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# **SOUTH KOREA VIDEO GAMING INDUSTRY REPORT**

Prepared by NZTE Seoul, July 2025

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# Executive Summary

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## Objectives

- Identify and communicate key opportunities for Kiwi game developers in the South Korean video gaming market.
- Help New Zealand exporters understand how to localise, market, and succeed in Korea's dynamic gaming ecosystem.

## Key Findings

- South Korea is the 4th largest gaming market globally.
- Mobile is the dominant platform, but PC and console still retain strong, loyal user bases.
- Gamers seek immersive narratives, stylised visuals, and competitive systems, aligning with Kiwi strengths in indie and storytelling games.
- Discovery is driven by YouTube, social media, online communities, and streamer culture—channels where small developers can win attention.
- Successful NZ games like Path of Exile 2 and Dredge show that culturally resonant localisation and publisher partnerships are key.

# South Korea Video Gaming Industry Overview

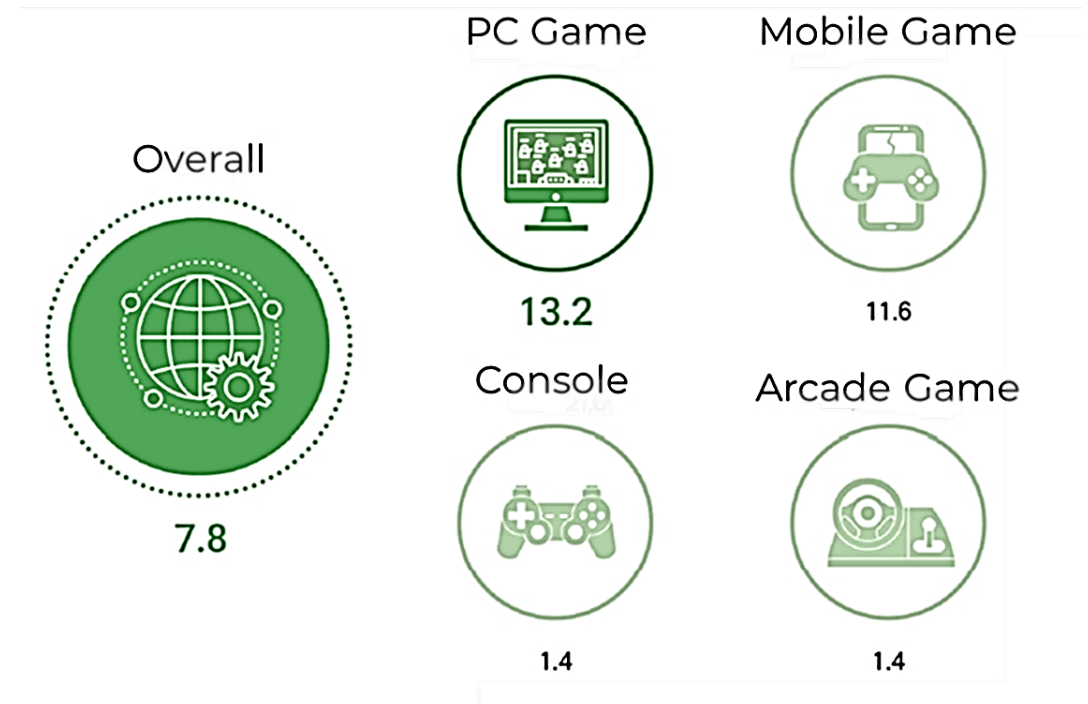


# South Korea 4<sup>th</sup> Largest Market and Share in the World

Top countries by video game revenues

	Market	Revenue (USD)	Players
1.	 China	45.8B	744.1M
2.	 United States	45.0B	209.8M
3.	 Japan	20.0B	77.1M
4.	 South Korea	7.9B	34.1M
5.	 Germany	6.6B	49.5M
6.	 United Kingdom	5.5B	38.5M
7.	 France	4.1B	38.8M
8.	 Canada	3.4B	22.0M
9.	 Italy	3.0B	36.1M
10.	 Brazil	2.6B	102.6M

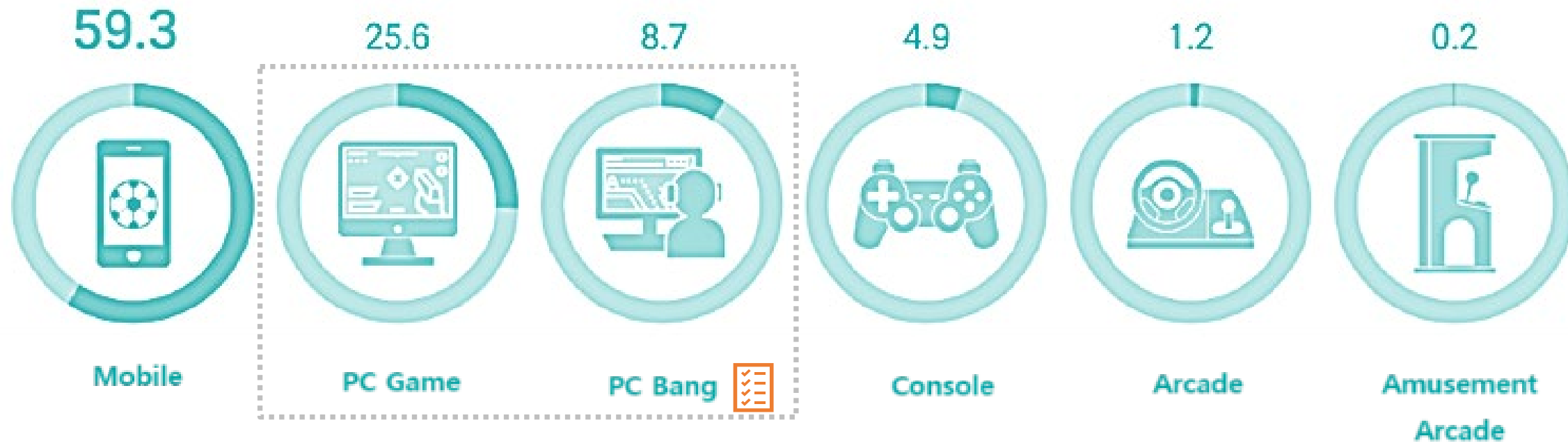
Korea's Share (%) in the World in 2023




<https://newzoo.com/resources/rankings/top-10-countries-by-game-revenues>

Source(s): Korea Creative Content Agency

# Domestic Gaming Market Composition in 2023



Unit: %  
Source: Korea Creative Content Agency

 PC Bangs are gaming cafes/lounges. In Korea, these are dedicated solely for gaming, and are equipped with faster Internet speeds, upgraded specs, mechanical keyboards and headsets for customers..

# Domestic Gaming Market Growth (2020-2023)

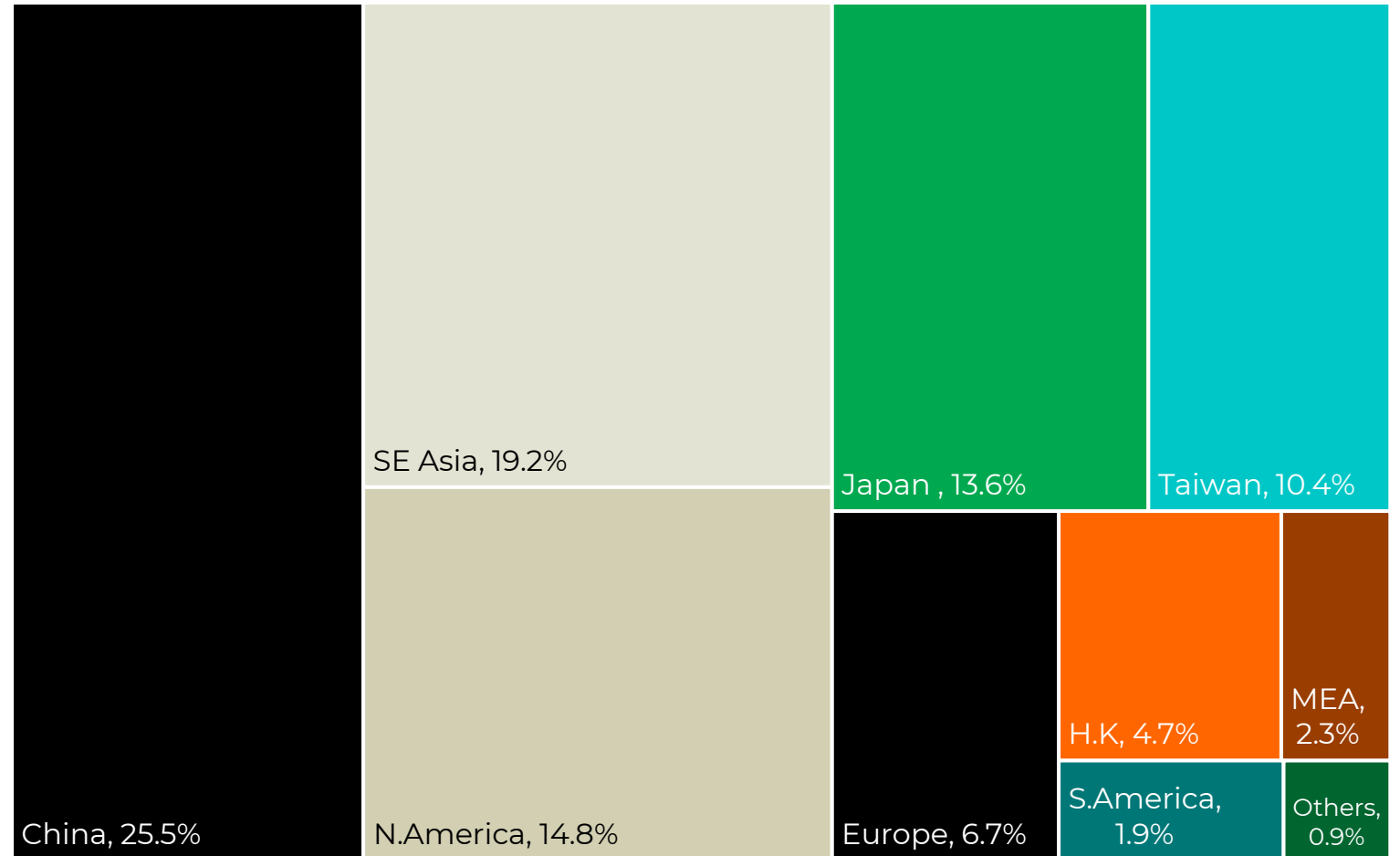
(Unit: KRW 100 Million, %)

	2020		2021		2022		2023	
	Revenue	Growth	Revenue	Growth	Revenue	Growth	Revenue	Growth
<b>Production and distribution</b>								
PC Game	49,012	2.0	56,373	15.0	58,053	3.0	58,888	1.4
Mobile	108,311	39.9	121,483	12.2	130,720	7.6	136,118	4.1
Console	10,925	57.3	10,520	-3.7	11,196	6.4	11,291	0.8
Arcade	2,272	1.6	2,733	20.3	2,976	8.9	2,852	-4.2
<b>Game rooms</b>								
PC Bang	17,970	-11.9	18,408	2.4	18,766	1.9	19,994	6.5
Amusement Arcade	365	-48.1	396	8.6	438	10.4	500	14.2
<b>Total</b>	<b>188,855</b>	<b>21.3</b>	<b>209,913</b>	<b>11.2</b>	<b>222,149</b>	<b>5.8</b>	<b>229,642</b>	<b>3.4</b>

# Korea's Game Exports and Destinations

(Unit: USD Million, %)

Year	Exports	Growth
2018	6,411	8.2
2019	6,657	3.8
2020	8,193	23.1
2021	8,672	5.8
2022	8,981	3.6
2023	8,394	-6.5

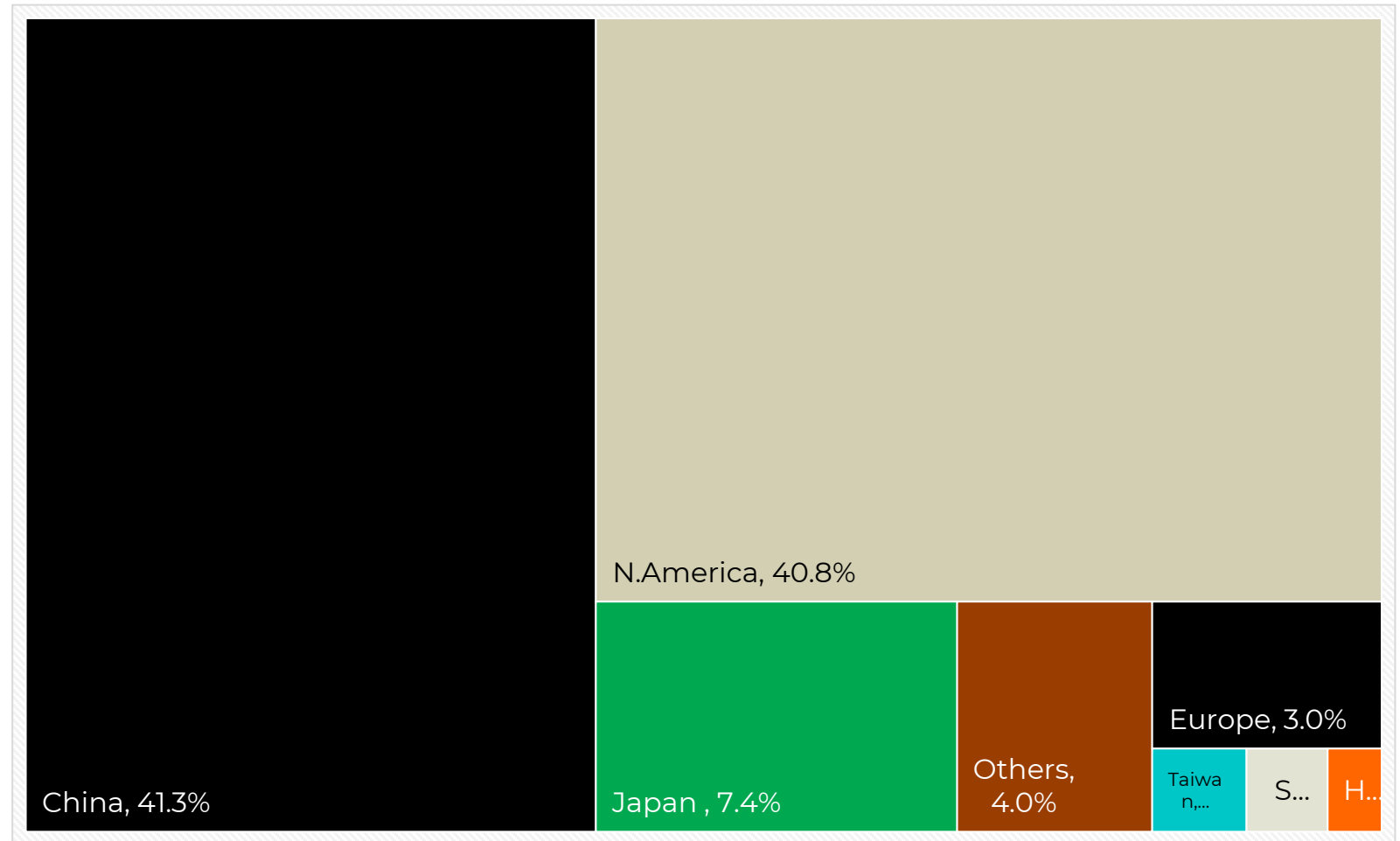


Source: Korea Creative Content Agency

# Korea's Game Imports and Sources

(Unit: USD Million, %)

Year	Imports	Growth
2018	305	16.3
2019	298	-2.5
2020	270	-9.2
2021	312	15.3
2022	260	-16.7
2023	253	-2.5



Source: Korea Creative Content Agency

# Key Trends in the Korean Gaming Market

- Growth has been slowing down since 2021. The market will continue to grow though.
- Full scale promotion of IP's for One-Source Multi-Use: Cross-platform collaboration, overseas market entrance and communication with users.
- Genre diversification from Massively Multiplayer Online Role-Playing Game (MMORPG) to casual and idle games.
- Decline in the game usage amid increased outdoor activities.
- As the demand for more transparent and better customer service increased, game companies have started to adopt communications and operational management as core strategies.
- Embracing cultural diversity by Korean companies and more localisations by western gaming companies.

Source: Korea Creative Content Agency

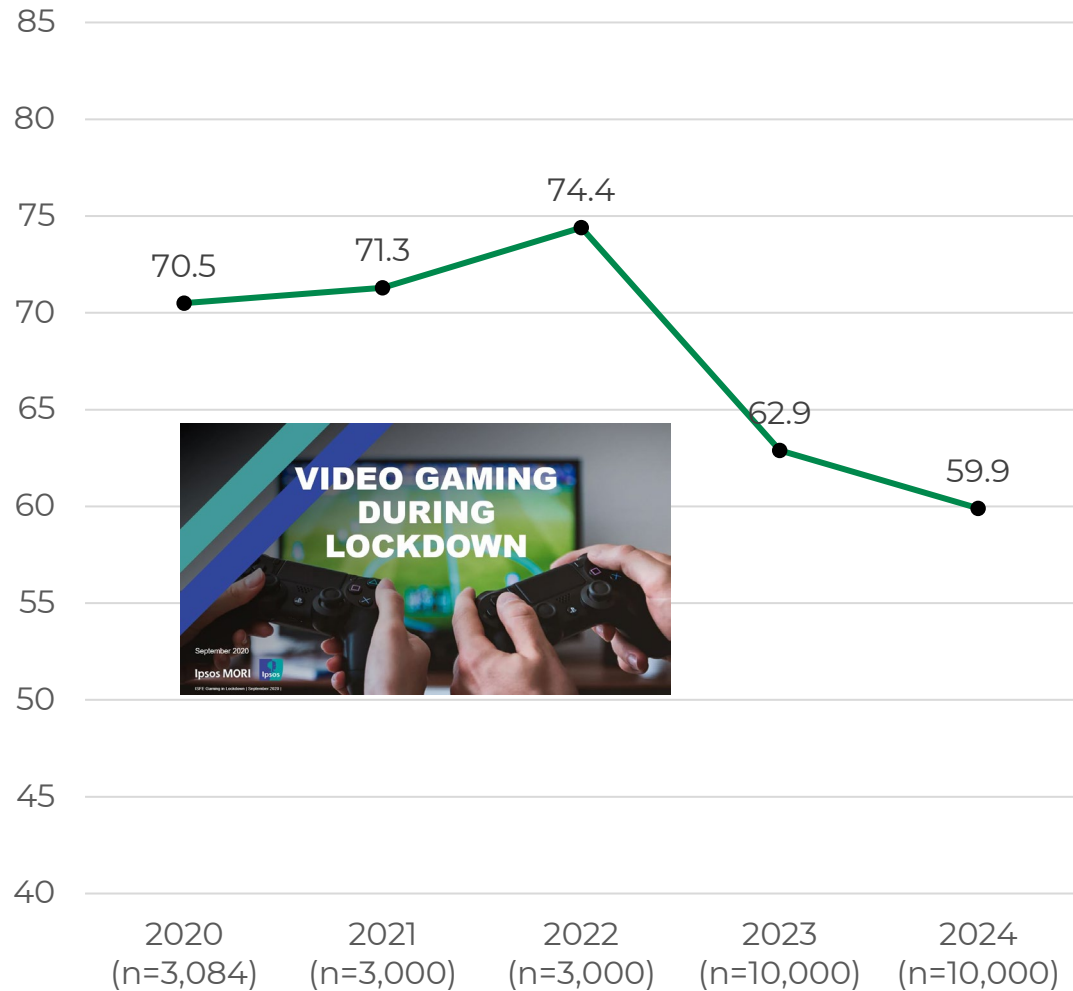
# Insights into South Korean Gamers



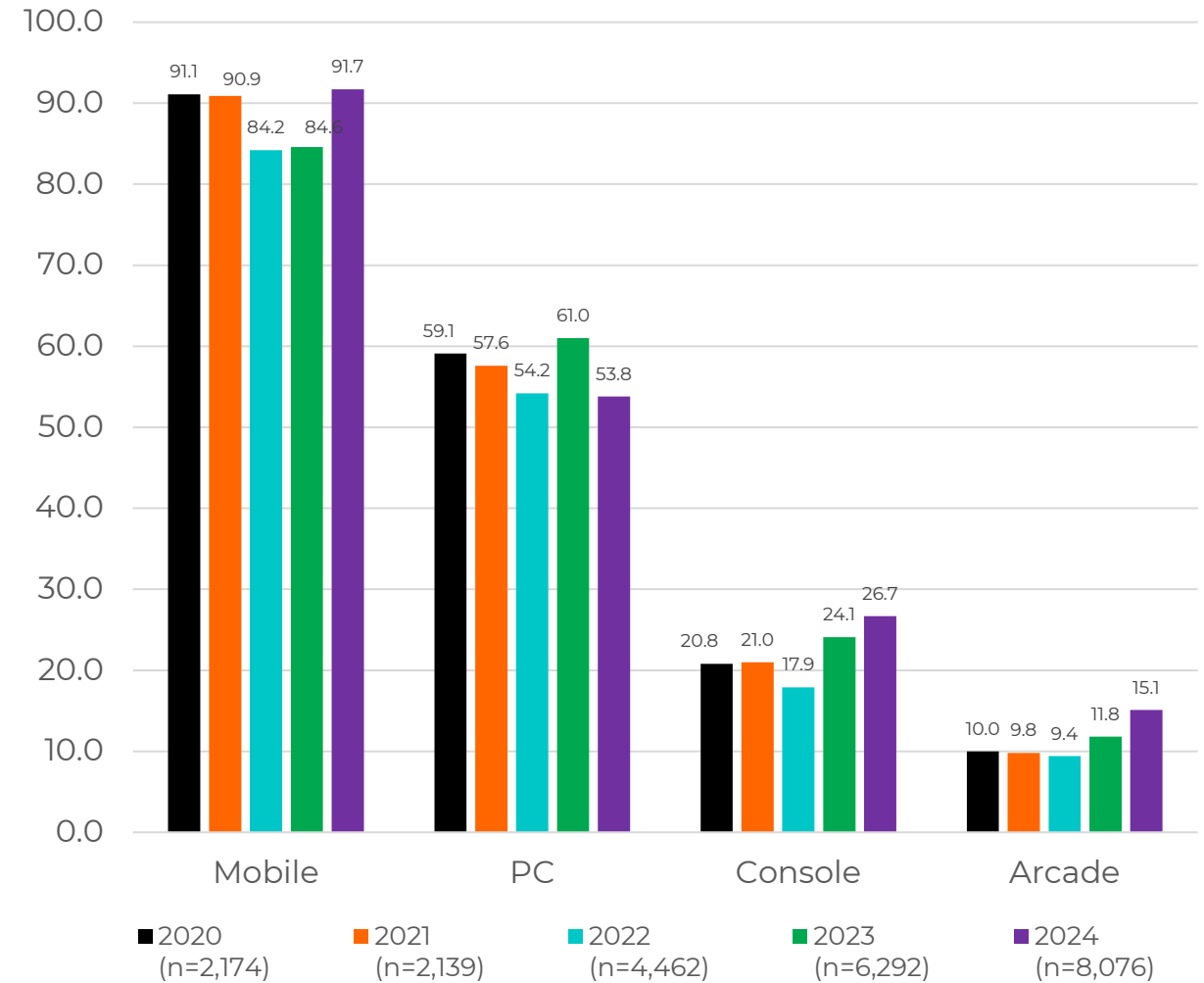
# Korean Video Gamers and Platforms

## Game Usage Rate Survey (%)

(2020-2023: 10-64 years old, 2024: 10-69 years old)



## Platform Used by Gamers (%)



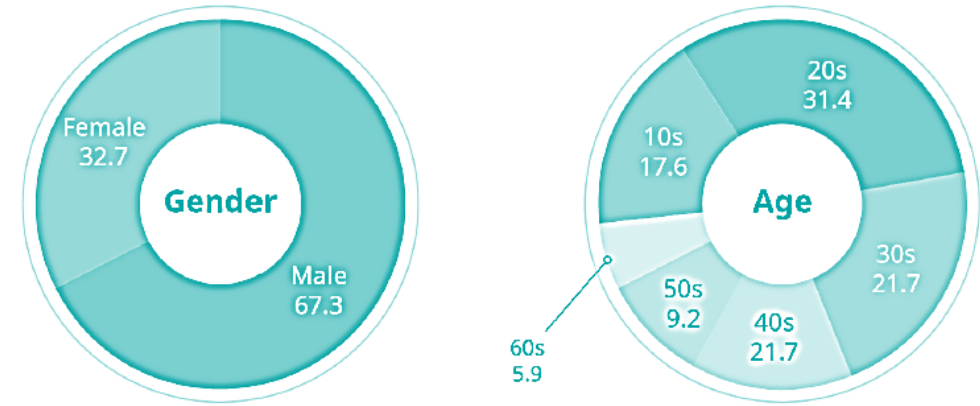
Source: Korea Creative Content Agency

# Korean Gamers Gender and Age Group by Platform

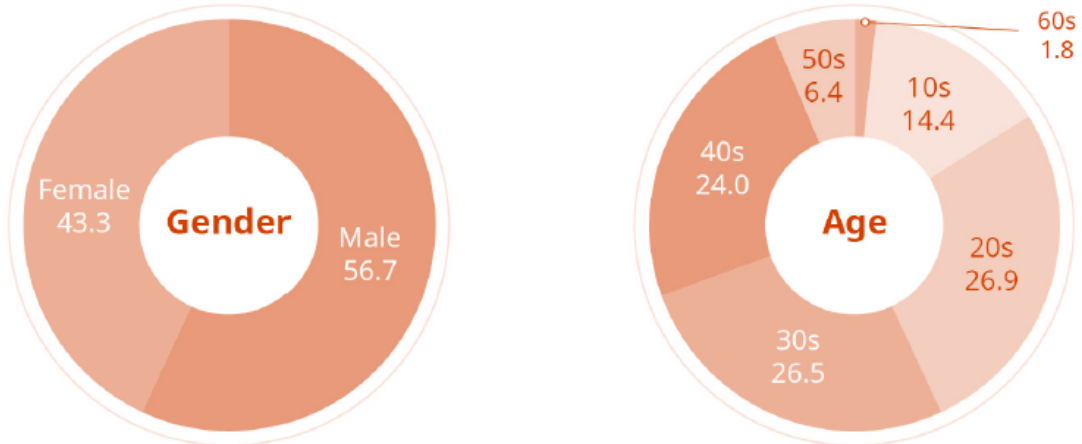
Gender/Age Distribution among Mobile Game Users [Mobile Game Users (n=7,402)]



Gender/Age Distribution among PC Game Usage [PC Game Users (n=4,347)]



Gender/Age Distribution among Console Game Users [Console Game Users (n=2,157)]

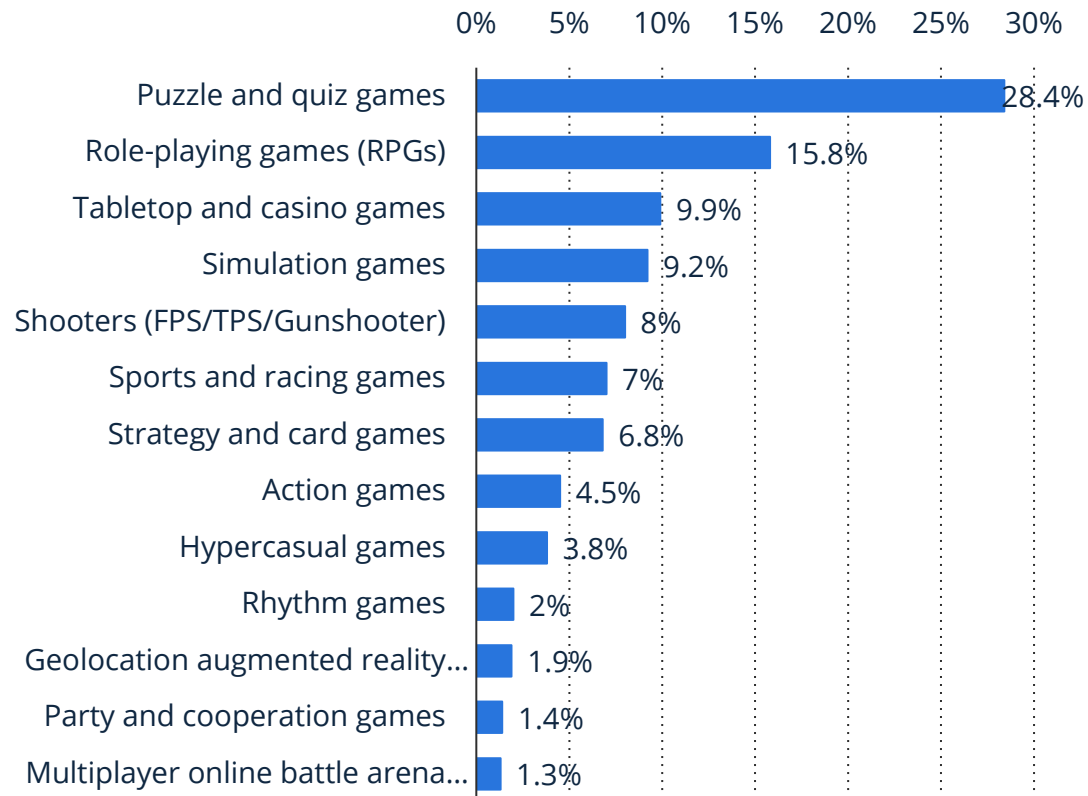


Gender/Age Distribution among Arcade Game Users [Arcade Game Users (n=1,220)]

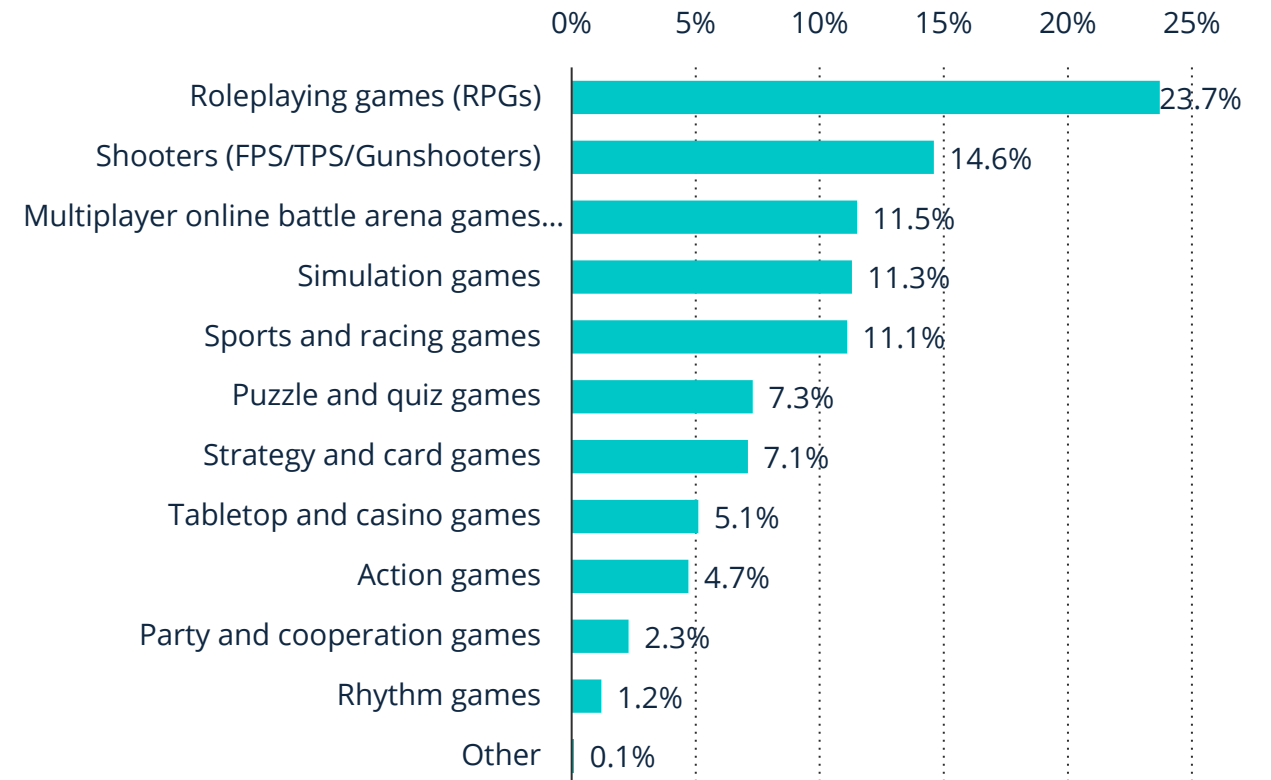


# Most Preferred Game Genres as of Oct 2024

## Mobile Games



## PC Games

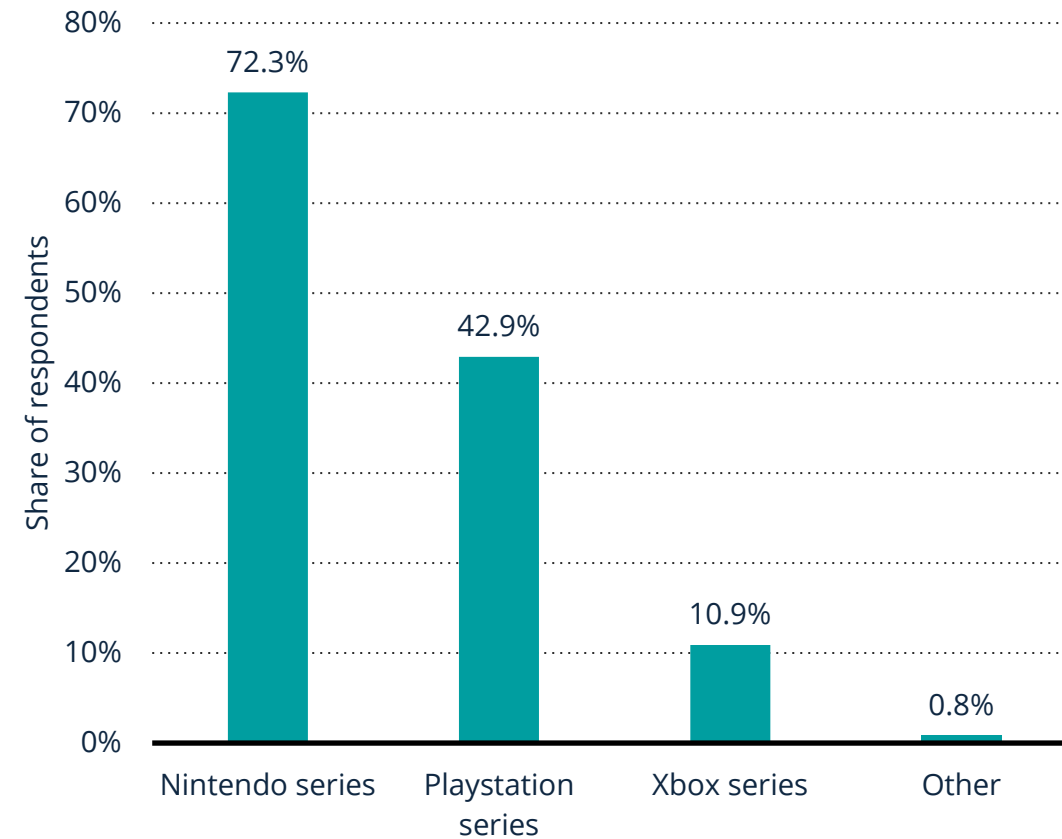


# Most Preferred Game Genres as of Oct 2024

Console Game



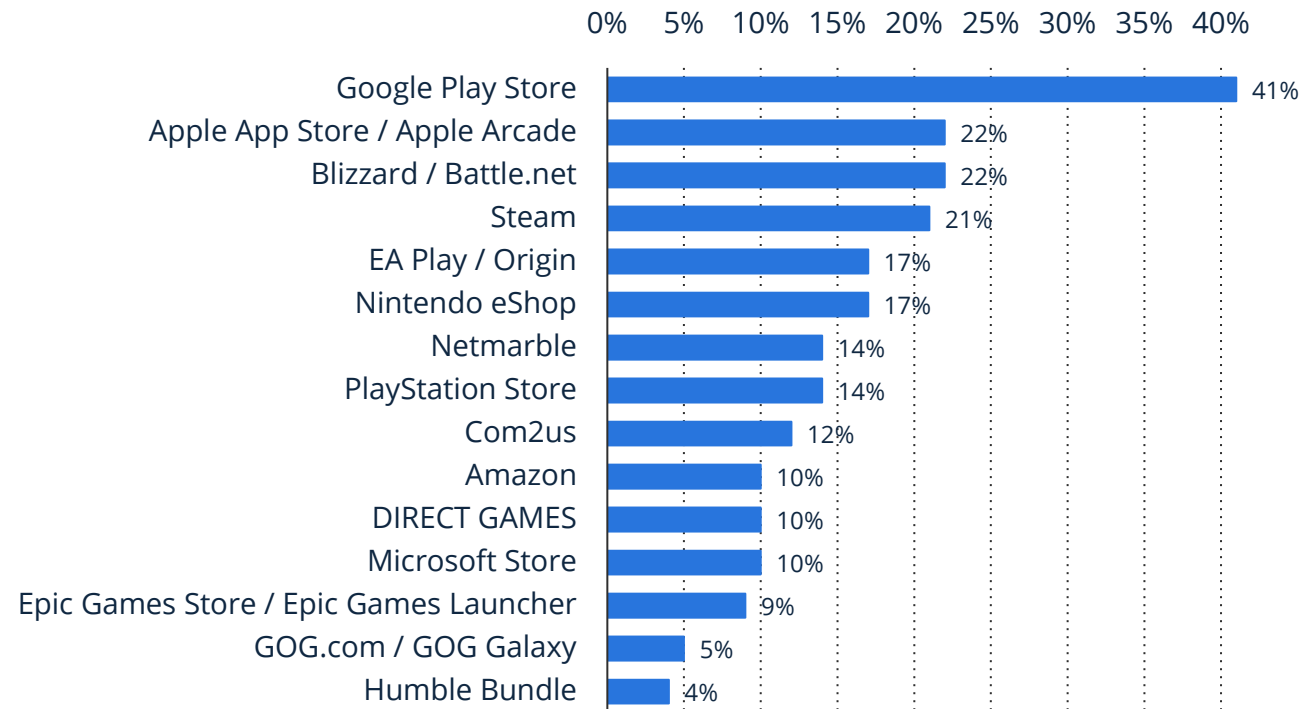
Common Console Used



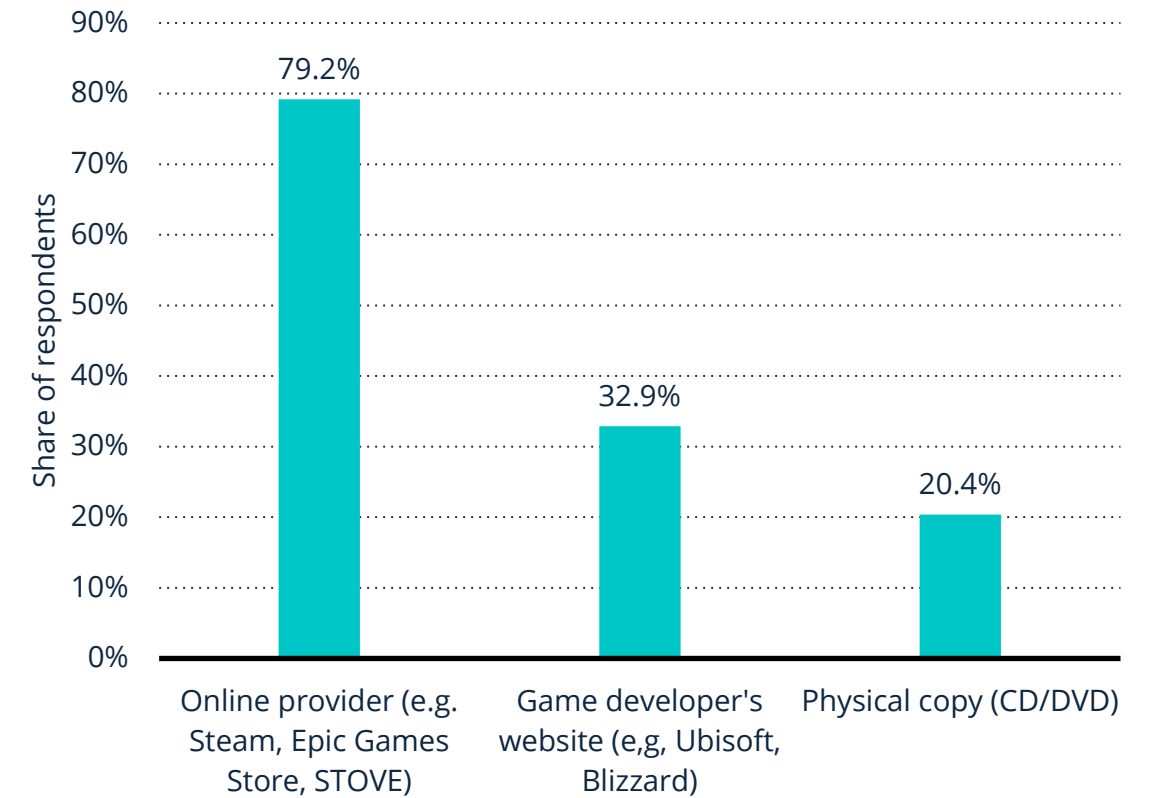
Source(s): Hankook Research; Korea Creative Content Agency; Ministry of the Interior and Safety (South Korea)

# Method of Game Purchase in South Korea

## Game Purchase by Store Brand in South Korea 2024



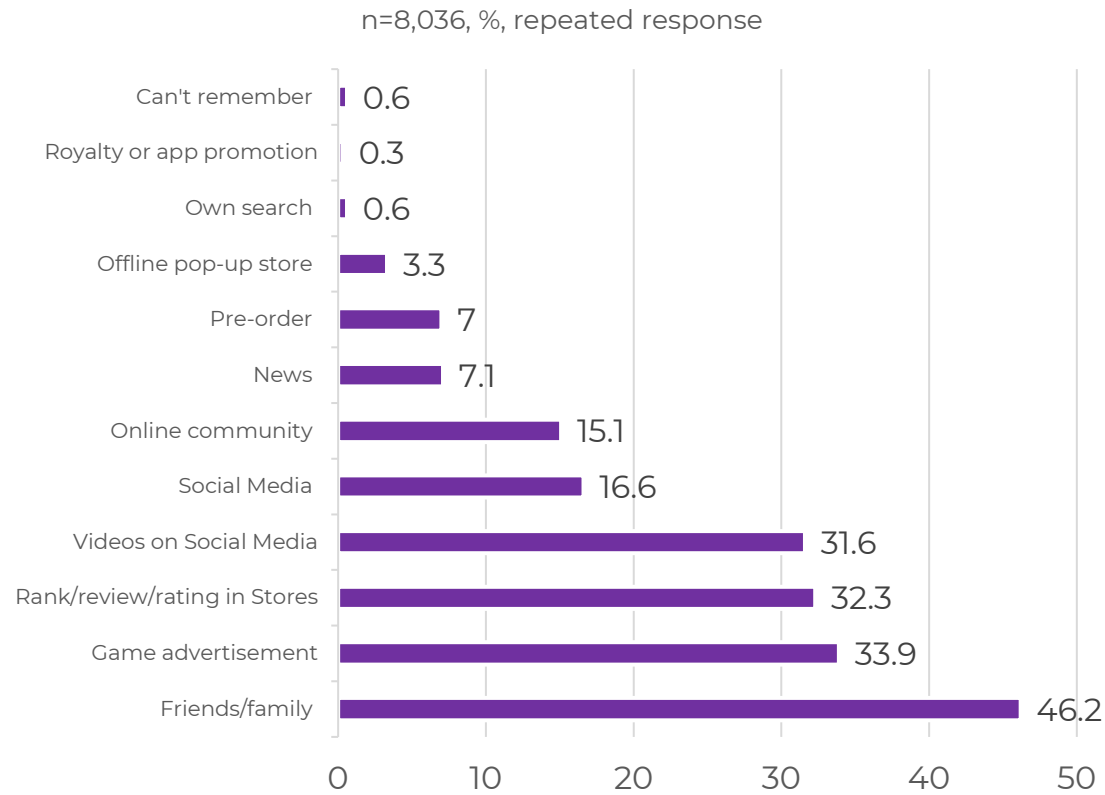
## PC Game Purchase Platform in South Korea 2024



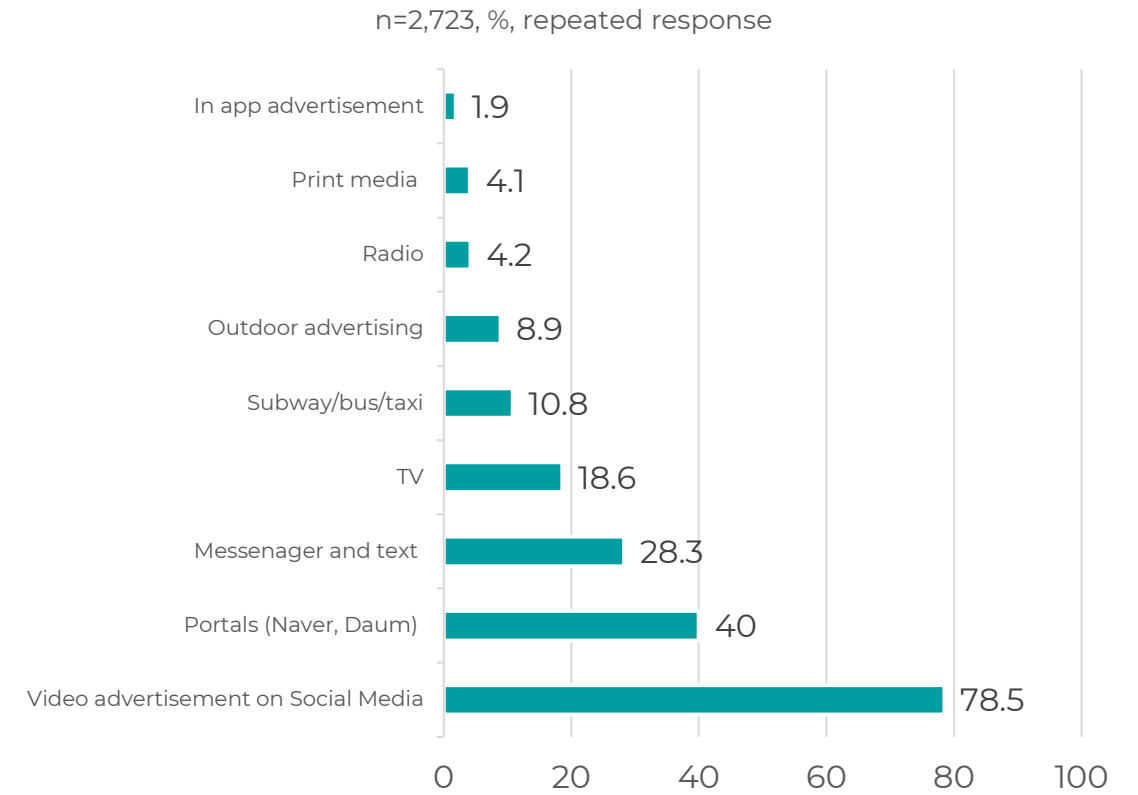
Source(s): Hankook Research; Korea Creative Content Agency; Ministry of the Interior and Safety (South Korea)

# Influential Platforms and Media for Game Discovery

## Information Sources Referred When Selecting Games



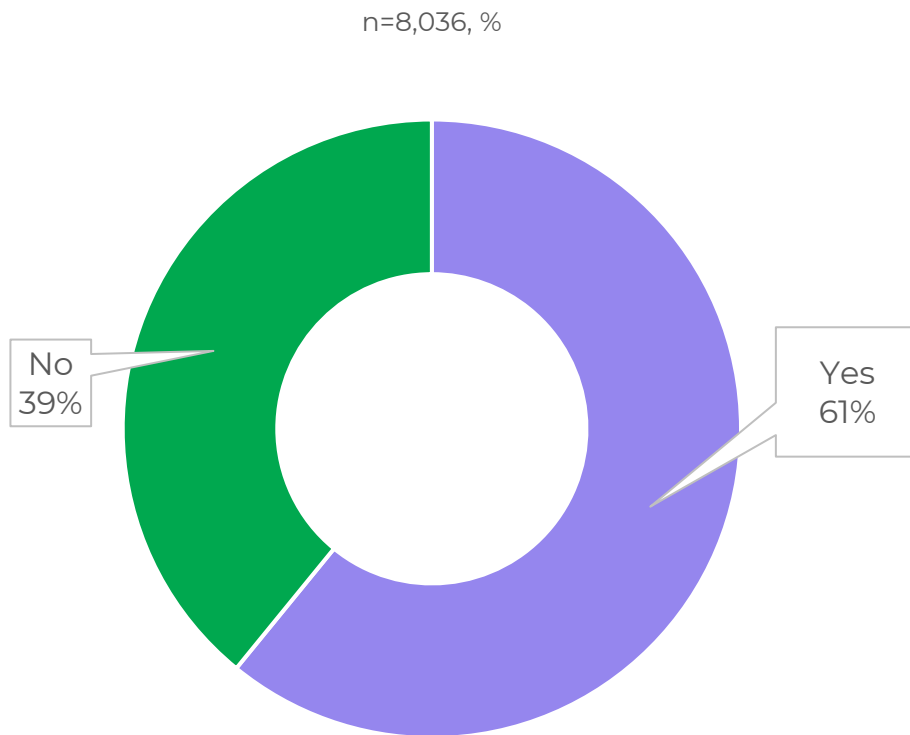
## Advertisement Referred When Selecting Games



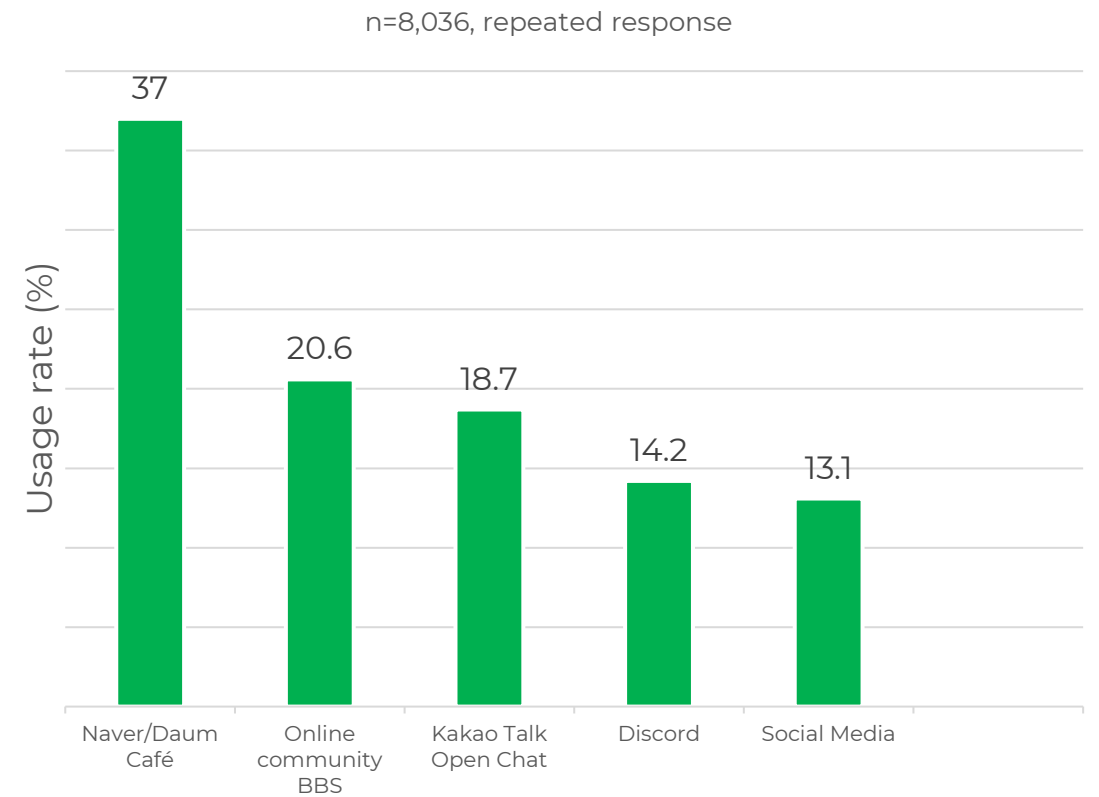
Source: Korea Creative Content Agency

# Influential Platforms and Media for Game Discovery

## Have You Participated in a Game Community?



## Online Communities Used in the Last 12 Months



Source: Korea Creative Content Agency

# How to Enter the Korean Gaming Market?



# Cultural Gaming Preferences to Consider

South Korean gamers display distinct cultural preferences. While fast-paced gameplay and competitive mechanics are popular, especially in multiplayer titles, emotional narratives and strong world-building also resonate well with audiences. Key drivers of player engagement include:

**Immersive storylines:** Games like *Lost Ark* and *MapleStory* succeed through rich lore and character progression.

**Stylised visuals:** There is strong appeal for sleek, modern aesthetics and anime-inspired character design.

**Familiar archetypes:** RPGs often feature high school settings, K-pop-inspired avatars, and emotionally charged themes like betrayal and redemption.

**Competitive appeal:** The culture of excellence and performance aligns well with games offering ranking systems, competitive ladders, and esports potential.



# Go-To-Market Strategy

## Localisation Best Practices

- Language nuance: Korean is highly context-sensitive. Use professional localisation teams familiar with gaming slang and honorifics.
- Cultural cues: Avoid foreign humour or metaphors that don't translate well. Also consider historical and cultural relationship between neighbouring countries.

## Local Publishers to Partner With

- Work with publishing partners (e.g., Kakao Games, Com2uS, Pearl Abyss) for localisation, marketing, distribution networks and compliance.

## Build Buzz and Partnerships with Influencers and Streamers

- Collaborate with suitable Korean streamers early to showcase gameplay.
- Highlight cultural elements or character customisation that appeals to local aesthetics.

## Platform-Specific Marketing

- YouTube is the dominant platforms for trailers and gameplay walkthroughs.
- CHZZK (by Naver) is rising fast as a Twitch alternative after Twitch's exit from the market in 2024.
- Social media: X (formerly Twitter) is effective for community engagement; Instagram and TikTok appeal to younger gamers.

# Go-To-Market Strategy

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## Legal Considerations

- Games must be rated by GRAC ([GAME RATING and ADMINISTRATION COMMITTEE](#))
- Strict rules around loot boxes and in-game purchases must be followed.

## Pre-launch Community Building Platforms

Korean-specific platforms where communities form pre-launch:

- Naver Café: Still widely used for fandoms and game-specific discussion boards.
- DC Inside: For memes, image boards, and hardcore fan engagement.
- Ruliweb and Inven: Popular game-specific forums.
- Important to set up early fan engagement through sneak peeks, dev blogs, and alpha tester recruitment.

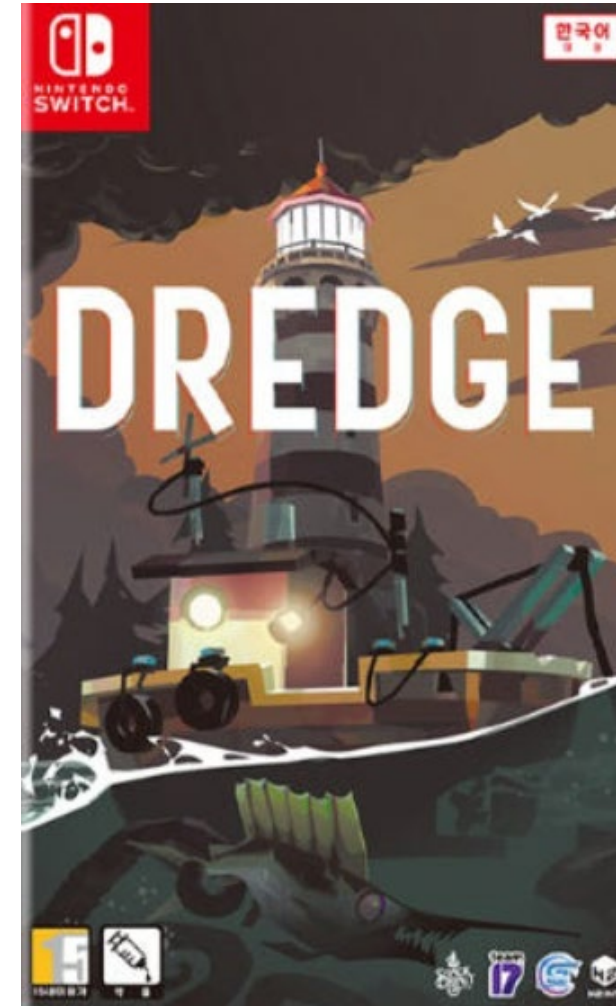
## Case Study: Path of Exile 2 (Grinding Gear Games, New Zealand)



- Deep and complex gameplay systems appealed to Korea's hardcore PC gaming audience, especially within the MMORPG segments.
- Ongoing seasonal content and leagues helped maintain player engagement and return rates.
- Success in Korea was supported by a strategic partnership with Kakao Games, which handled localisation and local publishing, enabling broad reach and market penetration.
- Korean-language forums and strong community management fostered a dedicated player base.

## Case Study: Dredge (Black Salt Games, New Zealand)

- Atmospheric narrative and Lovecraftian tone resonated with Korean gamers who value immersive and mysterious storytelling.
- Compact gameplay loops and fishing mechanics provided an accessible entry point for casual and hardcore players alike.
- Strong word-of-mouth and positive Steam reviews attracted the attention of Korean streamers, helping the game gain visibility.
- Localisation efforts were praised, especially for tone and thematic consistency across languages.



## Conclusion – Why Korea for Kiwi Games

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- Korea is a world-class gaming market: 4th globally by revenue, highly digitised, with sophisticated and passionate gamer demographics.
- Cultural fit with Kiwi creativity: Demand for narrative-rich, stylised, and emotionally resonant titles matches strengths of NZ indie developers.
- Proven path to success: Case studies (e.g., Path of Exile 2, Dredge) demonstrate success through local publishing, localisation, and community-building.
- Entry is achievable but nuanced: Requires local partners, understanding of gamer psychology, and compliance with strict legal frameworks.
- NZTE can help: We can connect you with publishers, streamers, localisation services, and advise on your go-to-market strategy.



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