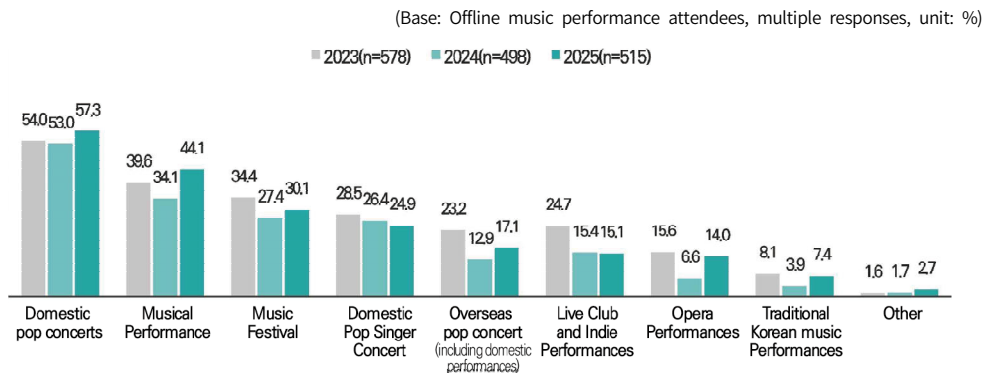
12.5% of all respondents reported purchasing platform albums, with a relatively high purchase rate among those in their 20s and 30s.

Figure 1-11 Platform Album Purchase Experience

3-5. Music Performance Attendance

(1) Offline Music Performance Genres Attended

Among offline music performance attendees (n=515), the genre with the highest attendance was "domestic pop concerts" at 57.3%, followed by "musical performances" (44.1%), "music festivals" (30.1%), and "classical performances" (24.9%).

Figure 1-12 Offline Music Performance Genres Attended

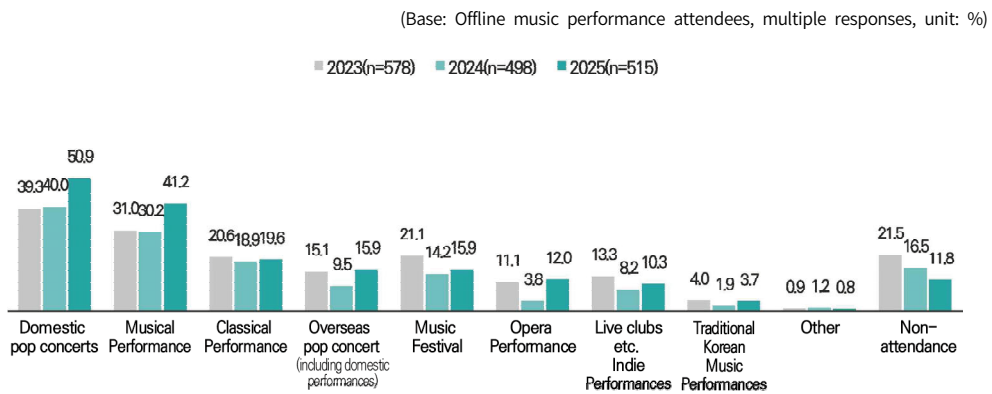
Note: In 2025, "Domestic popular music concert" was revised to "Domestic pop singer concert," and "Overseas music concert (including domestic performances)" was revised to "Overseas pop singer concert (including domestic performances)."

(2) Paid Offline Music Performance Genres Attended

Among offline music performance attendees (n=515), the most frequently attended paid performance genre was "domestic pop concerts" at 50.9%, followed by "musical performances" (41.2%) and "classical performances" (19.6%).

Looking at the characteristics of the respondents, "domestic pop concerts" and "musical performances" were relatively higher among women than men.

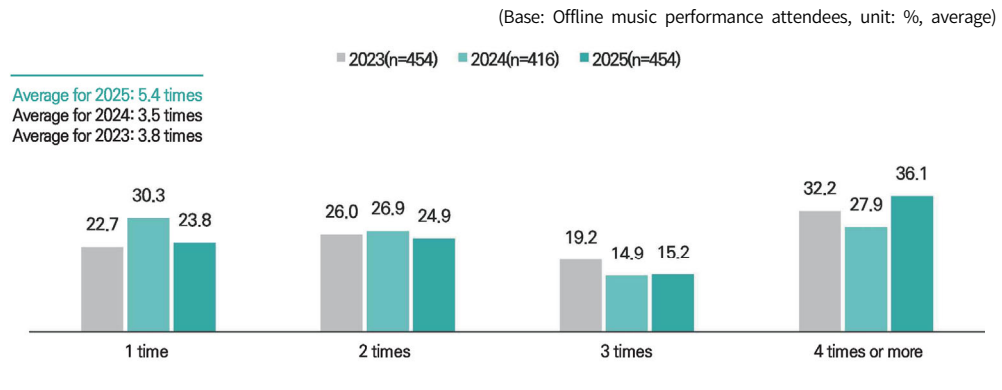
Figure 1-13 Paid Offline Music Performance Genres Attended



Note: In 2025, "Domestic popular music concert" was revised to "Domestic pop singer concert," and "Overseas music concert (including domestic performances)" was revised to "Overseas pop singer concert (including domestic performances)."

(3) Frequency of Paid Attendance at Offline Music Performances

The average number of paid attendances for offline music performance attendees (n=454) was 5.4 times. In details, "4 times or more" (36.1%), "2 times" (24.9%), "1 time" (23.8%), and "3 times" (15.2%) were reported, in that order.

Figure 1-14 Number of Paid Attendances at Offline Music Performances

3-6. Music-Related Video Platform Usage

(1) Music-Related Online Video Usage Rate

It was found that 90.2% of all respondents had using music-related online videos, with particularly high usage rates among teenagers compared to other age groups.

Figure 1-15 Music-Related Online Video Usage Rate

Note: In the 2025 survey, items separated into "official music videos" and "online video content other than official music videos" will be integrated as "music-related online videos", presenting only the results for 2025.

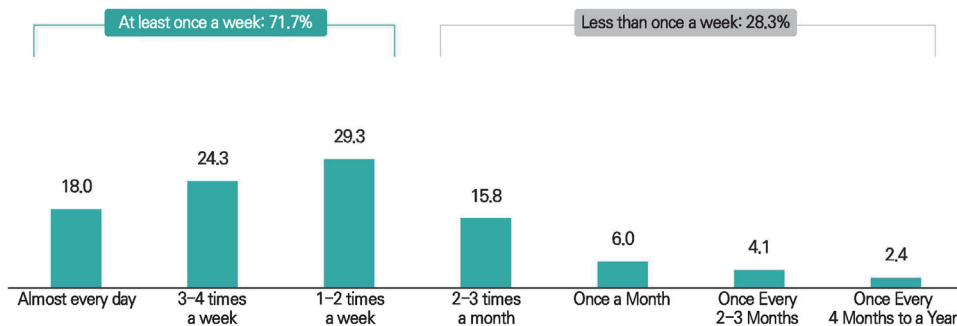
(2) Music-Related Online Video Usage Frequency

71.7% of users of music-related online videos (n=2,707) used them "at least once a week", with a particularly high proportion among those in their teens and 20s.

Specifically, "1-2 times a week" (29.3%) was the highest, followed by "3-4 times a week" at 24.3%.

Figure 1-16 Music-Related Online Video Usage Frequency

(Base: Users of music-related online videos, unit: %)



Note: In the 2025 survey, items separated into "official music videos" and "online video content other than official music videos" will be integrated as "music-related online videos", presenting only the results for 2025.

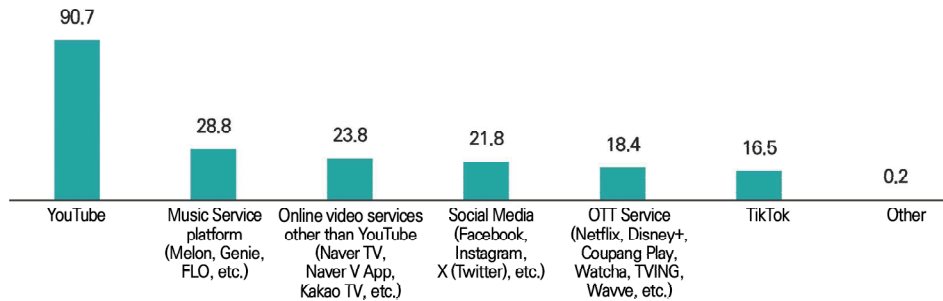
(3) Music-Related Online Video Platforms and Services

Among users of music-related online videos (n=2,707), "YouTube" was the most used platform at 90.7%.

Next was "music service platforms" (28.8%), "online video services other than YouTube" (23.8%), and "social media platforms" (21.8%).

Figure 1-17 Music-Related Online Video Platforms and Services

(Base: Users of music-related online videos, multiple responses, unit: %)



Note 1. In 2025, the categories "official music videos" and "online video content other than official music videos" were integrated into "music-related online videos," and only 2025 results are presented.

2. In 2025, the following items were added: "OTT services (Netflix, Disney+, Coupang Play, Watcha, Tving, Wavve, etc.)," and "social media platforms (Facebook, Instagram, X [formerly Twitter], etc.)."

(4) Types of Music-Related Online Video Content Used

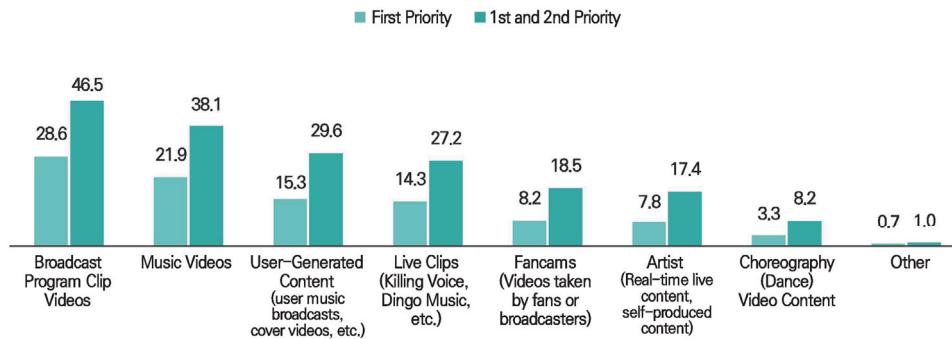
Among music-related online video users (n=2,707), "broadcast program clip videos" (46.5%), "music videos" (38.1%), "user-generated content" (29.6%), and "live clips" (27.2%) were the most popular.

By respondent characteristics, "broadcast program clip videos" were relatively higher among women and those aged 50-60, while "user-generated content" was relatively higher among men and those in their 60s.

Meanwhile, the top choice was also "broadcast program clip videos," accounting for 28.6%, followed by "music videos" (at a lower percentage).

Figure 1-18 Types of Music-Related Online Video Content Used

(Base: Users of music-related online videos, unit: %)



Note 1. In 2025, the categories "official music videos" and "online video content other than official music videos" were integrated into "music-related online videos," and only 2025 results are presented.

2. In 2025, "Live Club" was revised to "Live Club (Killing Voice, Dingo Music, etc.)."

3. In 2025, "Music Video" was added as a category.

3-7. Other Music-Related Usage

(1) Music Merchandise Purchase Rate and Purchased Items

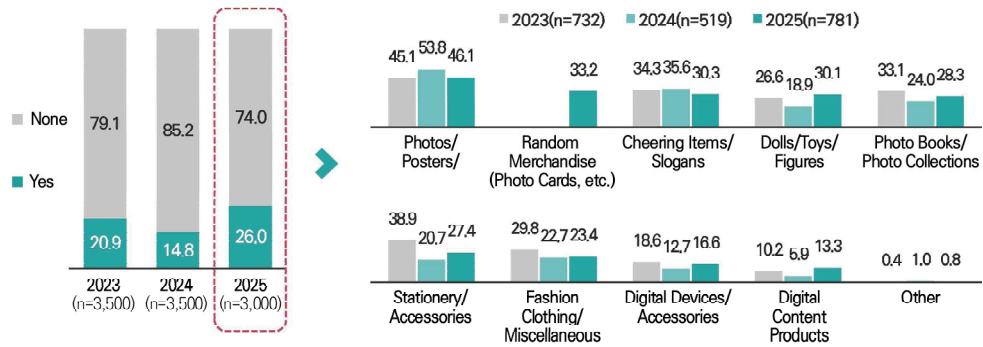
26.0% of all respondents reported purchasing music merchandise, with particularly high purchase rates among women and teenagers.

Among music goods/MD purchasers (n=781), the most purchased item was "Photos/Posters" at 46.1%, followed by "Random" (33.2%), "Cheering Items/Slogans" (30.3%), "Dolls/Toys/Figures" (30.1%), and "Photo Books/Collections" (28.3%).

By respondent characteristics, "Photos/Posters" and "Random Merchandise" were relatively high among women and those in their teens and 20s, while "Cheering Items/Slogans" were relatively high among women and those in their 30s and 60s, and "Dolls/Toys/Figures" were relatively higher among those in their 20s.

Figure 1-19 Music Merchandise Purchase Experience and Purchased Items

(Base: Total, Music Goods/MD Purchasers (Multiple Responses Allowed), Unit: %)



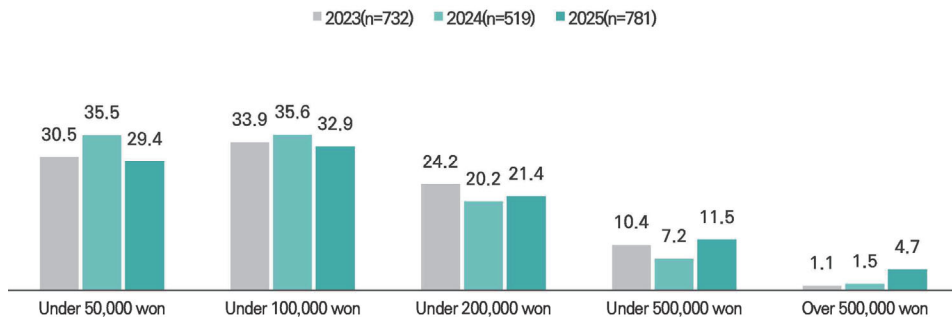
Note: In 2025, "random merchandise (photocards, etc.)" was added.

(2) Total Purchase Cost of Music Merchandise

The total annual purchase cost among music merchandise (n=781) was highest in the "less than 50,000 won" at 32.9%, followed by "less than 50,000 won" (29.4%) and "less than 100,000 won" (21.4%).

Figure 1-20 Total Purchase Cost of Music Merchandise

(Base: Music Merchandise Buyers, Unit: %)



Part 2. Music Industry Support Overview

In 2024, the domestic popular music performance market recorded ticket sales revenue of approximately 757 billion won, showing a 31.3% increase compared to the previous year, indicating a rise in face-to-face performances. This accounted for 52% of total ticket sales in the performance market, and it can be said that it continues to show the highest growth among performance sectors (classical, musicals, theater, etc.) in all performance results and indicators, including the number of performances and sessions.

According to the International Federation of the Phonographic Industry (IFPI), global recorded music industry revenue was 29.6 billion dollars (approximately 42 trillion won). Specifically, streaming revenue accounted for 69% of total revenue at 20.4 billion dollars (approximately 29 trillion won). Subscription streaming revenue increased by 9.5% compared to the previous year, and the number of paid subscription accounts increased by 10.6% compared to the previous year, reaching 752 million worldwide, indicating the continued strength of streaming services.

The Korea Creative Content Agency has continuously developed existing projects, including support for online and offline music performances, music content production and performances using technology, and overseas expansion, enabling musicians across various genres to achieve significant outcomes both domestically and internationally.

1. Strengthening Production Capabilities

1-1. MuseOn

The promising musician support project MuseOn, which has been promoted since 2019, focuses on discovering and nurturing new musicians with musicality and potential. In 2024, an open call was conducted for "Muse On 2024," and 10 teams were selected from a total of 380 applicants through document and live evaluations.

The selected musicians received support for ▲ album/music release (up to 20 million won per team) ▲ planning and hosting the concert "Muse On Live Week (MuseOn Day)" ▲ appearances in web entertainment content ▲ participation in music festivals, music broadcasts, and radio appearances ▲ production of live clip and one interview video ▲ profile photo shoots.

Through diverse support ranging from album production and creative-based activities to various promotional and marketing support, the participating musicians of "MuseOn 2024" increased their recognition and enhanced their capabilities. As a result, the total number of followers on social media for MuseOn musicians increased by 48.7% compared to before the project. Musician "3san" showed the highest growth rate, with a 244% increase in Instagram followers. The group "Touched" sold out all seats at Olympic Hall within one minute after ticket sales opened of ticket sales opening their solo concert "HIGHLIGHT III".

Figure 1-21 MuseOn 2024 Event Highlights



1-2. Support for Hosting Space-Planning Performances

The "Support for Hosting Space-Planning Performances", which has been promoted since 2020, aims to revitalize the popular music performance industry and expand diversity by supporting hosting of creatively planned performances. In 2024, the project provided for large performances up to 70 million won and medium-sized performances up to 40 million won. A total of 10 projects in various forms of performances, from large performances accommodating over 1,000 people to themed performances utilizing abandoned factories and multicultural spaces.

Figure 1-22

2024 Space-Planning Performance Hosting Support Event Highlights



1-3. Hybrid Online and Offline Performance Support

The online performance production support, established in 2021, was renamed in 2024 as a hybrid online and offline performance project to reflect the industry structure in which where offline and online performances coexist. While the existing online performances focused technologies such as artificial intelligence (AI) and extended reality (XR), in 2024, support focused on hybrid formats combining online and offline performances with technological elements. By investing up to 400 million won per project, the production of music content was supported for a total of 6 projects, including performances combining popular music and media art, and virtual artist performances utilizing motion capture technology.

Figure 1-23

2024 Hybrid Online and Offline Performance Hosting Support Project



1-4. ICT-Music (Music Tech) Production Support

The ICT-Music (Music Tech) production support project, which started in 2020, supports the production of new convergence content combining music with various information and communication technologies (ICT). In 2024, to provide focused support in stages, the existing single project support format was restructured into two fields: planning and production support, and advancement and marketing support. In the planning and production support field, up to 200 million won was provided, while up to 300 million won was provided for advancement and marketing support. A total of 10 projects were selected, with 5 projects in each field. Additionally, for the 5 projects selected in the advancement and marketing field, support was provided to encourage participation in the "2024 Music & Entertainment Fair (MU:CON)" and the North American music tech networking conference "Music Tectonics", promoting the expansion of the global music tech business.

1-5. New IP Development and Utilization Support Based on Musician Activities

The support project for the development and utilization of new IP based on musician activities in 2024, supports the planning of new IP (music, albums, MD, etc.) and related performances for musicians. It was established to comprehensively support all creative activities of artists, reflecting the characteristics of the music market where music, albums, merchandise, videos, promotions, and performances are organically linked. Considering the target audience and planning scale, the top 8 projects were supported with up to 200 million won based on evaluation rankings. The next 5 projects were supported with up to 100 million won.

1-6. Hybrid Music Video Production Support

The hybrid music video production support project, newly established in 2023, is an indirect support program promoted under the name "Everything We Do Is Music", which solicited applications from domestic popular music musicians, agencies, and performance production companies planning concerts, showcases, fan meetings, and festivals in 2024, and selected a total of 10 teams from 51 applicants through a first written evaluation and a second face-to-face evaluation.

Depending on the nature of the selected musicians' performances, creative stage implementation using advanced technologies such as motion capture, XR, AR, holograms, AI real-time VFX was supported. It also provided optimal production environments including consulting and filming studio support necessary for technology utilization.

In line with the characteristics of this project, titled "Support for Content Production Centered on Musicians", it was designed to allow artists to actively participate in all processes from planning to production and on-site operation. As a result ▲ exposure to a total of 210,000 domestic and international audiences ▲ a total of 53 offline performance screenings ▲ a total of 1.73 million views combined on the musicians' YouTube channels and the KOCCA MUSIC channel ▲ total sales of 35.6 billion won for 10 performances were recorded.

1-7. Operation of "KOCCA MUSIC Studio" and Hosting of the Planned Performance "ON THE K"

The "KOCCA Music Studio", an online space specialized in popular music production that has been operating since December 2021, is promoting its own planned performance "ON THE K", which entered Season 4 in 2024. The planned performance "ON THE K", conducted under the concept of "coexistence", was the first live filming with an audience since its opening. A total of over 340 people attending the four on-site performances, and online views recorded a total of 285,146.

In addition, in 2024, "Free Rental Program (Open Studio)" was introduced,

supporting the production of 43 different types of content for a total of 16 musicians. In each production process, equipment and facilities for content production capable of applying new and convergence technologies were provided, along with support for online performance operation personnel.

2. Distribution Support

2-1. Hosting of the Music & Entertainment Fair (MU:CON)

The "Music & Entertainment Fair (MU:CON)", or MU:CON, is the largest global music market in Korea, supporting network building in the domestic and international music industry and the overseas expansion of domestic musicians. Following 2023, MU:CON has expanded its participation targets to domestic and international music and entertainment industry-related companies and organizations, strengthening its global business scope. It also changed its Korean name from the Seoul International Music Fair to "Music & Entertainment Fair".

The 2024 MU:CON was held over four days from September 24 to 27. The business program was held at the Grand Hyatt in Hannam-dong from September 24 to 26, while the showcase program was operated separately in the music mecca of Hongdae from September 26 to 27. This enhanced business focus and participant convenience, as well as accessibility for general audiences.

The business program included business matching, networking, open sessions and workshops, and promotional exhibitions for participating musicians in music tech and showcase programs. In particular, the newly introduced "Global Partners Matching" program within business matching resulted in a total of 1,098 business consultations. Open sessions and workshops were conducted, focusing on practical workshops reflecting current trends in the global music and entertainment industry. A new "Deep Dive" program was established to invite experts from overseas regions, providing participants with in-depth information on entering local markets. Additionally, to allow industry stakeholders who could not attend in person

to view the sessions, the open sessions and workshop programs were subsequently uploaded to the official YouTube channel "KOCCA MUSIC."

The showcase program featured a total of 53 teams, including 35 musicians selected through an open call, 5 outstanding musicians linked to local music creation centers, 3 overseas musicians, 4 musicians recommended by music and entertainment-related associations, and 6 guest musicians, who performed in person over two days. A total of 6,302 people attended this program, and online, it was live-streamed through the "KOCCA MUSIC" YouTube channel, with videos for each musician were uploaded as live clips.

Figure 1-24

Key highlights of the 2024 Music & Entertainment Fair (MU:CON)



2-2. Overseas Tour and Festival Participation Support

In response to the trend of revitalizing face-to-face performances both domestically and internationally, support projects for overseas tours and overseas festival participation were implemented to enhance the global presence and recognition of domestic musicians. The overseas tour support project supported 5 tasks, generating over \$1.3 million in overseas sales, while the 10 projects participating in the overseas festival participation support project attracted a total of 190,000 spectators across 18 performances. Additionally, through more than 50 on-site business consultations, additional proposals for participation in overseas festivals were secured, accelerating global expansion.

2-3. Global Promotion Support for Outstanding Musicians

Since 2022, Korea Creative Content Agency has been operating a project to select outstanding musicians from major programs to strengthen linkage between popular music support projects and provide follow-up support. These selected musicians received global promotion support. The target projects are ▲MU:CON ▲Korea Spotlight, and based on the evaluation of the results reports from participating musicians in these projects, 12 teams with excellent evaluations were selected and provided with global promotion support.

3. Conclusion

In 2024, face-to-face popular music performances recorded rapid growth both domestically and internationally, and this growth is expected to continue into 2025. Moreover, with the increase in music streaming subscribers, demand for and consumption of diverse music tailored to consumer characteristics, such as playlists, are expanding.

Accordingly, the Korea Creative Content Agency plans to expand the production and performance support of music content that can be consumed in various genres. For overseas expansion, it will introduce various forms of customized support measures, such as participation in local festivals or hosting showcases directly, according to the characteristics of each country, to promote the diversity and development of Korean popular music.