



Summer 2025 Trend Debrief

Webtoons & Microdramas

We are the world's leading **research & strategy, creative, and marketing** agency specialising in **kids, teens and family fandom**.

We help our clients **understand their audience** better, **communicate their story** more effectively, and **reach their audience** more efficiently.



Introduction & Index

As a special summer bonus, we have put **two debriefs in one**. The similarities between these two 'new' content formats are obvious. Both are **mobile-first**, have adopted similar **revenue-generating strategies**, and do a great job of focusing on **growing and nurturing** their **fan bases**.

If you just want to jump to the bit you're most interested in please use the links below, else just scroll through.

You can **scan by just reading the highlighted text**

Webtoons

[Webtoons - TL;DR](#)

[What are Webtoons?](#)

[Webtoons by the numbers](#)

[Platforms and Genres](#)

[Why Young Audiences Love Webtoons](#)

[From Webtoons to Global Phenomenon](#)

[Why Webtoons Matter for Youth Focus IP Owners](#)

Microdramas

[Microdramas - TL;DR](#)

[What are Microdramas?](#)

[Microdrama Platforms and production](#)

[Notable Microdramas](#)

[How are Webtoons and Microdramas similar?](#)

[How Webtoons and Microdramas feed into the fandom journey](#)

[Conclusion](#)

Webtoons - TL;DR

Webtoons are **mobile-first**, scrollable digital comics that have become a global entertainment phenomenon, especially with kids, teens, and young adults.

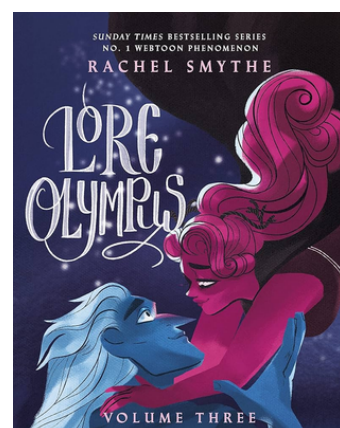
They're **huge**: the biggest platforms attract over **170 million monthly users** worldwide, with around **70% being under 24**, and the under-18 audience is the fastest-growing cohort.

The format's bingeable stories, relatable characters, and free-to-read access make it a **perfect fit for how young audiences consume content - quick, visual, and shareable** right on their phones.

Romance, fantasy, slice-of-life, and LGBTQ+ stories top the charts because they **resonate with readers on a personal level and foster dedicated fan communities**.

Platforms like Webtoon, Tapas, and Tappytoon are now **powerful pipelines for IP**, with hit titles like Lore Olympus, Tower of God, and Heartstopper proving that a strong **webtoon can become a global franchise**.

For brands and IP owners, webtoons offer an **authentic way to reach millions** of young fans, **test new ideas, generate incremental revenue** and **keep fandoms engaged** year-round.



What are **Webtoons**?

Webtoons are digital comics specifically designed for reading on **smartphones and tablets**. Unlike traditional comic books, they are a continuous vertical strip that you scroll through, panel by panel (check the video on the right).

The format originated in South Korea in the early 2000s and quickly became popular thanks to its **intuitive, mobile-friendly layout and ease of accessibility**.

New 'episodes' of webtoons typically come out **weekly**.

Webtoon platforms often **build a sense of community**: fans can comment on episodes, discuss storylines, and interact directly with creators.

Today, webtoons **cover an incredibly wide range of genres**, from romance and fantasy to sci-fi and slice-of-life stories, attracting diverse and enthusiastic audiences.

With massive global platforms like Webtoon, Tapas, and TappyToons hosting millions of regular users, webtoons are now an **influential force shaping how a whole new generation engages with stories online**.



Webtoons by the numbers

They are huge

Webtoons has
(the largest platform)

170 Million

Monthly active users
globally

Despite it's Asian origins,
North America accounts for

48%

of global Webtoons revenues
and Europe accounts for

22%

The audience is engaged

27 Minutes

Average session length

2.7 times a week

average number of times
users visit Webtoons

Young female audience

60%

of the global audience is
women, and 70% of the
creators are women

70%

of the USA audience is under 24

30%

annual growth for under 18s
making them the fastest growing
segment of all age bands

Very Lucrative

\$9B

value of the global webtoons
market. This is almost the
same with the global comic
market

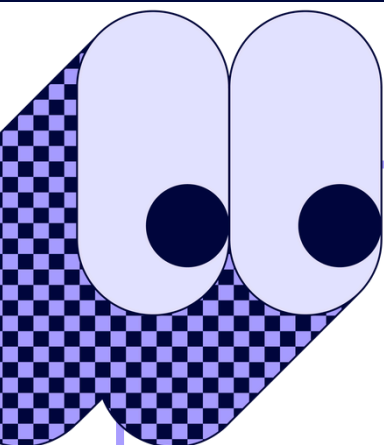
10x

estimated growth over the
next 10 years

The top 100 creators on
Webtoon earned an average

\$1M

in 2023



Key Platforms



Webtoon is widely regarded as the world's largest Webtoon platform and a pioneer of the format



Tapas is known for its broad genre mix and strong Gen Z appeal. It supports both emerging and established creators



Lezhin Comics focuses on premium webtoons, often exploring mature and niche themes.



Tappytoon brings officially licensed Korean webtoons to global audiences, with a strong focus on romance, fantasy, and drama.

Genres

Romance

Why it works: Relatable drama, emotional cliff-hangers, and first love stories.

Popular titles: Lore Olympus, True Beauty, Let's Play.

Why kids & teens love it: It feels real, easy to talk about with friends, and shareable moments.

Slice of Life & Drama

Why it works: Everyday school life, family, friendships, relatable ups & downs.

Popular titles: My Giant Nerd Boyfriend, I Love Yoo, Age Matters.

Why kids & teens love it: Readers see themselves, and feel connected to a community.

Action & Thriller

Why it works: High stakes, tournament arcs, monsters, fast plot.

Popular titles: The God of High School, Solo Leveling, Sweet Home.

Why kids & teens love it: Adrenaline and cliff-hangers keep fans coming back. Feels like anime/gaming.

Fantasy & Urban Fantasy

Why it works: Big escapist worlds, magic, adventures with relatable young heroes.

Popular titles: Tower of God, Omniscient Reader, The Remarried Empress.

Why kids & teens love it: Escapism + bingeable plot twists. Often blends in romance (Romantasy).

BL (Boys' Love) & LGBTQ+

Why it works: Tender, emotional stories and diverse representation.

Popular titles: Heartstopper, Cherry Blossoms After Winter, Killing Stalking.

Why kids & teens love it: A safe way to explore identity, big fandoms, inclusive, and warm.

Why These Genres Work

- They mix relatable everyday life and imaginative worlds.
- They're designed for weekly hits & community discussion, perfect for building fandoms.
- They champion diversity & identity, letting young readers see themselves.



Why Young Audiences Love **Webtoons**

Mobile and On-Demand

Webtoons fit seamlessly into **how kids and teens use their phones**. The scrollable format feels as natural as browsing social feeds. New episodes drop weekly, giving young readers something fresh to look forward to.

Community and Interaction

Webtoon platforms are **designed for sharing, reacting, and engaging with other fans**. Teens and tweens like, comment, and swap theories. This transforms reading into a deeper, more immersive fandom experience, making readers feel part of a bigger community.

Visual and Easy to Consume

Bright, colourful art and big, expressive panels make webtoons **easy to follow**. The format breaks stories into **quick, digestible episodes** that keep short attention spans engaged and make it easy to binge-read.

Low Barrier & Cost

Most webtoons are **free to read**. For those who want to jump ahead or dive deeper, **micro-payments are small and feel accessible**.

From Webtoon to Global Phenomena

Webtoons naturally lend themselves to **cross-media storytelling**.

A hit webtoon can grow from a digital comic into a book series, a TV show, a movie, or a game, carrying its loyal fanbase with it. For studios, publishers, and streamers, the **pre-existing fandom de-risks new projects**.

Webtoons can act as both a **testing ground for new stories** and a **launchpad for global franchises**.

The trend is already well underway, Webtoon's has done **900+ adaptation deals in the past decade**



Lore Olympus (link)

Originally a webtoon reimagining Greek mythology, Lore Olympus has racked up **over a billion reads** and won multiple Eisner Awards.

It's now a bestselling graphic novel series and has an **animated adaptation in the works with the Jim Henson Company**.



Tower of God (link)

Tower of God is a fantasy action webtoon with a mix of adventure, betrayal, and supernatural battles.

It's one of the **first Korean webtoons to hit a truly global scale**, with billions of views since its launch in 2010. Tower of God was **adapted into an anime streamed on Crunchyroll**.



Heartstopper(link)

Originally a self-published webcomic on Tumblr and Tapas, Heartstopper became a **bestselling graphic novel series and then a breakout Netflix hit**.

Its wholesome LGBTQ+ teen romance struck a chord with young audiences worldwide and has become a **massive fandom in its own right**.

Why **Webtoons** Matter for Youth Focused IP Owners

Reach and Engagement

Webtoons deliver **impressive reach and real fan loyalty**. Platforms like Webtoon and Tapas connect brands and creators with **millions of dedicated kids and teens**, turning up every week to read, comment, and share. This mobile-first engagement is gold for anyone wanting to stay **front-of-mind with young audiences**.

Cost-Effective Way to Test New IP and Stories

Webtoons are a smart, low-risk **testing ground for new characters, worlds, or spin-offs**. With relatively **low investment**, you can gauge what clicks with young fans, and use **real-time feedback to refine stories**. If it takes off, you already have proof of demand before investing in bigger adaptations.

New Revenue Streams for Existing IP

For established franchises, webtoons open up **fresh ways to monetise stories you already own**. A popular webtoon spin-off can drive ad revenue, micro-payments for early access, and licensing deals. Webtoon themselves have just launched a consumer product arm. It's a great way to **extend the revenue streams of beloved IP**.

Tool for Growing and Nurturing a Fanbase

Webtoons help brands and creators **build community**. Weekly episodes and comment sections keep young fans coming back, while social sharing spreads the word organically. It's a space where **deep fan engagement** turns casual readers into active advocates and superfans.

Microdramas - TL;DR



Microdramas are **ultra-short, vertically framed soap operas** designed for smartphones, featuring one- to three-minute chapters that **end on irresistible cliff-hangers**.

The format first caught fire on Chinese apps around 2019 and by 2023 had become a **five-billion-dollar industry** at home. **Production costs stay low**, often a mid-five-figure budget funds an entire season, yet the storytelling is high-octane, packed with twists that prompt **viewers to binge half a dozen episodes in a single sitting**.

Since 2022, the model has raced westward through dedicated apps such as ReelShort, DramaBox and ShortTV, **together drawing roughly fifty to sixty million monthly users in North America alone**. Teen **discovery is fuelled by viral teaser clips on TikTok** and Instagram Reels.

Consumer spend is rising fast, US audiences poured hundreds of millions of dollars into "coin" bundles in 2024, while flagship series like The Double Life of My Billionaire Husband have exceeded four hundred million views. Brands such as **KFC** and **Walmart** have also got on board and developed their own series.

Looking ahead, expect **more local-language launches in Europe and Latin America**, experiments with **AI-assisted or animated vertical episodes** and **growing interest from mainstream streamers** who see microdramas as a **quick, data-driven testing ground for new IP**.



What are **Microdramas**?

Microdramas are **ultra-short, serialised video stories** designed exclusively for smartphones.

The bite-sized soap operas play out in vertical video format. Episodes typically run only 1–3 minutes, and every episode ends on a dramatic cliffhanger to keep viewers hooked.

Production values are modest (often low five-figure budgets per series) and casts are usually unknown actors, but **the content leans into over-the-top plots** (for example, enemies-to-lovers romances, makeover dramas or werewolf fantasies) to grab attention.

A microdrama series is **the length of a movie broken into dozens of snackable chapters**, all optimised for quick, **on-the-go viewing on your phone**.

This format **took off first in China**, after exploding there, the government cracked down on the 'vulgar' content and **production studios looked to the 'west' to maintain their (extensive) revenue streams**.



Microdramas by the numbers

They are huge

In China before the big 'lock down' there was

270 Million

DAILY active views

The new US platform, ReelShort attracted

60 Million

Monthly active viewer in just two years

The audience is engaged

5-6 minute

Average session length, is the same as Instagram

Daily Visits

The average users watches Microdramas once a day

Popular with Under 18s

~20%

of heavy users are under 18 (consume 10 or more episodes a day)

Fastest growing group

Under 18s are the fastest growing group, driven by TikTok promotion

Very Lucrative

\$5B

Value of the Chinese Microdrama market in 2023, rivalling its entire domestic film industry

\$1.2B

spent on US microdrama apps in 2024

\$10B

Predicted global market size by 2029

Leading Western **Microdrama** Platforms



ReelShort (by Crazy Maple Studio)

- The first major breakout in the US.
- Launched in 2022, now with 55–60 million monthly active users.
- Focuses on romance, thriller, and supernatural.
- Known for the viral hit Fated to My Forbidden Alpha.



DramaBox (by StoryMatrix)

- Another big US player, founded in 2022.
- Surged in 2024, rivalling ReelShort for monthly active users.
- Strong on supernatural, teen romance, and school dramas.
- Younger audience skew.



GoodShort

- Newer app pushing into the US and UK since 2023.
- Focuses on supernatural romance and revenge plots.
- Growing fast with a few million monthly users and TikTok-led discovery.
- One to watch as it aims for 10 million users by 2025.



ShortMax

- Asia-based app now expanding into Western markets.
- Popular for romance and fantasy series adapted for Western audiences.
- Often ranks high alongside ReelShort and DramaBox in app stores.
- Backed by strong production volume and local-language versions.



YouTube Shorts & TikTok (unofficially)

- Not dedicated microdrama apps, but huge for promoting microdramas.
- Many studios post the first few episodes as short clips on TikTok to go viral and funnel viewers to the app.

Notable Microdramas



Fated to My Forbidden Alpha

First Western microdrama to explode on TikTok.

A single werewolf-transformation clip went viral and proved short-form soap tropes could drive app installs at scale.

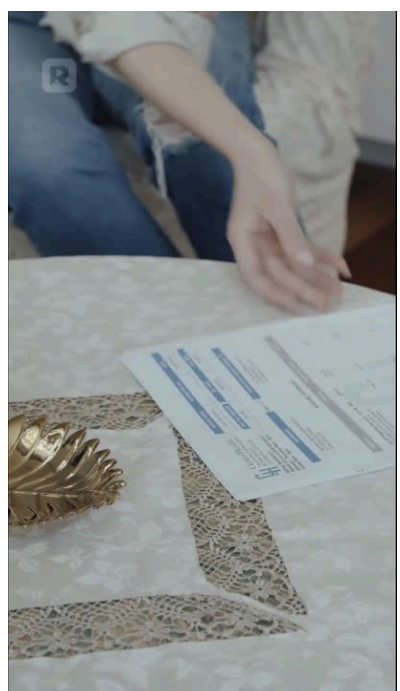
Brought ~1.5 million new users to ReelShort within weeks of the clip going live.



Night Shift Diary

Demonstrated the **upper ceiling of audience scale in China** and kicked off merchandising deals, proving short dramas can rival mainstream TV in reach.

Surpassed 1 billion views, one of the first microdramas to hit that milestone.



The Double Life of My Billionaire Husband

Commercial flagship for the format. Shows that melodramatic "secret billionaire" plots convert viewers into paying fans and travel well across languages.

450 million total views on the English version, with the Spanish dub already "nearly half that" again.



Reincarnation: Don't Mess with the Foodie Empress

First time a global fast-food chain self-produced a full vertical microdrama rather than just placing products. The story wove KFC weekend meal deals directly into the plot and drove both mass reach and measurable sales uplift.

Topped 100 million views across all platforms within its first week, 1.4 billion cumulative views within three months.

How are **Webtoons** and **Microdramas** similar and different?

There are many **similarities** between Webtoons and Microdramas (hence why they are in the same trend debrief).

Serialised, Cliff-hanger Driven Storytelling

Episodes or chapters **end on a dramatic hook** to encourage immediate continuation or return visits.

High Engagement & Repeat Visits

Users regularly return (webtoon readers ~2–3 times per week; microdrama fans ~5–7 sessions per week) and **spend multiple minutes per session**.

Fandom & Community Building

Both **cultivate passionate fan communities** that discuss plots, share fan art or video clips, and drive social-media virality.

Mobile-First, Vertical Design

Both formats are **optimised for smartphone viewing**, using portrait orientation to fit scrolling habits.

Youth-Centric Audiences

Core demographic skews teens and young adults (13–24), who value bite-sized, on-the-go entertainment.

Low Barriers to Entry

Most content is free to start; optional microtransactions or ads unlock premium or early access, appealing to younger budgets.

Transmedia & IP Extension

Successful series often expand into print books, TV/film adaptations or merchandise, turning digital originals into broader franchises.

There are however a couple of notable **differences**

Format

The obvious **difference is their format**, one being scrolling image-based and one being live action (there are some animated Microdramas, but this is very rare due to their costs).

Market Maturity

Webtoons have been around for over 25 years but Microdrama have really only been around for five years globally and two in the 'west'.

UGC

Anyone can create webtoons and upload them to the various platforms (like YouTube or Roblox). **Microdramas are 'invite-only'** as the platforms all curate their output.

How **Webtoons** and **Microdramas** feed into the fandom journey

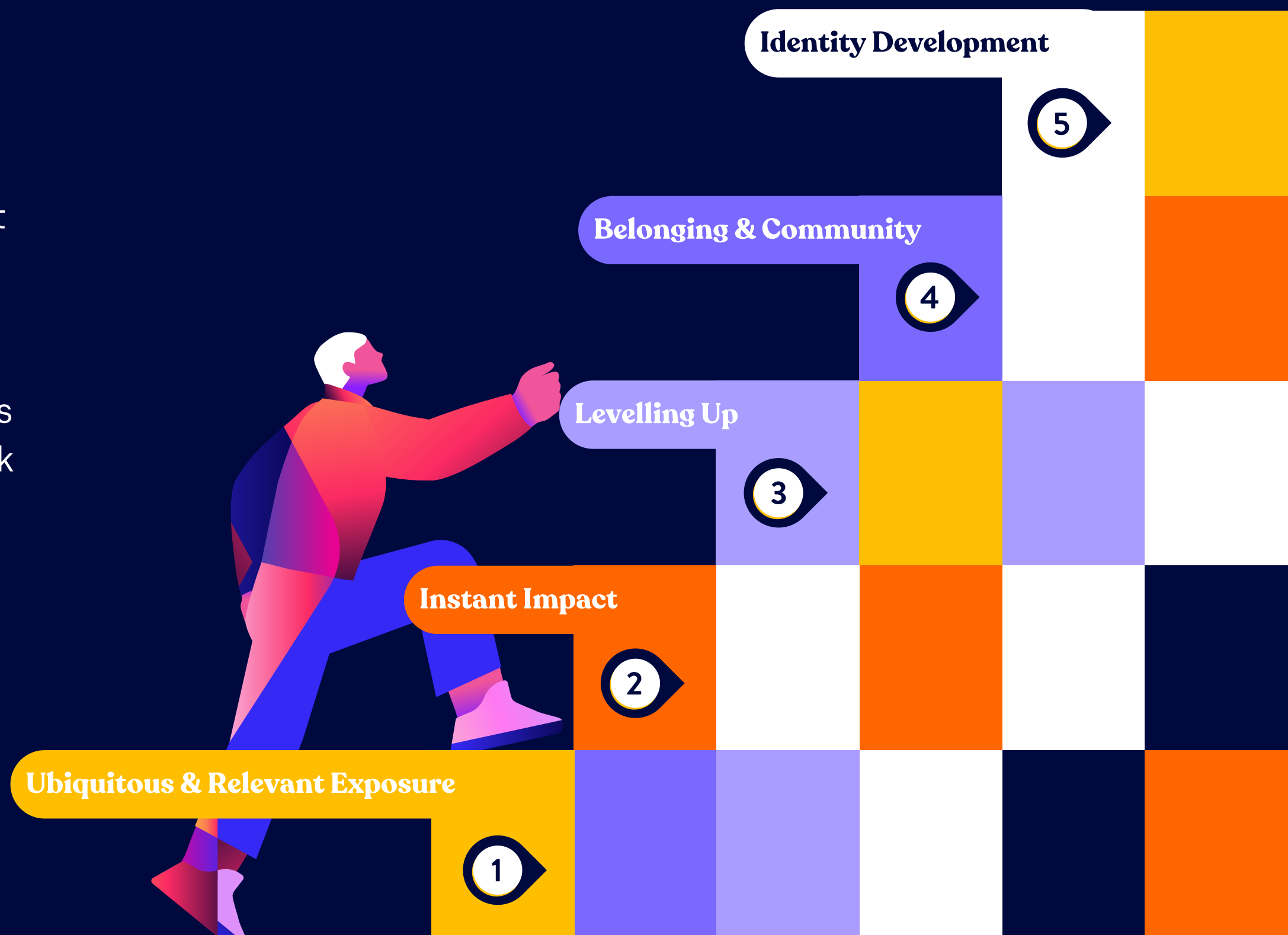
This is our **Fandom Journey**. It's the steps a fan needs to take to go from **zero to super fan**.

Plenty of models look at what levers you need to pull but they don't focus on **which ones you need to use at which part of the process**.

It is built on **interviews with over ten thousand kids**, teens and families around the world and the journeys they took in their fandoms.

Webtoons and Microdramas are fandom super tools, very specifically engineered to get users to super fan quickly.

If you want us to help you strengthen your fandom journey let us know.



How **Webtoons** and **Microdramas** feed into the fandom journey

Microdrama, and to a greater extent, Webtoon **fans are fully committed to their fandom**, with the breadth of spin-off content, IRL meet ups and merchandise, they can **easily define themselves as a fan**.

Identity Development

5

By linking the content directly with fan conversations and allowing fans to dictate (to a degree) the direction of the stories, **fan feel invested and have a sense of ownership** that surpasses most other content.

Belonging & Community

4

As with all fandoms, the **fans thrive on being in the know** and upto date on the latest twists and turns in the plots. Knowing this and all the corresponding fan theories will **help fans flex their knowledge** and **increase their status** in the fandom and amongst their friends.

Levelling Up

3

The format is designed to **hook the audience in instantly**, and create a quick emotional hook that makes them want to explore more.

Instant Impact

2

Webtoons and Microdramas are mobile-first and platform-native, **meeting young audiences exactly where they already spend time**. As they increase in popularity Teen and Tweens will get increasing exposed to the format and the corresponding IPs.

Ubiquitous & Relevant Exposure

1



Conclusion

Webtoons and Microdramas aren't just a passing trend, they're a **smart, scalable way to meet kids and teens exactly where they are:** on their phones, scrolling and sharing.

They've proven they can grow local stories into **global blockbusters**, with built-in **fanbases hungry for more.**

For brands and creators, they're a **low-risk** testbed for new ideas and a springboard for IP that sticks.

In a crowded content landscape, webtoons and microdramas are a fast-track to **fresh fandoms, deeper engagement, and stories that travel** far beyond the scroll.