2021 CHARACTER INDUSTRY WHITE PAPER

SUMMARY

ENGLISH / 中文

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SUMMARY

Part 1 Character User Trends

1. Research Design

The subjects of this research are Koreans between the ages of 3 and 69, residing in Korea, and who have used character content "at least once every 2-3 months" in the past year.

As the study's sample framework, 1,170,000 research panels were set up nationwide. The research, which is based on the June 2021 resident registration population statistics data provided by the National Statistical Office, was carried out by sending an online survey via email according to the population component ratio, as sorted by region, gender, and age. Then, the target sample was completed based on the use status of character content.

The research was conducted once a year, and the response standard period was from July 2020 to July 2021 (a period of 12 months), unless otherwise stated. Data collection was completed through an online survey that was sent from July 26 to August 13, 2021.

Table 1 2021 Factual Research Design for Character Users

Type	Contents
Target population	All Koreans ages 3-69
Research population	Koreans between the ages of 3 to 69 and have used character content at least once every 2 to 3 months
Research areas	17 cities and provinces nationwide
Data collection method	Online research through a structural survey
Sample framework	Resident Registration Population Statistics data as of June 2021 provided by the Ministry of the Interior and Safety A total of 1,170,000 research panels set up nationwide by the research institution was used as its sample framework.
Sampling method	Proportional allocation according to region/gender/age
Sampling error	±1.73%p at 95% confidence level
Valid sample	3,200 people
Data collection period	July – August, 2021 (Jul. 26 – Aug. 13, 2021)
Organizing agency	Korea Creative Content Agency
Executing agency	Global Research

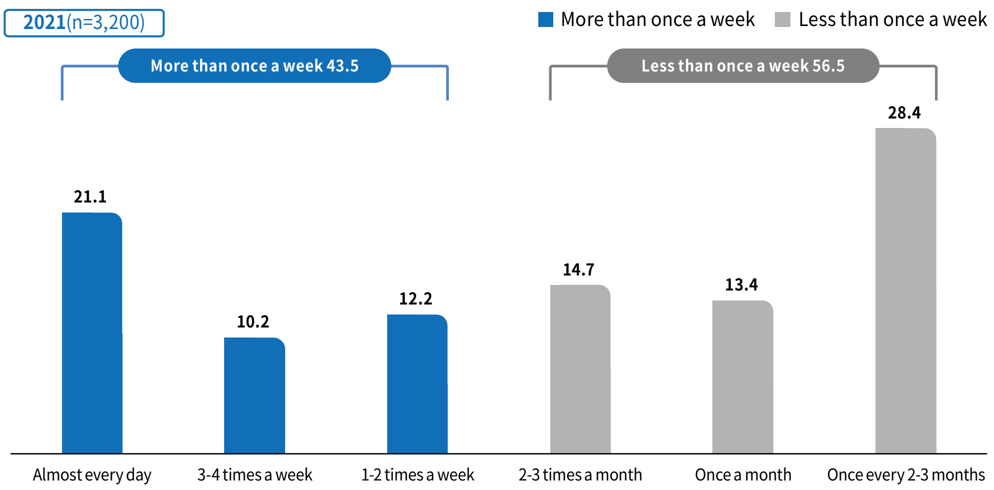
2. Character Content Use Frequency in the Past Year

Regarding the character content use frequency in the past year, those who responded that they used character content “more than once a week” turned out to be 43.5%, and such frequency has been increasing since 2019.

Males have a relatively higher rate in terms of using character content “more than once a week” than females. Based on age, the lower the age group, the higher was the proportion of using character content “more than once a week,” and it was the highest in the age group of 3 to 9.

Figure 1 Character Content Use Frequency in the Past Year

(Base: All, Unit: %)

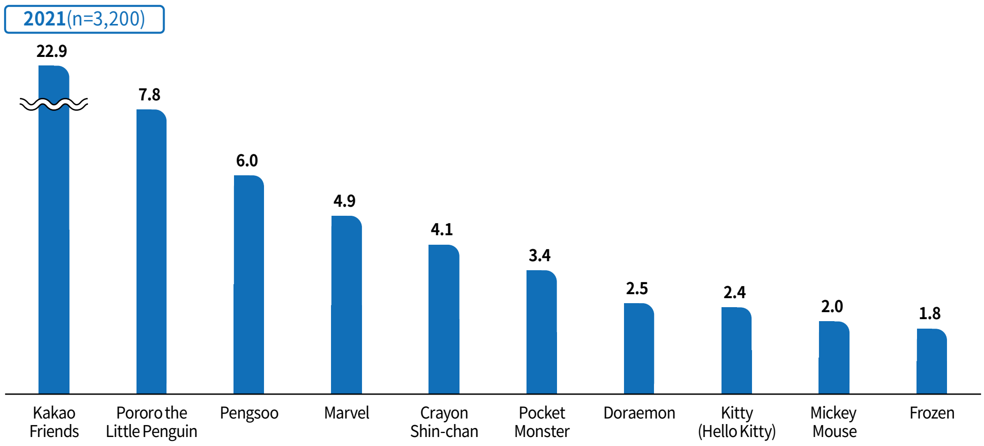


3. Most Preferred Character

In terms of character likeability, “Kakao Friends” received the highest result with 22.9%, maintaining its top ranking since 2019. “Pororo the Little Penguin (7.8%)” rose to second place, while “Pengsoo (6.0%)” fell to the third place.

Figure 2 Most Preferred Character

(Base: All, Unit: %, 1st ranking basis, Top 10s)



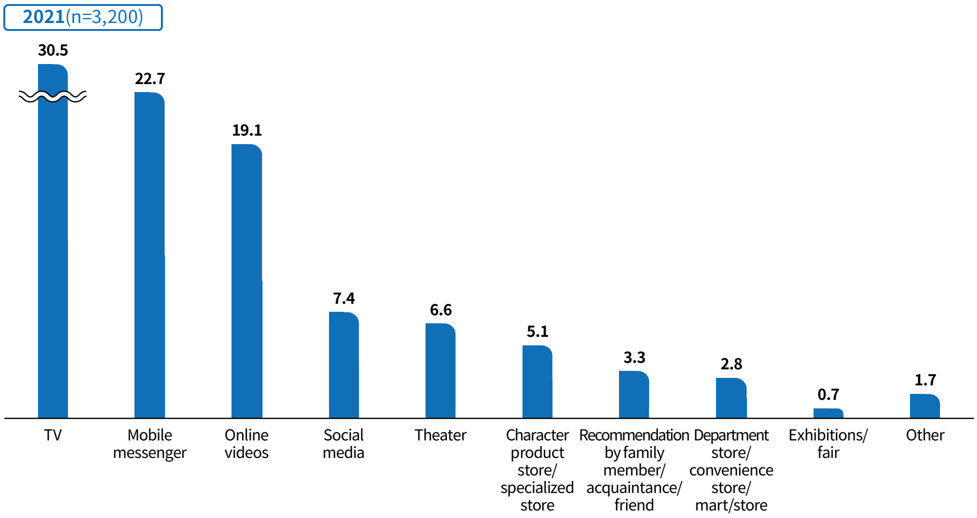
4. Channel for Initial Awareness of the Character (Media)

“TV (30.5%)” received the highest response rate among the media channels through which the character first gained awareness, followed by “mobile messenger (22.7%),” “online videos (19.1%),” “social media (7.4%),” and “theater (6.6%).” The ratio of character awareness through “TV” and “mobile messenger” decreased compared to that of the previous year, while the ratio of awareness through “online video” increased.

By age, the ratio of respondents aged 3 to 9 who responded that they recognized a character through “TV” and “online video” was relatively high, as well as there was a relatively high ratio of respondents in their 30s and 50s who responded that they recognized a character through “mobile messenger” and those in their teens and 20s through “social media.”

Figure 3 Channel for Initial Awareness of the Character (Media)

(Base: All, Unit: %)

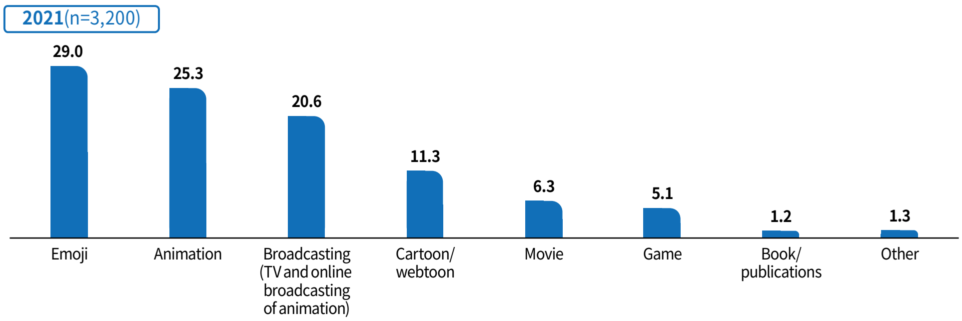


5. Channel for Initial Awareness of the Character (Content)

"Emoji (29.0%)" received the highest responses in terms of the content channel for initial awareness of the character, followed by "Animation (25.3%)," "Broadcasting (20.6%)," and "Cartoon/webtoon (11.3%)," and "Movie (6.3%)." The ratio of recognizing characters through "Broadcasting" decreased, when compared to the previous year, while that of "Animation" increased.

Figure 4 Channel for Initial Awareness of the Character (Content)

(Base: All, Unit: %)

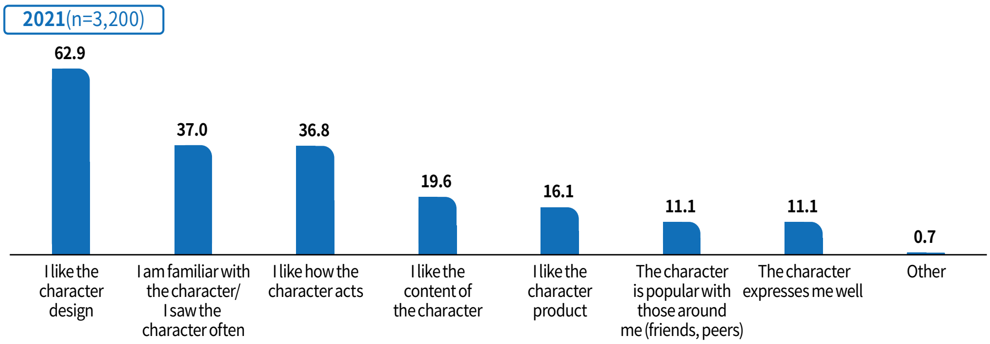


6. Reasons for Character Preference

Regarding the reason for liking the most preferred character (based on the 1+2 ranks), "I like the character design" ranked the highest with 62.9%, followed by "I am familiar with the character/I saw the character often (37.0%)," "I like how the character acts (36.8%)," and "I like the content of the character (19.6%)."

Figure 5 Reasons for Character Preference

(Base: All, multiple responses, Unit: %, based on ranks 1+2)

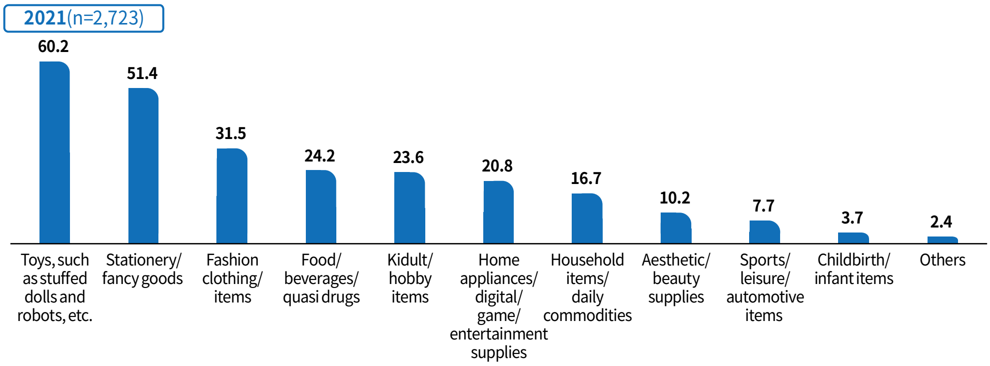


7. Purchase Trends of Character Goods in a Year

The most purchased line of goods by respondents who purchased character products in the past year was "Toys, such as stuffed dolls, robots, etc." with the highest share of 60.2%, followed by "Stationery/fancy goods (51.4%)," "Fashion clothing/items (31.5%)," and "Food/beverages/quasi drugs (24.2%)." The YoY increase of "Fashion clothing/items" and "Food/beverages/quasi drugs" was relatively large, compared to the increase of other product groups.

Figure 6 Purchase Trends of Character Goods in a Year

(Base: Users who purchased character goods in the past year, multiple responses, Unit: %)



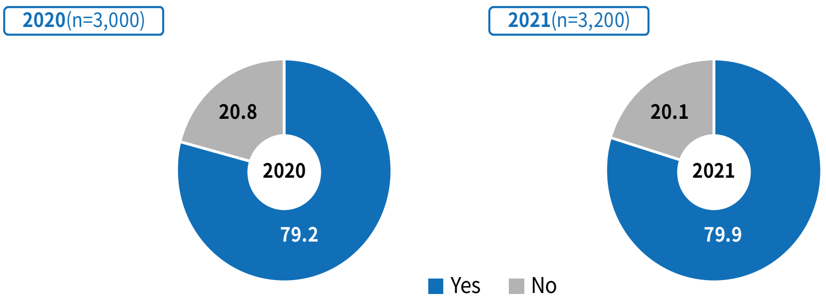
8. User Experience (Purchase) of Mobile Character Goods in a Year

The rate of experience in using(purchasing) mobile character products was 79.9%, and it has been increasing since 2019.

By age, the ratio of user in their 20s who had experience in using(purchasing) mobile character products was the highest.

Figure 7 User Experience (Purchase) of Mobile Character Goods in a Year

(Base: All, Unit: %)



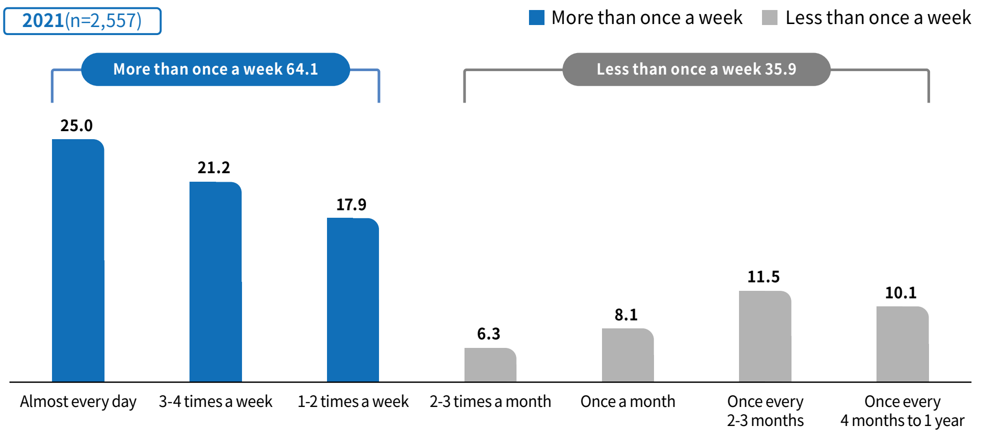
9. Mobile Character Products Use(Purchase) Frequency in the Past Year

In terms of mobile character products use frequency, those who responded that they used(purchased) mobile character products “more than once a week” turned out to be 64.1%, and it has been increasing since 2019.

In terms of the characteristics of the respondents, the ratio of males using mobile character products “more than once a week” was relatively higher than that of females. By age, the lower the age group, the higher was the rate of using mobile character products. The response “more than once a week” rated the highest among those 3 to 9 years old and teenagers.

Figure 8 Mobile Character Products Use(Purchase) Frequency in the Past Year

(Base: Users who purchased mobile character goods in the past year, Unit: %)



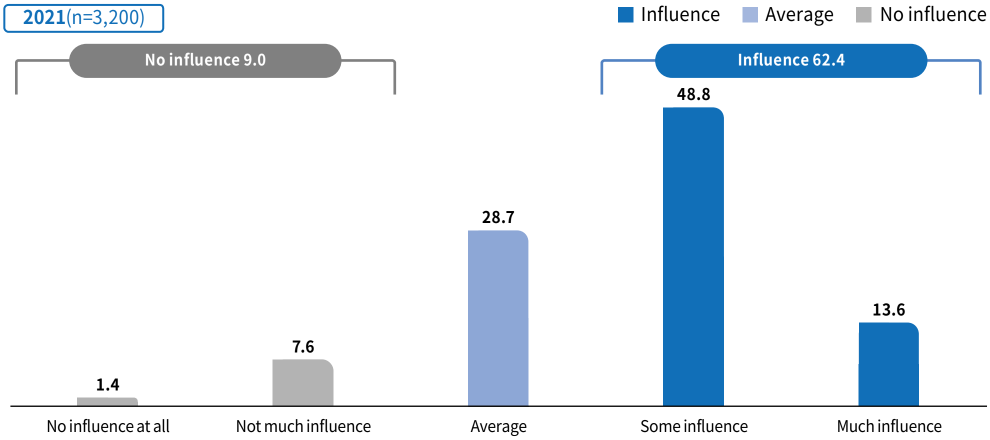
10. Influence of Characters on Purchasing Products

Those who responded that the characters “had an impact” on their decision when purchasing a product turned out to be 62.4%, and it is a 5.2%p increase from the previous year.

In terms of the characteristics of the respondents, it was found that the influence of characters on the purchasing decision was relatively high for females, and in the age group of 3 to 9 years old when purchasing products.

Figure 9 Influence of Characters on Purchasing Products

(Base: All, Unit: %)

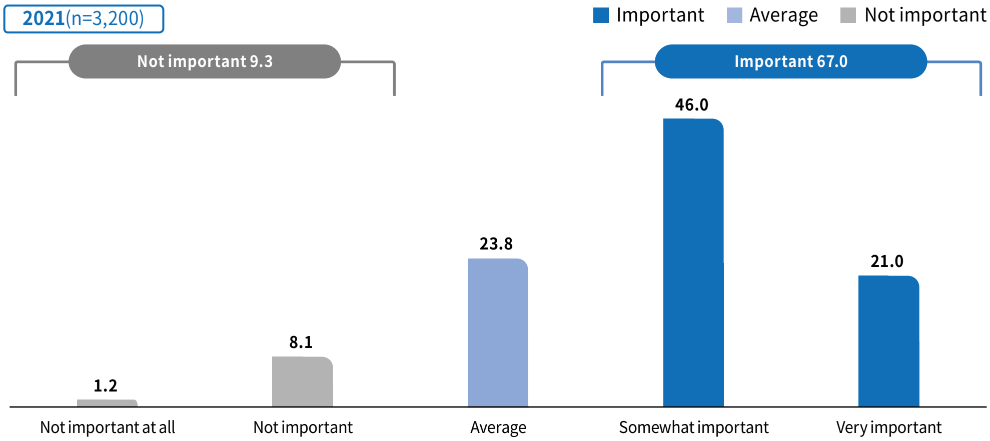


11. Influence of a Product's Originality on the Purchasing Decision

Those who responded that the originality of a product had an impact on their purchasing decision turned out to be 67.0%, and it is a 5.4%p increase from the previous year.

Figure 10 Influence of a Product's Originality on the Purchasing Decision

(Base: All, Unit: %)

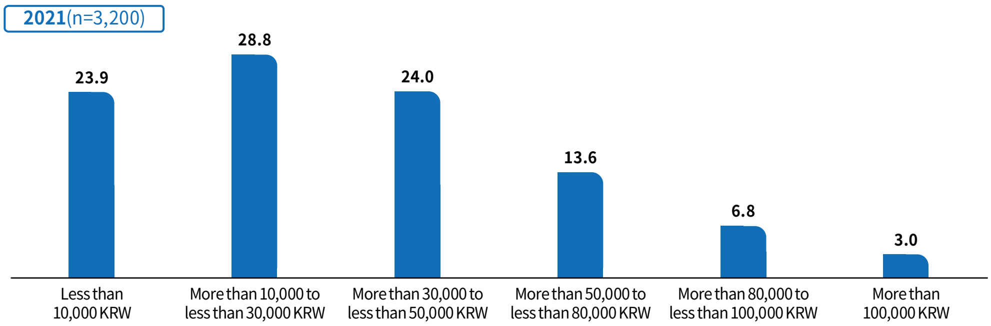


12. Character Content Consumption Level

When measuring the monthly average consumption of character content, the response rate of “More than 10,000 to less than 30,000 KRW” ranked the highest at 28.8%, followed by “More than 30,000 to less than 50,000 KRW (24.0%),” and “Less than 10,000 KRW (23.9%)”. The ratio of those who answered that they could spend “less than 30,000 KRW” decreased compared to the previous year, while the ratio of those who answered that they could spend “more than 30,000 KRW” increased compared to the ratio of the previous year.

Figure 11 Average Monthly Consumable Amount for Character Content

(Base: All, Unit: %)



Part 2 Support Programs for Character

The Korea Creative Content Agency has introduced various production and distribution support programs to strengthen the capabilities of the Korean character industry, and to revitalize the licensing industry. The following are the key contents of the support programs that were carried out in 2020.

1. Increasing Production Capabilities

1) Support Programs for the Development and Commercialization of New Character IP

The development and commercialization support project for new character IP seeks to strengthen creative competencies, and to establish a foundation for the licensing industry to discover character IPs for new content. In 2020, 11 new development programs and 5 follow-up support projects were selected from the businesses that are less than 7 years old.

Moreover, a new character IP management support programs was promoted as follow-up support for the aforementioned programs. A pitching event was held to provide customized consulting and management for selected tasks. It also offered PR/marketing, distribution, and publicity materials, as well as distribution and investment attraction assistance, and strengthened its commercialization capabilities through a boot camp.

Furthermore, by promoting the pop-up store business to expand the distribution channels of small and medium-sized character companies that suffered from business difficulties due to the COVID-19 pandemic, the program provided support for the product sales of 16 small and medium-sized content companies and 7 cooperative companies.

2) Support Programs for Content IP Licensing

The support program for content IP licensing aims to revitalize the licensing business through content IP. Production/development and promotion expenses were subsidized to discover and vitalize content IP that was suitable for diversified production, distribution, and consumption environments. In 2020, support was provided to 39 programs.

2. Support Programs for Distribution

1) Korea Character Licensing Fair

The "Korea Character Licensing Fair," which celebrated its 18th anniversary in 2019, is the largest character licensing business market in Korea. It is a character licensing event that encompasses B2B and B2C, including comics, animation, games, broadcasting, MCN, kidult, and art toys beyond characters. With more than 100,000 visitors and 300 companies participating every year, it is the largest and the most symbolic event in Korea. However, the event was canceled in 2020 as a preventive measure against the spread of COVID-19.

Though the event was canceled due to external factors, the Korea Creative Content Agency, the organizer of the event, identified major tasks, such as "achieving B2B enhancement and an efficient operation system" and "strengthening collaboration with cooperatives" to sustain the growth of the character licensing fair in the future. The Agency is also planning to implement the tasks by stages after the 2021 event.

2) Licensing Conference 2020

The "Licensing Con 2020," which was held for the second time, is designed to provide trend information on content licensing industry workers and to vitalize the licensing business. The theme for 2020 was "IP Business, Challenge the Change." About 50 domestic and foreign speakers were invited to discuss industry issues and countermeasures in depth, focusing on the IP business, which is the most discussed topic in the content industry. A total of 35 programs, including conference sessions, workshop lectures, and live talks, were also held.

Particularly in 2020, due to the COVID-19 pandemic, the conference became an opportunity to introduce the insights of influential figures in the content industry through the new format called online conferencing.

3) Korea Content Awards (Character Category)

The 2020 Korea Content Awards (Character Category) was held to inspire creative motivation and pride among character industry workers by rewarding best-selling domestic content and hard-working content industry contributors. Five works, from a total of 19 submitted works, were selected for the 2020 Korea Content Awards (Character Category) as winners after two rounds of screening by experts.

Table 2 2020 Korea Content Awards Winners in the Character Category

Order	Winner	Applicant Company/Person
Presidential Prize	Giant Peng TV	EBS
Minister of Culture and Sports Prize	Bread Barbershop	MonsterStudio
	Zombiedumb Season 2	Anyzac
	Stay Pangah	Art Licensing
Director of Korea Content Agency Prize	Common Siblings	KVision

2021
卡通形象
产业白皮书

摘　要

第一节 卡通形象使用现况

1. 调查设计

本调查的对象为 在韩国居住的3周岁至69周岁的国民中，最近一年中“至少每2-3个月一次”使用过卡通形象内容的人。

以调查执行机构拥有的全国固定样本组117万名为抽样框，根据截至2021年6月统计厅居民登记人口统计资料，按各地区、性别、年龄的人口组成比例发送网络调查邮件后，根据是否使用卡通形象内容进行了调查，直至完成目标样本。

调查周期为一年一次，内容使用调查的回答标准除非另行提及，否则均为2020年7月至2021年7月（最近一年)。数据收集在2021年7月26日至8月13日期间通过网络调查方式进行。

表 1 2021卡通形象产业用户实情调查设计

项目	内容
目标总体	3周岁~69周岁的全体国民
调查总体	在3周岁～69周岁的全体国民中，最近一年中“至少每2-3个月一次”使用过卡通形象内容的人
调查地区	全国17个市和道
资料收集方法	通过结构化的问卷在网上进行调查
抽样框	截至2021年6月，行政自治部提供的居民登记人口统计现状 把调查执行机构持有的全国固定样本组117万名作为抽样框
抽样方法	按性别/年龄/地区比例分配
样本误差	在95%置信度下为±1.73%p
有效样本	3,200名
资料收集时间	2021年7月~8月(2021.7.26~8.13)
调查主管	韩国文化产业振兴院
调查执行	(株) Global Research

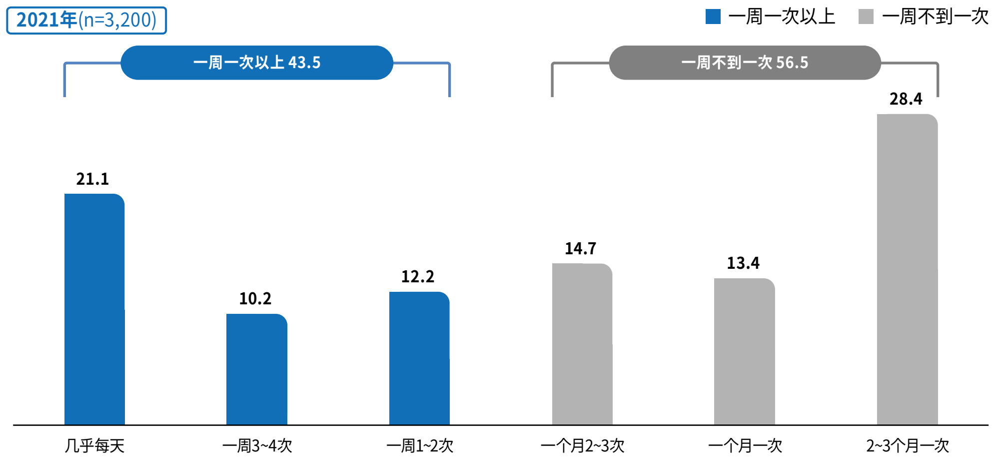
2. 最近一年卡通形象内容使用频率

在最近一年使用卡通形象内容的人中，回答"一周一次以上"的比例为43.5%，自2019年以来一直在增加。

相比女性，男性回答"一周一次以上"的比例更高。按年龄层来看，年龄越小，"一周一次以上"的卡通形象内容使用率越高，其中3~9岁年龄层最高。

图 1 最近一年卡通形象内容使用频率

(Base: 全体, 单位: %)

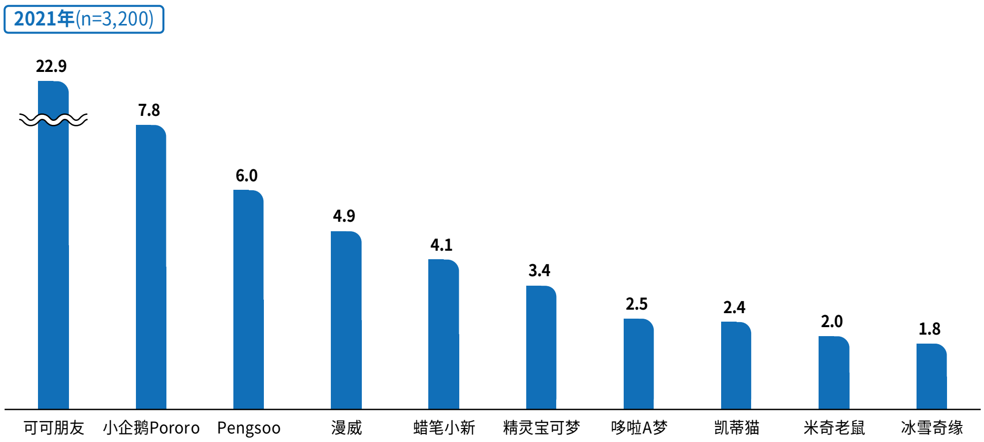


3. 最受喜爱的卡通形象

目前，最受喜爱的卡通形象为"可可朋友(Kakao Friends)(22.9%)。自2019年以来，一直保持最受喜爱的卡通形象第一名。"小企鹅Pororo"(7.8%)上升至第2位，"Pengsoo (6.0%)"下降至第3位。

图 2 最受喜爱的卡通形象

(Base:全体，单位：%，基于第1名，前10位)



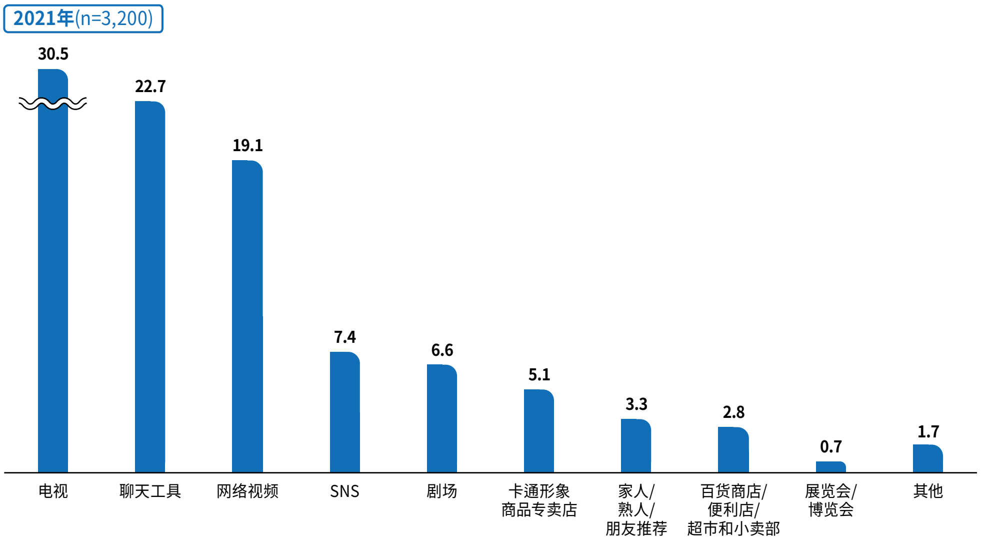
4. 认识卡通形象的渠道(媒介)

在使用卡通形象内容的人认识最喜爱卡通形象的渠道中，"电视"以30.5%占据首位。其后，依次为"聊天工具(22.7%)"，"网络视频(19.1%)"，"SNS(7.4%)"，"剧场(6.6%)"等。通过"电视"和"聊天工具"认识卡通形象的比例与上一年相比有所下降，而"网络视频"则呈上升趋势。

按年龄层来看，3~9岁年龄层回答通过"电视"和"网络视频"认识卡通形象的比例相对较高。30~39岁和 50~59岁年龄层回答通过"聊天工具"认识卡通形象的比例相对较高，而10~19岁和20~29岁年龄层则是回答通过"SNS"认识卡通形象的比例相对较高。

图 3 认识卡通形象的渠道(媒介)

(Base: 全体, 单位: %)

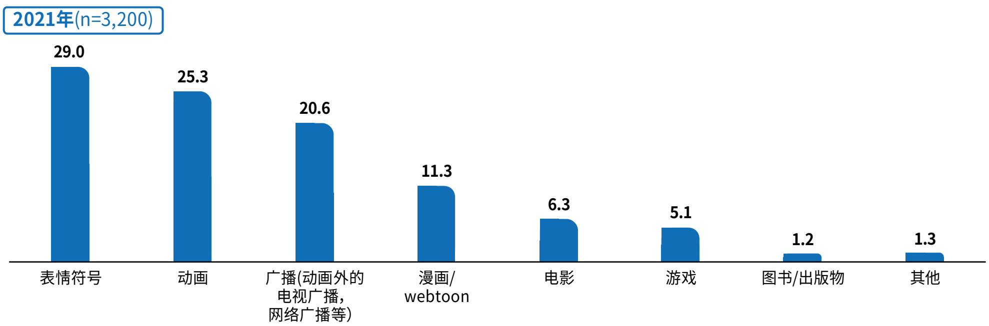


5. 认识卡通形象的渠道(内容)

在使用卡通形象内容的人认识最喜爱卡通形象的内容中，“表情符号”以29.0%占据首位。其后，依次为“动画(25.3%)”，“广播(20.6%)”，“漫画/webtoon(11.3%)”，“电影(6.3%)”等。通过“广播”认识卡通形象的比例与上一年相比有所下降，而“动画”则有所提高。

图 4 认识卡通形象的渠道(内容)

(Base: 全体，单位: %)

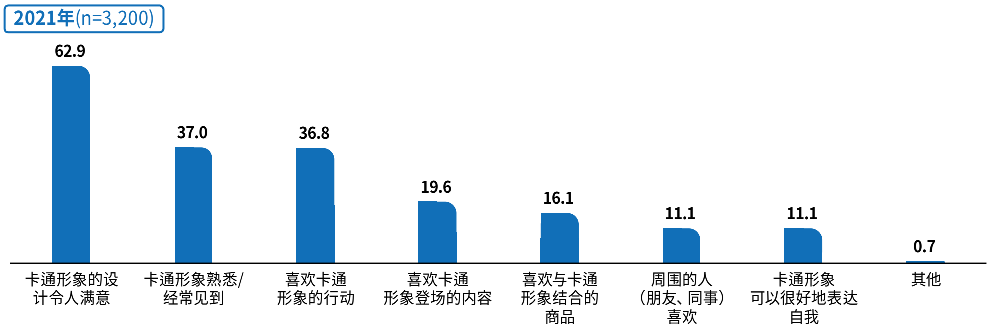


6. 卡通形象喜好理由

卡通形象的喜好理由(以第1+2位为准)中，“卡通形象的设计令人满意”以62.9%占据首位。其后，依次为“卡通形象熟悉/经常见到(37.0%)”、“喜欢卡通形象的行动(36.8%)”、“喜欢卡通形象登场的内容(19.6%)”。

图 5 卡通形象喜好理由

(Base: 全体, 可多选, 单位: %, 以第1+2位为准)

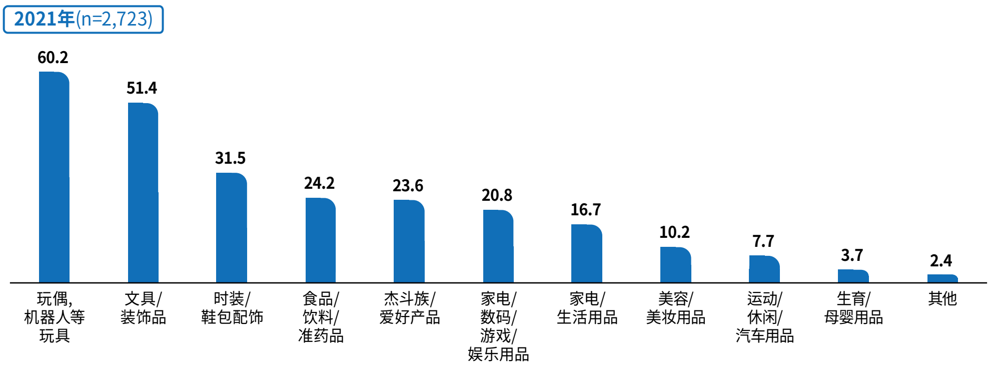


7. 最近一年卡通形象商品购买倾向

最近一年购买过卡通形象商品的人购买最多的商品为“玩偶、机器人等玩具(60.2%)”。其后，依次为“文具/装饰品(51.4%)”，“时装/鞋包配饰(31.5%)”，“食品/饮料/准药品(24.2%)”等。与其他产品组相比，“时装/鞋包配饰”和“食品/饮料/准药品”的增长较上一年相对较大。

图 6 最近一年卡通形象商品购买倾向

(Base: 最近一年购买过卡通形象商品的人，可多选，单位：%)

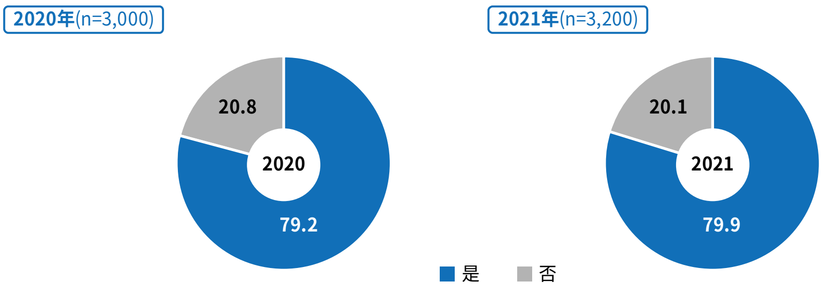


8. 最近一年使用（购买）手机卡通形象商品的经历

最近一年购买过手机卡通形象商品的人比例为79.9%，自2019年以来持续呈上升趋势。按年龄层来看，20~29岁年龄层有购买手机卡通形象商品经历的比例最高。

图 7 最近一年使用（购买）手机卡通形象商品的经历

(Base: 全体，单位：%)



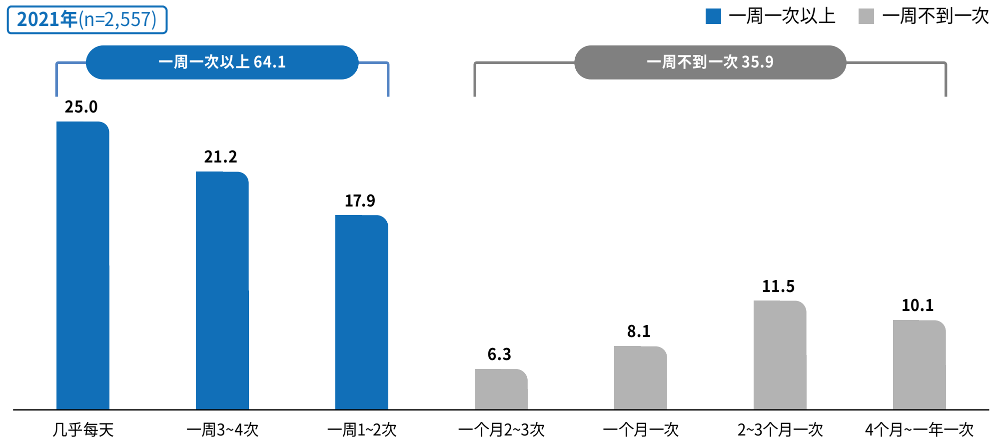
9. 最近一年使用（购买）手机卡通形象商品的频率

在最近一年使用（购买）手机卡通形象商品的频率中，回答“一周一次以上”的比例最高，占64.1%，自2019年以来一直呈上升趋势。

从受访者的特征来看，相比女性，男性回答“一周一次以上”的比例更高。按年龄层来看，年龄越小，“一周一次以上”的手机卡通形象商品使用比例越高，其中3~9岁和10~19岁年龄层最高。

图 8 最近一年使用（购买）手机卡通形象商品的频率

(Base: 最近一年手机卡通形象商品用户，单位: %)



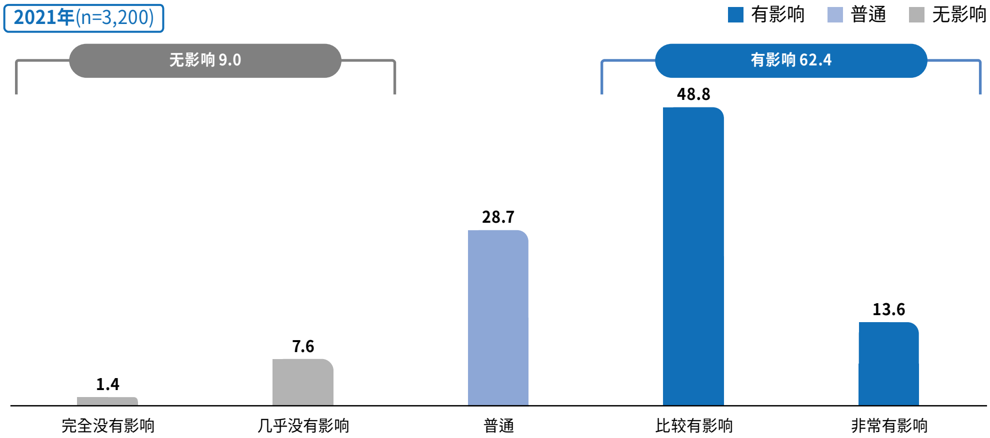
10. 卡通形象是否影响商品购买

针对“购买商品时，卡通形象是否对做出购买决定产生影响”的提问，回答“是”的比例为62.4%，与上一年相比增长了5.2%p。

从受访者的特征来看，女性和3~9岁年龄层人群在购买商品时，卡通形象对做出购买决定产生的影响相对较大。

图 9 卡通形象是否对做出购买决定产生影响

(Base：全体，单位：%)

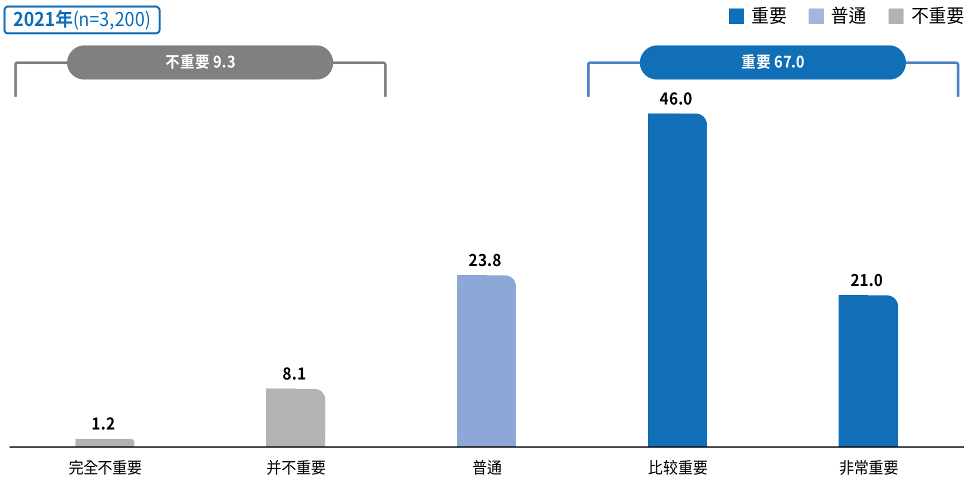


11. 购买卡通形象时正品与否对购买商品的影响

针对“购买卡通形象时，正品与否对购买商品的影响”，回答“有影响”的比例为67.0%，与上一年相比增长了5.4%p。

图 10 购买卡通形象时正品与否对购买商品的影响

(Base：全体，单位：%)

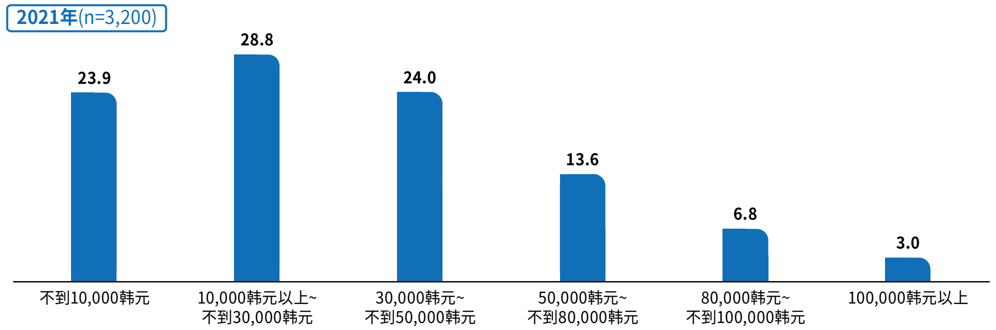


12. 卡通形象内容可消费水平

在月平均卡通形象可消费金额中，回答“10,000韩元以上~不到30,000韩元”的比例最高，占28.8%。其后，依次为“30,000韩元以上~不到50,000韩元”(24.0%)，“不到10,000韩元”(23.9%)等。回答“不到30,000韩元”的比例较上一年下降，而回答“30,000韩元以上”的比例则较上一年上升。

图 11 月平均卡通形象可消费金额

(Base: 全体, 单位: %)



第二节 卡通形象扶持项目

韩国文化产业振兴院为加强韩国卡通形象产业能力并振兴授权产业，推进了各种制作和分发扶持项目。2020年进行的扶持项目主要内容如下。

1. 加强制作能力

1）新卡通形象IP开发及商业化扶持

新卡通形象IP开发和商业化扶持项目旨在通过发掘新内容的卡通形象IP来增强创作能力并为授权产业奠定基础。以创业未满7年的新企业为对象，在2020年选择了11个新开发和5个后续扶持课题。

另一方面，为了新卡通形象IP开发及商业化扶持课题的后续扶持，推进了新卡通形象IP管理扶持项目。以被选定的课题为对象，提供定制化的咨询及管理并 举办了推介活动。此外，还扶持了宣传，营销，流通发行，招商引资等，通过举办训练营来加强商业化能力。

此外，通过推广快闪店业务，扩大因新冠肺炎导致经营困难的中小卡通形象公司的流通渠道，扶持了16家中小内容公司和7家合作公司的产品销售。

2）内容IP授权扶持

内容IP授权扶持项目是以促进使用内容IP的授权业务发展为目标的项目。为此扶持制作开发 及营销费 用，以发 掘和发 展适合多元化制作，分发，消费环 境的内 容IP。在2020年扶持了39个课题。

2. 分发扶持

1）卡通形象授权交易会

2019年迎来第18届的“卡通形象授权交易会”是韩国最大的卡通形象授权商业专业市场，不仅限于卡通形象，该活动还融合了漫画，动画片，游戏，广播，MCN，杰斗族，艺术玩具等，是结合了B2B和B2C的卡通形象授权专业活动。每年有约超过100,000名观众和300家公司参加，是韩国规模最大，最具象征意义的活动，但为了预防新冠肺炎，2020年的活动已被取消。

尽管该活动因外部因素被取消，但活动主办方韩国文化产业振兴院将发掘“加强B2B和提高运营系统效率”和“加强与合作方的协作”等主要课题，以促进未来卡通形象授权交易会的持续发展，并计划在2021年活动中应用并逐步实施。

2) 2020授权大会

“Licensing Con 2020”是韩国唯一向内容授权产业从事者提供趋势信息和促进授权业务发展的会议，该活动继2019年之后第二次举行。2020年的主题是“IP（知识产权）业务，挑战变革(Challenge the Change)”。约50位国内外演讲嘉宾受邀深入探讨行业问题与对策，聚焦IP业务这一近期内容行业最大的话题，活动共提供了35个板块，包括会议、研讨会讲座和现场演讲。

特别是2020年由于新冠肺炎，大会通过网络会议这一新形式成为了介绍在内容业界发挥影响力的人物们的见解的机会。

3) 大韩民国内容大奖(卡通形象类)

大韩民国内容大奖是一项旨在通过奖励国内优秀内容和为内容产业发展做出贡献者，激发业界从事者的创作动力并振兴产业的项目。“2020大韩民国内容大奖（卡通形象类)”共征集了19部作品，经过两轮专家筛选，最终有5部作品入选获奖作品。

表 2 2020大韩民国内容大奖卡通形象部门获奖作品

奖项	获奖作品	申报单位
总统奖	Giant Peng TV	韩国教育广播公司
文化体育观光部长官奖	Bread Barbershop	Monster Studio
	逗比僵尸第2季	ANYZAC
	Stay Pangah	Art Licensing
韩国文化产业振兴院长奖	常见兄妹	K-VISION

2021 CHARACTER INDUSTRY WHITE PAPER

SUMMARY

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Ministry of Culture, Sports and Tourism

KOCCA

KOREA CREATIVE CONTENT AGENCY