

NOL WAVE REPORT



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The Pull Toward Korea,
**The Beginning of
K-Vibe**

Introduction

Today, the whole world is riding the wave of K-culture.

From K-pop melodies dominating global music charts, to fan-driven narratives exploding across social media, to travelers following their footsteps to Korea, and the rising global passion for Korean dramas, films, and games—these are no longer passing trends. They have grown into one of the defining cultural phenomena of our time.

This immense momentum created by K-culture goes far beyond the simple “popularity of content.” The collective enthusiasm of global fandoms energizes digital spaces, platforms carry that energy across borders, and encounters with local cultures give rise to entirely new meanings.

Last year’s NOL Wave Report highlighted how public–private tourism initiatives revitalized regional economies, underscoring the social and economic value produced through a virtuous cycle between platforms and local content.

This year, we take a deeper step—examining the engines and structures that power the spread of K-culture and sustain its momentum.

Rather than merely cataloging visible phenomena, we explore the underlying forces and mechanisms that drive their expansion. We also illustrate how K-culture integrates into the daily lives of people around the world, shaping new lifestyles in the process.

Through this report, our goal is not only to observe the waves of K-culture but to interpret the principles behind them, offering insight into their sustainability and future value. In doing so, we seek to redefine the cultural and industrial significance of K-culture and explore its potential within an ever-evolving global cultural landscape.

2025 NOL Wave Report Editorial Team
NOL Universe Communication

A Message to Open the K-Vibe Journey

“
From
K-Content to
K-Experience,
Toward
a Global Bridge
”

Lee Chul-woong
CEO, NOL Universe

Following last year’s publication, NOL Universe presents the NOL Wave Report once again this year.

This edition examines the intersection between the Korean Wave and Korean tourism through a data-driven approach and amplifies the voices of diverse stakeholders such as international users, partners, and local governments to explore the synergy structure between K-content and tourism. Our analysis reaffirms that K-content is not merely a cultural product to be consumed—it is a vital source for developing high–value-added tourism offerings. This indicates that when Korea’s cultural appeal converges with its tourism industry, a new form of K-lifestyle industry emerges—one that global audiences aspire to experience firsthand.

As a platform company that encompasses all sectors of leisure—including travel packages, accommodations, flights, and ticketing—NOL Universe is building an ecosystem that meaningfully expands inbound tourism. In particular, NOL World, our Korean travel platform for international visitors, has grown into a gateway for cultural exchange and a data hub that connects 8.3 million global users, integrating fragmented travel information into a single unified experience.

Looking ahead, NOL Universe will leverage these strengths to evolve into a tourism infrastructure company that connects data with content, leading new trends in Korean tourism. Through these efforts, we aim to elevate Korea’s competitiveness in the global tourism market and strengthen our role as a global bridge that delivers K-content to audiences around the world.

Beyond Seoul, we will discover and link distinctive regional resources using data-driven insights, creating journeys that allow global travelers to experience Korea’s layered charm and everyday culture. In doing so, we will cultivate a sustainable tourism ecosystem that grows alongside local communities and establish a structure in which the ripple effects of K-content contribute to regional economies and Korea’s national brand value.

The convergence of K-content and tourism is no longer a simple industry collaboration—it is evolving into a strategic sector that drives national competitiveness. NOL Universe stands at the forefront of this transformation, bringing together the integrated value of K-content and Korean tourism and serving as a global hub that amplifies Korea’s cultural competitiveness through data, platforms, and partnerships.

We extend our sincere gratitude to everyone who has been part of this journey, and we hope that this year’s NOL Wave Report serves as a meaningful milestone for the future of Korean tourism.



Messages from Those Spreading K-Vibe



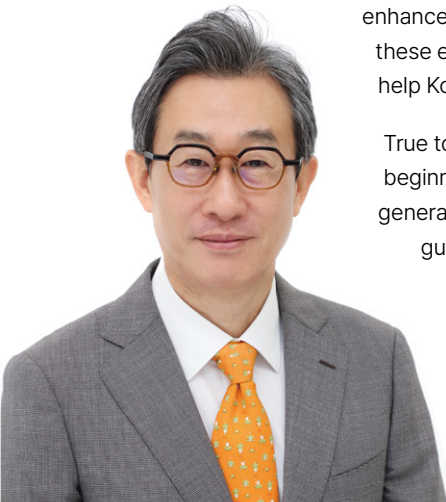
I hope the
NOL Wave Report
will become
a starting
point for

'an era in which
culture and travel
grow together.'



Kim Nam-chun

Acting Director,
Tourism Content
Strategy Division,
Korea Tourism
Organization



Amid the profound transformation of the global tourism market, the NOL Wave Report holds special significance as it proposes new directions for inbound tourism and global marketing, while offering an in-depth analysis of the synergies created by culture, technology, and the content industry.

Today, travel is no longer simply about moving from one place to another. It has become a medium through which individuals expand their cultural identities and connect with different worlds. The power of content—music, drama, fashion, food, and more—has emerged as a primary driver of travel decisions, and the Korean Wave now stands as one of the most influential cultural gateways drawing visitors to Korea.

In response to this trend, the Korea Tourism Organization is actively expanding content-based tourism, enabling global travelers to experience Korea's sensibilities and everyday life through the convergence of K-culture and tourism. We are developing experiential tourism products that incorporate performances, dramas, K-pop, and other forms of K-content into travel itineraries. Through data-driven global marketing, we aim to guide visitors naturally from a "trip where they watch" to a "trip where they participate."

NOL Universe, an innovative platform company in the private sector, shares this global vision and aligns closely with our direction for content-based tourism. By introducing new forms of global products that merge culture and travel, NOL Universe continues to explore ways to connect performances, experiences, and K-content into a single, seamless journey.

This transformation represents a virtuous cycle in which the Korean Wave evolves beyond passive viewing and expands into immersive experiences that inspire actual travel to Korea.

I believe this report offers meaningful insights and clear direction for the inbound tourism industry as it navigates this journey. Moving forward, the Korea Tourism Organization will expand collaboration not only with private companies in the tourism sector but also with related industries—including the content industry—to build a global ecosystem in which the Korean Wave and tourism grow together. As a public institution, we will continue to enhance credibility and strengthen Korea's national brand value, while combining these efforts with the creativity and execution capabilities of the private sector to help Korean tourism achieve new global breakthroughs.

True to its name, the NOL Wave Report carries insights and vision that herald the beginning of a new wave. I expect it to serve as a compass that anticipates the next generation of industry shifts driven by the convergence of travel and culture, and to guide the future direction of the global tourism sector, including that of Korea.

I hope this report inspires companies, institutions, and stakeholders across the tourism industry, becoming a starting point for an era in which culture and travel grow together. Once again, I extend my sincere congratulations on the publication of the NOL Wave Report.



I hope we can
work closely,
grow together,
and expand
the tourism
ecosystem.



Gil Ki-yeon

CEO, Seoul Tourism
Organization

The tourism market is evolving rapidly, and this moment demands innovative ways of thinking. We believe that new value can be uncovered through the convergence of K-content and the tourism industry, and that this report will serve as an important milestone in charting that journey.

In our society, travel is still sometimes viewed merely as consumption or even a luxury. However, tourism must now be recognized as a foundational pillar of the national economy and a vital industry that generates future value.

The COVID-19 pandemic revealed, more clearly than ever, the far-reaching economic influence and ripple effects of tourism. As we enter the post-pandemic era, the desire to travel has surged almost instinctively, triggering a global tourism boom—and at the heart of this movement lies K-content.

Today, the Korean Wave has become a true global trend—one that leaves those who fail to keep pace behind. Beginning with K-pop and expanding to Korean films, dramas, and food, it has now grown to include even symbolic elements of Korean culture, from tigers and magpies to the jeoseungsaja (Korean grim reaper), all drawing international attention. Yet if the movement stops here, K-content risks remaining merely a consumable product. We must not forget that once-celebrated cultural phenomena—such as Hong Kong cinema or Japan's J-pop—gradually faded from the global spotlight because they relied solely on commercial success without establishing the foundations for sustainable growth. This is a crucial lesson and a cautionary example for the future direction of the Korean Wave.

Now is the time for the tourism industry and K-content to truly converge. Tourism serves as a bridge that connects the excitement generated by K-content to real-world experiences. If K-content is a "vessel" that contains Korea's unique cultural values, then tourism is the "restaurant" that allows people around the world to taste what that vessel holds. No matter how exceptional the food may be, a restaurant cannot thrive without proper hygiene, quality service, and effective promotion. Likewise, when K-content sparks global curiosity, it is the role of tourism to draw visitors in and welcome them warmly. And when tourism and content come together to create hands-on experiences, they enable deep immersion and lasting memories of Korean culture. In short, only with a strong, well-developed tourism industry can K-content transcend being a consumable product and flourish sustainably as true soft power.

This NOL Wave Report provides an in-depth examination of the interrelationship and synergy between tourism and K-content, and I am confident it will contribute meaningfully to the next stage of development for our tourism industry. I also hope that the Seoul Tourism Organization and NOL Universe will continue to collaborate closely, grow together, and help expand Korea's tourism ecosystem. Once again, congratulations on the publication of this report, and I wish NOL Universe continued growth and lasting success.

How K-Vibe Comes to Life

Familiar Yet New, Originality That Can't Be Replicated

- Global + Local Strategy**
Harmonizing Korea's unique sensibility with universal global appeal
- Creative Innovation**
Distinctive expression through genre blending, format experimentation, and the use of technology
- Cultural Authenticity Natural**
global storytelling grounded in the essence of "K-ness"

Beyond Seeing & Hearing, Toward Doing & Feeling

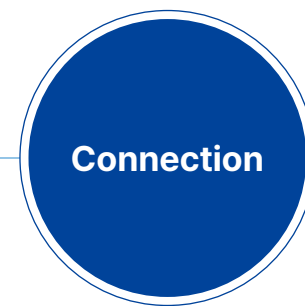
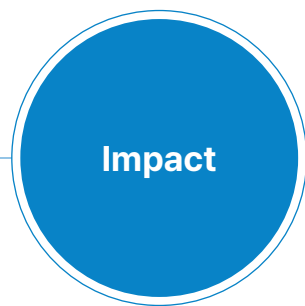
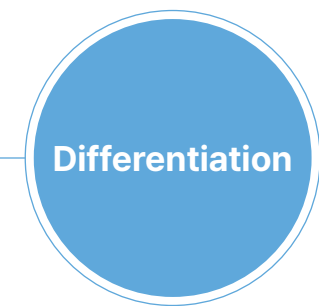
- Digital Experiences**
OTT viewing and social media content consumption
- On-Site Experiences**
Concerts, fan meetings, and visits to drama filming locations
- Interactive Experiences**
Dance, beauty, food-related challenges

Where One Becomes Everything, and Everything Connects as One

- Multi-Crossover**
Derivative value that extending from music → fashion → tourism
- Global Expansion**
Hyper-connected growth through viral content
- Economic and Social Influence**
Shifts in consumer trends and the elevation of national brand value

An Emotional Bond that Unites, Transcending Time and Space

- Fandom Communities**
Fans build stronger bonds by creating and sharing content on their own.
- Universal Resonance**
Shared emotional codes—growth, challenge, solidarity, love—embedded within Korean narratives
- Platform Connectivity**
Real-time interaction through global platforms such as YouTube, TikTok, and Weverse



Food **K-CONTENT**

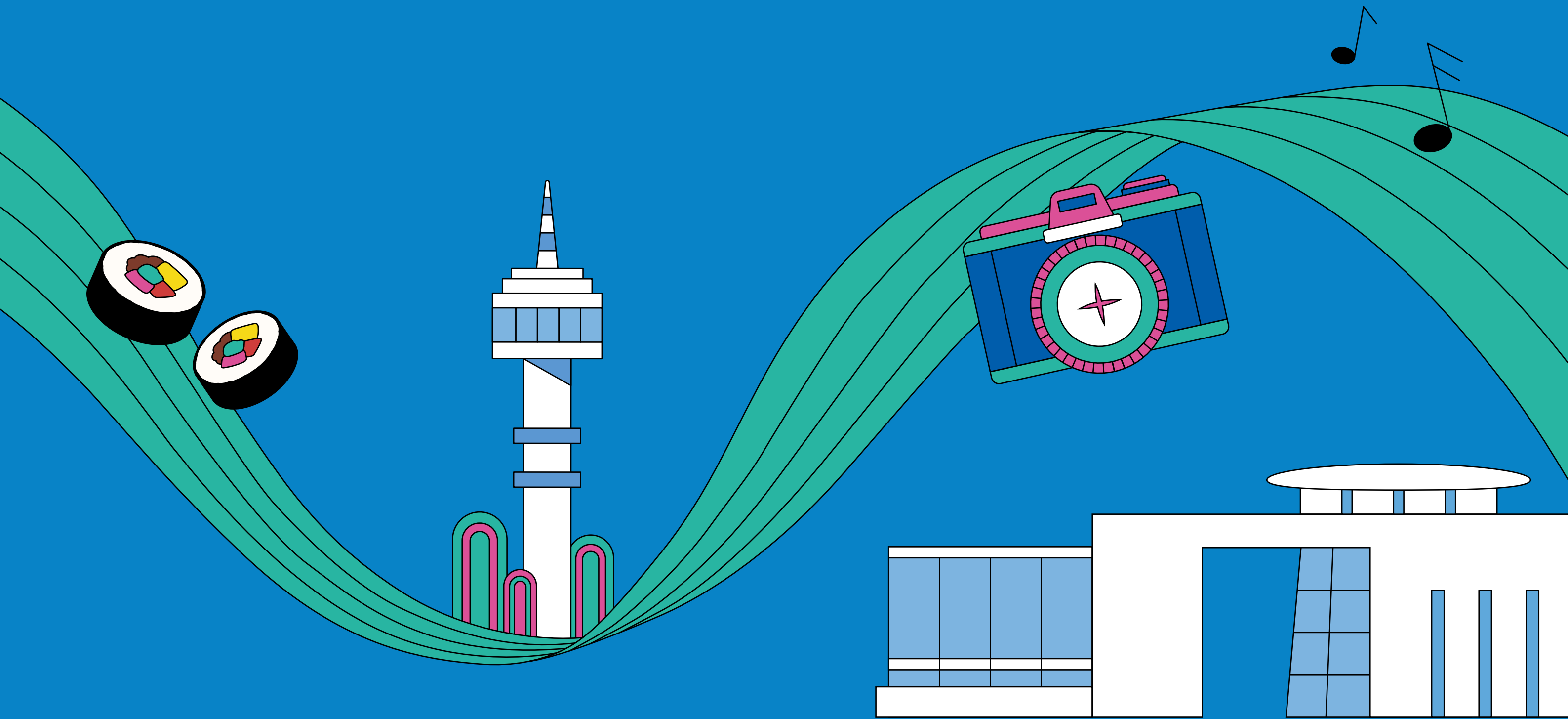
Music

Drama · Film · Entertainment

Beauty

Lifestyle

K-VIBE

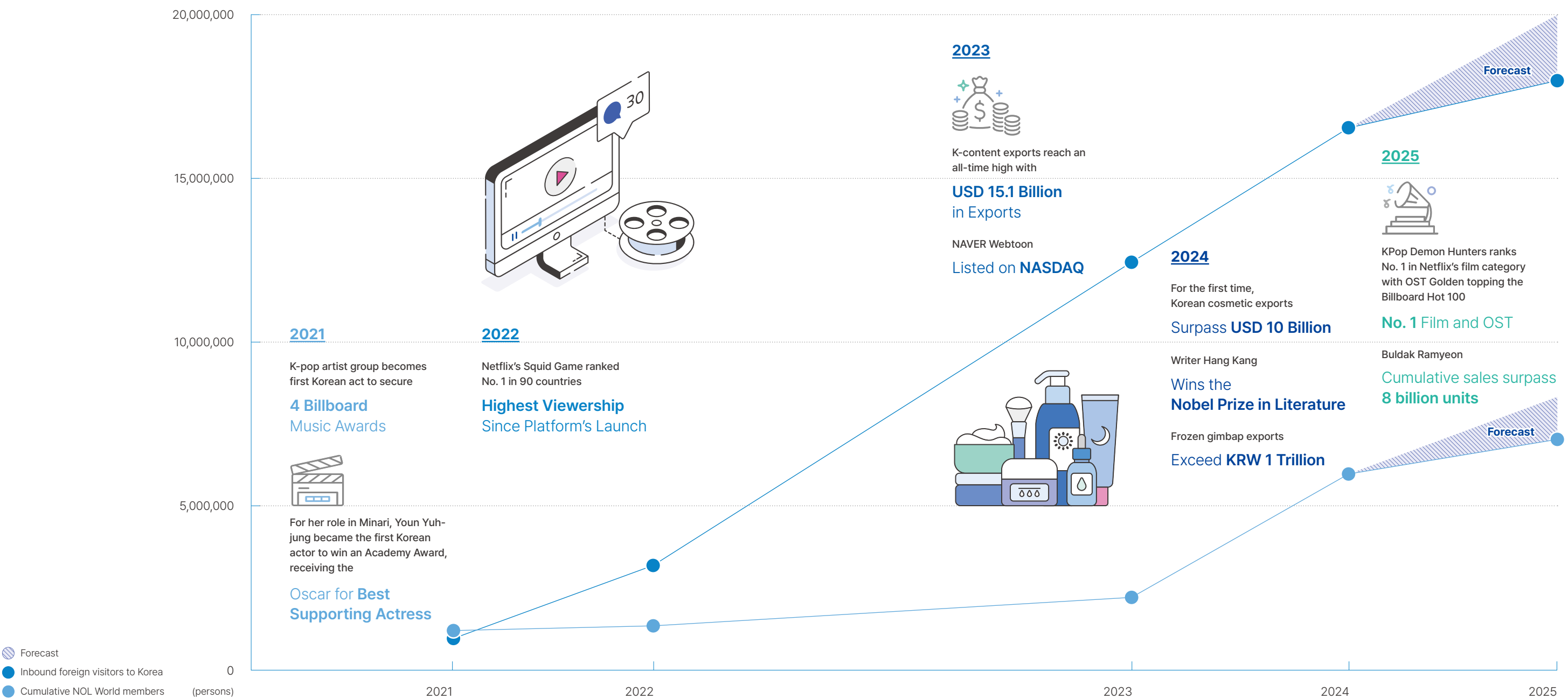


The World Feels
K-Vibe Now

K-Culture Timeline: K-Content Moves the World toward Korea

K-content is evolving from mere “on-screen enjoyment” to “on-site experiences,” becoming a central driver of Korean tourism and global community formation. In the past five years, its influence has broadened from music, dramas, and films to include beauty, food, and lifestyle, drawing substantial worldwide interest.

K-content has transitioned from a passing trend to an indispensable mainstream force in the global cultural market, extending “on-screen enjoyment” into “on-site experiences.” This heightened global interest is reflected not only in the increasing number of international visitors to Korea but also in the distinct and measurable performance indicators observed on the NOL World platform for overseas users.



Listening to the Pulse of K-Vibe Through Data

Over the past 5 years, 1.66 million users around the world have consumed K-content through NOL World

* Based on number of purchases from Jan. 2021 to Oct. 2025

The number of purchasing customers on NOL World has increased by roughly five times compared to 2021.

A notable insight is that even with this significant expansion of the customer base, nearly half of all customers are still first-time buyers. This indicates not only quantitative growth but the emergence of a dual growth structure—one driven by a continuous inflow of new users alongside active repeat engagement from existing customers.

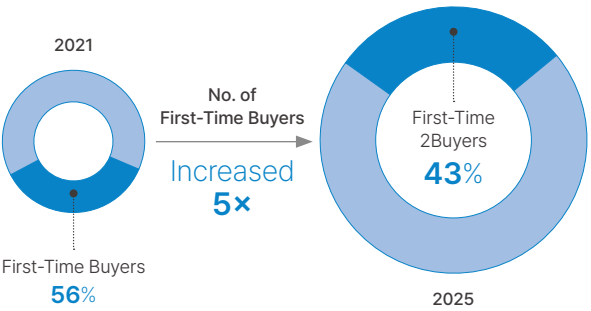
At the same time, customer loyalty is rising rapidly. The number of repeat purchasers (two or more purchases) has increased approximately eightfold while the number of loyal customers with five or more purchases has surged an extraordinary twenty-sevenfold compared to 2021. This demonstrates that NOL World has evolved beyond a platform for one-off consumption into a sustainable fandom ecosystem—one in which experiences deepen into relationships, and those relationships expand into new forms of consumption.

This expansion of the customer base is also reflected in transaction metrics.

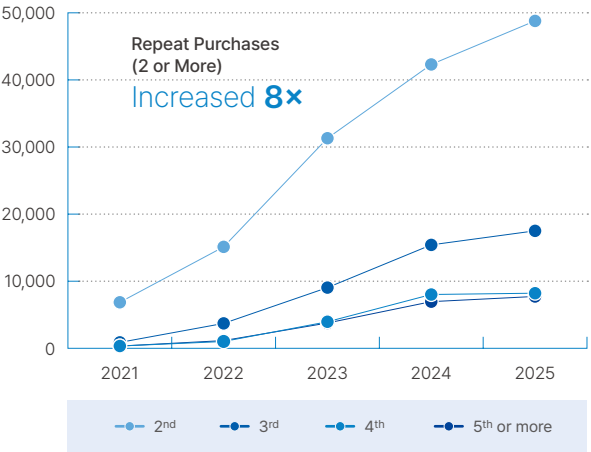
Transaction value has grown at a compound annual growth rate of 133%, increasing nearly thirtyfold compared to 2021—clear evidence of NOL World’s rapid growth trajectory.

Notably, the sharp rise in transaction value seen in 2024 can be attributed to a full-scale recovery in on-site cultural consumption following the pandemic, combined with the global expansion of K-content, which drove explosive demand for experiential spending such as performances, exhibitions, and tourism. Additionally, NOL World’s efforts to strengthen multilingual support and expand internationally tailored content—which significantly improved accessibility for overseas fans—are key factors that accelerated this growth momentum.

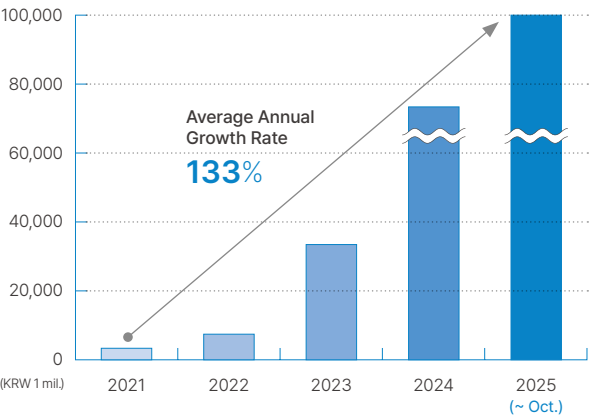
Share of First-Time Buyers Among NOL World Customers



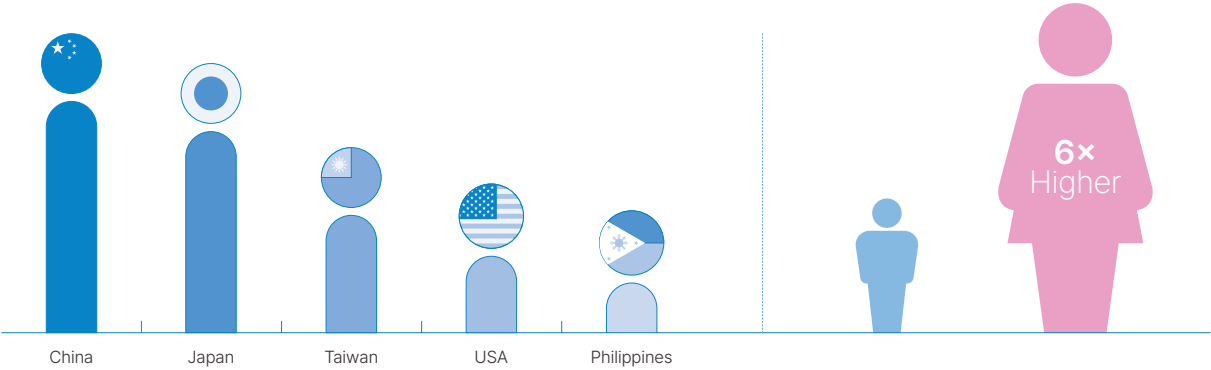
NOL World Repeat Purchases



NOL World Transaction Volume Trend



NOL World Customer Distribution by Nationality and Gender



* Based on average monthly EKYC (electronic Know Your Customer) authentications from Jan. to Oct. 2025

The top countries purchasing NOL World products are China, Japan, Taiwan, the United States, and the Philippines, in that order—demonstrating that enthusiasm for K-content consumption remains especially strong in geographically and culturally proximate Asian markets. Among these, China stands out with a share roughly three times larger than Japan, the second-largest market, underscoring its overwhelming presence.

In addition, the proportion of female customers is approximately six times higher than that of male customers, indicating that the core audience driving the NOL World experience is a female-led global fandom.

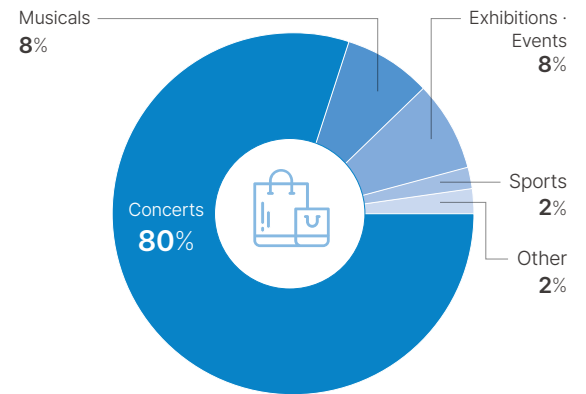
Over the past five years, NOL World’s sales have been overwhelmingly driven by concerts.

Concerts account for 80% of total sales, firmly establishing them as the core category leading overall revenue. This is followed by musicals (8%), exhibitions and events (8%), and sports (2%).

The compound annual growth rate of purchases by category reveals an interesting shift. Sports recorded the highest growth rate at 1,104%, followed by exhibitions and events at 398%, and play at 243%.

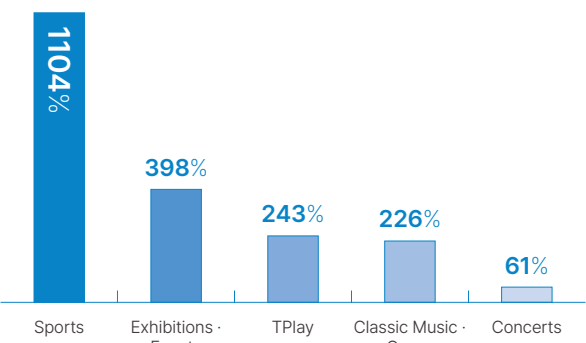
These trends show that NOL World holds a strong competitive advantage as a fandom experience platform centered on K-pop and live performances, while also highlighting significant potential for expansion into broader cultural and lifestyle domains beyond concerts.

Sales Distribution by Category



* Average purchases from Jan. 2021 to Oct. 2025

Annual Growth of Major Purchases by Category



93% of NOL World users plan
a trip to Korea due to their interest in K-content



K-culture is evolving beyond simple entertainment into a powerful economic engine that generates real travel demand and drives consumption of Korean products. According to a survey of NOL World customers, 93.1% of respondents said that K-content prompted them to search for or plan travel to Korea, indicating clear direct and indirect behavioral changes.

K-content fandom is also transitioning from temporary
consumption to a long-term lifestyle.

Among K-content viewers, K-Dramas (17.8%) and K-Pop (17.4%) ranked as the most consumed categories. More notably, consumption is distributed quite evenly across genres. Films (14.7%), Entertainment and Variety Shows (14.1%), Food Content (Mukbang) (12.1%), and Beauty and Fashion (10.9%) all recorded high consumption rates exceeding 10%.

This suggests that K-content has moved beyond the realm of entertainment: fans now demonstrate sustained interest in nearly every aspect of the Korean lifestyle. That interest is also translating into real purchasing behavior. When asked what items they bought after watching K-content, respondents cited Food and Beverages (19.4%), Cosmetics and Skincare (19.2%), and Fashion Items (18.4%) as the top three categories—revealing a strong desire to experience and consume elements of everyday Korean life depicted in content.

Demand for extended stays is also growing as fans
pursue deeper, more immersive K-experiences.

Beyond K-pop, Food and Culinary Experiences (26.6%) and Traditional Culture (25.8%) emerged as the most appealing aspects of Korea. This deep cultural curiosity is reflected in preferred trip duration: 70.8% of respondents expressed interest in long-term stays of seven days or more, with the ideal duration cited as one to two weeks (40.8%).

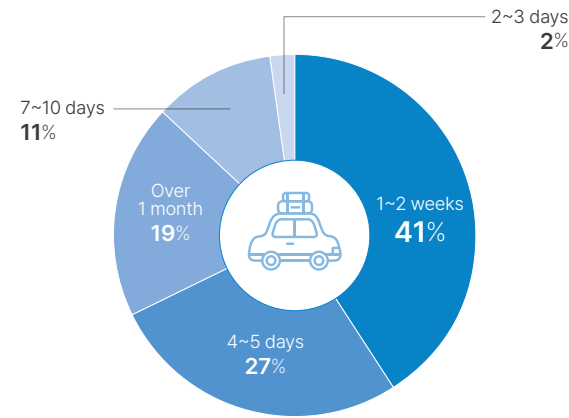
This indicates strong demand for extended, highly immersive experiences that short trips cannot satisfy—reflecting a desire to deeply engage with local culture and lifestyle. Travel activity preferences also centered on Shopping (13.2%) and Food experiences and Café Tours (13.0%), demonstrating that the strongest motivation is to directly experience and consume the trendy, everyday aspects of Korea showcased in content.

Types of K-Content Consumed in the
Past 6 Months

(Multiple Responses)

	Content Type	Share
1st	K-Drama	17.8%
2nd	K-Pop	17.4%
3rd	Film	14.7%
4th	Entertainment · Variety Shows	14.1%
5th	Food Content (Mukbang)	12.1%
6th	Beauty · Fashion	10.9%
7th	Webtoons · Web Novels	9.6%

Ideal Length of Stay When Visiting Korea



* Survey Period · Target · Method: Online survey conducted with 131 NOL World foreign customers from Oct. to Nov. 2025

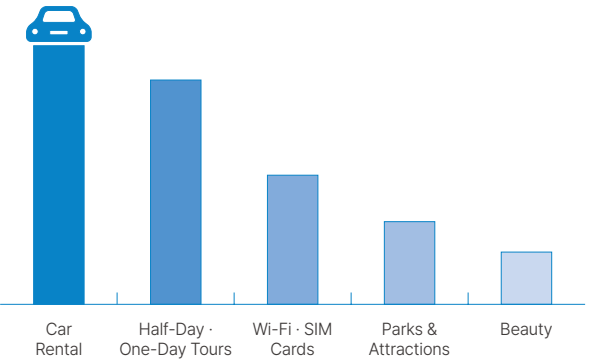
Passion for K-content
now expanding into experiences across all of Korea



Travelers who come to Korea for performances are expanding their spending beyond the event itself into journeys that immerse them in everyday Korean life and lifestyle. In fact, data on additional purchases made within two months of buying performance tickets show high purchase rates for Rental Cars, Tours, Wi-Fi and SIM Cards, Parks and Attractions, and Beauty Products. This indicates that performances function not merely as cultural events but as starting points that lead travelers into deeper, experience-driven exploration of Korea.

Recently, international visitors have increasingly favored local spaces that Koreans themselves enjoy rather than traditional tourist attractions. These spaces serve not simply as sites for consumption or viewing, but as “sensory stages where visitors can experience what Korea feels like right now.”

Additional Purchases of Tours & Activities by Ticket Buyers



* Mar. 2024 (launch of Tours & Activities purchasing service) ~ Oct. 2025

Locations with the Highest Number of “Likes” by Category

Tourist Attractions	Restaurants · Cafes	Pop-Ups · Events
HYBE	Geumdwaeji Sikdang	K-Food Festival <i>NeokNeok</i>
Gwangjang Market	Myeongdong Kyoja (Main Branch)	Banpodaegyo Bridge Moonlight Rainbow Fountain
The Hyundai Seoul (Hyundai Department Store)	London Bagel Museum	Seoul Dal
Gyeongbokgung Palace	Café Onion Seongsu	Neoguri Ramen Pop-Up
Olive Young Myeong-dong Flagship Store	Jinokhwa Halmae Wonjo Dakhanmari	Gyeongbokgung Palace Changing of the Guard

* Mar. 2024 (launch of place information & itinerary creation service) to Oct. 2025

At traditional markets and local eateries, visitors encounter the emotional texture of everyday life and the warmth of human interaction. Trendy cafés and department stores offer a glimpse into Korea’s distinctive aesthetics and contemporary lifestyle sensibility. Meanwhile, pop-up stores and urban festivals have emerged as new cultural platforms where content, brands, and spaces converge—giving tourists opportunities to directly experience K-lifestyle in real life.

Interesting place. Difficult sit to eat but I can feel different culture. Food is pretty good.

Sweets, fashion, interiors, Commercial facilities are packed with trends in Korea at that time. I love going to Korea at least once.

We had an open run on weekdays.19 teams were on standby, but there were seats up to the 3rd floor, so we were able to enter right away!Of course the meat is delicious here, but basil sam is especially delicious!Now that you're here, make sure you try it.I ordered twice and finished eating 🍴 It's a Michelin restaurant lined up with Koreans, so please try it 🌟

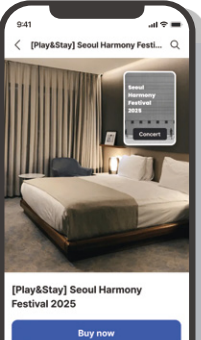
Gwangjang Market “Interesting place. Hard to find a seat to eat, but I could really feel a different culture. The food is awesome!”

The Hyundai Seoul “Sweets, fashion, interiors—everything is filled with the latest Korean trends. A must-visit whenever you’re in Korea!”

Geumdwaeji Sikdang “We went on a weekday open run. There were 19 groups waiting, but seating goes up to the 3rd floor, so we got in quickly! The meat is great, but the basil ssam is especially delicious—make sure you try it. I ordered it twice. It’s a Michelin-listed spot popular with Koreans, so be sure to visit!”

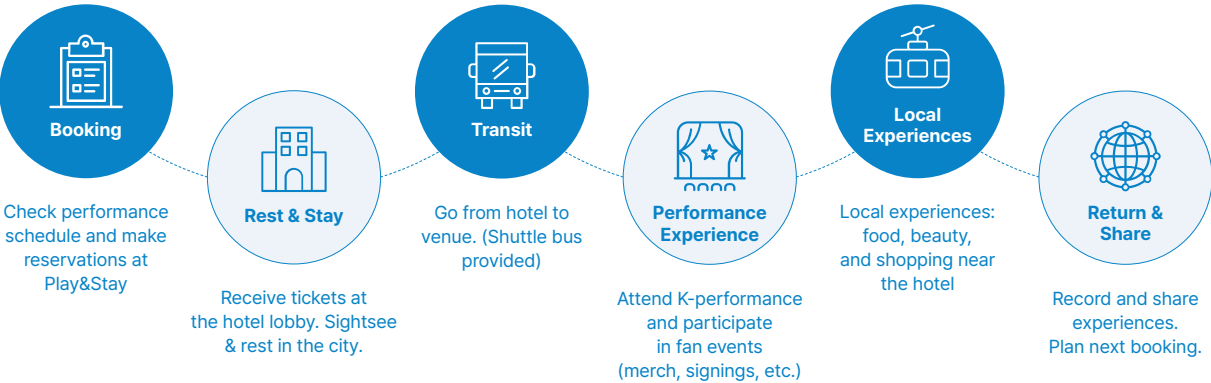
▲ Visitor Reviews

The K-Vibe Experience as One Continuous Journey



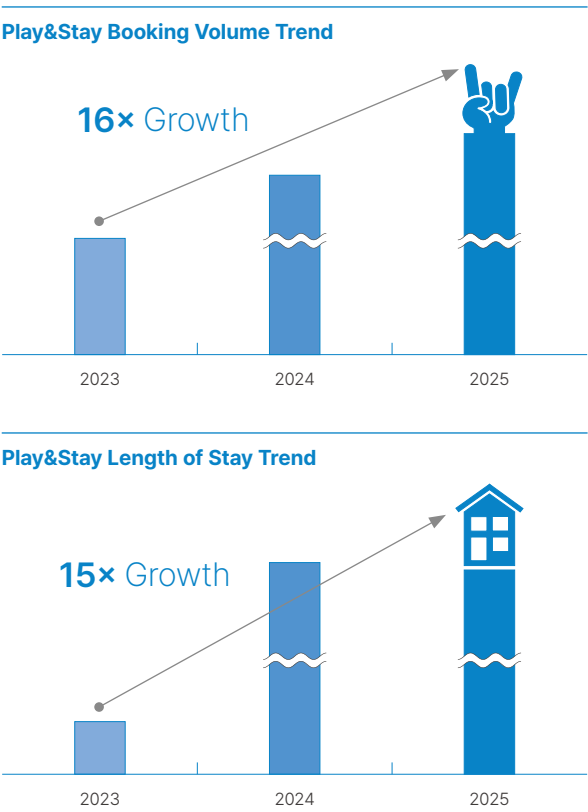
What is Play&Stay?

'Play&Stay is NOL World's performance-linked package product—a stay-oriented program that bundles live performance attendance with accommodation. Designed to let fans book both performance tickets and hotel stays in a single step, it enables them to extend the emotional impact of the show into a fuller experience that includes travel, lodging, and cultural activities in Seoul. The program also offers performance-exclusive benefits such as limited-edition merchandise, fan sign events, and hotel stays near the venue—features that have resulted in high satisfaction and strong repeat purchase rates among global fans.

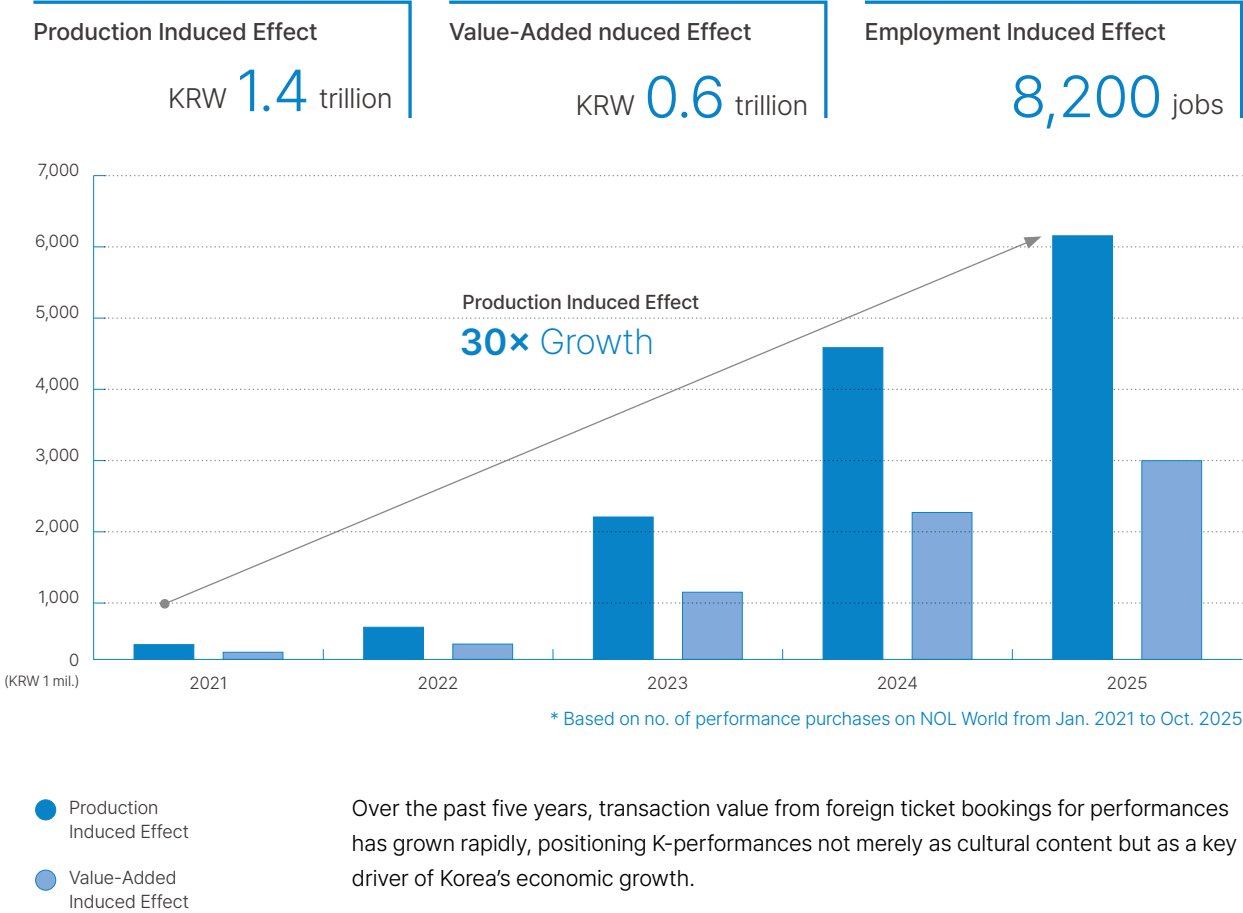


The growth of Play&Stay reflects more than rising demand for performance attendance—it signals that performance-centered, stay-based tourism is emerging as a new travel format. In a survey of 61 customers who used Play&Stay in October, 91% expressed an intention to reuse the product, and more than half said they had a “special experience unlike anything they had previously had in Korea.” Furthermore, seven out of ten respondents cited fan-tailored benefits—such as exclusive merchandise and fan sign events—as the primary reason for choosing Play&Stay, while 78% reported that the package increased both their length of stay in Korea and their overall spending.

These results indicate that Play&Stay is evolving beyond a simple accommodation package into immersive tourism content that seamlessly integrates fans’ emotions with their stay experience.



The Economic Impact Created by K-Vibe



Over the past five years, transaction value from foreign ticket bookings for performances has grown rapidly, positioning K-performances not merely as cultural content but as a key driver of Korea’s economic growth.

As of 2025 (January–October), foreign performance bookings are estimated to have generated approximately KRW 620 billion in production-induced effects and KRW 300 billion in value-added induced effects. Over the past five years, the cumulative totals reach approximately KRW 1.4 trillion and KRW 600 billion, respectively. This illustrates that performances are expanding beyond a “single ticket” transaction into a hub of economic activity spanning tourism, consumption, and service industries.

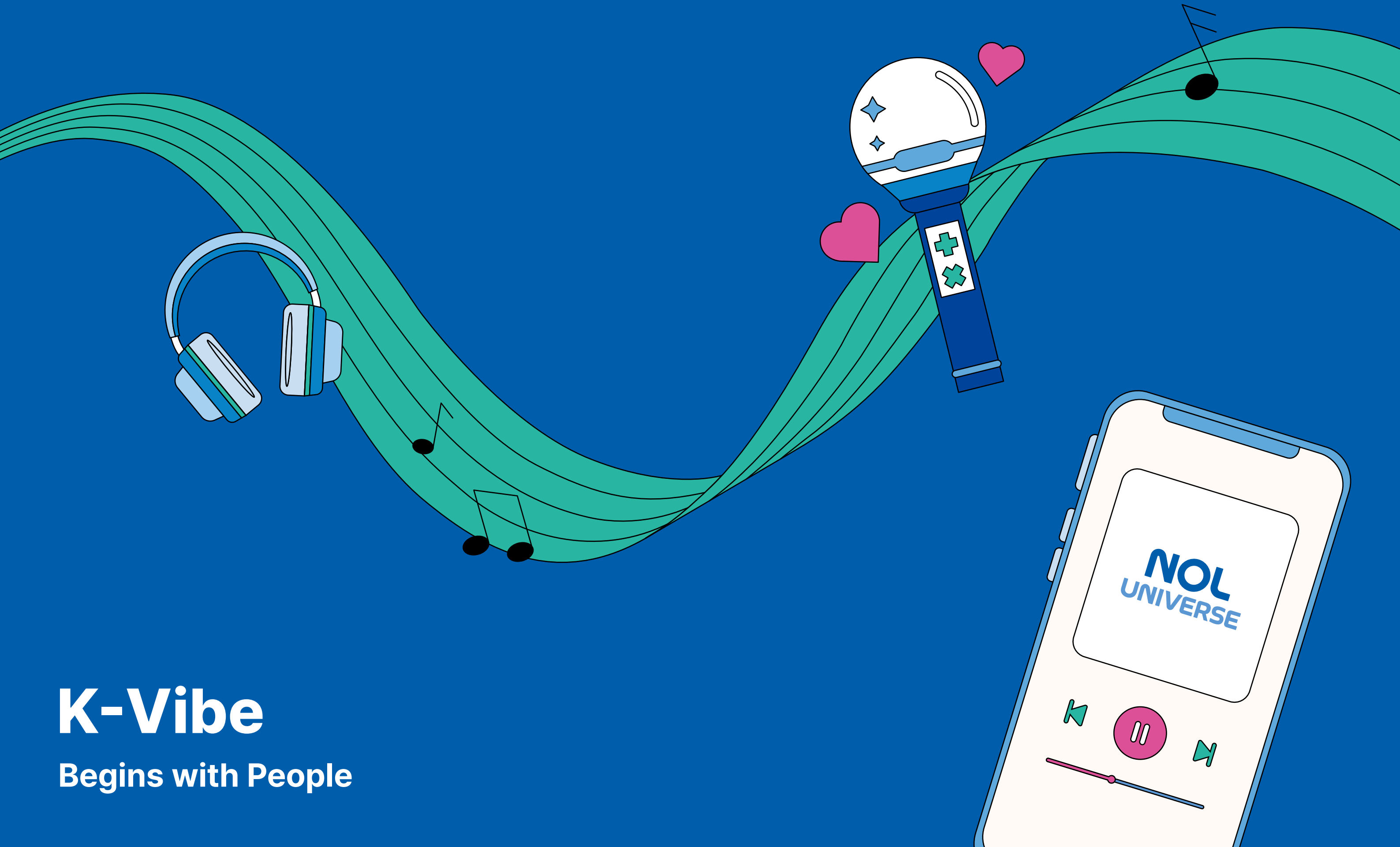
In addition, increased spending driven by foreign attendance at performances is generating significant employment ripple effects. Over the past five years, the cumulative employment-induced effect is estimated at approximately 8,200 jobs, with broad job creation across related sectors—including accommodation, transportation, food and beverage, and retail—centered around performances. This trend demonstrates that K-performances are evolving beyond cultural enjoyment into a high value-added industry that contributes to qualitative economic growth and the sustainability of regional economies.

- Direct Expenditure = No. of Performance Bookings × (Per-Capita Performance Spending + Performance Attribution Ratio × Per-Capita Travel Spending)
- Production Induced Effect = Direct Expenditure × Production Induced Coefficient
- Value-Added Induced Effect = Direct Expenditure × Value-Added Induced Coefficient
- Employment Induced Effect = Production Induced Effect × Employment Inducement Coefficient

* 1Per-capita travel spending was derived from statistical data in the Ministry of Culture, Sports & Tourism and the Korea Tourism Organization's Survey on the Actual Conditions of Foreign Tourists.

* The production-induced and value-added induced coefficients reference the Bank of Korea's Input-Output Tables (average values for culture and tourism sectors).

* The employment inducement coefficient reflects the average for the culture, leisure, and tourism industries in the Bank of Korea's Input-Output Tables: approximately 6 jobs per KRW 1 billion (= 0.6 jobs per KRW 100 million).



K-Vibe

Begins with People

NOL World User Interviews: “Decisive Moments of Travel” Shaped by K-Content

NOL World engaged with customers from around the world to conduct in-depth research on perceptions of the Korean Wave and Korean tourism. The interviews revealed that K-content functions not merely as a source of interest, but as a core motivation and even a prerequisite in travel decision-making. This underscores the strategic imperative for NOL World—as a global platform for K-culture fans—to design and deliver the decisive moments that shape travelers’ choices.



1.
Philliana
Journalist, USA

2.
Idasaree (Dew)
Entertainment Industry Professional, Thailand

3.
Lydia
Office Worker, Malaysia

Conversations with actual customers did more than confirm that K-content is a powerful driver of tourism to Korea—they made it unmistakably clear that securing a ticket is the decisive, non-negotiable condition that determines whether a trip to Korea happens at all.

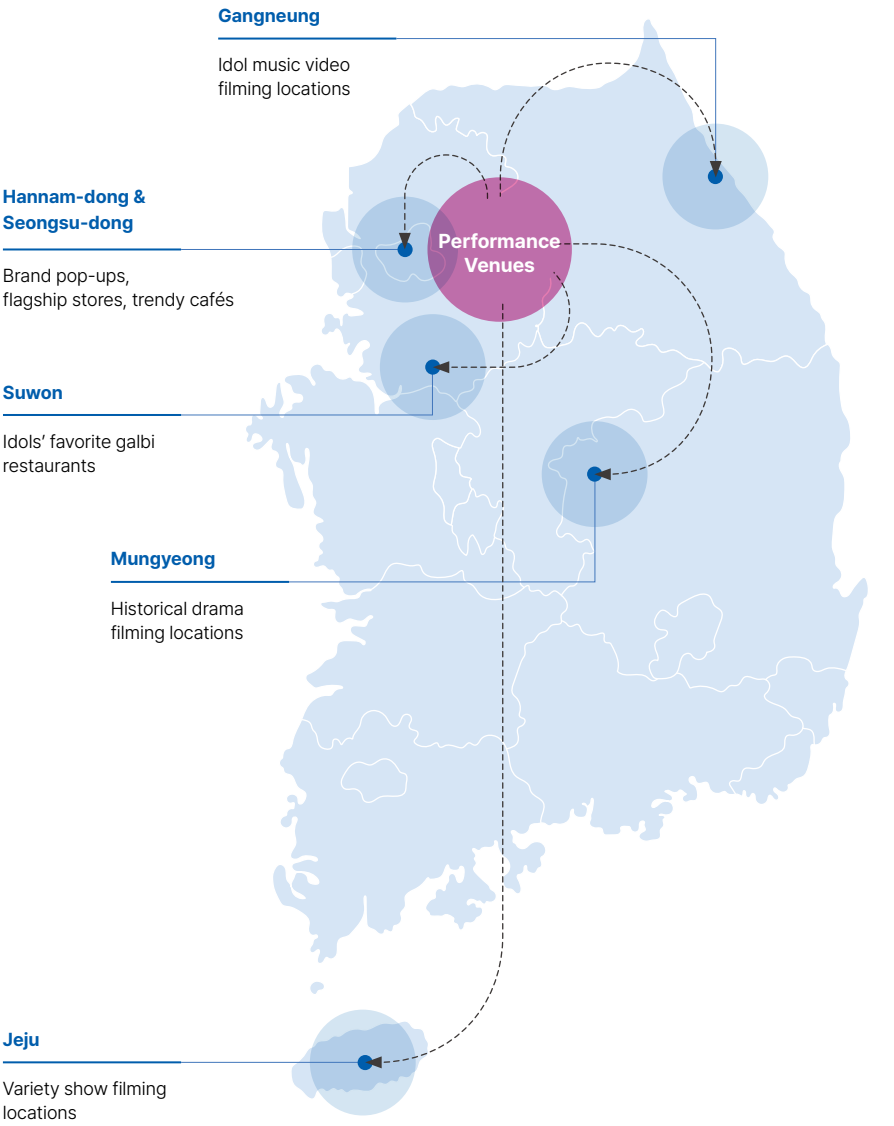
Lydia from Malaysia and Dew from Thailand repeatedly emphasized that obtaining tickets was the strongest motivating factor in their decision to visit Korea. Because the performance was the core purpose of their trip, having tickets in hand allowed them to plan their journey with confidence. Their stories demonstrate that attending a K-pop concert is not simply one component of a travel itinerary, but a decisive moment that defines the overall direction and purpose of the trip. For fans, a ticket is far more than a cultural product—it is the trigger and starting point that sets their journey to Korea in motion.

Philliana from the United States highlighted the unique level of immersion found only in performances held in Korea. She explained, “In Korea, artists can perform in the most natural and comfortable state, without any language barriers, which creates something truly special that you can never experience in other countries.” In other words, the value of concerts in Korea lies not in physical venues alone, but in the authenticity that comes from artists communicating in their native language and delivering their highest-level performances on home ground. Philliana’s experience underscores that fans today are not seeking trips centered on sightseeing alone—they crave deeply immersive experiences that allow them to encounter the artist’s “true self” at the closest possible distance.

K-content is increasingly serving as a “navigation system” for regional tourism growth. Interview insights show that travelers’ patterns are expanding beyond traditional destinations like Seoul and Busan into new regions—guided by the footsteps of their favorite artists or by locations featured in content. In other words, K-content is no longer simply sparking curiosity about a place; it is playing a functional role in shaping travel routes and itineraries themselves.

Lydia from Malaysia illustrated this vividly, saying, “I want to visit Cheonan, the hometown of my favorite star, and go to a Korean beef restaurant that the artist once visited.” Her ability to pinpoint not only the city but specific locations within it clearly demonstrates how strongly K-content influences the selection of actual regional travel destinations.

Dew from Thailand similarly seeks out neighborhoods like Seongsu-dong and Hannam-dong—areas known for their distinctive local brands—based on Korean influencer content she encountered on social media. Philliana from the United States also expressed her desire to visit BTS-related music video filming sites, restaurants, and cafés, revealing a strong wish to recreate in her own travels the “trendy everyday life of Koreans” she had experienced through content. Together, these examples show that K-content extends far beyond generating interest; it acts like a map that provides concrete guidance for regional choices and travel routes.



Another notable point is that fans are increasingly demonstrating attitudes akin to those of professional observers, going beyond pure consumer enthusiasm. Dew, who works in the entertainment industry, explained that she repeatedly visits Korea “to directly experience and understand the systematic production structure of the K-pop industry.” She added that “the K-pop industry has professionalized the creative process and meticulously systemized it, turning art into something scientific,” expressing high regard for its advanced training and promotion systems.

These remarks make it clear that K-pop is no longer an industry driven solely by fandom consumption; it has expanded into a global knowledge industry actively studied and benchmarked by overseas professionals. In other words, the influence of K-culture now reaches beyond the B2C domain to include learning and benchmarking demand from B2B audiences, experts, and industry practitioners. This suggests that K-content has evolved beyond entertainment to become a global industrial reference.



Travelers expressed high appreciation for NOL World’s current strengths while also signaling expectations for functional enhancements that would enable deeper levels of immersion. Lydia suggested offering a broader range of performance and accommodation options tailored to global fans—an indication of the need for greater choice and reliability when international users plan their trips to Korea.

Dew emphasized her hope that the platform’s servers remain stable during peak periods such as ticketing windows, reinforcing that platform reliability and stability are fundamental prerequisites for fandom-driven travel. Meanwhile, Philliana requested more proactive promotion of tourism information, local guides, and content-based recommendations aligned with specific artists’ performance schedules—reflecting expectations for NOL World to further strengthen its role as a content-linked travel hub.

Taken together, these customer insights point clearly in one direction: building on a stable and reliable ticketing infrastructure, NOL World must evolve into a platform that integrates performance-centered travel information, local experiences, and personalized recommendations—enabling global fans to fully immerse themselves in and complete their K-experience while in Korea.

In short, as fans’ purposes, desires, and travel behaviors evolve, the platform must likewise expand to become a holistic partner that supports the entire fan experience.

INTERVIEW



Philliana

Seeing in person—in Korea—the stage I had only watched through videos was an entirely different experience. The way artists speak comfortably in their native language and immerse themselves naturally in the performance is something you rarely feel at overseas shows. That’s why I chose to attend a concert in Korea: I wanted to experience firsthand the authenticity and ease that only a home-country performance can offer.



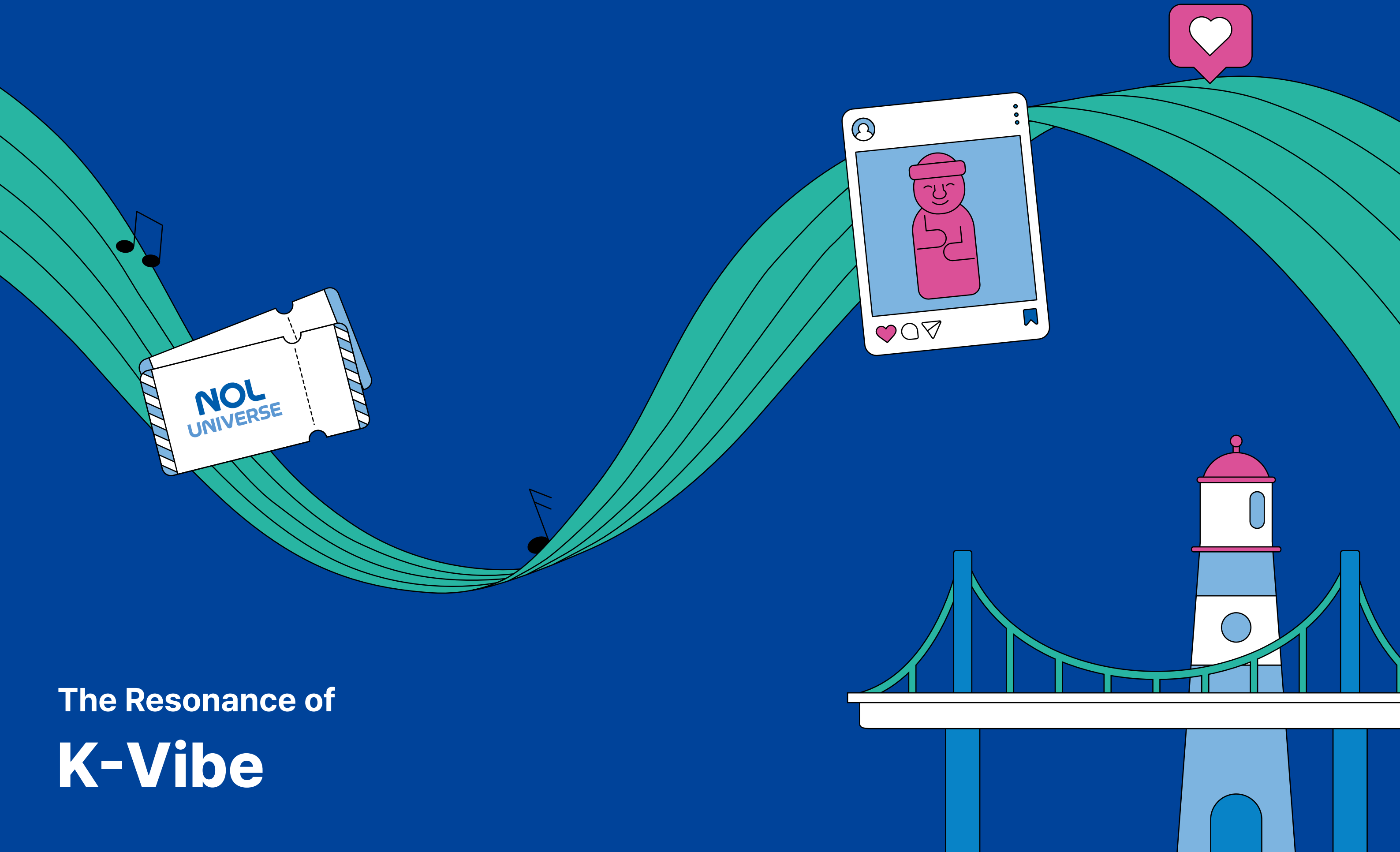
Dew

I usually keep up with news about new pop-up stores and flagship openings in places like Seongsu-dong and Hannam-dong through Korean social media influencers. It allows me to quickly see where locals go and which brands are gaining traction, so I plan my travel itinerary based on those trends. It’s the most practical source of information for understanding what’s truly trending in Korea right now.

Lydia



I now fully understand why people say ticketing for K-pop concerts is a war. For overseas fans, differences in platform access and information often make it difficult to secure tickets—even when we are eager to attend performances in Korea. I hope there will be more stable and equitable opportunities for international fans to obtain tickets, enabling global fans to get closer to the stage with the same passion and effort. Experiencing a concert in Korea firsthand is truly something special.



The Resonance of
K-Vibe

A Global Leap: Connecting the World with Seamless Flow

NOL Universe's existing inbound platform has recently been rebranded as “NOL World,” marking a shift that goes far beyond simply attracting overseas visitors to Korea. It represents a decisive transition into a truly global business. This rebranding signals a clear commitment to move past a Korea-centric “inbound” model and evolve into a borderless platform that connects K-culture fans wherever they are. Beyond the sale of performance tickets in Korea, NOL World now aims to support concerts held overseas as well, positioning itself as a central global platform in K-culture’s expanding worldwide journey. By broadening the touchpoints of K-culture experiences across both domestic and international markets, NOL World continues to introduce new forms of travel and cultural engagement that align with the rapidly evolving global landscape.

The keyword that best captures this border-defying movement is “FLUX.” **FLUX** embodies both fluidity and immersion, fully reflecting our vision—“bringing every joy to everyone, without the boundaries of borders”—and our brand tagline, “All ways to joy.”

More than a concept, the FLUX strategy represents NOL World's forward-looking approach: one that adapts flexibly to shifting global needs while creating deeply immersive experiences that allow customers to dive fully into K-culture and its content.

F

Feel Korea

L

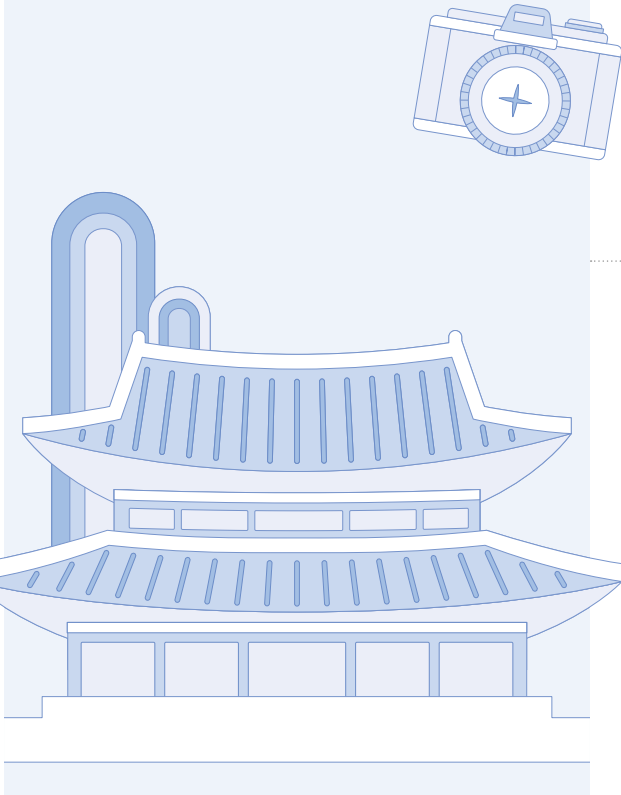
Live local

U

Ultra - immersion

X

X - factor

Business Roadmap Through FLUX 	K-Culture: The Joy of Korea Felt Through All Five Senses	From Traveler to Being Local, Blending into Everyday Korean Life	A Singular K-Journey Experienced Through Ultra-Immersion	A Decisive Charm That Brings Visitors Back Again	
	Strategic Objective	Localize and deliver preference- driven journeys	Serve as global bridge and deliver exclusive experiences	Serve as global bridge and deliver exclusive experiences	Differentiate via convenience services and technological innovation
	Key Details	K-Content–Based Product Expansion We maximize the joy of travel by developing themed tours based on K-content such as K-pop, dramas, and K-food, visits to filming-locations, and merchandise-linked products. Enhancing Experiential Products We expand high-engagement experiences— such as cooking classes, K-beauty sessions, and one-day traditional culture workshops— that allow customers to actively participate and immerse themselves with all five senses.	Local Experience Curation We uncover hidden gems across Korea and spaces favored by locals to offer trips where travelers can experience authentic local lifestyles. Real-Time Flexibility We provide information on popular attractions, events, and dining spots based on date and location, enabling travelers to adjust their plans easily on the go and choose the optimal routes during their trip.	K-Culture Global Bridge By securing tickets for Korean artists’ performances both in Korea and abroad, we deliver borderless K-culture experiences to fans worldwide, creating opportunities for full immersion. Exclusive Product Development We continuously develop single-vendor ticket offerings and premium tour products available only on NOL World—unique experiences that cannot be replicated— thereby creating strong distinctive appeal.	Ultra-Personalized Journey Design Using big data and AI technologies, we analyze customers’ past behaviors and content preferences to propose Korean travel itineraries optimized for each person, ensuring the highest level of immersive experience. Integrated Convenience Services We maximize convenience through AI-powered automatic multilingual support, simplified and globally optimized payment systems, and one- stop access to all essential information and services needed before, during, and after travel.
NOL World Case Study	K-POP Fan Tour Stray Kids ENHYPEN SEVENTEEN BOYNEXTDOOR ₩15,000 231 Jishwareng (Seokchoon) @ jishwareng Cafe/Cheese ₩ 25 Hoseodchon @ hoseodchon Restaurant ₩ 10 Paper-uk @ paper-uk Restaurant ₩ 11 ▲ Sharing K-pop artists’ favorite restaurant spots To introduce an app in a Korean’s hand Drifting House Seoul There is a popular K-drama scene where the main character goes to a drifting house to relax and enjoy the view. Drifting House Seoul is a place where you can enjoy the view and relax in a comfortable and stylish environment. Drifting House Seoul is a place where you can enjoy the view and relax in a comfortable and stylish environment. Drifting House Seoul is a place where you can enjoy the view and relax in a comfortable and stylish environment. To introduce an app in a Korean’s hand Home of K-pop at Poryungmachi In a drama, there is a scene where a character goes to a place called Poryungmachi. Poryungmachi is a place where you can enjoy the view and relax in a comfortable and stylish environment. Poryungmachi is a place where you can enjoy the view and relax in a comfortable and stylish environment. Poryungmachi is a place where you can enjoy the view and relax in a comfortable and stylish environment. ▲ Introducing signature K-drama hangout courses such as jjimjilbangs and pojangmaches	Location-based recommendations for restaurants & cafés, pop-ups, shopping, and things to do Sales of overseas concert tickets and packages for Korean artists			

Expanding from a Single Flow into a New Universe

*

Source

Survey of 131

NOL World customers

NOL Universe is not simply a platform company that connects travel and concerts. We are a brand that designs experiences, sets emotions in motion, and expands culture. At the heart of our journey lies a continuous flow—one that evolves, deepens, and creates true immersion.

Now, NOL Universe seeks to extend that flow across the world.

By dissolving boundaries between performances and tourism, local and global, digital and physical, we aim to build a new ecosystem where the world connects through K-culture. Experiences that begin on NOL World move beyond cities and national borders, becoming a shared cultural language embraced by fans and travelers worldwide.

Yet our journey does not end here.

Nearly half of our international customers—49.2%—say they have never traveled beyond Seoul, nor even considered it. This shows how heavily Korean tourism remains concentrated in the capital. Notably, the biggest barriers to regional travel were the lack of information (28.4%) and transportation inconvenience (22.4%).*

Bridging this “regional information gap” is the core of the next wave we aim to create. With social media (40%) and YouTube (18.5%) emerging as primary travel information sources, demand for visual, real-time content is unmistakably strong. This makes clear why NOL World must evolve beyond a booking platform into a travel information hub—one that integrates real-time local content with travel technology. Through this transformation, we will spark a new flow of tourism and extend the momentum of K-content from Seoul to regions nationwide.

This journey cannot be undertaken alone.

A true K-culture ecosystem can only emerge when content creators, travel companies, local cultural communities, and fans are connected within a single, seamless flow.

At the center of that flow, NOL Universe will continue to carry forward the essence of nolda—joy, immersion, and expansion—while shaping the Next Wave that connects to the world.

