2023
CHARACTER
INDUSTRY
WHITE PAPER

SUMMARY

ENGLISH / 中文

Character

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SUMMARY

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PART 1. Usage Status

1. Survey Design

The subjects of this survey are people between the ages of 3 and 69 living across the country who have used real-life or digital character content "more than once every two to three months" in the past year.

The survey's sampling frame was based on the 1.17 million people from the survey agency's national survey panel, and the population composition ratio by region, gender, and age from Statistics Korea's resident registration demographic data as of June 2022 and the character user survey from the past three years. After sending an online survey email considering the content use rate, the survey was conducted until the target number of samples was obtained depending on whether or not the character content was used.

The survey cycle was once a year, and the response standard for the content usage survey was from May 2022 to June 2023(the most recent year), unless otherwise stated.

| Table 1 | Online Questionnaire Survey Design on Character Users |

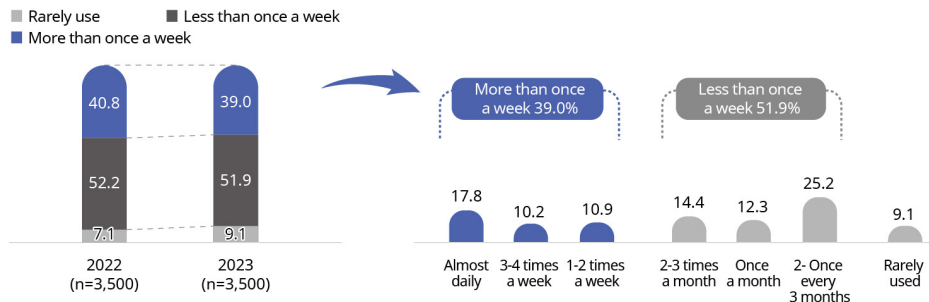| Division	Content
Target Population	• All citizens aged from 10 to 69
Survey Population	• Those who have used character content (real-life character merchandise, merchandise created by using character IP, and digital character merchandise) "at least once in two to three months" in the past year among all citizens aged from 3 to 69
Survey Area	• Nationwide
Data Collecting Method	• Online survey using structured questionnaires
Sampling Frame	• Resident registration demographic status provided by the Ministry of Public Administration and Security as of May 2023 • Used the 1.17 million people from the nationwide survey panel held by the survey agency as a sampling frame
Sampling Method	• Proportionally allocated by gender/age/region
Sampling Error	• ±1.66%p at 95% confidence level
Valid Sample	• 3,500 people (post-weighted to 3,500 after surveying 3,621 people) • To increase the reliability of the sample for children (ages 3 to 9), post-weighting of 500 respondents aged 3 to 9 to 379 was based on the ratio of respondents aged 3 to 9 compared to all respondents in the previous year.
Data Collecting Period	• June – July 2023 (June 2 – July 14, 2023)
Survey Host	• Korea Creative Content Agency
Survey Agency	• Global Research Co., Ltd.

2. Frequency of Using Character Content

2-1. Frequency of Using Real-life Character Products

The frequency of using physical character merchandise was "more than once a week" at 39.0%, "less than once a week" at 51.9%, and "once every 2-3 months" was the highest at 25.2%.

Looking at the respondent characteristics, the proportion of people aged 3 to 9 using physical character merchandise "more than once a week" was relatively high.

| Figure 1 | Frequency of Using Real-life Character Products |

(Base: All, Unit: %)

■ Rarely use   ■ Less than once a week
■ More than once a week

More than once a week 39.0%

Less than once a week 51.9%

	2022 (n=3,500)	2023 (n=3,500)
More than once a week	40.8	39.0
Less than once a week	52.2	51.9
Rarely use	7.1	9.1

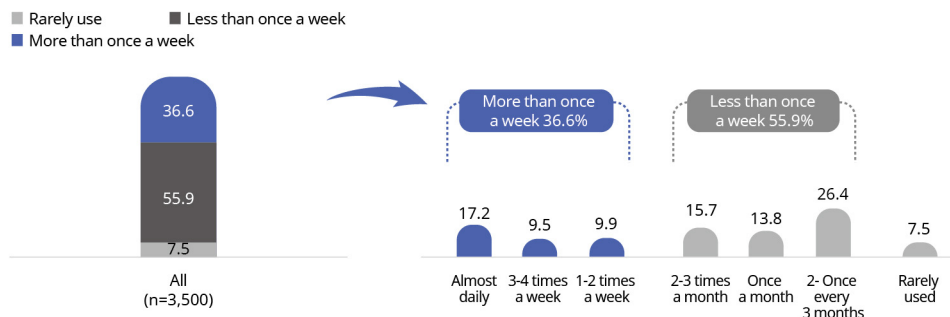| Almost daily	3-4 times a week	1-2 times a week	2-3 times a month	Once a month	2- Once every 3 months	Rarely used
17.8	10.2	10.9	14.4	12.3	25.2	9.1

2-2. Frequency of Using Products Created Using Character IP

The frequency of using merchandise using character IP was "more than once a week" at 36.6% and "less than once a week" at 55.9%, with "once every 2-3 months" being the highest at 26.4%.

Looking at respondent characteristics, the proportion of people in their 20s and those aged 3 to 9 who used merchandise using character IP "more than once a week" was relatively high.

| Figure 2 | Frequency of Using Products Created Using Character IP |

(Base: All, Unit: %)

■ Rarely use   ■ Less than once a week
■ More than once a week

More than once a week 36.6%

Less than once a week 55.9%

All (n=3,500)	
More than once a week	36.6
Less than once a week	55.9
Rarely use	7.5

Almost daily	3-4 times a week	1-2 times a week	2-3 times a month	Once a month	2- Once every 3 months	Rarely used
17.2	9.5	9.9	15.7	13.8	26.4	7.5

2-3. Frequency of Using Digital Character Merchandise

The frequency of using digital character merchandise was "more than once a week" at 61.3%, and "less than once a week" at 19.6%, with "almost daily" being the highest at 23.6%.

Looking at respondent characteristics, the proportion of people in their 20s using digital character merchandise "more than once a week" was relatively high.

Figure 3	Frequency of Using Digital Character Products

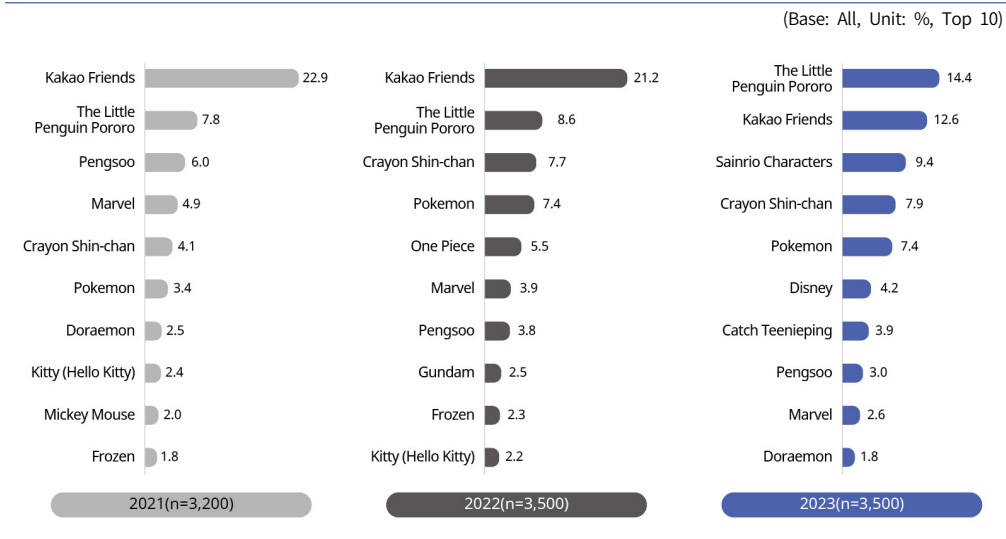(Base: All, Unit: %)
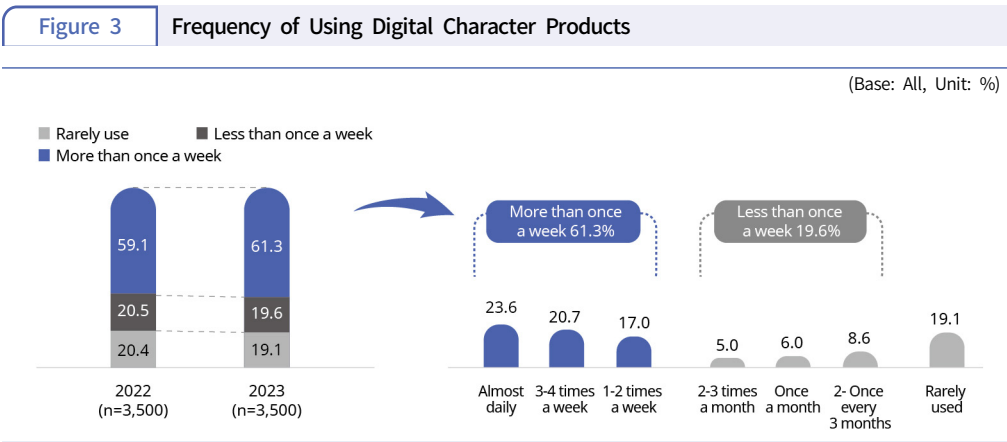
3. Most Favored Character

The most favored character was "The Little Penguin Pororo" with 14.4%, followed by "Kakao Friends(12.6%)," "Sanrio Characters(9.4%)," "Crayon Shin-chan(7.9%)," and "Pokemon(7.4%)."

The rank of "The Little Penguin Pororo" rose to 1st place from second in 2022, and "Sanrio Characters" and "Catch Teenieping" made it to the top 10.

Looking at respondent characteristics, "The Little Penguin Pororo" and "Crayon Shin-chan" are popular among those in their 20s, "Kakao Friends"

among those in their 40s and older, and "Sanrio Characters" and "Pokemon" among those aged 3 to 9 and teenagers, 3. Additionally, the prevalence of "Catch Teenieping" was relatively high in children aged 3-9 years.

Figure 4	Most Favored Character

(Base: All, Unit: %, Top 10)

2021(n=3,200)

Character	%
Kakao Friends	22.9
The Little Penguin Pororo	7.8
Pengsoo	6.0
Marvel	4.9
Crayon Shin-chan	4.1
Pokemon	3.4
Doraemon	2.5
Kitty (Hello Kitty)	2.4
Mickey Mouse	2.0
Frozen	1.8

2022(n=3,500)

Character	%
Kakao Friends	21.2
The Little Penguin Pororo	8.6
Crayon Shin-chan	7.7
Pokemon	7.4
One Piece	5.5
Marvel	3.9
Pengsoo	3.8
Gundam	2.5
Frozen	2.3
Kitty (Hello Kitty)	2.2

2023(n=3,500)

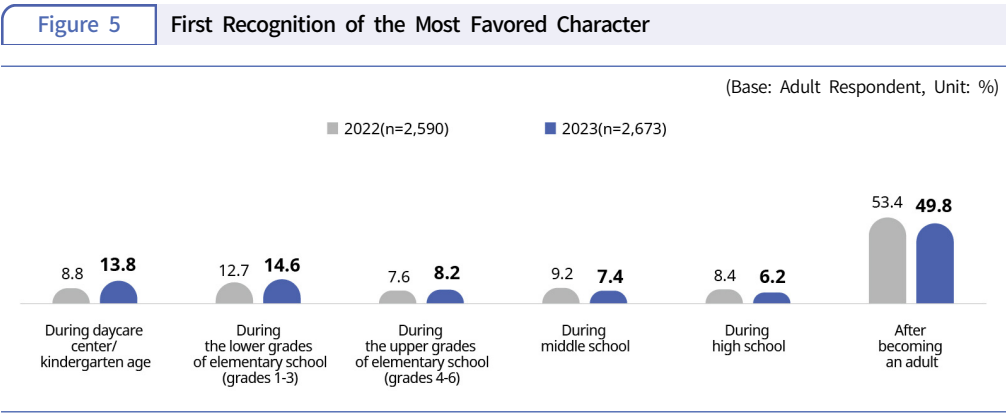| Character	%
The Little Penguin Pororo	14.4
Kakao Friends	12.6
Sainrio Characters	9.4
Crayon Shin-chan	7.9
Pokemon	7.4
Disney	4.2
Catch Teenieping	3.9
Pengsoo	3.0
Marvel	2.6
Doraemon	1.8

4. First Recognition of the Most Favored Character

The top reason for favoring a character, based on 1 and 2 rankings, is "liking the character design" at 57.5%, trailed by "being familiar with/seeing the character often" at 34.1%, and "liking the character's behavior" also at 34.1%. Other popular reasons include "because I like the character's behavior(34.1%) 29.4%)," "I like content featuring characters(22.8%)," etc.

While the response "because I like the design of the character" has continued to decrease since 2021, the response "because I like the content featuring the character" has shown an increasing trend.

Women had a relatively higher response than men for "I like the character design" when considering respondent characteristics. Teenagers

who answered "because I like the character design" and "because I like the character's behavior," people in their 60s who answered "because the character is familiar/watched often," 3 to 9 year olds who answered "because I like content featuring the character," and those in their 30s who answered "I like merchandise that incorporate characters" was relatively high by age.

| Figure 5 | First Recognition of the Most Favored Character |

(Base: Adult Respondent, Unit: %)

■ 2022(n=2,590)   ■ 2023(n=2,673)

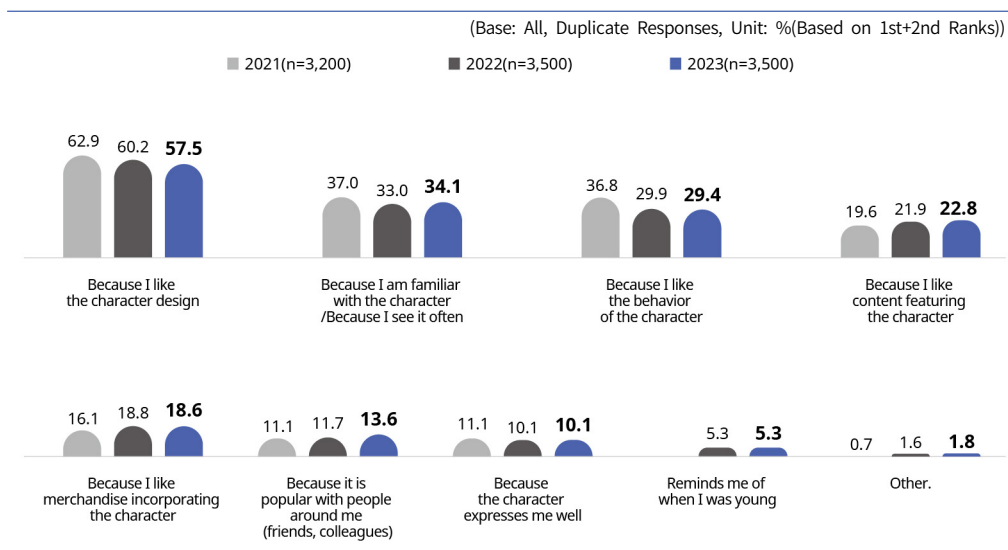|	During daycare center/ kindergarten age	During the lower grades of elementary school (grades 1-3)	During the upper grades of elementary school (grades 4-6)	During middle school	During high school	After becoming an adult
2022	8.8	12.7	7.6	9.2	8.4	53.4
2023	13.8	14.6	8.2	7.4	6.2	49.8

5. Reason for the Most Favored Character

Regarding the reason behind the preference of the most favored character(based on 1st+2nd ranks), "because I like the character design" was the highest at 57.5%, followed by "because I am familiar with the character/see it often(34.1%)," and "because I like the character's behavior (34.1%)" 29.4%)," "because I like content featuring the character(22.8%)," and etc.

Despite a decrease in the response "Because I like the design of the character" since 2021, the response "Because I like the content featuring the character" has been on the rise.

Analyzing the respondent characteristics, women had a relatively higher response than men for "I like the character design."

By age, teenagers who answered "because I like the character design" and "because I like the character's behavior" were relatively high, followed by people in their 60s who answered "because the character is familiar/watched often," 3 to 9 year olds who answered "because I like content featuring the character," and those in their 30s who answered "I like merchandise incorporating the character."

Figure 6	Reason for the Most Favored Character

(Base: All, Duplicate Responses, Unit: %(Based on 1st+2nd Ranks))

■ 2021(n=3,200)   ■ 2022(n=3,500)   ■ 2023(n=3,500)

Reason	2021	2022	2023
Because I like the character design	62.9	60.2	**57.5**
Because I am familiar with the character /Because I see it often	37.0	33.0	**34.1**
Because I like the behavior of the character	36.8	29.9	**29.4**
Because I like content featuring the character	19.6	21.9	**22.8**
Because I like merchandise incorporating the character	16.1	18.8	**18.6**
Because it is popular with people around me (friends, colleagues)	11.1	11.7	**13.6**
Because the character expresses me well	11.1	10.1	**10.1**
Reminds me of when I was young		5.3	**5.3**
Other.	0.7	1.6	**1.8**

6. Experience of Purchasing Real-life Character Goods

The percentage of people who purchased real-life character merchandises in the past year was 76.1%.

Those aged 3 to 9 had the highest level of experience in purchasing real-life character merchandises.

| Figure 7 | Experience of Purchasing Real-life Character Goods in the Past Year |

(Base: All, Unit: %)
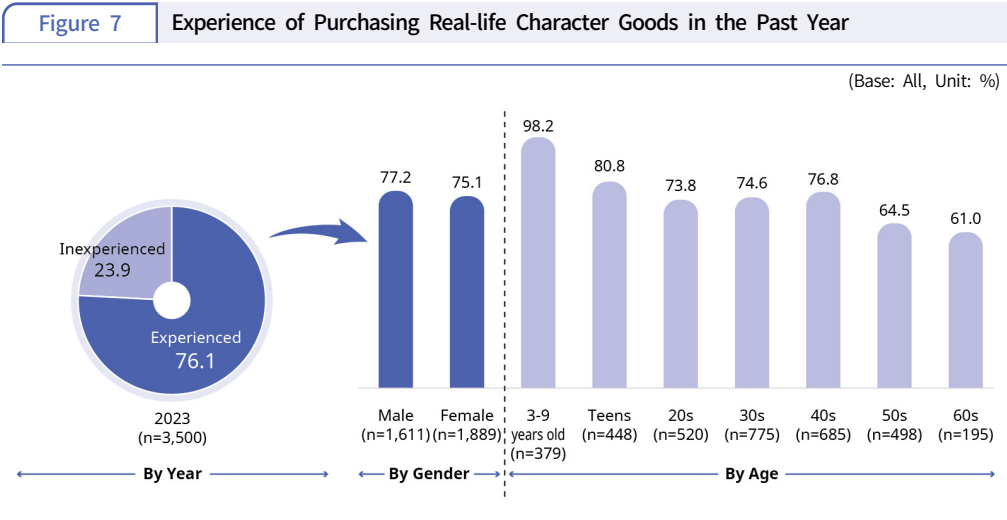
7. Type of Real-life Character Goods Purchased

The most purchased type of real-life character was "dolls(stuffed dolls, princess dolls, etc.)," which accounted for 57.8% of purchases.
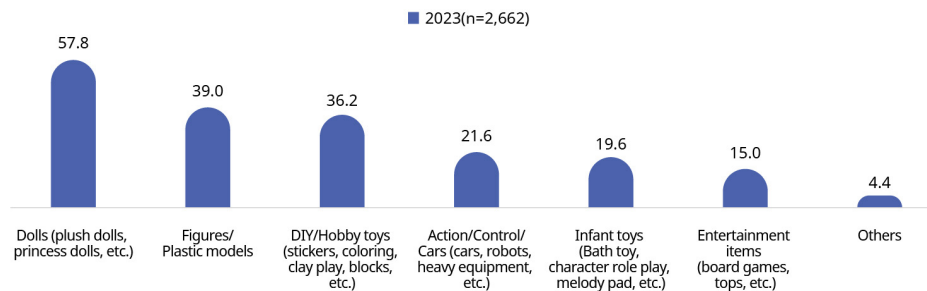
This was followed by "Figures/Plastic Models(39.0%)," "DIY/Hobby Toys (36.2%)," and "Action/Control/Cars(21.6%)."

Based on respondent characteristics, the proportion of women purchasing "dolls," "DIY/hobby toys," and "infant/toddler toys," and the proportion of men purchasing "figures/plastic models," "action/control/cars," and "entertainment merchandise" were was relatively high.

By age, those in their 20s and 30s purchased "dolls," those in their 40s purchased "figures/plastic models," and those aged 3 to 9 purchased "DIY/hobby toys," "action/control/cars," and "baby/toddler toys" appeared to be popular.

| Figure 8 | Type of Real-life Character Goods Purchased |

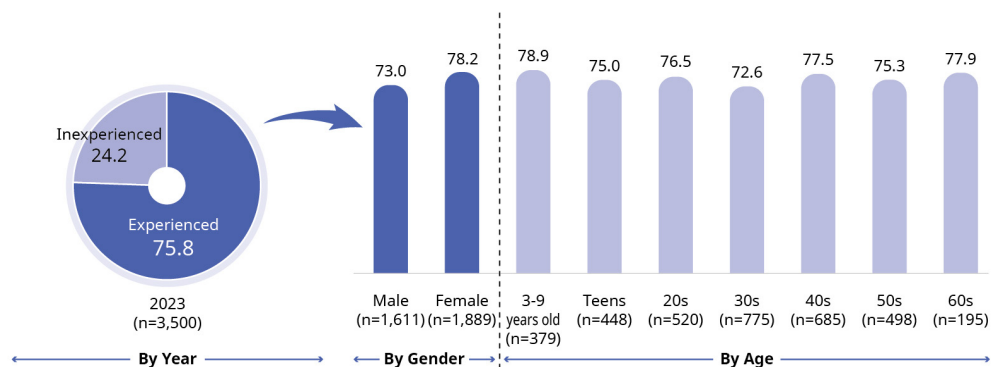(Base: People with Experience of Purchasing Real-life Character Goods, Duplicate Responses, Unit: %)

■ 2023(n=2,662)

Dolls (plush dolls, princess dolls, etc.)	Figures/ Plastic models	DIY/Hobby toys (stickers, coloring, clay play, blocks, etc.)	Action/Control/ Cars (cars, robots, heavy equipment, etc.)	Infant toys (Bath toy, character role play, melody pad, etc.)	Entertainment items (board games, tops, etc.)	Others
57.8	39.0	36.2	21.6	19.6	15.0	4.4

8. Experience of Purchasing Goods Created by Featuring Character IP

In the past year, 75.8% of individuals purchased merchandise featuring character IP.

Looking at respondent characteristics, it was found that those aged 3 to 9 had the most substantial experience purchasing merchandise featuring character IP.

| Figure 9 | Experience of Purchasing Goods Created by Featuring Character IP in the Past Year |

(Base: All, Unit: %)

Inexperienced 24.2

Experienced 75.8

2023 (n=3,500)

Male (n=1,611)	Female (n=1,889)	3-9 years old (n=379)	Teens (n=448)	20s (n=520)	30s (n=775)	40s (n=685)	50s (n=498)	60s (n=195)
73.0	78.2	78.9	75.0	76.5	72.6	77.5	75.3	77.9

By Year ← By Gender → By Age

9. Types of Goods Created by Featuring Character IP

The types of merchandise featuring character IP purchased were "stationery/fancy(school supplies, etc.)(46.0%)" and "food/beverage/quasi-drugs (45.6%)."

This was followed by "miscellaneous merchandise/accessories(43.1%)," "fashion clothing(31.3%)," and "home/daily necessities(16.8%)."

Looking at respondent characteristics, women showed a relatively high purchase rate for "stationery/fancy" and "miscellaneous merchandise/accessories," while men showed a relatively high purchase rate for "fashion clothing" and "sports/leisure/automotive merchandise."

By age, the purchase rates were relatively high for "Stationery/Fancy" among teenagers, "Food/Beverage/Quasi-drugs" among those in their 30s and 50s, "Fashion Clothing" among those aged 3 to 9 and those in their 30s, "Miscellaneous Goods/Accessories" among those aged 3 to 9, and "fashion clothing," "home/daily necessities," and "beauty/beauty merchandise" among those in their 20s.

| Figure 10 | Types of Goods Created by Featuring Character IP |

(Base: People with Experience of Purchasing Goods Created by Using Character IP, Duplicate Responses, Unit: %)
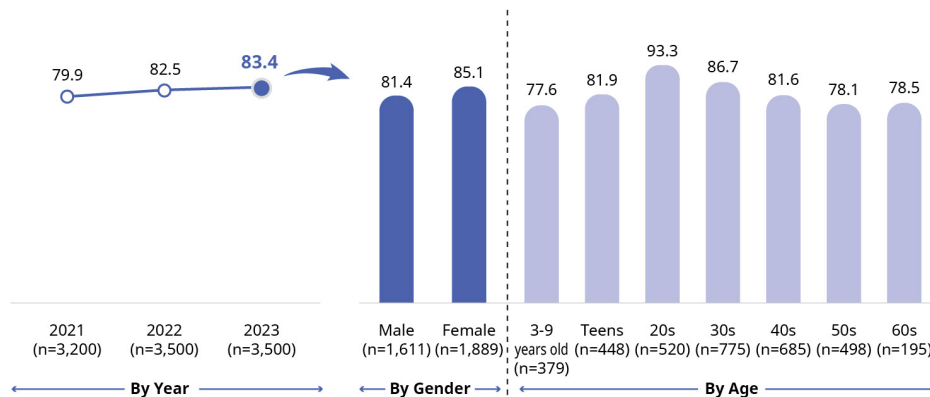
■ 2023(n=2,654)
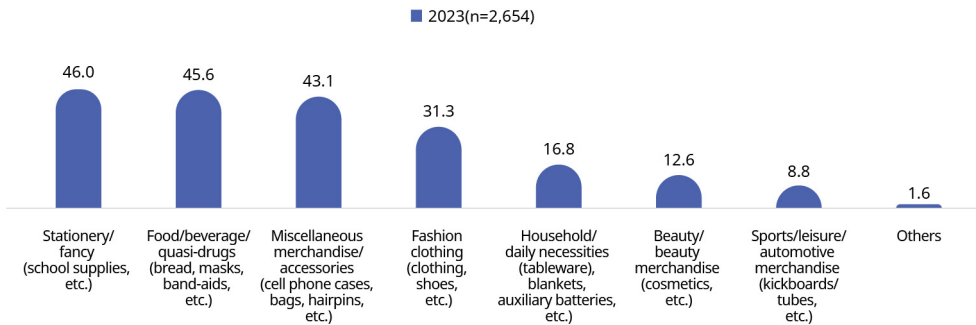
10. Experience of Purchasing Digital Character Merchandise

The proportion of people who have experience(purchasing) digital character merchandise in the past year was 83.4%, and has continued to increase since 2021.

From the analysis, it was found that people in their 20s had the highest level of experience using(purchasing) digital character merchandise.

| Figure 11 | Experience of Using (Purchasing) Digital Character Merchandise in the Past Year |

(Base: All, Unit: %)

By Year: 2021 (n=3,200) 79.9 | 2022 (n=3,500) 82.5 | 2023 (n=3,500) 83.4
By Gender: Male (n=1,611) 81.4 | Female (n=1,889) 85.1
By Age: 3-9 years old (n=379) 77.6 | Teens (n=448) 81.9 | 20s (n=520) 93.3 | 30s (n=775) 86.7 | 40s (n=685) 81.6 | 50s (n=498) 78.1 | 60s (n=195) 78.5

11. Monthly Average Expenditure of Character Usage

As for the amount that can be spent when using a character on average per month, the highest is "$8 to less than $24" at 33.2%, followed by "less than $8(24.0%)" and "$24 to less than $40(23.2%)" appeared in that order.

Upon analyzing characteristics of the respondents, the proportion of people who can spend appeared to be significant as most respondents in their teens responded "more than $8 but less than $24", those in their 60s

"less than $8," and those aged 3 to 9 "$24 and less than $80."

| Figure 12 | Monthly Average Expenditure of Character Usage |

(Base: All, Unit: %)

■ 2021年(n=3,200)　■ 2022年(n=3,500)　■ 2023年(n=3,500)

	8美元以下	8美元以上~24美元以下	24美元以上~40美元以下	40美元以上~62美元以下	62美元以上~80美元以下	80美元以上
2021	23.9	28.8	24.0	13.6	6.8	3.0
2022	23.8	29.0	23.3	14.1	7.2	2.7
2023	24.0	33.2	23.2	13.2	6.2	0.3
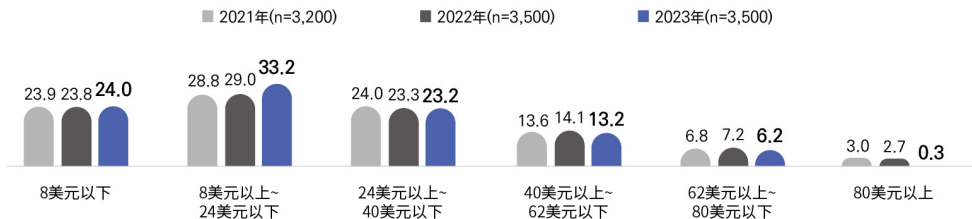
1) 2022 average exchange rate: 1 U.S. dollar = 1,290 won (Woori Bank)

12. Character's Impact on Merchandise Purchasing Decision

65.2% of respondents said that characters "influence" their purchasing decisions when purchasing merchandise, and the trend has continued to gradually increase since 2021.

When examining at respondent characteristics, it was found that characters had a significant impact on purchasing decisions among 3 to 9-year-olds when purchasing merchandise.

| Figure 13 | Character's Impact on Merchandise Purchasing Decision |

(Base: All, Unit: %)

■ No influence　■ Some influence
■ Has influence

	2021 (n=3,200)	2022 (n=3,500)	2023 (n=3,500)
Has influence	62.4	64.2	65.2
Some influence	28.7	26.6	26.1
No influence	9.0	9.3	8.7

No influence 8.7%　　Has influence 65.2%

| No influence at all	Not much influence	Some influence	Moderate influence	Huge influence
1.8	6.9	26.1		13.7
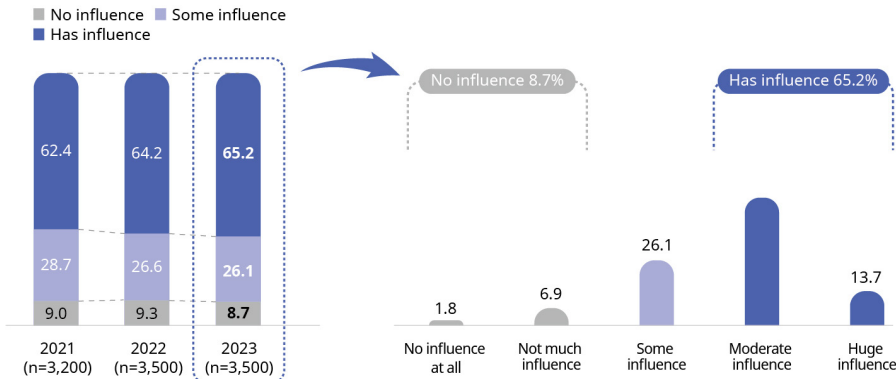
13. Influence of Authenticity on Character Merchandise Purchasing Decisions

When purchasing character merchandise, 61.4% of respondents reported that authenticity has an influence on their purchase decision, and the trend has continued to slightly decrease since 2021.

When looking at respondent characteristics, it was found that the influence of authenticity was relatively large among those in their 20s.

| Figure 14 | Influence of Authenticity on Character Merchandise Purchasing Decisions |

(Base: All, Unit: %)
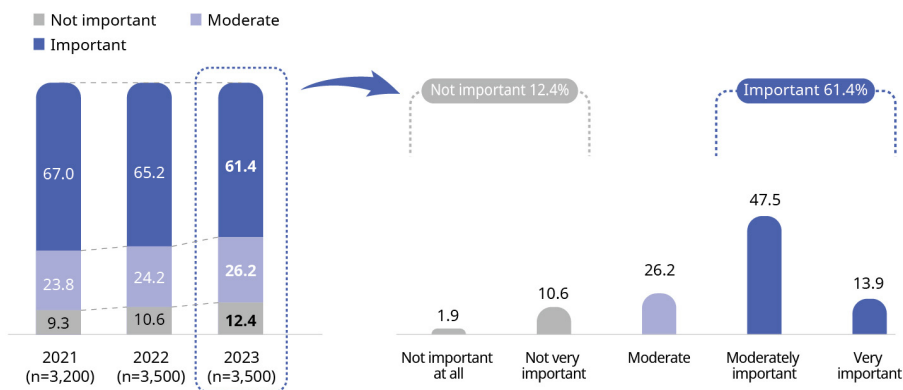
14. Scope of Additional Expenditure for Merchandise Featuring Character IP

The scope of additional payment that can be spent for merchandise featuring character IP is relatively high at "less than 10%(32.0%)" and "less than 10 to 20%(30.7%)," and the rate of no additional payment was found to be 10.6%.

The rate of no additional payment increased by 3.7% points from the previous year.

Looking at respondent characteristics, the responses "less than 10%" and "not willing to pay" were relatively high among those in their 60s, and the responses "less than 10-20%" were relatively high among those aged 3 to 9.

| Figure 15 | Scope of Additional Payment for Goods Created by using Character IP |

(Base: All, Unit: %)

■ 2021(n=3,200)   ■ 2022(n=3,500)   ■ 2023(n=3,500)

	Less than 10%	Less than 10-20%	Less than 20-30%	Less than 30-40%	More than 40%	Not willing to pay extra
2021	33.7	32.7	17.8	5.5	2.3	7.9
2022	31.1	31.3	20.6	8.0	2.2	6.9
2023	32.0	30.7	17.7	7.3	1.7	10.6
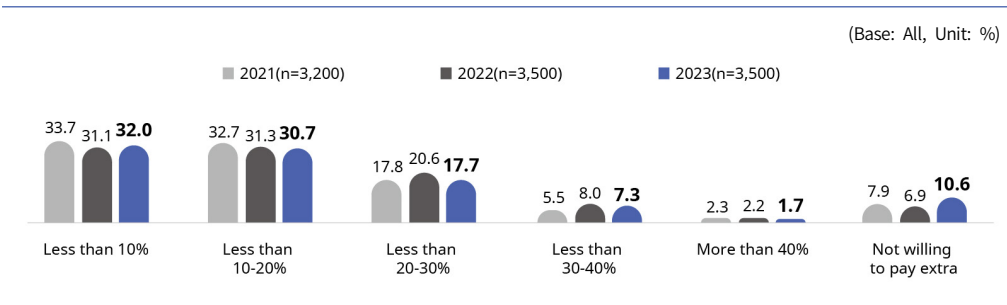
PART 2. Support Project

The Korea Creative Content Agency promoted production and distribution support projects to enhance the capabilities of the Korean character industry and revitalize the licensing industry. The primary component of the support projects implemented in 2022 include the following.

1. Production Capabilities Enhancement

1-1. Supporting New character IP Development and Commercialization

The new character IP development support project is a project that aims to enhance creativity and establish a strong foundation for the licensing industry by creatng new character IP. In 2022, twelve new character IPs were developed and discovered through this support project.

Furthermore, management supported projects aimed to improve new character IP development tasks, strengthen commercialization capabilities through customized consulting and expert training for licensing and business revitalization for selected tasks. Additionally, these projects provided numerous promotional opportunities including showcasing to display project achievements and sharing know-how in connection with the Character Licensing Fair.

1-2. Supporting Content IP Licensing

The Content IP Licensing Support Project aims to revitalize the licensing business using content IP. To discover and activate content IP suitable for the diversified production, distribution, and consumption environment, we supported the production, development, and marketing costs of projects that promote licensing business by utilizing excellent domestic content IP. Through this, we facilitated the growth of diverse genres of excellent content IP and the activation of additional businesses, and endorsing a total of 23 initiatives to strengthen the foundation of the licensing industry.

1-3. IP Licensing Build-up

IP Licensing Build-up Proejct provides support licensing areas and strengthen production and business capabilities. This is achieved by leveraging the platforms of large companies and utilizing the existing IPs of small and medium-sized content companies.

Among the industries that can license content IP, one theme park(Lotte World), one F&B(Daehan Flour Mills), one distribution(Lotte Home Shopping), and one public institution(Korea Energy Agency) participated this year, with a total of three large corporations and in collaboration with one organization, five participating companies in the screen and merchandise fields were selected through a contest.

Companies participating in the collaboration with Lotte World include Dankong's Super Kongs(screen), Gold Frame(merchandise)'s Chogmango, and Daehan Flour collaborated with Big Fine Studio"s Sky Surfer(screen). Be My Pet(Screen) with Samsaek and Lili were selected as the company collaborating with Lotte Home Shopping, and finally, Acoms(Screen) was selected as the company collaborating with the Korea Energy Agency.

Four CP companies and five participating companies joined "he "2022

Content IP Industry Exhibition" held at COEX from November 10 to 12. They had completed collaborative IP content production cost support, expert consulting, and prototype production.

2. Distribution Support

2-1. Character Licensing Fair

"Character Licensing Fair" is the biggest event in Korea that focuses exclusively on character licensing business, with a proud history spanning 21 years.

In 2020, it was canceled due to COVID-19 pandemic. Nevertheless, the event bounced back in 2021 for its 20th anniversary from November 25 to 28, and in 2022, around the time it was previously held at COEX Hall A for 4 days from July 14 to 17. It was held three years after the pandemic in mid-July, when the event was originally held. Compared to 2021, which focused on revitalizing B2B business, B2C was significantly strengthened to suit the characteristics of this event, which has many family customers with infants and young children. As the event was held in the summer, the event venue was designed with a cool feel, including ice cream and a swimming pool, under the theme of "Summer Flex."

In this event, experiential content that attendees could directly participate were noticeably expanded. From "My Own Goods Making Experience" where you can make your own T-shirts and emoticons, "Character Board Game," "Gwanghwagea" realistic content demonstrations, idol fan meetings, character parades, etc., a variety of content was provided for everyone from children to family visitors to enjoy together.

In addition, we provided a variety of attractions for families as well as those in their 20s and 30s to enjoy, such as "Pilso Goods Convenience Store." This store showcased examples of collaboration with the distribution

industry, featuring products such as Lotte Home Shopping's <Belly Gom> and Nongshim <Raccoon>, and the "Rookie Project," which showcases the works of emerging character creators.

Collaboration with companies and related organizations was actively promoted to revitalize the content IP business. The event was sponsored by NCSoft Co., Ltd., the Korea Character Culture Industry Association, the Korea Character Association, the Character Designers Association, the Korea Cultural Content Licensing Association, and the Korea Character Society. The event created practical business opportunities and high-quality business consulting opportunities for character and content companies during the event. In the "Business Lounge," we provided active support for B2B consulting programs, such as 1:1 business matching and on-site matching. Additionally, the "Consulting Zone" provides professional consultation to experts in related fields, including legal professionals seeking advice on job opportunities, overseas expansion, financial systems, labor issues, and legal disputes.

The "Licensing Practical Workshop" aimed at spreading business insight and know-how, was held in advance a week prior to the event. Additionally "K-Content Video Export Consultation" co-hosted by the Korea Creative Content Agency and the Korea International Trade Association was also held together, but experienced a decline in attendance due to COVID-19. We supported the business capabilities and business revitalization of domestic character and content companies.

The Korea Creative Content Agency, which hosted the event, seized the opportunity to launch social responsibility management(ESG) in cooperation with other companies and organizations. We signed a business agreement with the Korea Energy Agency for ESG projects, such as joint planning and development of carbon-neutral content in response to climate change. Additionally, we pursued a business agreement with Lotte World to collaborate on promotion and distribution support for characters from new designers and small and medium-sized content companies.

2-2. Licensing Conference

"Licensing Con 2022," Korea's only business conference in the field of content IP licensing, was held from November 11 to 12. It was held at COEX Studio 159. As in 2021, it was held offline in 2022, with simultaneous online broadcasting.

The theme of the 2022 conference, which celebrated its 4th anniversary since 2019, was "Presentation of K-Content IP Business Model" and introduced K-Content's global strategy and all-round business diversification cases. Five conference sessions were organized, including the keynote session "Opening the IP Universe," and a variety of programs were operated, including 13 lectures, live talks, and special sessions.

"Licensing Con 2022" served as a platform to examine the impact of K-content, which has gained prominence as mainstream content worldwide, and to discuss the characteristics that resonate with global fans. In addition, insight was provided by once again emphasizing the importance of flexible and creative combination between various genres within infinitely expanding IP business environment.

2-3. Character IP Goods Distribution Test Bed

To expand distribution channels for small and medium-sized character companies specializing in character merchandise, we placed their products in a movie theater-related pop-up store(Cream Store) (Megabox Suwon Yeongtong branch) and three large distribution malls(Toys R Us Jamsil, Gimpo Airport, Eunpyeong branch, etc.) By promoting distribution support projects, we supported the sales of various merchandise by 43 small and medium-sized content companies. We arranged an exhibition booth in coordination with the character licensing fair and operated a pop-up exhibition within the theme park(Lotte World). Our objective was to assist

small and medium-sized content companies to increase sales and increase IP brand recognition.

2-4. Korea Content Awards - Character Category

The Korea Content Awards project seeks to spur creativity among industry workers and revive the content sector by recognizing exceptional domestic works and contributors. A total of 21 works were received for the "2022 Korea Content Awards - Character Category," and 5 works were finally chosen as winners through two rounds of expert screening and public evaluation.

The President's Award was presented to <Belly Gom>, a character from Lotte Home Shopping, a distribution company, with 1.26 million cumulative subscribers on social media and 300 million cumulative views as of 2022. <Cococo Alu>, <Dinosaur Daebari>, and <Peekaboo, My Pet> were selected for the Minister of Culture, Sports and Tourism Award, and <Buddy Friends> was awarded the Korea Creative Content Agency Director's Award.

The 2022 awards ceremony was took place in Room 401 of COEX Conference Room on December 14 with approximately 200 winners and officials in attendance, and a certificate and small cash prizes were awarded as prizes.

2023
卡通形象
产业白皮书

摘　要

Character

第一章　卡通使用现状

1. 调查设计

本次调查的对象是居住在全国的3~69周岁的国民中，在最近一年内"2~3个月1次以上"使用过实物卡通或数码卡通产品的人。

调查中将调查执行机构所拥有的全国调查面板117万名作为抽样框，考虑到截止2022年6月统计厅对居民登记人口统计资料的各地区、性别、年龄段人口结构比率以及之前三年卡通用户实况调查的产品使用率，发送在线调查邮件后，根据卡通内容的使用情况进行调查，直至达到目标样本完成。

调查周期为每年一次，如果没有特别提及，有关文化产品使用调查内容的回答标准，则定为2022年5月~2023年6月(最近一年)期间。

表 1	卡通用户线上问卷调查设计
区分	内容
目标募集群体	3~69周岁全体国民
调查募集群体	3~69周岁全体国民中最近一年内"2~3个月使用一次以上"卡通（实物卡通商品、卡通IP应用商品、数码卡通商品）产品的用户
调查地区	全国
资料收集方法	通过结构化的问卷表进行线上问卷调查
抽样框	截至2023年5月，行政安全部提供居民登记人口统计现状。 将调查执行机构所拥有的全国调查面板117万人用于抽样框。
抽样方法	性别/年龄段/各地区按比率分配
标本误差	95%可信水平上 ±1.63%p
有效标本	3,500名（对3,621名进行调查以后以3,500名赋予期后加权值） 为了提高婴幼儿（3~9岁）对象的标本可信度，以上一年度全体受访者对比3-9岁受访者的比率为准，将3~9岁段年龄500名作为379名赋予期后加权值。
资料收集期间	2023年6~7月(2023.06.02.~2023.07.14.)
调查机构	韩国文化产业振兴院
调查执行	（株）全球调查

2. 卡通产品使用频率

2-1. 实物卡通商品使用频率

  在实物卡通商品使用频率中，"每周1次以上"占39.0%，"每周1次以下"占51.9%，其中"2~3个月1次"占25.2%，所占比率最高。

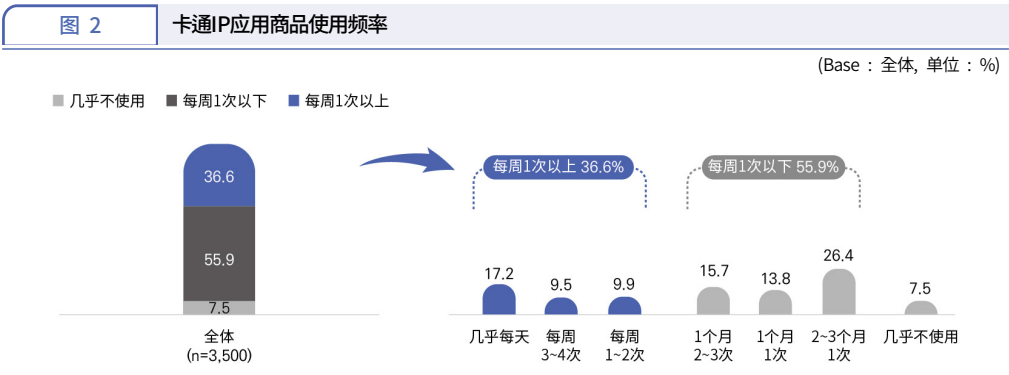 从受访者的特点来看，3~9岁段的人群中"每周使用1次以上"实物卡通商品的比率相对较高。

图 1	实物卡通商品使用频率

(Base：全体，单位：%)
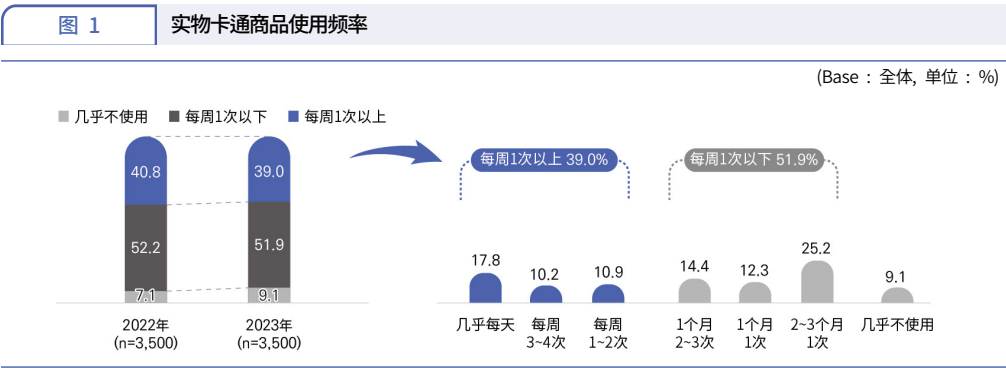
2-2. 卡通IP应用商品使用频率

  从卡通IP应用商品使用频率来看，"每周1次以上"占36.6%，"每周1次以下"占55.9%，其中"2~3个月1次"占26.4%，所占比率最高。

  从受访者的特点来看，20岁段和3~9岁段人群中每周使用1次以上卡通IP应用商品的比率相对较高。

图 2	卡通IP应用商品使用频率

■ 几乎不使用　■ 每周1次以下　■ 每周1次以上

每周1次以上 36.6%　　每周1次以下 55.9%

36.6

55.9

7.5

全体
(n=3,500)

17.2 几乎每天
9.5 每周3~4次
9.9 每周1~2次

15.7 1个月2~3次
13.8 1个月1次
26.4 2~3个月1次
7.5 几乎不使用

2-3. 数码卡通商品使用频率

在使用数码卡通商品的频率方面，"每周1次以上"占61.3%，"每周1次以下"占19.6%，其中"几乎每天"占23.6%，所占比率最高。

从受访者的特点来看，在20岁段人群中"每周1次以上"的数码卡通商品使用比率相对较高。

图 3	数码卡通商品使用频率

■ 几乎不使用　■ 每周1次以下　■ 每周1次以上

주 1회 이상 61.3%　　주 1회 미만 19.6%

59.1 / 61.3

20.5 / 19.6

20.4 / 19.1

2022年
(n=3,500)　　2023年
(n=3,500)

23.6 几乎每天
20.7 每周3~4次
17.0 每周1~2次

5.0 1个月2~3次
6.0 1个月1次
8.6 2~3个月1次
19.1 几乎不使用
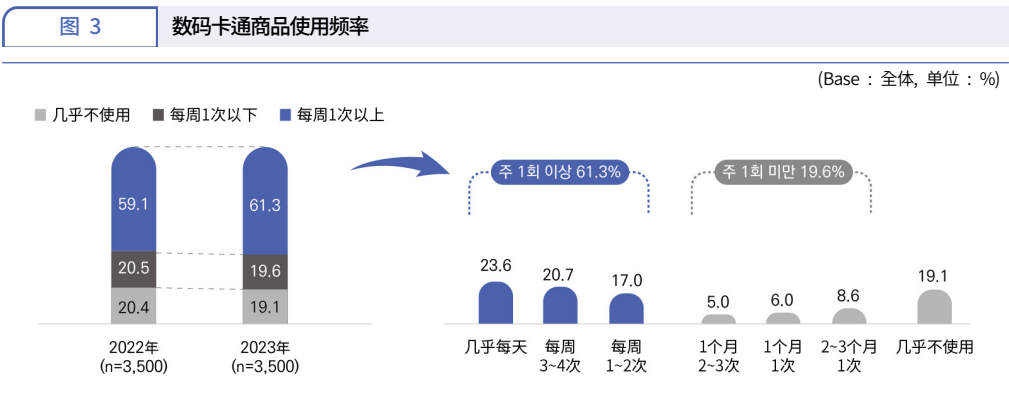
3. 最喜欢的卡通

最喜欢的卡通是"菠萝菠萝菠萝萝"，占14.4%。

接着依次为"Kakao Friends (12.6%)"，"三丽鸥卡通(9.4%)"，" 挡不住的蜡笔小

新(7.9%)"、"口袋怪兽(7.4%)"。

"菠萝菠萝菠萝萝"的喜欢度排名上升到第一位(2022年第2位→2023年第1位),"三丽鸥卡通"和"奇妙萌可"进入了前10名。

从受访者的特点来看,20岁段在"菠萝菠萝菠萝萝"和"挡不住的蜡笔小新",40岁以上年龄段在"Kakao Friends",3~9岁和10岁段在"三丽鸥卡通"和"口袋怪兽",3~9岁在"奇妙萌可"的比率相对较高。

| 图 4 | 最喜欢的卡通 |

(Base：全体, 单位：%, 排名前10)

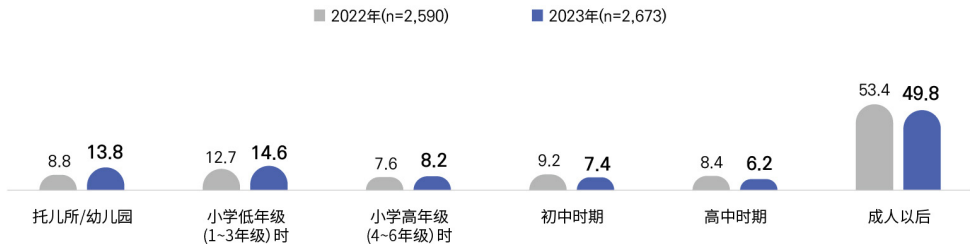| 2021年(n=3,200)		2022年(n=3,500)		2023年(n=3,500)	
Kakao Friends	22.9	Kakao Friends	21.2	菠萝菠萝菠萝萝	14.4
菠萝菠萝菠萝萝	7.8	菠萝菠萝菠萝萝	8.6	Kakao Friends	12.6
彭秀	6.0	挡不住的蜡笔小新	7.7	三丽鸥卡通	9.4
MARVEL	4.9	口袋鬼怪	7.4	挡不住的蜡笔小新	7.9
挡不住的蜡笔小新	4.1	航海王	5.5	口袋鬼怪	7.4
口袋鬼怪	3.4	MARVEL	3.9	迪斯尼	4.2
哆啦A梦	2.5	彭秀	3.8	奇妙萌可	3.9
凯蒂(凯蒂猫)	2.4	高达	2.5	彭秀	3.0
米老鼠	2.0	冬季王国	2.3	MARVEL	2.6
冬季王国	1.8	凯蒂(凯蒂猫)	2.2	哆啦A梦	1.8

4. 首次知道最喜欢的卡通的时间

以成人受访者为对象,询问首次知道最喜欢的卡通的时间,回答"长大成人后"才知道的最多,达到49.8%,其次是"小学低年级时(14.6%)","托儿所/幼儿园时(13.8%)","小学高年级时(8.2%)"等。

从受访者的特点来看,年龄越大,回答"长大成人后"的人相对较多,20岁段的人回答"小学低年级时",40岁段的人回答"托儿所/幼儿园时"的人相对较多。

首次知道最喜欢的卡通的时间

(Base：成人受访者, 单位：%)

■ 2022年(n=2,590)　■ 2023年(n=2,673)

	托儿所/幼儿园	小学低年级(1~3年级)时	小学高年级(4~6年级)时	初中时期	高中时期	成人以后
2022年	8.8	12.7	7.6	9.2	8.4	53.4
2023年	13.8	14.6	8.2	7.4	6.2	49.8

5. 最喜欢卡通的理由

从最喜欢卡通的理由(以1+2顺序为准)来看，"因为喜欢卡通的设计"以57.5%居首位，其次是"因为熟悉卡通/经常看"(34.1%)，"因为卡通的行为好"(29.4%)，"因为喜欢卡通出场的内容"(22.8%)等。
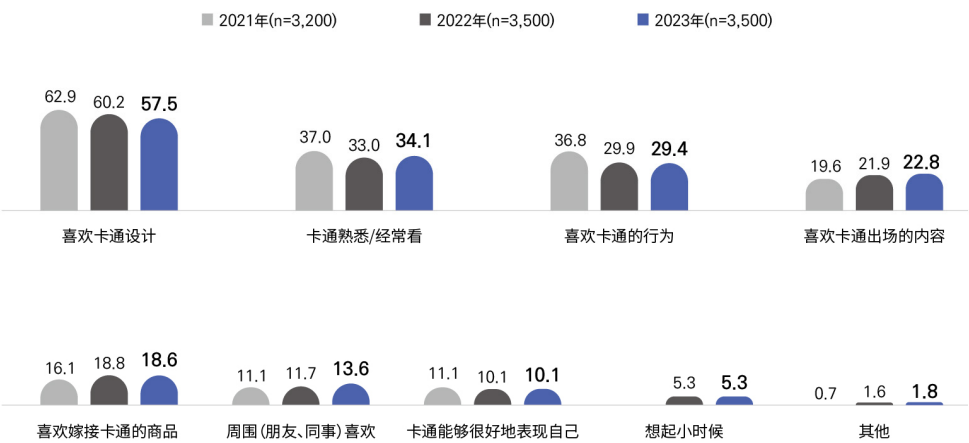
回答"因为喜欢卡通的设计"的人从2021年以后持续减少，而"因为喜欢卡通出场的内容"的回答则呈增加趋势。

从受访者的特点来看，女性回答"因为喜欢卡通的设计"的比例比男性受访者相对较高。

从年龄段来看,10岁段回答"因为喜欢卡通设计"和"因为卡通的行为好"，60岁段回答"因为熟悉卡通/经常看见"，3~9岁段回答"因为喜欢卡通出场的内容"，30岁段回答"喜欢嫁接卡通的商品"的比例相对较高。

图 6	最喜欢卡通的理由

(Base：全体, 重复回答, 单位：%(以1+2顺序为准))

■ 2021年(n=3,200)　■ 2022年(n=3,500)　■ 2023年(n=3,500)

喜欢卡通设计	卡通熟悉/经常看	喜欢卡通的行为	喜欢卡通出场的内容
62.9 / 60.2 / **57.5**	37.0 / 33.0 / **34.1**	36.8 / 29.9 / **29.4**	19.6 / 21.9 / **22.8**

喜欢嫁接卡通的商品	周围(朋友、同事)喜欢	卡通能够很好地表现自己	想起小时候	其他
16.1 / 18.8 / **18.6**	11.1 / 11.7 / **13.6**	11.1 / 10.1 / **10.1**	5.3 / **5.3**	0.7 / 1.6 / **1.8**

6. 实物卡通商品购买经验

最近一年内有购买实物卡通形象商品经验的比率为76.1%。

从受访者的特点来看，3~9岁段的人购买实物卡通形象商品的经验最高。

图 7	最近一年内实物卡通商品购买经验

(Base：全体, 单位：%)

无经验 23.9

经验 76.1

2023年
(n=3,500)

男 (n=1,611)	女 (n=1,889)	3-9岁 (n=379)	10岁段 (n=448)	20岁段 (n=520)	30岁段 (n=775)	40岁段 (n=685)	50岁段 (n=498)	60岁段 (n=195)
77.2	75.1	98.2	80.8	73.8	74.6	76.8	64.5	61.0

按年份　　　性别　　　按年龄
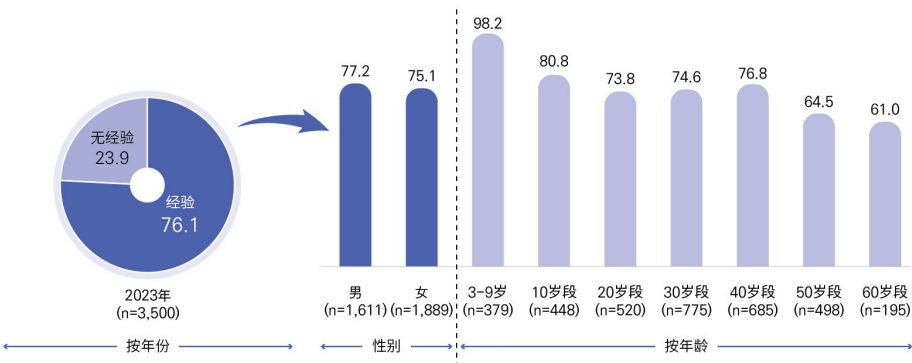
7. 实物卡通商品购买类型

所购买的实物卡通形象商品类型中，"洋娃娃(布娃娃、公主娃娃等)"的比率最高，占57.8%。

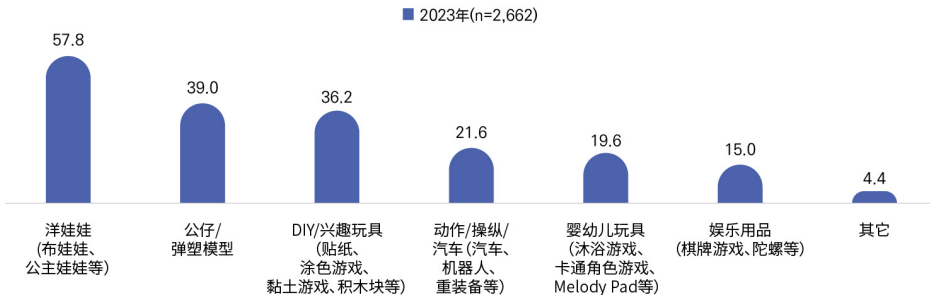接着依次为"公仔/弹塑模型(39.0%)"，"DIY/兴趣玩具(36.2%)"，"动作/操纵/汽车(21.6%)"等。

从受访者的特点来看，女性购买"洋娃娃"和"DIY/兴趣玩具"，"婴幼儿玩具"的比率相对较高，男性购买"公仔/弹塑模型"和"动作/操纵/汽车"，"娱乐用品"的比率相对较高。

从年龄段来看，20岁段和30岁段的人购买"洋娃娃"，40岁段的人购买"公仔/弹塑模型"，3~9岁的人购买"DIY/兴趣玩具"，"动作/操纵/汽车"，"婴幼儿玩具"的比率相对较高。
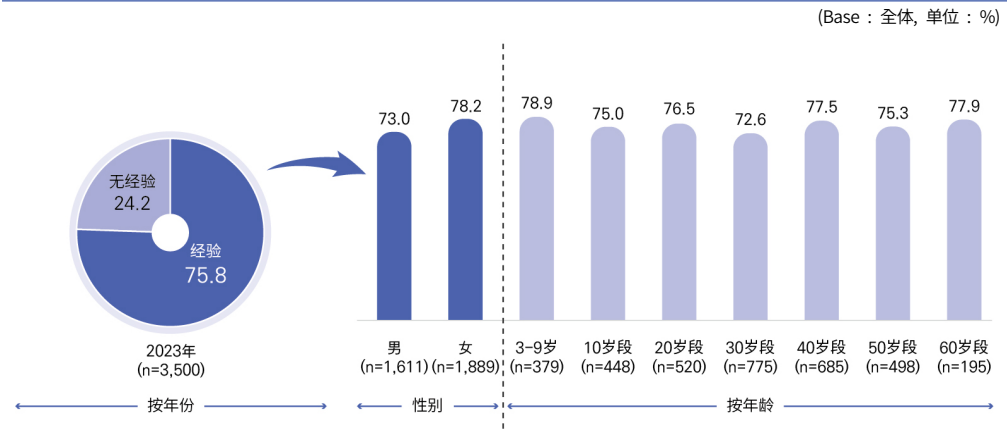
| 图 8 | 实物卡通商品购买类型 |

(Base：有实物卡通商品购买经验的人,重复回答, 单位：%)

■ 2023年(n=2,662)

8. 卡通IP应用商品购买经验

最近1年内有购买卡通IP应用商品经验的比率为75.8%。

从受访者的特点来看，3~9岁的人购买卡通IP应用商品的比率最高。

| 图 9 | 最近一年内卡通IP应用商品购买经验 |

(Base：全体, 单位：%)
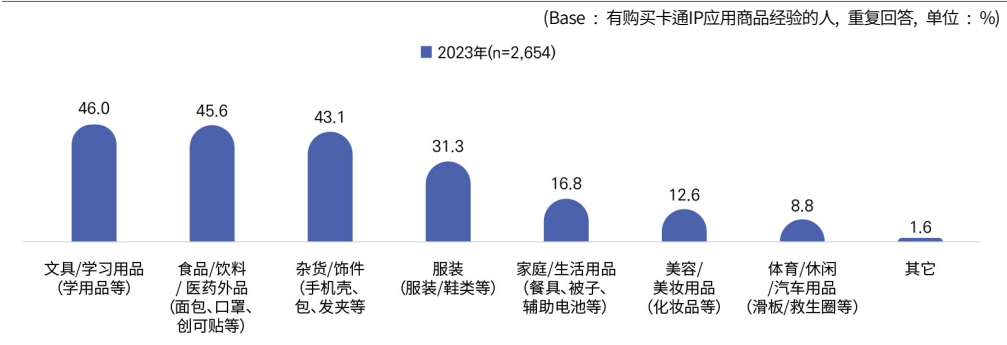

9. 卡通IP应用商品购买类型

所购买的卡通IP应用商品类型中，"文具/学习用品(46.0%)"和"食品/饮料/医药外品(45.6%)"比率最高。

接着依次为"杂货/饰品(43.1%)"，"服装(31.3%)"，"家庭/生活用品(16.8%)"等。

从受访者的特点来看，女性购买"文具/学习用品"，"杂货/饰品"的比率相对较高，男性购买"服装"，"体育/休闲/汽车用品"的比率相对较高。

从年龄段来看，10岁段在"文具/学习用品"，30岁段和50岁段在"食品/饮料/医药外品"，3 ～ 9岁和30岁段在"服装"，3~9岁在"杂货/饰品"和"服装"，"家庭/生活用品"，20岁段在"美容/美妆用品"的购买比率相对较高。
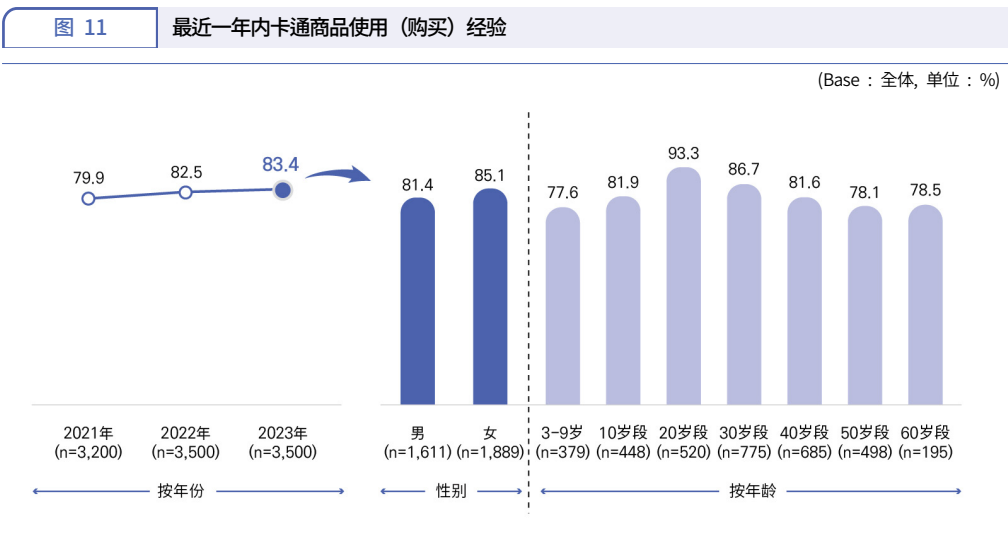
| 图 10 | 卡通IP应用商品购买类型 |

(Base：有购买卡通IP应用商品经验的人, 重复回答, 单位：%)

■ 2023年(n=2,654)

10. 数码卡通商品使用（购买）经验

　　最近一年内有使用(购买)数码卡通商品经验的比率为83.4%，从2021年开始呈现出持续增加的趋势。

　　从受访者的特点来看，在20岁段的人群中有使用(购买)数码卡通商品经验的比率最高。

| 图 11 | 最近一年内卡通商品使用（购买）经验 |

(Base：全体，单位：%)

| | 79.9 | 82.5 | **83.4** | | 81.4 | 85.1 | | 77.6 | 81.9 | 93.3 | 86.7 | 81.6 | 78.1 | 78.5 |

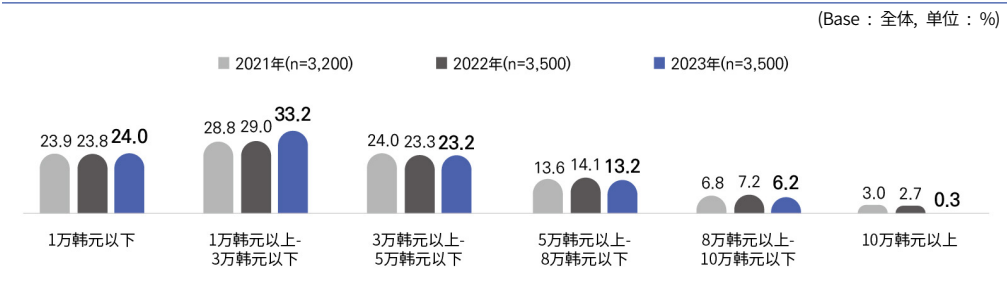| 2021年
(n=3,200) | 2022年
(n=3,500) | 2023年
(n=3,500) | 男
(n=1,611) | 女
(n=1,889) | 3-9岁
(n=379) | 10岁段
(n=448) | 20岁段
(n=520) | 30岁段
(n=775) | 40岁段
(n=685) | 50岁段
(n=498) | 60岁段
(n=195) |

| 按年份 | 性别 | 按年龄 |

11. 使用卡通时月平均可消费金额

　　使用卡通时月平均可消费金额中，"8美元以上~24美元以下"最多，达到33.2%，其次是"8美元以下(24.0%)"，"24美元以上~40美元以下(23.2%)"等。

　　从受访者的特点来看，在10岁段受访者中"8美元以上~24美元以下"，60岁段受访者中"8美元以下"，3至9岁段受访者中"24美元以上~80美元以下"的可消费比率相对较高。
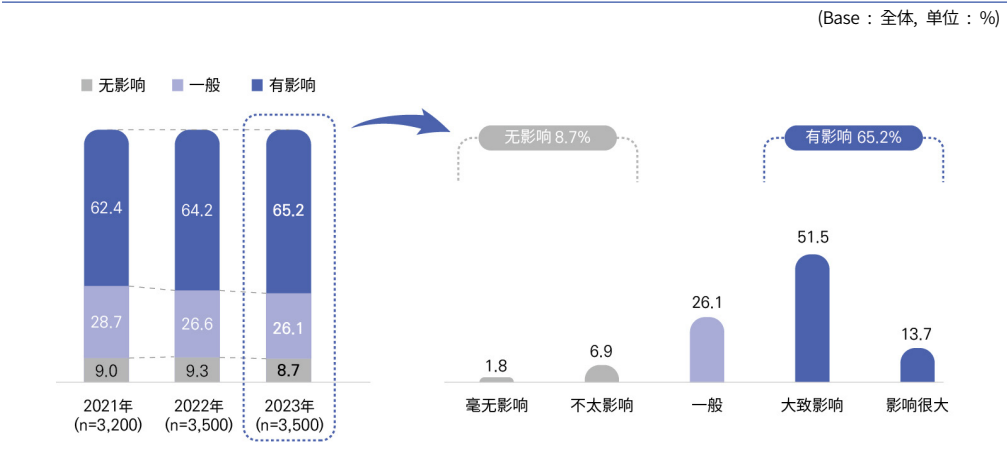
图 12	使用卡通时月平均可消费金额

(Base：全体, 单位：%)

■ 2021年(n=3,200)　■ 2022年(n=3,500)　■ 2023年(n=3,500)

1万韩元以下	1万韩元以上-3万韩元以下	3万韩元以上-5万韩元以下	5万韩元以上-8万韩元以下	8万韩元以上-10万韩元以下	10万韩元以上
23.9 23.8 **24.0**	28.8 29.0 **33.2**	24.0 23.3 **23.2**	13.6 14.1 **13.2**	6.8 7.2 **6.2**	3.0 2.7 **0.3**

12. 购买商品时卡通是否对决定购买产生影响

回答平时购买商品时卡通对决定购买"产生影响"的人占65.2%，从2021年开始持续出现小幅增加的趋势。

从受访者的特点来看，在3~9岁段的人群中在购买商品时卡通对决定购买所产生的影响相对较大。

图 13	购买商品时卡通是否对决定购买产生影响

(Base：全体, 单位：%)

■ 无影响　■ 一般　■ 有影响

2021年(n=3,200)	2022年(n=3,500)	2023年(n=3,500)
62.4	64.2	65.2
28.7	26.6	26.1
9.0	9.3	8.7

无影响 8.7%　　有影响 65.2%

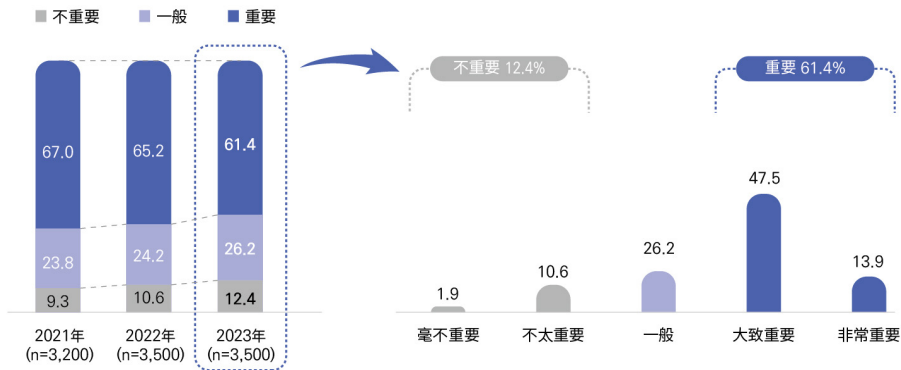| 毫无影响	不太影响	一般	大致影响	影响很大
1.8	6.9	26.1	51.5	13.7

13. 购买卡通商品时正品与否对决定购买所产生的影响

回答购买卡通商品时正品与否对决定购买"产生影响"的人占61.4%，自2021年以后呈持续小幅减少的趋势。

从受访者的特点来看，在20岁段的年轻人中正品与否的影响相对较大。

| 图 14 | 购买卡通商品时正品与否对决定购买所产生的影响 |

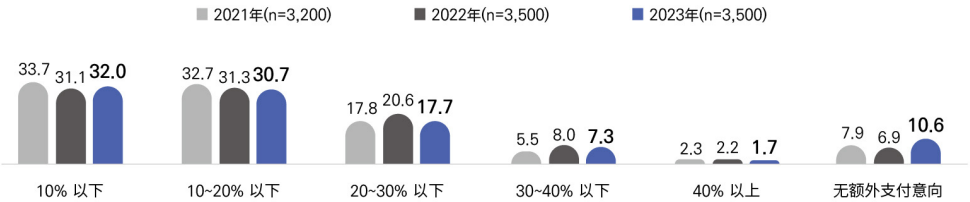(Base：全体，单位：%)

14. 对卡通IP应用商品可额外支付费用的范围

对应用卡通IP的商品可额外支付的范围为"10%以下(32.0%)"和"10~20%以下(30.7%)"相对较高，没有额外支付意向的比率为10.6%。

没有额外支付意向的比率比上一年度增加了3.7%p。

从受访者的特点来看，在60岁段受访者中回答"10%以下"和"没有支付意向"的人相对较多，在3~9岁段受访者中回答"10~20%以下"的人相对较多。

图 15　　对卡通IP应用商品可额外支付费用的范围

(Base：全体, 单位：%)

■ 2021年(n=3,200)　　■ 2022年(n=3,500)　　■ 2023年(n=3,500)

	10% 以下	10~20% 以下	20~30% 以下	30~40% 以下	40% 以上	无额外支付意向
2021年	33.7	32.7	17.8	5.5	2.3	7.9
2022年	31.1	31.3	20.6	8.0	2.2	6.9
2023年	32.0	30.7	17.7	7.3	1.7	10.6

第二章　卡通支援项目

韩国文化产业振兴院为了提升韩国卡通产业的能力，活跃授权行业，推行了多种制作和分销支持项目。2022年开展的支援项目的主要内容如下。

1. 提升制作能力

1-1. 支持新卡通IP的开发和商业化

新卡通IP开发支持项目是通过开发新卡通IP来增强创作能力和建立授权产业基础的项目。2022年通过该支持项目实现了12个新卡通IP的开发和发现。

此外，还对新卡通IP开发任务进行了额外的管理支持（间接支持）项目并行推进。这包括为选定项目提供定制咨询和专家培训以增强商业化能力，以及提供各种宣传机会，如与卡通授权展联合举办的展示项目成果和知识共享的展示会。

1-2. 内容IP授权支持

内容IP授权支持项目旨在活跃使用内容IP的授权商业。该项目支持了适应多变的制作，分销，消费环境下的内容IP的发现和激活，为使用优秀国产内容IP推进授权业务的项目提供了制作，开发及市场营销费用的支持。通过这一过程，促进了优秀内容IP的多样化类型扩展和增值业务的活跃，共支持了23个强化授权产业基础的项目。

1-3. IP授权增强

　　IP授权增强项目是一个旨在利用大企业平台和中小内容公司现有内容IP来探索授权领域，增强制作和商业能力的支持项目。

　　今年参与的内容IP可利用授权的行业包括一个主题公园(乐天世界)，一个餐饮企业(韩国制粉)，一个分销渠道(乐天电视购物)，以及一个公共机构(韩国能源公社)。合作的三家大企业和一个机构共选拔了5家参与企业，设计屏幕和商品领域。

　　与乐天世界合作的公司包括DANKONG的Superkongs(屏幕)、Goldframe的Chogmang-go(商品)；与韩国制粉合作的是Bigpine Studio的SkySurfer(屏幕)；与乐天电视购物合作的是Bimypet的Samsek and Lili(屏幕)；最后与韩国能源公社合作的是Acomz(屏幕)。

　　4家CP公司和5家参与企业参与了合作IP内容的制作费用支持和专家咨询，并在11月10日至12日于韩国世界贸易中心(COEX)举办的"2022内容IP产业展"上展出了完成的样品。

2. 支援流通

2-1. 卡通授权展

　　"卡通授权展"是拥有二十一年历史的韩国最大规模的卡通授权商务专业市场。

　　2020年因新冠肺炎疫情而被取消，但在2021年迎来二十周年之际于11月25日至28日重新举行了该项活动，2022年7月14日至17日在韩国贸易中心A厅举行，为期4天。这是继疫情大流行之后时隔3年在原定活动举办时期——7月中旬正常举办的活动，与将焦点放在促进B2B商务活动的2021年相比，根据带着婴幼儿以家庭为单位观看的顾客较多的活动特性，大幅加强了B2C。因为是在夏天正常举办，所以以"享受夏天(Summer Flex)"为主题，以冰淇淋、游泳场等凉爽的感觉布置了活动场地。

　　此次活动还大幅加强了参观游客可以直接参与的体验型文化内容产品。从可以亲自制作T恤和表情包的"我自己的商品制作体验"，"卡通棋牌游戏"，"光华时代"实感内容演示到偶像粉丝见面会，卡通游行等，从孩子到家庭单位的参观游客都可以享受的多

样内容。

此外,还提供了诸如乐天电视购物的《贝利熊>，农心的《浣熊》等与流通行业合作的案例"Feel So Goods便利店"，展示了新兴角色创作者作品的"Rookie Project"等不仅适合家庭单位，还能让20至30岁的年轻人享受的各种观赏内容。

而且，为了搞活内容IP业务，积极促进了企业和有关团体的合作。由（株）NCSOFT，韩国卡通文化产业协会，韩国卡通协会，卡通设计师协会，韩国文化产品授权协会，韩国卡通学会提供赞助，在活动期间创造出卡通及文化产品企业的实质性商业机会，提供优质的商务咨询机会,在"商务休息室"积极支援1:1商务配对，现场配对等B2B咨询项目，在"咨询区"律师等相关领域的专家提供了关于就业，金融制度，海外拓展，劳务，法律纠纷等领域的专业咨询。

为了扩散商业洞察及经验，在正式活动一周前提前举办了"授权实务研讨会"，由韩国文化产业振兴院和韩国贸易协会共同主办的"K-内容视频出口咨询会"也一同举行，为激活因新冠疫情受挫的国内卡通和内容公司的业务能力和商业提供支持。

另外，作为活动主办方的韩国文化产业振兴院借此活动机会正式启动了与其他公司‧和机构合作的社会责任管理(ESG)。与韩国能源公团签署了应对气候变化的碳中和内容共同规划开发等ESG项目的业务协议，并通过与乐天世界的业务协议，突进了新兴设计师和中小内容公司卡通的推广和流通支持合作。

2-2. 举办授权会议

作为国内唯一的内容IP授权领域商务会议，"授权会2022"于2022年11月11日至12日在韩国世界贸易中心（COEX）Studio 159举行。与2021年相同，2022年的会议也以线下形式进行，并同时进行了线上直播。

自2019年以来，2022年的会议是第四次举办，主题为"提出K-内容IP商业模型"。会议介绍了K-内容的全球战略和全方位业务多元化案例。包括主题会议"打开IP宇宙"在内，共组织了5个会议环节，13场讲座和现场对话、特别环节等丰富多彩的行程安排。

"授权会2022"成为了分析全球主流内容中K-内容的实力并讨论受全球粉丝喜爱的内容特性的平台。此外，在不断扩展的IP业务环境中，再次强调了不同类型之间灵活且创新结合的重要性并给出了洞察。

2-3. 运营卡通IP商品流通测试平台

为了扩大中小卡通公司的分销渠道推进了一项分销支持项目，该项目在与电影院合作的快闪店(Cream Store)中的1个地点(Megabox水原灵通店)和大型分销商场的3个地点(玩具反斗城蚕室、金浦机场、恩平店等)入驻卡通商品。支持了43家中小内容公司多样化产品的销售。与卡通授权博览会相联系，组建展示空间，并在主题公园(乐天世界)内运营快闪展，帮助中小内容公司扩大销售额和提高IP品牌价值。

2-4. 大韩民国内容大奖卡通部门

大韩民国内容大奖是一个旨在通过奖励国内优秀内容及对内容产业发展有贡献的人士，以激励行业从业者的创作热情和活跃产业的项目。"2022大韩民国内容大奖-卡通部门"共收到21个作品的申请，经过两轮专家评审和国民评价等环节，最终有5个作品被选为获奖作品。

总统奖由流通公司乐天电视购物的卡通形象，截止2022年度，SNS累计关注达到126万人，累计点击率达到3亿次的《贝利熊》获得。文化体育观光部长官奖由《COCOCO ALLOO》，《恐龙大发》，《哎哟哟，我的宠物》获得，韩国文化产业振兴院长奖则由《小鸟朋友》获得。

2022年的获奖作品颁奖典礼于12月14日在韩国世界贸易中心（COEX）会议室401号举行，有约200名获奖者和相关人员参加。根据荣誉等级颁发了奖状和一定数额的奖金作为奖品。

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