2022 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, who are residing in Korea and have been exposed to real or digital character content “At least once every 2 to 3 months” in the past year.

By setting 1.17 million research panels nationwide as sample framework, the research used the June 2022 resident registration population statistics data provided by the National Statistical Office as basis. The character user survey for the previous three years was also referred to. The present survey was carried out by sending an online survey email according to the population component ratio sorted by region, gender, and age, until the target sample was completed depending on the usage status of character contents.

The research was conducted once a year, and the response standard period was from July 2021 to July 2022 (last 1 year), unless otherwise stated.

Table 1 2022 Factual Research Design for Character Users

Type	Content
Target Population	• All Koreans ages 3 to 69
Research Population	• Koreans between the ages of 3 to 69 who were exposed to character (actual or digital character) content “At least once every 2 to 3 months” content in the past year
Research Areas	• Nationwide
Data Collection Method	• Online research through a structured survey
Sample Framework	• Resident Registration Population Statistics data as of June 2022 provided by the Ministry of the Interior and Safety • A total of 1.17 million research panels set up nationwide by the research agency was used as sample framework.
Sampling Method	• Proportional allocation according to region/gender/age
Sampling Error	• ±1.63%p at 95% confidence level
Valid Sample	• 3,500 people (post-weighted to 3,500 after survey of 3,608) • In order to increase the reliability of the sampling of children (3 to 9 years old), post-weighted 500 people aged 3 to 9 years to 392 people based on the ratio of respondents aged 3 to 9 years to total respondents in the previous year
Data Collection Period	• July to August 2022 (July 22 to August 21)

Type	Content
Organizing Agency	• Korea Creative Content Agency
Executing Agency	• Global Research

2. Character Content Use Frequency in the Past Year

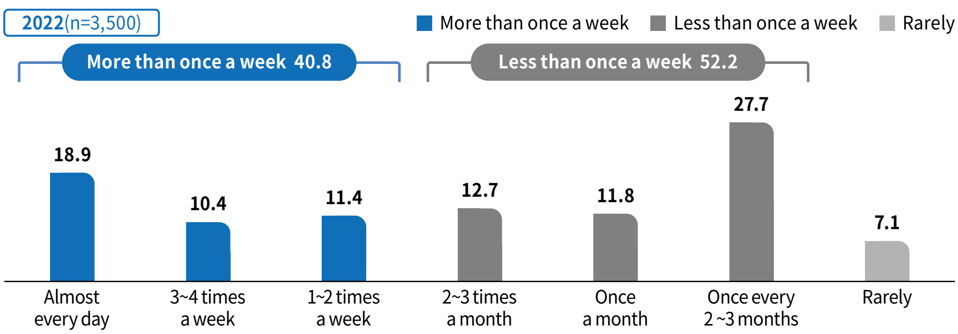
1) Real Character Content Use Frequency

With regard to the frequency of using real character content, 40.8% of the respondents said “More than once a week” and 52.2% of them said “Less than once a week.” “Once every 2 to 3 months” was the most frequent response at 27.7%.

Looking at the characteristics of the respondents, males had a relatively higher rate of using real character content “More than once a week” compared to females. By age, it was relatively higher in the age group of 3 to 9 years old.

Figure 1 Real Character Content Use Frequency in the Past Year

(Base: All, Unit: %)



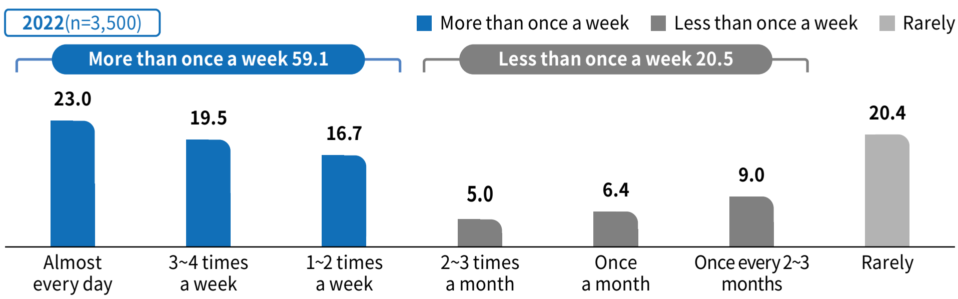
2) Digital Character Content Use Frequency

Regarding frequency of using digital character content, 59.1% of the respondents said “More than once a week,” and among them, “Almost every day” was the most frequent response at 23.0%.

Looking at the characteristics of the respondents, the ratio of using digital character contents “More than once a week” was relatively high among those in their 20s.

Figure 2 Digital Character Content Use Frequency in a Year

(Base: All, Unit: %)

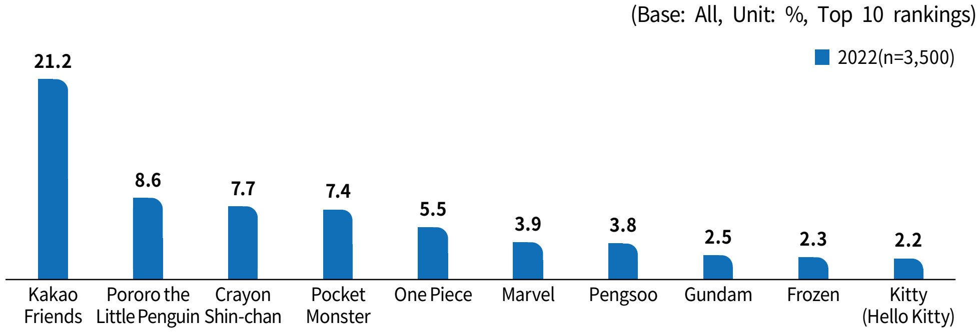


3. Most Preferred Character

In terms of most preferred character, “Kakao Friends” received the highest result with 21.2%, and it has ranked number one since 2020. “Pengsoo(3.8%)” fell to the 7th place, while “OnePiece(5.5%)” and “Gundam(2.5%)” entered the top10.

Looking at the characteristics of the respondents, those in their 40s preferred “Kakao Friends,” those aged 3-9 years old preferred “Pokémon” and “Pororo the Little Penguin,” and those in their 20s preferred “Crayon Shin-chan” and “One Piece.”

Figure 3 Most Preferred Character

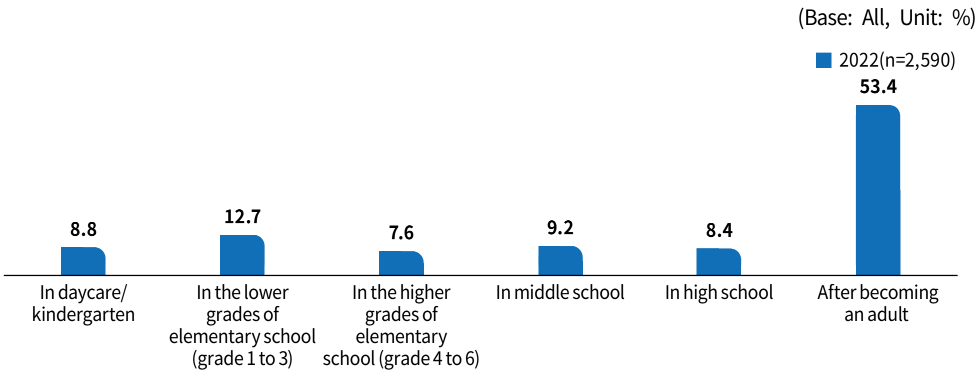


4. Initial Awareness of The Most Preferred Character

When asked when they first became aware of their favorite character, 53.4% of the adult respondents said “After becoming an adult,” followed by “In the lower grades of elementary school(12.7%),” “In middle school(9.2%),” and “In daycare/kindergarten(8.8%).”

Looking at the characteristics of the respondents, the higher the age group, the higher the response of “After becoming an adult” becomes, and the lower the age group, the higher the response of “In the lower grades of elementary school” and “In daycare/kindergarten” become.

Figure 4 Initial Awareness of the Most Preferred Character



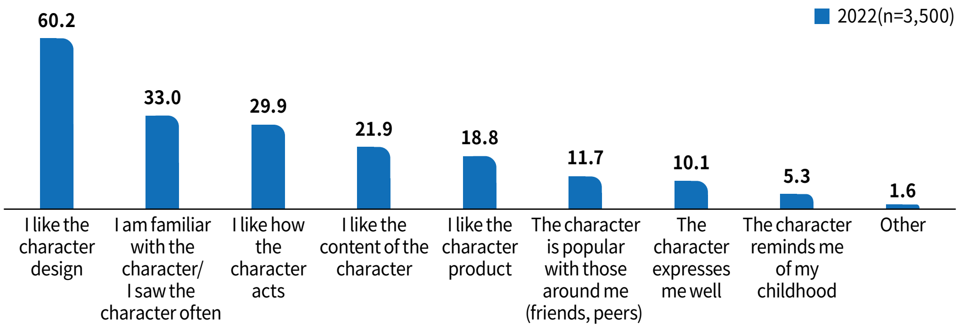
5. Reasons for Character Preference

Regarding the reason for liking the most preferred character (based on the 1+2 rankings), "I like the character design" ranked the highest with 60.2%, followed by "I am familiar with the character / I saw the character often (33.0%)," "I like how the character acts(29.9%)," and "I like the content of the character(21.9%)."

Based on the characteristics of the respondents, females answered "because I like the character design" relatively higher than males. By age, teenagers answered "I like the character design," those in their 50s and 60s answered, "I am familiar with the character/I saw the character often," those in their 30s answered, "I like how the character acts" and those aged 3 to 9 years old answered, "I like the content of the character."

Figure 5 Reason for Character Preference

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



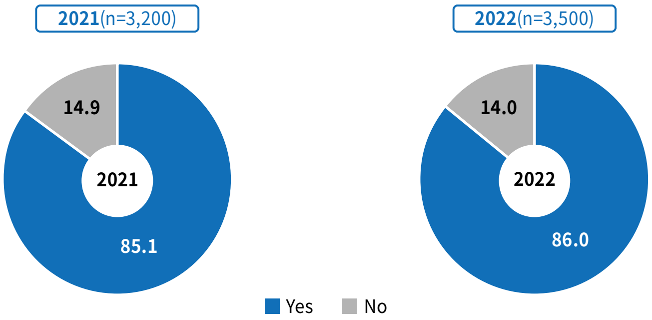
6. User Experience (Purchase) of Real Character Goods

The ratio of experience in purchasing real character products in the past year was 86.0%, which has been on a similar level since 2020.

Looking at the characteristics of the respondents, experience of purchasing character products was the highest among those aged 3 to 9 years old.

Figure 6 User Experience (Purchase) of Real Character Goods in a Year

(Base: All, Unit: %)



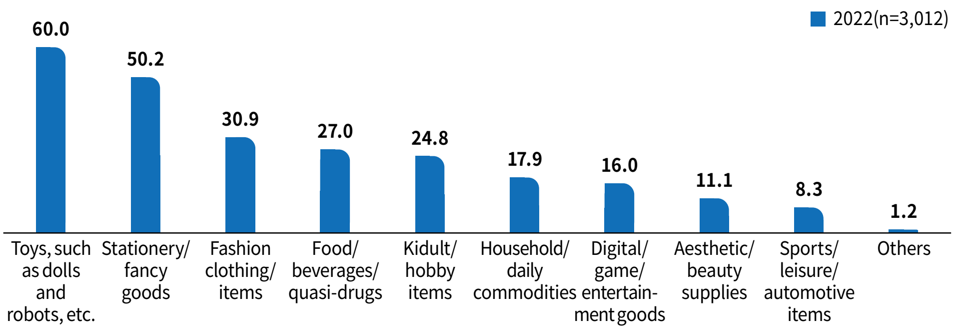
7. Purchase Trends of Real Character Goods

The most purchased line of products by respondents who purchased character products in the past year was "Toys, such as dolls and robots, etc." with the highest share at 60.0%, followed by "Stationery/fancy goods(50.2%)," "Fashion clothing/items(30.9%)," "Food/beverages/quasi-drugs(27.0%)," and "Kidult/hobby items(24.8%)." The categories of "Food/beverages/quasi-drugs" and "Kidult/hobby items" have been increasing since 2020.

Looking at the characteristics of the respondents, males had a relatively high purchase rate of "Kidult/hobby items" and "Digital/game/entertainment goods," while females had a relatively high purchase rate of "Stationery/fancy goods." By age group, the purchase ratio of "Toys, such as dolls and robots, etc.," "Fashion clothing/items," and "Food/beverages/quasi-drugs" in 3 to 9-year-olds, "Stationery/fancy goods" in teenagers, and "Kidult/hobby items" in those in their 60s were relatively high.

Figure 7 Purchase Trends of Real Character Goods in a Year

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



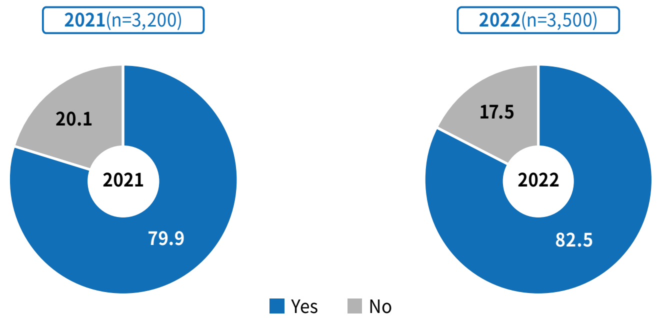
8. User Experience (Purchase) of Digital Character Goods

The ratio of experience in purchasing digital character products in the past year was 82.5%, and this specific ratio has been increasing since 2020.

Looking at the characteristics of the respondents, the results showed that experience of purchasing digital character products was highest among those in their 20s.

Figure 8 User Experience (Purchase) of Digital Character Goods in a Year

(Base: All, Unit: %)



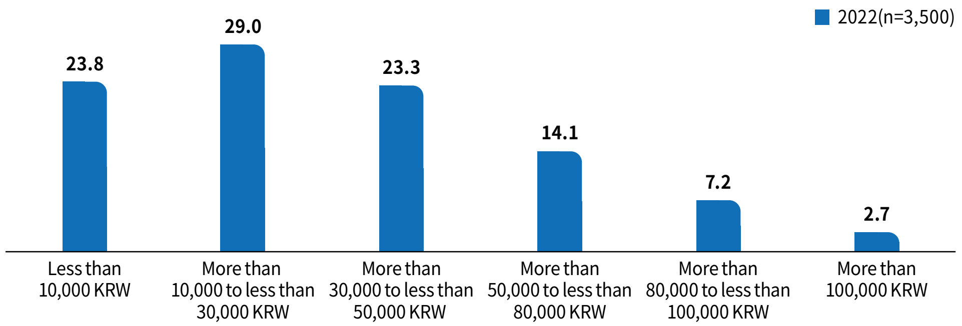
9. Character Content Consumption Level

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 29.0%, followed by “Less than 10,000 KRW(23.8%)” and “More than 30,000 to less than 50,000 KRW(23.3%).”

Looking at the characteristics of the respondents, the ratio of those in their 60s who can consume “Less than 10,000 KRW,” teenagers who can consume “More than 10,000 to less than 30,000 KRW ,” and those aged 3 to 9 who can consume “More than 30,000 KRW” showed a relatively high rate of consumption.

Figure 9 Average Monthly Consumable Amount for Character Content

(Base: All, Unit: %)



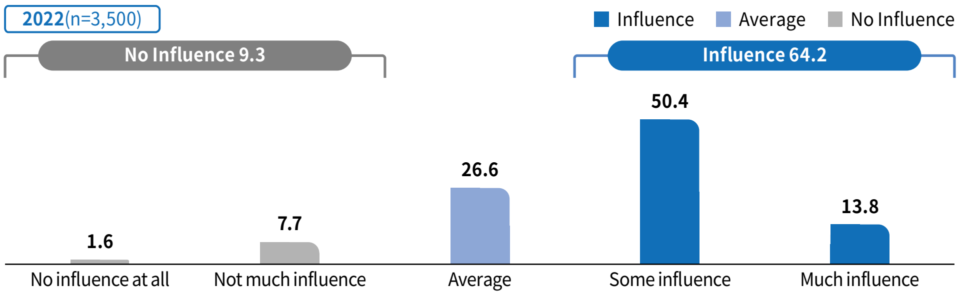
10. Influence of Characters on Purchasing Products

Those who responded that the characters “had an Influence” on their decision when purchasing a product turned out to be 64.2%, a 1.8%p increase from the previous year.

Looking at the characteristics of the respondents, it showed that the influence of characters on purchasing products is relatively large on the purchase decision of those in the age group of 3 to 9 years old.

Figure 10 Influence of Characters on Purchasing Products

(Base: All, Unit: %)



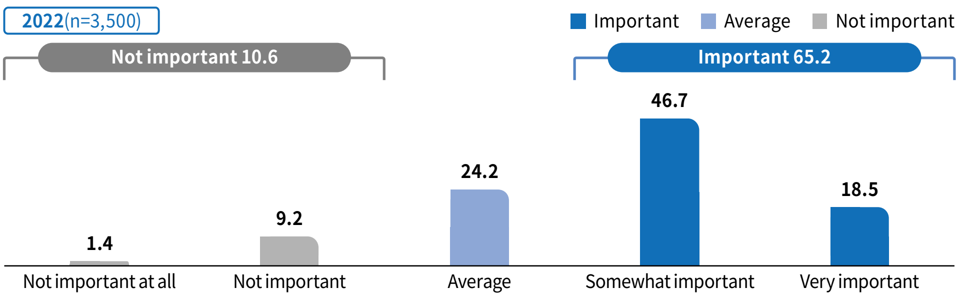
11. Influence of a Product's Originality on the Purchasing Decision

Those who responded that the originality of a product "Important" on their purchase decision turned out to 65.2%, which is a 1.8%p decrease from the previous year.

Looking at the characteristics of the respondents, the influence of a product's originality was relatively large for those in their 40s.

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

(Base: All, Unit: %)



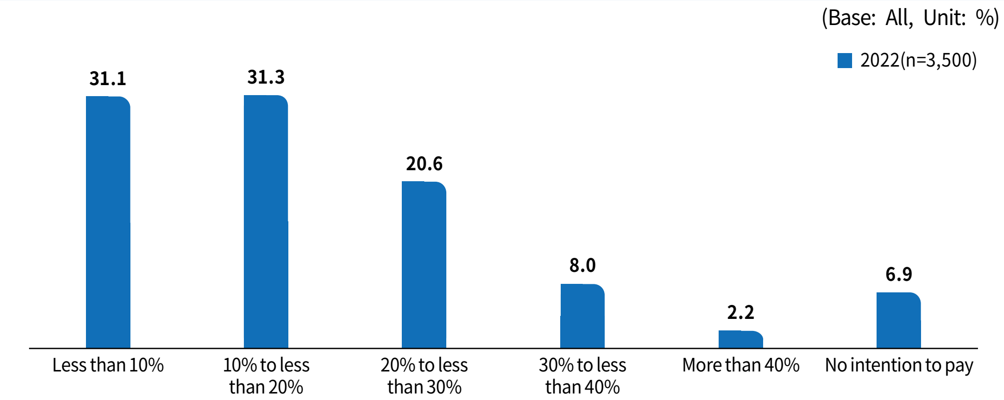
12. Scope of Additional Payment for Products with Characters

The scope of additional payment for products with characters is relatively high in "less than 10 to 20%" at 31.3% and "less than 10%" at 31.1%. The rate of no additional payment was 6.9%.

Willingness to pay "less than 20%" decreased compared to the previous year, while willingness to pay "less than 20 to 40%" increased from last year.

Looking at the characteristics of the respondents, the response of "less than 10%" was relatively high for those in their 50s, while the response of "no intention to pay" was relatively high for those in their 60s.

Figure 12 Scope of Additional Payment for Products with Characters



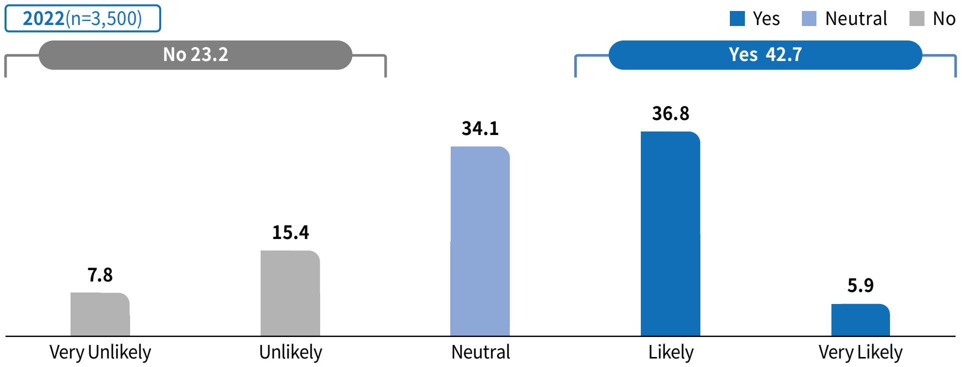
13. Intention to Use The Character When It is Implemented as a Metaverse Service

The ratio of those who are "willing" to use a favorite character if it is implemented in the form of a metaverse service was 42.7%, which is a 4.2%p decrease from the previous year.

Looking at the characteristics of the respondents, males showed a relatively higher willingness to use the metaverse service than females, and by age, those in their teens and 50s were more willing.

Figure 13 Intention to Use the Character When It is Implemented as a Metaverse Service

(Base: All, Unit: %)



Part 2 Support Programs for Character

The Korea Creative Content Agency has introduced various production and distribution support projects to strengthen the capabilities of the Korean character industry and revitalize the licensing industry. The following are the key contents of the support projects carried out in 2021.

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. A total of 14 new character IPs were developed and discovered through this project in 2021.

Moreover, various promotional opportunities were provided. These were aimed at strengthening commercialization capabilities through licensing and customized consulting for business vitalization and expert training for selected tasks. A showcase is also held to share project achievements and know-how in connection with the character licensing fair.

2) Support Programs for Contents IP Licensing

The support project for content IP licensing aims to revitalize the licensing business with 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. The project promoted the expansion of various genres of excellent content IP and vitalization of additional businesses. A total of 21 tasks were supported to strengthen the foundation of the licensing industry.

3) IP Licensing Build-Up

IP licensing build-up is a support project for discovering the licensing field and to strengthen production and business capabilities by using the platform of large companies and the existing content IP of small and medium-sized content companies.

This year, theme parks (Everland, Lotte World) and entertainment company (Megabox) collaborated with 6 participating companies in the screen and goods categories through public offering for licensing using content IP.

The companies participating in the collaboration with Lotte World are OOSSO's Uzzuzzu My Pet (screen) and GoldFrame's BoBi BoNi (goods). The companies that collaborated with Everland are Atoonz's Hello Jadoo (screen) and Bemypet's Samsek & Lili (goods). The companies that collaborated with Megabox are Twin Spica's Banitte & Friends (screen), and Winterbird's Veryberrybap (goods).

Three CP companies and 6 participating companies participated in the "2021 Character Licensing Fair" exhibition and event held at COEX from November 25th to 28th. Support for collaborating IP content production cost was provided, along with expert consulting and prototype production.

2. Support Programs for Distribution

1) Korea Character Licensing Fair

The "Character Licensing Fair," which boasts of 20 years of history, represents the largest character licensing business market in Korea. It is an event that encompasses B2B and B2C centering on the promotion of a variety of contents IPs, including comics, animation, games, broadcasting, MCN, and kidult beyond characters.

This event, the largest fair in Korea with more than 100,000 visitors and 300 companies participating every year, was canceled in 2020 due to COVID-19. In 2021, in commemoration of its 20th anniversary, it was held at the C and D Halls at COEX from November 25th to 28th.

Due to the nature of this event, which usually have large numbers of family visitors with infants, the number of visitors decreased sharply compared to previous years as an aftermath of the pandemic. The number of booth participation and programs were reduced following the reduction in marketing budgets by companies. To offset the effect, the event was held with a focus on preparing for post-COVID-19 and vitalizing B2B business.

A special forum (Theme: The achievements and strategic visions of the Character Licensing Fair) in connection with “Licensing Con” was held on November 25 to generate strategies for the fair’s sustainable growth in the future. Three presentations and discussions were held. The directions produced from this forum are summarized as strengthening B2B functions, strengthening private sector cooperation, and actively discovering new IPs. The Korea Creative Content Agency plans to continue to promote solid positioning and long-term growth as a global IP market by applying a development strategy anchored on these strategies from 2022.

2) Licensing Conference 2021

“Licensing Con 2021,” the only business conference in Korea in the field of content IP licensing, was held at the COEX Conference Room on November 25 to 26. Unlike 2020, which was conducted online, it was conducted as an offline event and was broadcast online in 2021.

The theme of the 2021 conference, the third since 2019, was “New Opportunities in IP Business.” Various strategies and cases for business diversification in the rapidly growing content IP market were introduced. Starting with the keynote session “Who will be the next Marvel,” various programs were held including 6 conference sessions, 18 lectures, 2 live talks, and a special forum.

“Licensing Con 2021” has recently become a venue for exploring strategies and sharing success stories to actively pursue opportunities as K-content has recently begun to be consumed earnestly in the global market through global OTT. Moreover, it was a meaningful occasion to confirm the fact that strategic approaches, collaboration, and continuous efforts are necessary for companies to build a concrete profit model and strengthen IP utilization as presented by world-class experts.

3) Operation of a Testbed for The Distribution of Character IP Products

In order to expand the distribution channels of small and medium-sized character companies, the sales of various products by 23 content companies were supported by implementing a distribution support project that launch character products in a pop-up store (Kream Store) linked to a movie theater (Megabox Hanam Branch) and 3 large distribution malls (Jamsil, Gimpo Airport, Eunpyeong branches of Toys R Us etc.). This was a new project in 2021 that expanded the pilot project in the previous year.

4) Korea Content Awards (Character category)

The Korea Contents Awards was established to inspire creative motivation and pride among character industry workers by rewarding best-selling domestic content and hard-working content industry contributors. A total of 24 works were submitted for the “2021 Korea Contents Awards – Character Category,” and 5 works were selected as the winners after two rounds of expert evaluation.

Table 1 Winners of the 2021 Korea Contents Awards in the Character Category

Company /Artist	Iconix	Smart Study	DesignEGG	Artpq	Blue Shark
Work	Zanmang Loopy	Pinkfong	Pat a Pat Como	Mongni	Walking Shark SHAAK
Award	Presidential Prize	Minister of Culture, Sports and Tourism Award			Korea Creative Content Agency Award
Prize	KRW 10 million	KRW 5 million			KRW 2 million

2022
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，最近一年中“至少每2-3个月一次”使用过实物卡通形象或数字卡通形象内容的人。

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2022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和前3年卡通形象用户实况调查的内容利用率发送网络调查邮件后，按照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2021年7月至2022年7月(最近一年)。

表 1　2022 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(实物卡通形象或数字卡通形象)内容的人
调查地区	• 全国
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2022年6月，行政自治部提供的居民登记人口统计现状 • 将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±1.63%p
有效样本	• 3,500名(对3,608名进行调查后赋予事后加权值为3,500名) • 为增加儿童（3-9岁）样本的可信度，根据上年度3-9岁受访者占总受访者的比例，将500名3-9岁的受访者赋予事后加权值为加为392名
资料收集时间	• 2022年7月~8月(7.22.~8.21.)
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

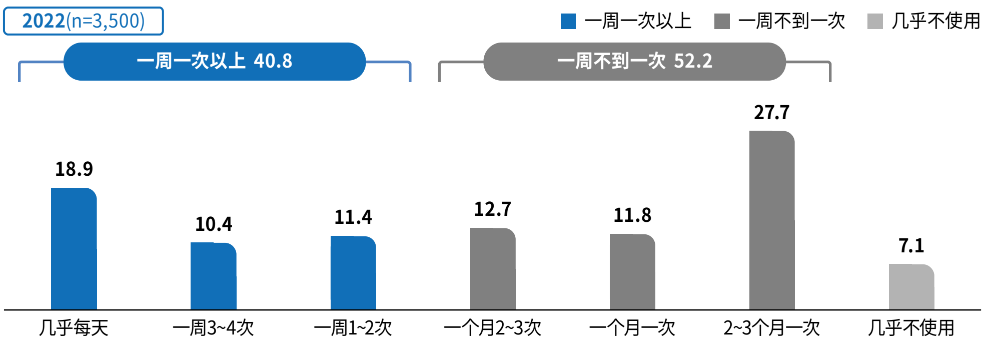
1）实物卡通形象内容使用频率

在实物卡通形象内容的使用频率中，“一周一次以上”占40.8%，“一周不到一次”占52.2%，其中“2~3个月一次”的比例最高，为27.7%。

从受访者特性来看，男性“一周一次以上”使用实物卡通形象内容的比例相对高于女性，从年龄层来看，在3-9岁的使用比例相对较高。

图 1 最近一年实物卡通形象内容使用频率

(Base：全体，单位：%)

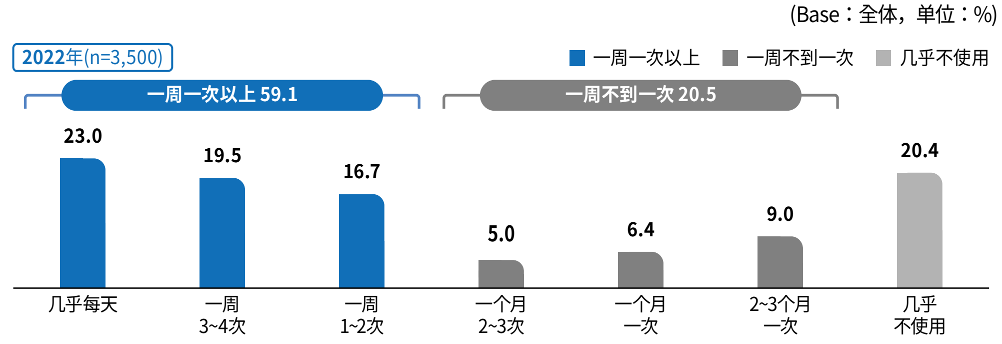


2）数字卡通形象内容使用频率

在数字卡通形象内容的使用频率中，“一周一次以上”占59.1%，其中“几乎每天”的比例最高，为23.0%。

从受访者特性来看，20~29岁年龄层“一周一次以上”使用数字卡通形象内容的比例相对较高。

图 2 最近一年数字卡通形象内容使用频率

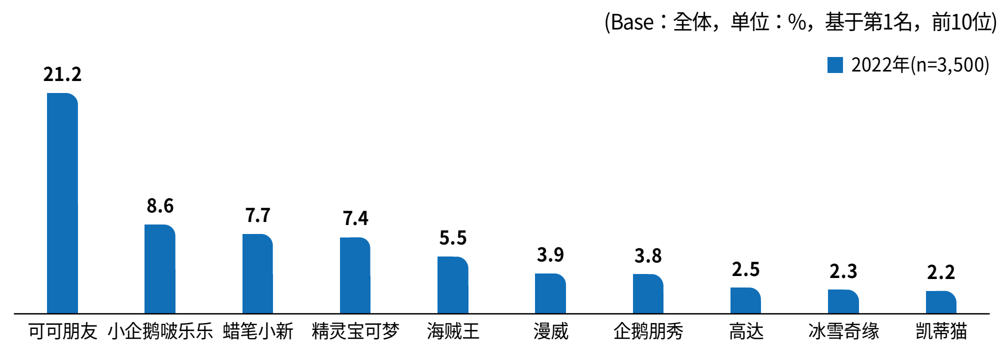


3. 最喜爱的卡通形象

最喜爱的卡通形象为"可可朋友(Kakao Friends(21.2%)"，自2020年以来一直被评为最受喜爱的卡通形象第一名。"企鹅朋秀(3.8%)"，下降至第7位，"海贼王(5.5%)"和"高达(2.5%)"进入前十。

从受访者特性来看，40~49岁年龄层喜爱"可可朋友(Kakao Friends)"的比例相对较高，3~9岁年龄层喜爱"精灵宝可梦"和"小企鹅啵乐乐"的比例相对较高，20~29岁年龄层喜爱"蜡笔小新"和"海贼王"的比例相对较高。

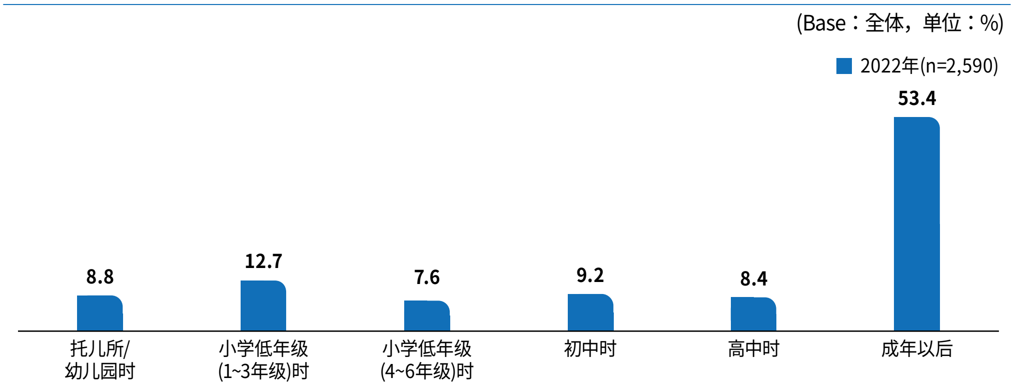
图 3 最喜爱的卡通形象



4. 最喜爱的卡通形象最初认识时间

在询问成年受访者最初认识最喜爱的卡通形象时，回答“成年以后”的比例最高，为53.4%。其次是“小学低年级(12.7%)”，“初中(9.2%)” 以及“托儿所/幼儿园(8.8%)”。从受访者的特性来看，年龄越大回答“成年以后”的比例相对较高，年龄越小回答“小学低年级”和“托儿所/幼儿园”的比例相对较高。

图 4 最喜爱的卡通形象最初认识时间



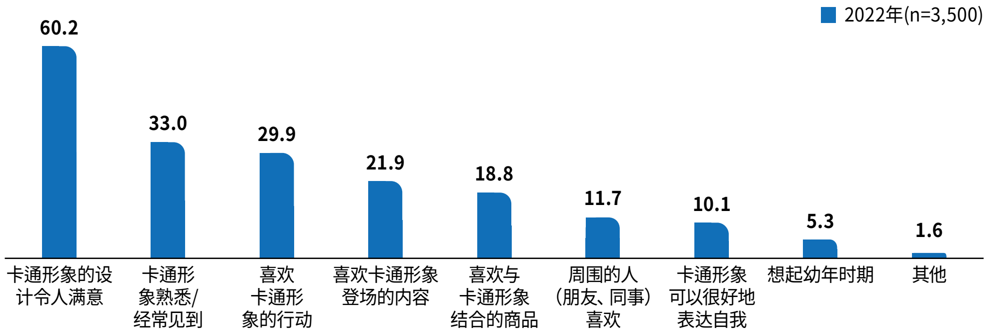
5. 卡通形象喜好理由

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60.2%占据首位。其次是“卡通形象熟悉/经常见到(33.0%)”，“喜欢卡通形象的行动(29.9%)”，“喜欢卡通形象登场的内容(21.9%)”。

从受访者的特性来看，相比男性，女性回答“卡通形象的设计令人满意”的比例相对较高。从年龄层来看，10~19岁回答“卡通形象的设计令人满意”的比例相对较高，50~59岁和60~69岁回答“卡通形象熟悉/经常见到”的比例相对较高，30~39岁回答“喜欢卡通形象的行动”的比例相对较高，3~9岁回答“喜欢卡通形象登场的内容”的比例相对较高。

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)

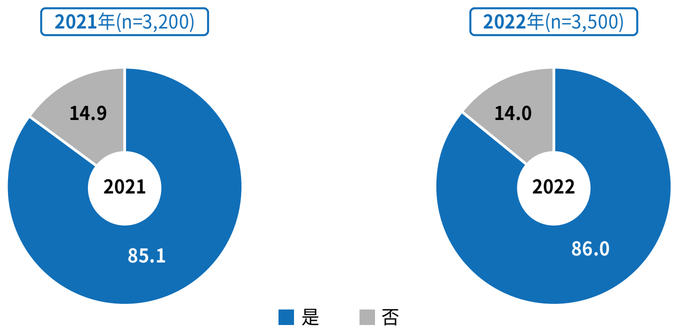


6. 实物卡通形象购买经历

最近一年有实物卡通形象商品购买经历的比例为86.0%，自2020年以来持续保持相似水平。从受访者的特性来看，3~9岁实物卡通形象商品购买经历最多。

图 6 最近一年实物卡通形象购买经历

(Base：全体，单位：%)



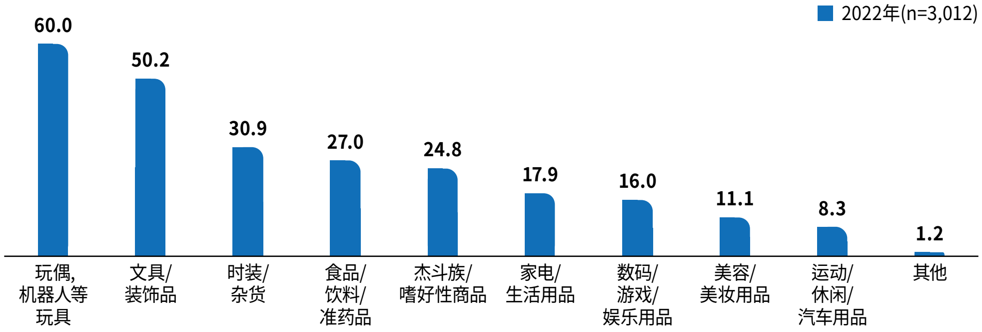
7. 实物卡通形象商品购买倾向

在最近一年购买最多的实物卡通形象商品中，“玩偶、机器人等玩具”占比最高，为60.0%。其次是“文具/装饰品(50.2%)”，“时装/杂货(30.9%)”，“食品/饮料/准药品(27.0%)”，“杰斗族/嗜好性商品(24.8%)”。“食品/饮料/准药品”和“大小孩/嗜好产品”自2020年以来持续呈增长趋势。

从受访者的特性来看，男性“杰斗族/嗜好性商品”和“数码/游戏/娱乐用品”的购买比例相对较高，女性“文具/装饰品”的购买比例相对较高。从年龄层来看，3~9岁“玩偶、机器人等玩具”，“时装/杂货”，“食品/饮料/准药品”的购买比例相对较高。10~19岁“文具/装饰品”的购买比例相对较高。60~69岁“杰斗族/嗜好性商品”的购买比例相对较高。

图 7 最近一年实物卡通形象商品购买倾向

(Base：最近一年购买过实物卡通形象商品的受访者，可多选，单位：%)



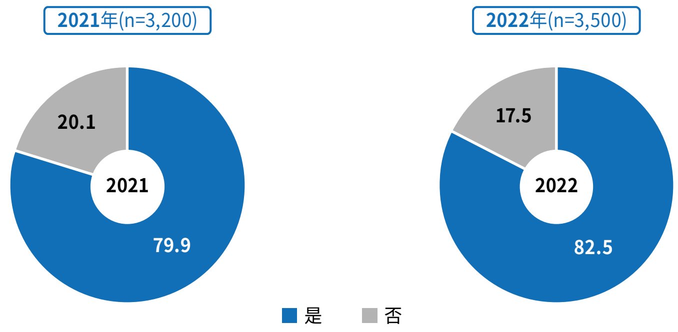
8. 数字卡通形象使用（购买）经历

最近一年有数字卡通形象商品使用（购买）经历的比例为82.5%，自2020年以来持续呈增长趋势。

从受访者的特性来看，20~29岁年龄层的数字卡通形象商品使用（购买）经历最多。

图 8 最近一年数字卡通形象使用（购买）经历

(Base：全体，单位：%)



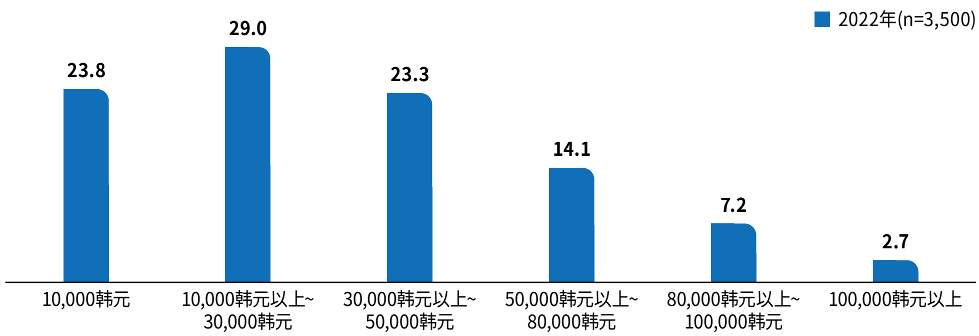
9. 月平均卡通形象使用时可消费金额

在月平均卡通形象使用时可消费金额中，回答“10,000韩元以上~30,000韩元”的比例最高，占29.0%。其次是“10,000韩元(23.8%)”，“30,000韩元以上~50,000韩元(23.3%)”。

从受访者特性来看，60~69岁年龄层可消费金额“10,000韩元”的比例相对较高，10~19岁年龄层可消费金额“10,000韩元以上~30,000韩元”的比例相对较高，3~9岁年龄层可消费金额“30,000韩元以上”比例相对较高。

图 9 月平均卡通形象使用时可消费金额

(Base：全体，单位：%)

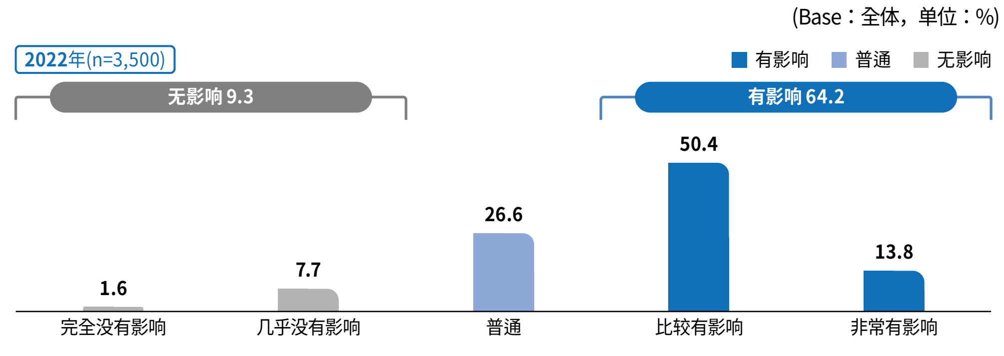


10. 卡通形象是否影响购买商品时的购买决定

64.2%的受访者表示在购买产品时卡通形象影响了购买决定，比上一年增加了1.8%p。

从受访者的特性来看，3~9岁年龄层购买商品时卡通形象对购买决定的影响相对较大。

图 10 卡通形象是否影响购买商品时的购买决定时

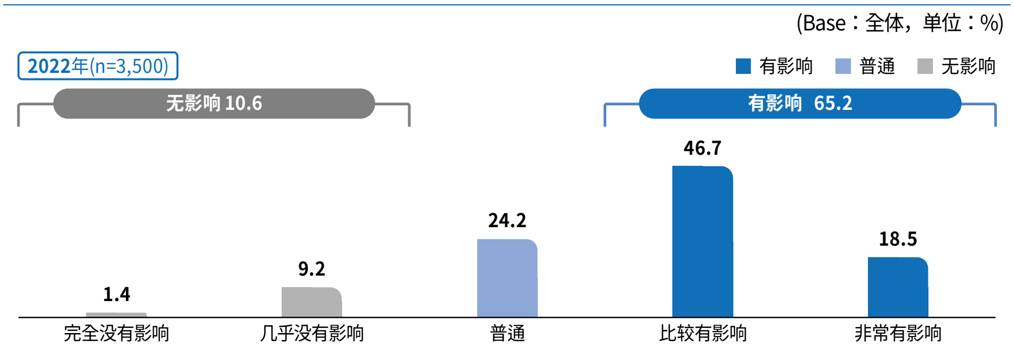


11. 购买卡通形象商品时正品与否对购买决定的影响

65.2%的受访者表示在购买卡通形象商品时，正品与否对购买决定“有影响”，较上一年减少了1.8%p。

从受访者的特性来看，在40~49岁年龄层中正品与否对购买决定的影响相对较大。

图 11 购买卡通形象商品时正品与否对购买决定的影响



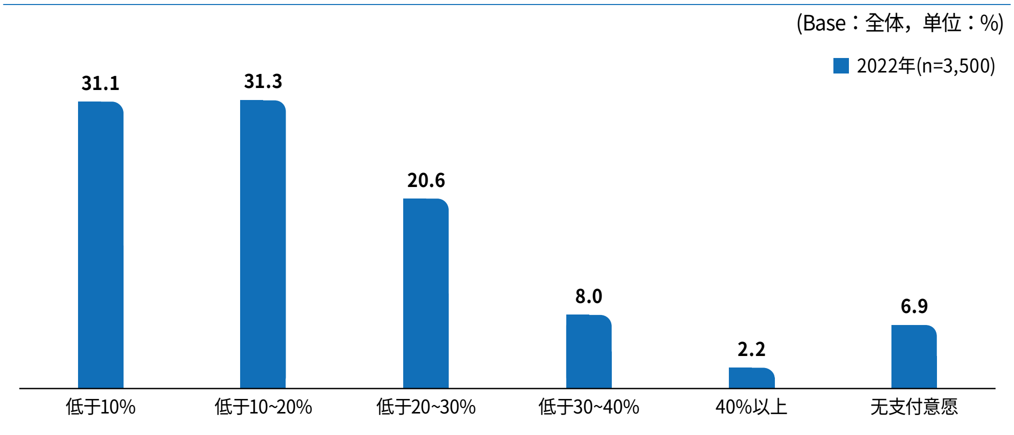
12. 带有卡通形象商品费用的额外支付可能范围

在带有卡通形象商品费用的额外支付可能范围中，“低于10~20%(31.3%)”和“低于10%(31.1%)”相对较高，不愿支付额外费用的比例为6.9%。

“低于20%”支付意愿较上一年有所下降，而“低于20~40%”的支付意愿较上一年有所增加。

从受访者的特性来看，50~59岁年龄层“低于10%”的回答相对较高，60~69岁年龄层“无支付意愿”的比例相对较高。

图 12 带有卡通形象商品费用的额外支付可能范围



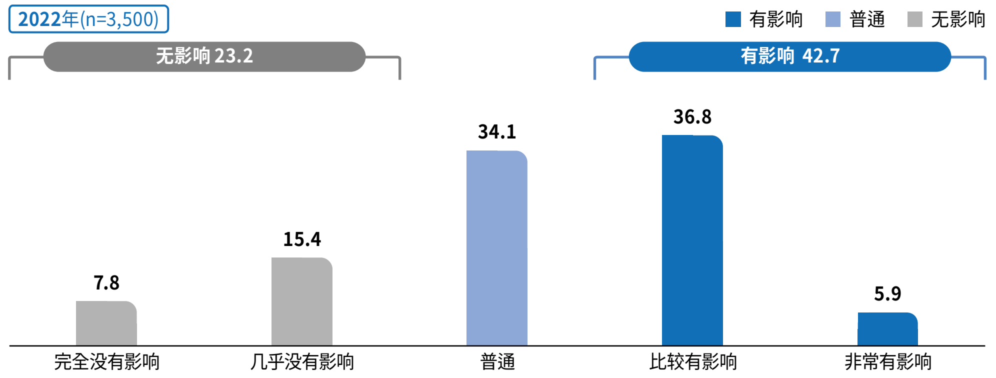
13. 当实现元宇宙服务时使用卡通形象的意向

如果将喜爱的卡通形象以元宇宙服务的形式实现，有使用意向的比例为42.7%，较上一年减少了4.2%p。

从受访者特性来看，男性的元宇宙服务使用意向高于女性，从年龄层来看，10~19岁和50~59岁年龄层的元宇宙服务使用意向相对较高。

图 13 当实现元宇宙服务时使用卡通形象的意向

(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。2021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来增强创意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2021年选择了11个新开发项目和5后续扶持项目。2021年通过该扶持项目，开发挖掘了14个新的卡通形象IP。

此外，针对新的卡通形象IP开发课题，同步推进了额外的管理扶持（间接扶持）项目。这旨在通过针对选定课题的授权和商业促进的定制化咨询以及专家培训来加强商业化能力，同时还提供了多种宣传机会，例如将项目成果展示和分享专业知识的展示与卡通形象授权交易会一起举办等。

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的授权业务为目标的项目。为了发现和促进适合多元化制作、分发和消费环境的内容IP，对使用优秀国内内容IP推进授权业务的制作/开发和营销费用给予了补贴。通过此举措，引导了优秀内容IP的多种题材扩充和附加业务的活跃化，共扶持了21个夯实授权产业基础的课题。

3）IP授权构建

IP授权构建是利用大企业平台，发掘利用中小型内容企业现有内容IP的授权领域，强化制作经营能力的支援项目。

在可使用内容IP授权的产业群中，今年与2家主题公园(爱宝乐园、乐天世界)、1家娱乐公司(Megabox)共3家大企业合作，通过公开招募选定了屏幕、周边商品的6家参与企业。

参与乐天世界合作的企业有USSO的Uzzuzzu My Pet(屏幕)、Gold Frame(周边商品)

的BobiBoni，参与爱宝乐园合作的企业有Atoonz(屏幕)的哈啰小梅子、Be My Pet(周边商品)的SamsekLili，最后参与Megabox合作的企业有Twinspica(屏幕)的Banitte以及Winterbird(周边商品)的Veryberry。

3家CP公司和6家参与企业参与了合作IP内容制作费用补贴和专家咨询、样品制作完成后11月25日至28日在COEX举行的“2021卡通形象授权交易会”上参与了展示和活动。

2. 分发扶持

1）卡通形象授权交易会

“卡通形象授权交易会”是拥有20多年历史的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、动漫、游戏、电视节目、MCN、杰斗族等B2B和B2C的多种内容IP推广。

该活动每年约有10万名以上的参观者，有300多家企业参加，是韩国最大规模的交易会，2020年因新冠疫情而取消，在迎来成立20周年的2021年，于11月25日至28日为期4天，在COEX的C、D馆正常举办。

在新冠疫情余波依然存在的情况下，由于活动的特性原本是带婴幼儿的家庭单位顾客较多，因此参观者人数较往年急剧减少，为了抵消企业营销预算的减少对展位参与规模及项目缩小的影响，将焦点放在了应对后新冠疫情时代的准备以及B2B商务促进方面。

为了日后交易会的持续增长战略导出，11月25日举行了与“授权大会"相联系的特别论坛(主题：卡通形象授权交易会，期间的成果和战略展望)，举行了三场演讲和讨论。本次论坛导出的方向性可以归纳为加强B2B功能、加强民间合作、积极发现新IP。韩国文化产业振兴院计划从2022年开始应用基于此的发展战略，继续谋求作为全球IP市场的稳固定位和长期增长。

2）举办授权大会

内容IP授权领域韩国唯一的商务会议“Licensing Con 2021”于11月25日至26日在COEX会议厅举行。与线上进行的2020年不同，2021年进行了线下活动，并同时进行了线上直播。

2021年大会是自2019年以来的第三届会议，主题是“IP业务的新机遇”，介绍了在快速增长的内容IP市场中实现业务多元化的多种策略和案例。从主旨演讲“谁将成为下一个漫

威”开始，举行了6场会议，随后是18场演讲和2场现场谈话。同时还提供了特别论坛等丰富的活动。

近来K-Contents通过全球OTT开始在全球市场上正式消费，“Licensing Con 2021”已成为寻求战略和分享成功案例以积极利用机会的空间。另外，通过世界级专家的发言，印证了为构建立体盈利模式及加强IP运用，需要各领域企业的战略性接近和合作、持续努力的事实。

3）卡通形象IP商品分发试验台运营

为了扩大中小卡通形象企业的分发渠道，通过推进将卡通形象商品入驻电影院连锁快闪店(Cream Store)(Megabox河南店)和3家大型玩具连锁店(玩具反斗城蚕室、金浦机场、恩平店)的分发扶持项目，扶持了23家中小文化内容企业的多种商品销售，这是将上一年的示范项目扩大，在2021年作为新项目进行的。

4）大韩民国文化产品大奖(卡通形象部门)

大韩民国内容大奖是一项旨在通过奖励国内优秀文化产品和为文化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。“2021大韩民国文化产品大奖(卡通形象部门)”共征集了24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 1　2021大韩民国文化产品大奖卡通形象部门获奖作品

所属	ICONIX	Smart Study	DESIGNEGG	ARTPQ	Blueshark
作品	ZanmangLoopy	碰碰狐	Pat a Pat Como	小海女梦妮	行走的小鲨鱼
奖项	总统奖	文化体育观光部长官奖			韩国文化产业振兴院长奖
奖金	10,000,000韩元	5,000,000韩元			2,000,000韩元

2022 CHARACTER INDUSTRY WHITE PAPER

Ministry of Culture, Sports and Tourism

KOCCA
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