



2022 CARTOON INDUSTRY WHITE PAPER

SUMMARY

ENGLISH / 中文



2022 CARTOON INDUSTRY WHITE PAPER

SUMMARY

Part 1. Cartoon User Trends

1. Objectives and Overview of the Survey

The objectives of this research include laying the foundation to establish a rational policy for cartoon/webtoon content users and the industry based on user statistical data and providing base data in support of the development, production, and marketing activities of the cartoon/webtoon industry.

The subjects of this research are Koreans between the ages of 10 and 69 who have used cartoon/webtoon content “at least once every 2~3 months” in the past year and live across the country.

The research cycle is once a year, and the response criteria for the content use survey were from July 2021 to July 2022 (the past year).

The data was collected through an online survey July to August 2022 (Jul. 22~Aug. 26).

Table 1 Online Research Design for Cartoon and Webtoon Users

Type	Content
Target Population	All citizens 10-69 years old
Research Population	Among all Koreans aged 10 to 69 who use cartoon/webtoon content (webtoon or published comics) “at least once every 2-3 months” in the past year
Research Area	Nationwide
Data Collection Method	Online research through a structural survey
Sample Framework	Resident Registration Population Statistics status as of June 2022 provided by the Ministry of the Interior and Safety A 1.17 million nationwide research panel registered at the research execution agency was used as the sampling framework.
Sampling Method	Proportional allocation by region, gender, and age
Sampling Error	±1.66%p at a 95% confidence level
Valid Sample	3,500 people
Data Collection Period	July to August 2022 (Jul 22 – Aug. 26.)
Supervisor	Korea Creative Content Agency
Executor	Global Research Co., Ltd.

2. Survey Content

1) Meaning of cartoon/webtoon contents

The [2022 Cartoon/Webtoon User Factual Survey] defined cartoon/webtoon as webtoon and published comics.

Cartoon movies (animation productions) and educational cartoons viewed on TV/theater/online platforms do not fall under cartoon/webtoon.

Webtoon refers to color cartoons with vertical scrolling. Published comics include series, including books of webtoons published offline, regular serials, and digital page comics.

Digital page cartoon refers to digital comics viewed in page format, including the ones with page-directed scans of published cartoons.

3. Survey Results

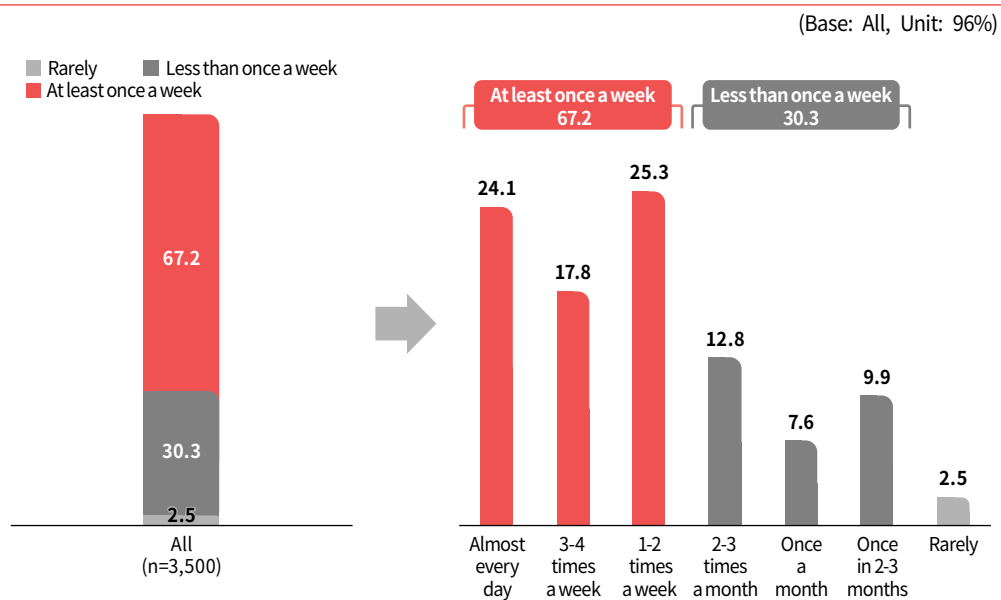
1) Frequency of cartoon/webtoon contents usage

(1) Frequency of webtoon usage

When asked about the frequency of using webtoons, 67.2% of the respondents answered “at least once a week.”

Except for teenagers, the rate of using webtoons “at least once a week” tended to increase as age increased after age 20.

The frequency of using webtoons by webtoon users (n=3,411) was “at least once a week” at 69.0%, which has been on the rise since 2020 (63.4% in 2020 → 66.9% in 2021 → 69.0% in 2022).

Figure 1 Frequency of Webtoon Contents Usage

Note: 1) In the case of the 2020 and 2021 surveys, questions were asked among webtoon users, while the 2022 surveys were asked among all users.
 2) In the 2020 and 2021 surveys, “once in 4 months to once a year” was considered “rarely” in 2022, and those who use webtoons at least once every 2 to 3 months were selected as webtoon users.

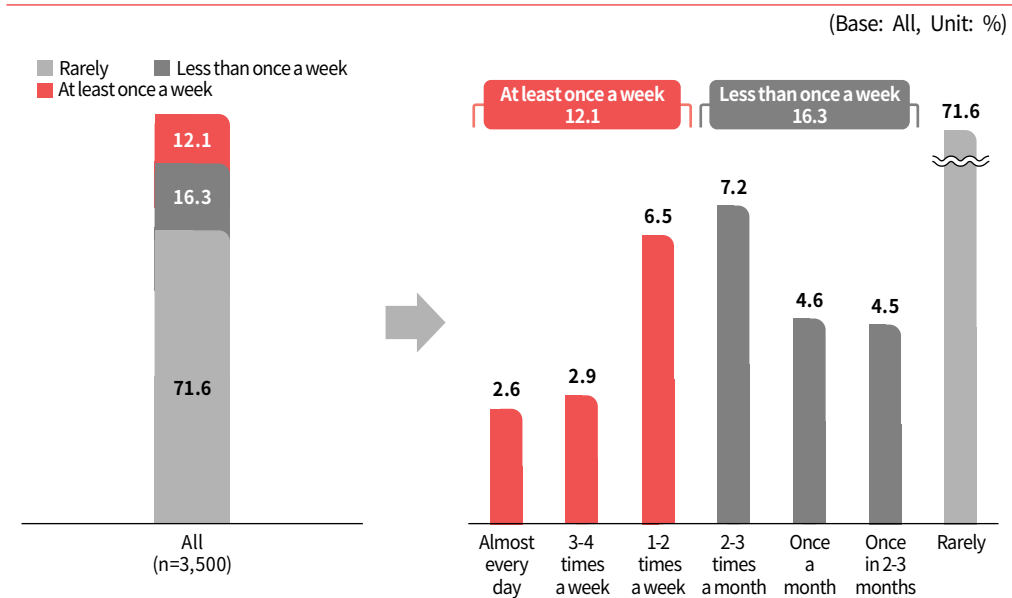
(2) Published comics usage frequency

When asked about the frequency of using published comics, 12.1% of the respondents answered “at least once a week,” and 71.6% of the respondents said they “rarely” use published comics.

The rate of using published comics “at least once a week” was relatively high among men compared to women, and those in their teens and 30s.

Among published comic users (n=994), the rate of using published comics “at least once a week” was 42.6%, which has been on the rise since 2020 (28.8% in 2020 → 33.8% in 2021 → 42.6% in 2022).

Figure 2 Published Comics Usage Frequency

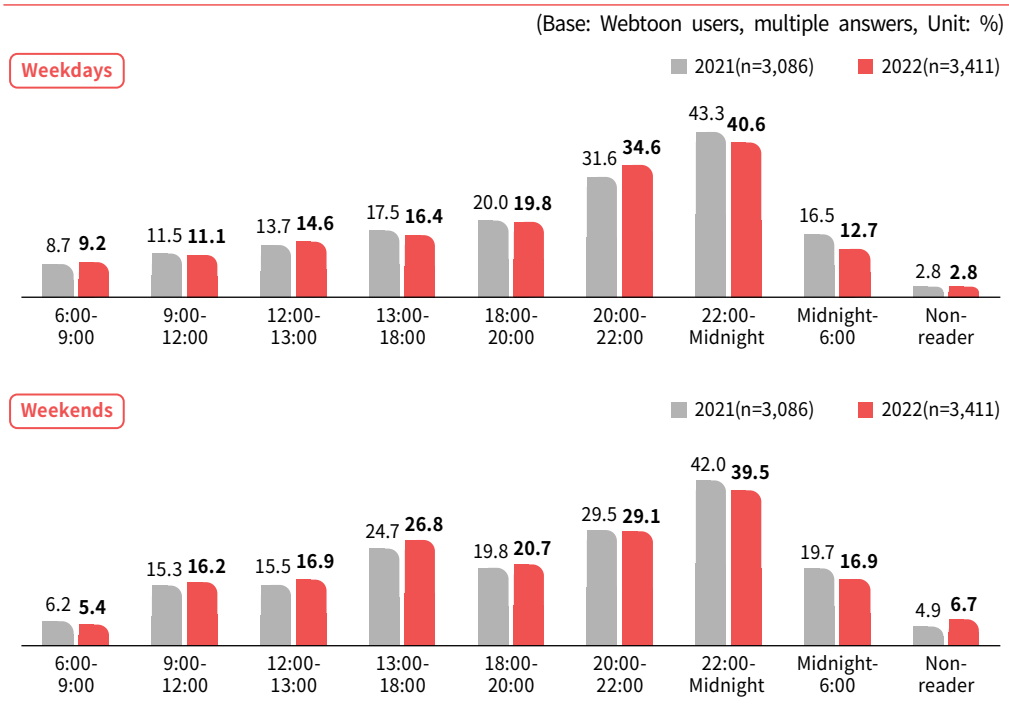


Note: 1) In the case of the 2020 and 2021 surveys, questions were asked among webtoon users, while in the 2022 surveys, questions were asked among all users.
 2) In the 2020 and 2021 surveys, “once in 4 months to once a year” was considered “rarely” in 2022, and those who use webtoons at least once every 2 to 3 months were selected as webtoon users.

2) Overall experience in using webtoon

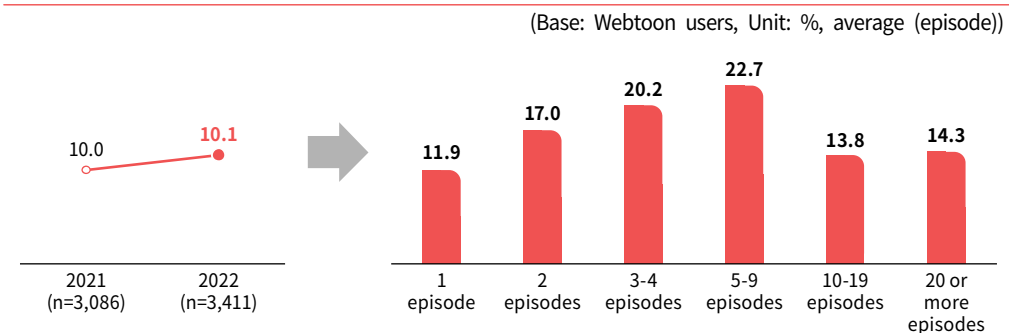
(1) Time slot for enjoying webtoons

In terms of the webtoon viewing time of webtoon users (n=3,411), the most active viewing time was from “20:00 to midnight” during weekdays and on weekends (40.6% for weekdays and 39.5% for weekends).

Figure 3 Time Slot for Enjoying Webtoons

(2) Number of webtoon works (based on episode) viewed per week

The average number of works viewed by webtoon users per week (n=3,411) was 10.1 episodes, which was the same as of the previous year.

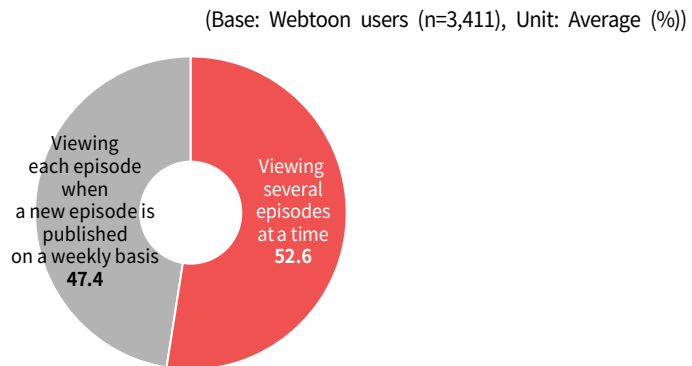
Figure 4 Number of Webtoon Works (Episode Basis) Viewed Per Week

Note) The question “How many webtoon episodes do you view regularly (based on episodes) per week?” in 2021 is changed to “How many episodes of webtoons (based on episodes) do you view on average per week?” in 2022.

(3) Preference in using webtoons

When using webtoons, 52.6% of the webtoon users (n=3,411) preferred “viewing several episodes at a time,” and 47.4% of them preferred “viewing each episode when a new episode is published on a weekly basis.”

Figure 5 Preference in Using Webtoons



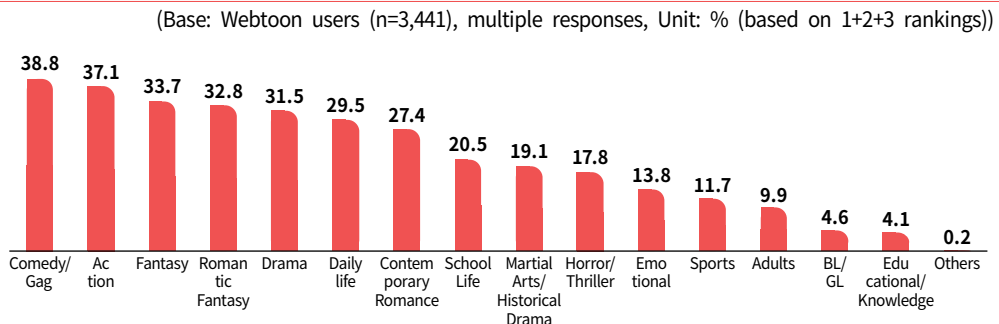
Note) A new question created in 2022.

Viewing each episode when a new episode is published on a weekly basis / Viewing several episodes at a time

(4) Favorite webtoon genre

The most favored genre of webtoons (1+2+3 rankings) was “Comedy/gag” at 38.8%, followed by “Action” at 37.1%, and “Fantasy” at 33.7%.

Figure 6 Favorite Webtoon Genre



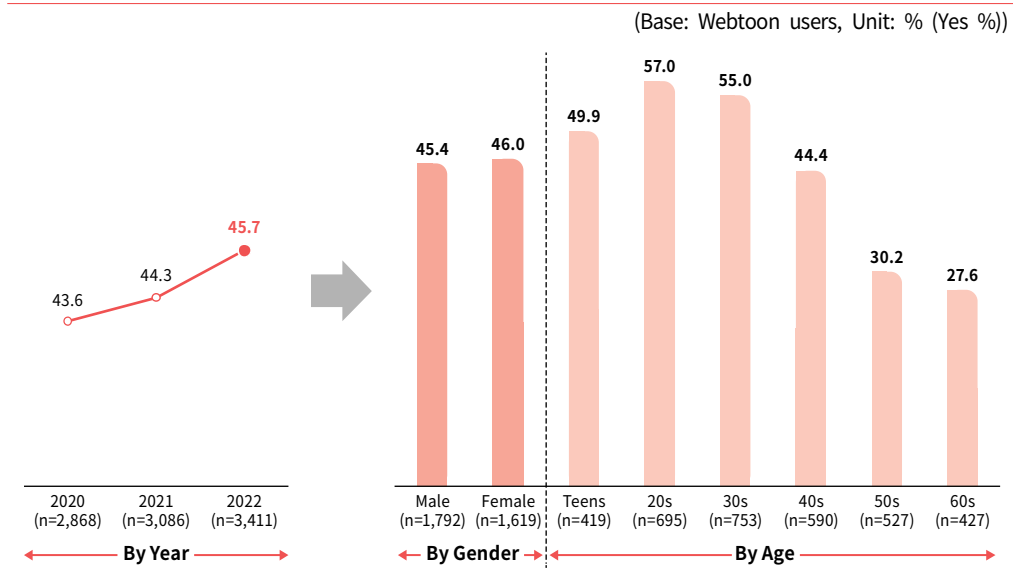
Note) Compared to the previous year, it changed from view diversification and ranking response questions to multiple response questions, so direct comparison is not available

3) Paid webtoon usage

(1) Paid webtoon use experience

Among webtoon users (n=3,411), 45.7% answered that they experienced paying for webtoons, and such practice has been increasing since 2020.

Figure 7 Paid webtoon use experience

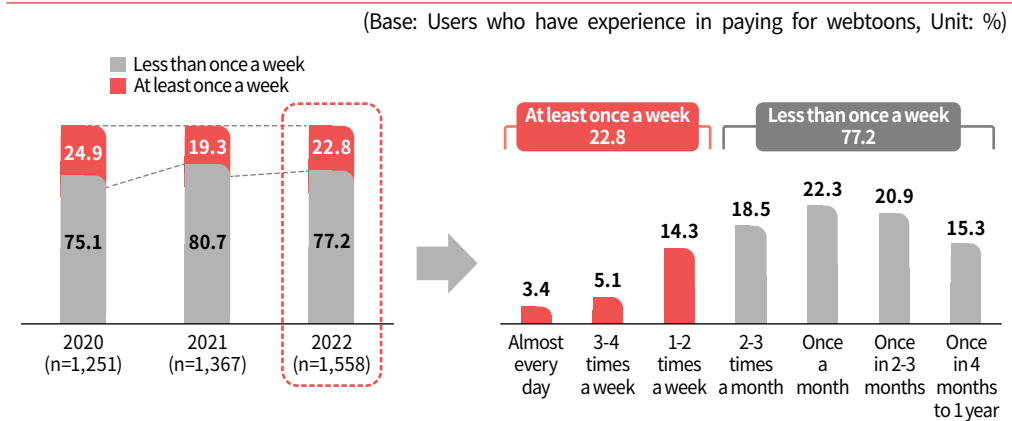


Note) The question changed from “Have you paid a fee to view webtoons in the past year?” in 2021 to “Have you paid a fee to view (rental, own) webtoons in the past year?” in 2022.

(2) Frequency of paying for webtoons

The frequency of paying for webtoons among those who experienced paying for webtoons (n=1,558) was the highest with “once a month” at 22.3%, and the rate of paying for webtoons “at least once a week” was 22.8%, up from the previous year.

Figure 8 Frequency of Paying for Webtoons

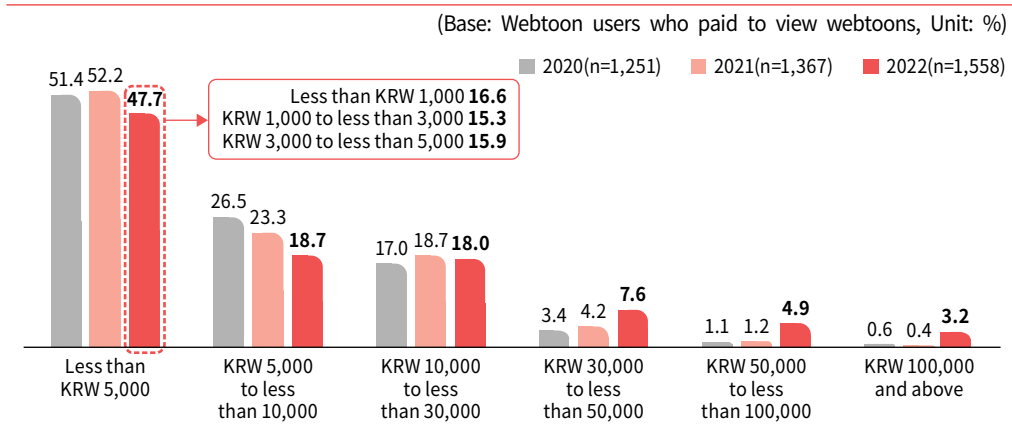


Note) 1) “Once in 4-6 months” in 2020 is changed to “Once in 4 months to 1 year” in 2021.
 2) The question changed from “How often did you pay a fee to view webtoons?” in 2021 to “How often did you pay a fee to view (rental, own) webtoons?” in 2022.

(3) Average monthly expenses for purchasing webtoons

The average monthly expenditure for purchasing webtoons for those who have experience in purchasing webtoons (n=1,558) was “less than KRW 5,000” at 47.7%, which is a 4.5%p drop from the previous year.

Figure 9 Average Monthly Expenses for Purchasing Webtoons



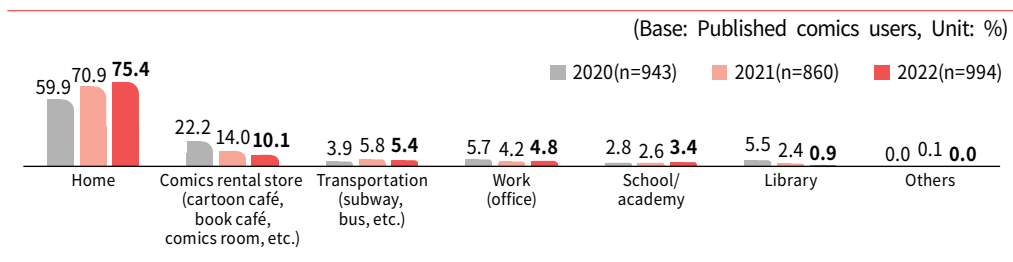
4. Published Comics Usage

1) Overall experience in using published comics

(1) Main viewing location for published comics

As for the location where published comics users (n=944) mainly read published comics, “Home” was the top answer at 75.4%, which has been on the rise since 2020. It was followed by “Comics rental store (Cartoon café, book café, comics room, etc.)” at 10.1%, decreasing since 2020.

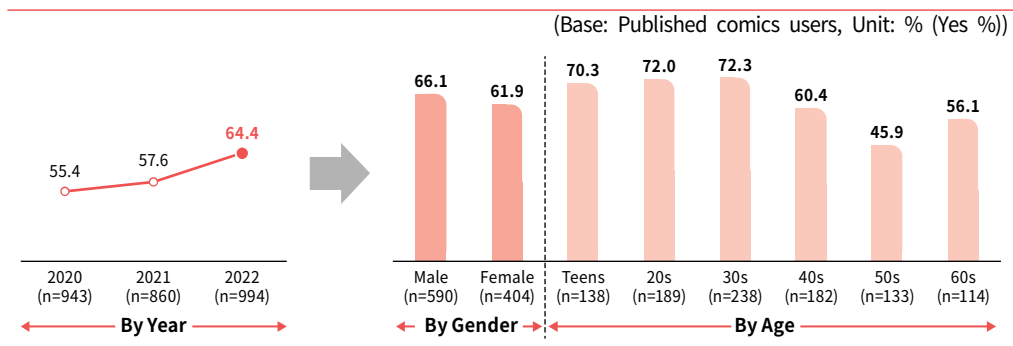
Figure 10 Main Viewing Location for Published Comics



(2) Having favorite published comics

Among published comics users (n=944), 64.4% answered “Yes” to having favorite paper cartoon works, and it has been increasing since 2020.

Figure 11 Having Favorite Published Comics

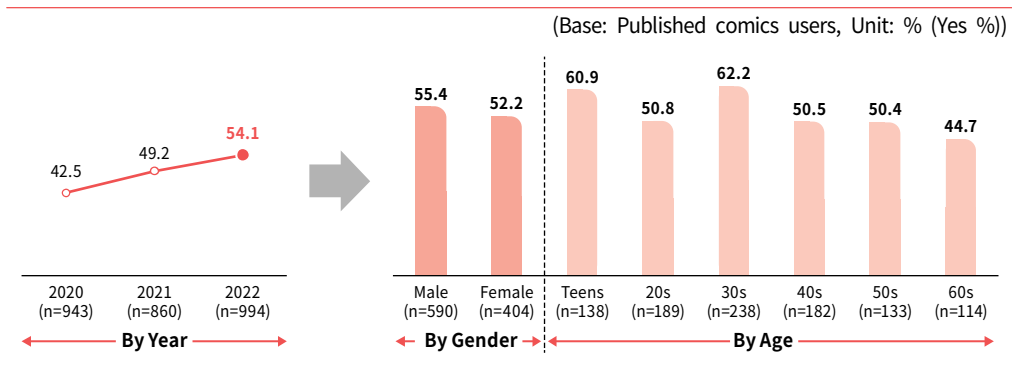


2) Published comics purchase

(1) Published comics purchase experience

Among published comics users (n=944), 54.1% said “Yes” to purchasing published comics, and such practice has been increasing since 2020.

Figure 12 Published comics purchase experience

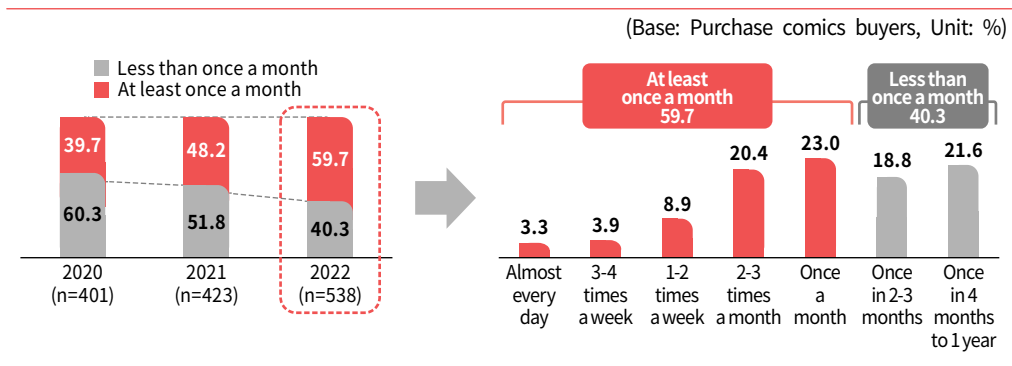


(2) Published comics purchase cycle

The ratio of purchasing published comics “at least once a month” was 59.7%, which has been increasing since 2020.

The purchase cycle of those with experience in purchasing published comics (n=538) was high for “once a month” with 23.0%.

Figure 13 Published Comics Purchase Cycle

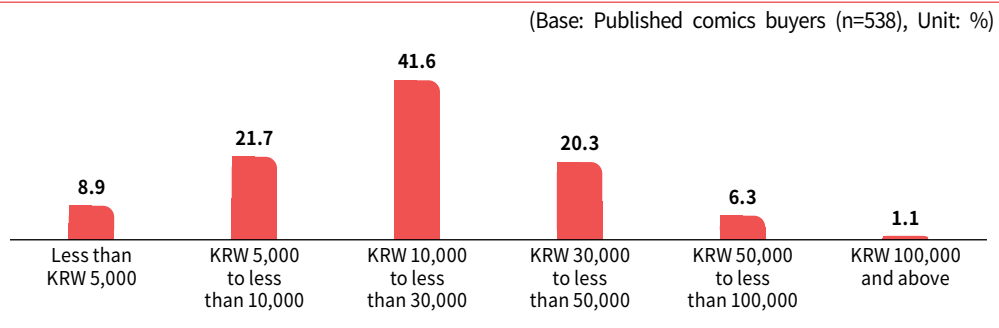


Note) The scale interval has been modified from the previous year.

(3) Average monthly expenses for published comics purchase

The average monthly expenditure of published comics buyers (n=538) was highest with “More than KRW 10,000 to 30,000” at 41.6%. It was followed by “More than KRW 5,000 to 10,000” at 21.7% and “More than 30,000 to 50,000” at 20.3%.

Figure 14 Average Monthly Expenses for Published Comics Purchase



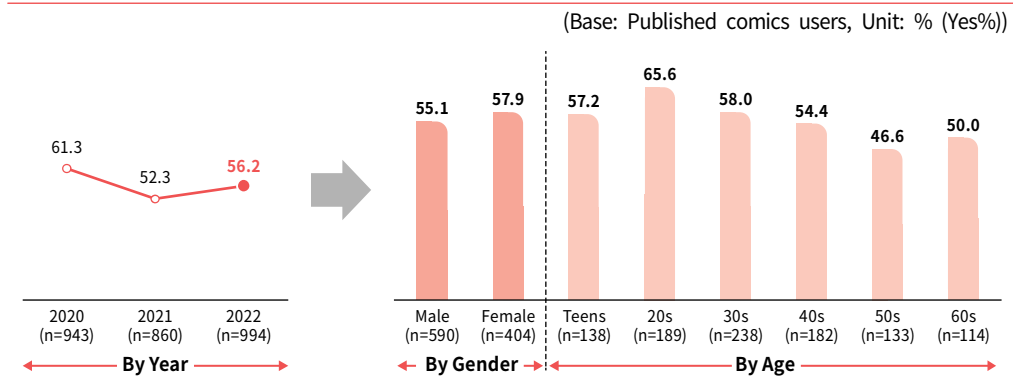
Note) The scale interval has been modified from the previous year.

3) Renting/reading published comics

(1) Experience of renting/reading published comics

Among published comics users (n=994), the ratio of those who answered “Yes” in renting/reading published comics was 56.2%, a 3.9%p difference from the previous year.

Figure 15 Experience of Renting/Reading Published Comics



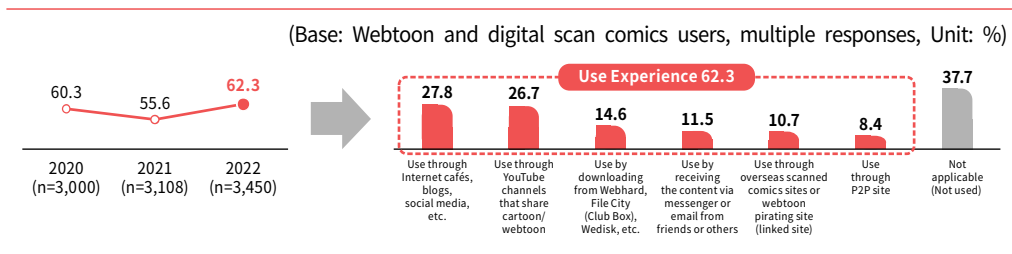
5. Illegal Use of Cartoon/Webtoon

1) Illegal use of cartoon/webtoon

The ratio of using cartoon/webtoon illegally was 62.3%, a YoY increase.

As for the type of illegal use, the top rankings were “use through internet cafés, blogs and social media, etc.,” at 27.8%, and “use through YouTube, which shares cartoons and webtoons,” at 26.7%.

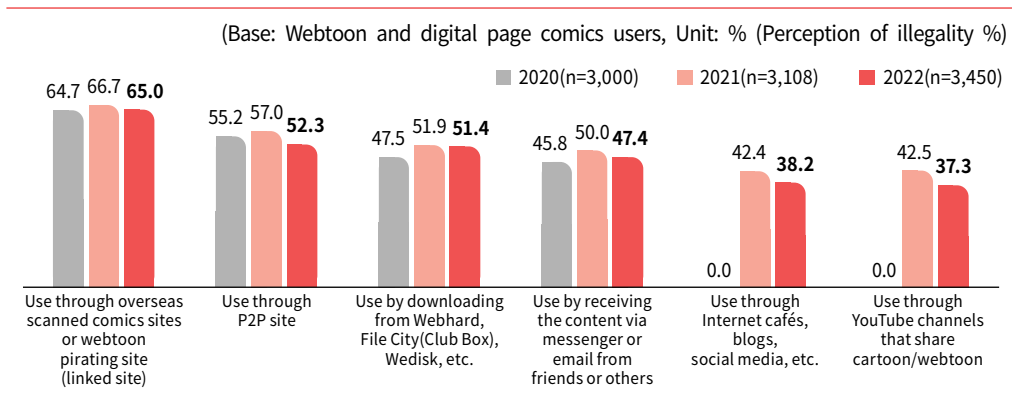
Figure 16 Illegal Use of Cartoon/Webtoon



2) Recognition of cartoon/webtoon piracy

Among the illegal use of comics and webtoons, the perception that “use through overseas scan comics sites or webtoon pirating site (linked site)” was the highest at 65.0%.

Figure 17 Recognition of the Cartoon/Webtoon Piracy



Part 2. Cartoon Industry Support Status

1. Reinforcing Production Capabilities

1) Creation and production support

(1) Support for cartoon diversity

This project aims to strengthen the diversity of cartoons by expanding the ecosystem of Korean cartoon creation. It supports inactive genres and alternative cartoons rather than popular genres. The business competition was held by dividing the production support into a short story (at least 120 pages), and a mid-length feature (at least 200 pages) in which a total of 223 projects were received. 65 outstanding diversity cartoon projects were selected and supported through a fair blind screening.

To challenge the difficulties that lie ahead for the support project structure, which consists of content (manuscript) production, publication, and distribution, content production was promoted as a support project for diversity cartoon production, and publication and distribution were divided into a support project for independent cartoon publication.

Selected works promoted the creation of an ecosystem of diverse cultures through the production of social media promotional videos and work reviews.

(2) Support for the initial stage of creation (Cartoon planning and development)

It is a project that supports the initial preparation process of new works that creators need the most, so that promising ideas are not buried and are instead developed into excellent cartoon IP.

Unlike the previous year, the project was reorganized and implemented by significantly expanding the scale of business support (the number of tasks), reducing the amount of production, and strengthening the support for development and coverage expenses so that creators could focus more on initial planning and development, and produce more quality contents.

Moreover, 90 newly selected planning and development projects have completed copyright registration, thus guaranteeing the rights of creators. Also, strategic promotions for each target were carried out, and some projects have been serialized on large platforms and have achieved excellent results, such as receiving awards in various contests.

(3) Support for independent comic publications

It is a project that strengthened the creators' publishing capabilities and expanded the market by supporting creator-oriented comics publication to secure diversity in the webtoon-centered comics distribution market. A minimum of KRW 6 million and a maximum of KRW 10 million were provided for each project, depending on the scale of support for manuscripts in a book format that can be distributed and published. A total of 43 projects were published as books through excellent independent comics publication consulting.

Excellent published comics were promoted to expand publication distribution through promotional videos on social media, independent comics platforms, and bookstore promotions.

2) Incubating of professional creators

(1) Establishment and operation of Webtoon Creation Experience Center/ regional webtoon campus

This project was launched to establish a regional base to promote webtoon creation and consumption culture by forming a specialized educational infrastructure, and create a virtuous cycle of the cartoon ecosystem in the region by cultivating local talents and supporting the cultural enjoyment of the underprivileged. The Webtoon Creation Experience Center has been incubating local talents after dividing it into a base-type experience center that supports creators in their preliminary stages, and a regional experience center that encourages youth job experience education.

Despite the difficult conditions caused by the continuing COVID-19 situation, efforts were made to promote stability in operation by planning various

non-face-to-face class methods by region to secure the consistency center operation experience.

Moreover, the project aimed to address the blind spots of cultural alienation by planning and operating a visiting Webtoon Creation Experience Center to provide webtoon education to vulnerable groups, such as the residents of social welfare facilities, who cannot receive webtoon education due to environmental restrictions or special conditions.

The cumulative number of users at the Webtoon Creation Experience Center, which began operating in 2015, and the regional webtoon campus, which was launched in 2017, has reached 210,000 (as of the end of 2021), creating 2,100 new jobs so far.

(2) Professional personnel incubation

The professional personnel training project is meaningful in fostering core personnel in the cartoon industry through expanding the webtoon creation base and step-by-step educational programming.

The “K-Comics Academy,” a specialized cartoon education program, focused its operation on vitalizing digital content production by providing various competency-enhancing education programs from planning, production, and business practices to prospective cartoonists, existing cartoonists, and industry workers.

Following the outbreak of COVID-19, face-to-face and non-face-to-face education were provided in parallel, and 526-hour regular education for 65 courses and 13 new video lectures were developed. High-quality cartoon and webtoon education courses were also provided free of charge.

3) Incubation of creators from the underprivileged

(1) Establishment and operation of a webtoon academy for young people with disabilities

This project was launched to establish and operate a webtoon education environment in welfare facilities for the disabled across the country, and resolve educational inequality for the culturally underprivileged and create jobs for

young people with disabilities. Among the welfare facilities for the disabled that was established in accordance with the relevant acts, webtoon education environments were created in a total of 11 facilities, 2 new and 9 existing facilities, in which support was provided for the purchase of equipment for webtoon education and operating expenses for educational programs. A total of 497 people attended the webtoon academy for young people with disabilities.

Moreover, the “Webtoon Story Concert for the Disabled” was held to raise awareness on the disabled, and promote creation by artists with disabilities. In the first part of the concert, the necessity and meaning of webtoon education was conveyed based on the experiences of the students from the webtoon academy in the actual education field. The second part was to seek career paths for the students of the Webtoon Academy, and discussing the direction of education policies for the disabled in the field of culture and arts, such as webtoon.

Webtoon education for young people with disabilities will not stop at being a simple leisure, but will expand into a foundation for people with disabilities to become self-reliant and find employment through continuous support for different activities.

(2) Webtoon senior mentoring

For senior citizens who wish to create webtoons and middle-aged artists who are experiencing difficulties due to career interruption, this project shares know-how and supports work created through group mentoring led by experts in the digital and storytelling fields.

A total of 28 people were selected, with 14 mentors in the digital and story fields and 14 mentees among senior and middle-aged artists, whose careers were interrupted. They were matched 2:2, and a total of 7 groups performed group tasks.

Efforts were exerted to guarantee the completeness of the project by holding online network events, so that more detailed intergenerational cooperation can be achieved in a non-face-to-face manner without moving between regions in consideration of the creators’ safety following the adjustment in social distancing rules.

As for group mentoring, a total of 14 original webtoon creations were produced after mentors and mentees faithfully fulfilled their roles.

2. Distribution Support

1) IP dissemination support

(1) Comics IP promotion support

This project, which was established in 2018 to continuously discover competitive cartoon IPs and to establish a fair comics appreciation culture, was divided into three tasks to eradicate the use of illegal webtoon sharing sites, hold a cartoon IP pitching event, and support excellent comics and story IP follow-up promotions.

The campaign to eradicate the use of illegal webtoon pirating sites, which was held from August 2021 to December 2021, urged comics users to raise their awareness of illegal webtoon pirating sites through various channels, such as YouTube videos, online ads, outdoor billboards, videos inside subway passenger cars, and offline booths.

The comics IP pitching event in 2021 was held twice under the “Contents Intellectual Property (IP) Commercialization Conference,” while biz matching was conducted between domestic comics IP holding companies and content companies of various genres.

For the first event, online pitching and video biz-matching were conducted to prevent the spread of COVID-19, and promoted synergy in connection with related events (BCWW). The second event was conducted with on-site pitching and face-to-face biz-matching to provide business opportunities for content producers who want to produce content by using cartoon IP.

A total of 48 companies (persons) participated in the event, resulting in 327 cases of business matching and 6 cases of contract signing.

The support for outstanding comics/story IP follow-up promotion is a project that supports follow-up promotion (PR/marketing) when a contract for secondary content is made through the content intellectual property (IP) consultation meeting in the previous year. In 2021, six works were promoted individually.

(2) Fostering global project companies

To encourage platform companies that will lead the overseas expansion of Korean comics, support was provided to eight companies that are planning to build a new platform overseas, or are currently operating through the establishment and operation of an overseas cartoon platform in 2021. In collaboration with the Korea Trade-Investment Promotion Agency (KOTRA), the companies selected for this project devised a project to benefit from KOTRA's support for overseas expansion, thus creating synergy for supporting the overseas expansion of the cartoon platform.

The comics agent fostering project supports the labor costs of participating personnel by selecting operators who are planning the commercialization of secondary contents, or those who are currently promoting the commercialization of excellent Korean cartoon/webtoon IPs. In 2021, a total of 11 companies received support through the project.

(3) Support for the creation of comics contents in connection with new technologies

The new technology-linked comics content creation support project, which supports new convergence content that combines domestic cartoon IP and realistic new technologies such as AR/VR/MR, was established in 2020, and concluded in 2021. In 2021, four works were selected, and secondary contents combining cartoon IP and new technology were produced.

2) Overseas expansion support

For this project, three tasks are being carried out to explore opportunities for overseas expansion through translation support for excellent Korean comics that are suitable for export: to advance into the global market and establish overseas networks for Korean comics, to support business for major overseas strategic markets, and to improve webtoon branding.

(1) Support for overseas export of comics and domestic and overseas marketing

In 2020, all planned overseas market participation and overseas pitching event schedules were canceled due to COVID-19, while the demand for content using domestic cartoons and webtoon IP grew explosively. In 2021, online or online/offline dualization events were held to support overseas expansion.

The project participated in the overseas market, “New York Comic-Con (October)” in the form of a Korean joint pavilion, with a total of four overseas pitching events in China (July), the US (August), France (September), and Japan (October) providing support for a total of 44 IPs.

Moreover, in line with the digital transformation that emerged due to COVID-19, the project promoted our business using the metaverse “Zepeto,” and created an online exhibition experience center in “Gather Town.”

The corporate autonomous overseas comics promotion support project, which was launched in 2019, supported six companies in 2021 by participating voluntarily in overseas markets and holding overseas pitching events. Some companies changed the venue to online platforms due to COVID-19, and moved to export their cartoons and webtoons.

Table 2 2021 Promotion Results for Overseas Cartoon Market and Overseas Pitching Events

Type	Country (Event)	Date	Participating Companies	No. of Consultations
Pitching	China (2021 K-Story & Comics in China)	Jul. 8-9	13	197
	USA (2021 K-Story & Comics & Characters in America)	Aug. 10-31	10	91
	Europe (2021 K-Comics & Animation in Europe)	Sep. 27-Oct. 01	7	169
	Japan (2021 K-Story & Comics in Japan)	Oct. 29-Nov. 5	10	53
Market	North American Market Marketing Publicity Promotion (New York Comic-Con)	Oct. 07-28	8	38

(2) Support for overseas exhibition and exchange of Korean comics

“ON, WEBTOON,” an online comics exhibition, was held in Kuala Lumpur, Malaysia, and in Osaka, Japan. In “ON, WEBTOON,” ON has multiple meanings, such as turning on, continuing, all, and online. It also contains the meaning of consolation to convey the joy and warmth of Korean webtoons to people

from all over the world who grew tired of COVID-19.

In collaboration with the Korean Embassy in Malaysia and the Korean Cultural Center in Osaka, it introduced five popular Korean webtoons, which have recently gained worldwide popularity, and are being serviced as dramas and movies through various OTT platforms, to both countries, where they received great responses from local Korean Wave fans.

Moreover, Belgium, a European comics powerhouse, held a special exhibition of the “BD Comic Strip Festival,” which is held every September. Korea was its guest of honor in commemoration of the 120th anniversary of the diplomatic ties between Korea and Belgium. The special cartoon exhibition, held with the help of the Belgian Comic Strip Center and the Korean Cultural Center in Belgium, organized the 112-year history of Korean cartoons from 1909, the beginning of modern cartoons, to the present, the heyday of digital cartoon webtoons. It introduced about 50 cartoonists and about 90 works, and held various side events to publicize the history and culture of Korean comics, paving the way for its entry into the European market, which can develop into a major webtoon consumption region in the future.

(3) Translation support for exported works

While secondary works based on webtoons, such as dramas and movies, are being actively produced and are gaining global popularity, 46 works of 23 excellent cartoon companies for export were translated. Likewise, a one-stop comprehensive support system, from publicity, marketing, and to local business, was provided to vitalize cartoon exports, and strengthen global competitiveness.

It targets domestic business operators, such as publishers, agencies, webtoon platforms, and cartoonists, who have the potential to enter new markets for overseas cartoon exports, but find it difficult to develop direct global business due to a lack of experience and know-how. Thus, the quality of the work, the effectiveness of overseas expansion, and the specificity of the promotion plan were evaluated. Translation, proofreading, and typesetting services were provided to reduce the burden of translation work on deserving companies.



2022 漫画 产业白皮书

摘 要

第1节 漫画和网络漫画用户趋势

1. 调查目的及概要

本调查的目的是通过用户统计数据为漫画和网络漫画内容用户和行业制定合理的政策，并将其作为依据资料支持漫画和网络漫画行业的开发、生产和营销活动。

本调查的对象为：在韩国居住的10周岁至69周岁的国民中，最近一年中“至少每2-3个月一次”看过漫画和网络漫画(网络漫画或出版漫画)的人。

调查周期为每年一次，观看内容调查的回答标准为2021年7月至2022年7月(最近一年)期间，除非另有说明。

资料收集在2022年7月至8月(7月22日至8月26日)期间通过在线问卷调查方法进行。

表 1 漫画和网络漫画用户在线调查设计

项目	内容
目标总体	• 10周岁~69周岁的全体国民
调查总体	• 在10周岁~69周岁的全体国民中最近一年至少每2-3个月一次“看过漫画和网络漫画(网络漫画或出版漫画)的人
调查地区	• 全国
资料收集方法	• 通过结构化的问卷进行在线问卷调查
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±1.66%p
有效样本	• 3,500名
资料收集时间	• 2022年7~8月(7.22.~8.26.)
调查主管	• 韩国文化产业振兴院
调查执行	• (株) Global Research

2. 调查内容

1) 漫画和网络漫画内容的含义

在《2022漫画和网络漫画用户现状调查》中，将漫画和网络漫画分为网络漫画和出版漫画。

在电视/剧场/网上观看的动画片(动漫)和学习漫画不属于漫画和网络漫画。

网络漫画是指以垂直滚动的形式观看的彩色漫画。出版漫画是指包括网络漫画纸质单行本在内的系列片、定期连载物和数字页面漫画。数字页面漫画是指包括扫描出版漫画的情况在内,以页面形式阅读的数字漫画。

3. 调查结果

1) 漫画和网络漫画阅读频率

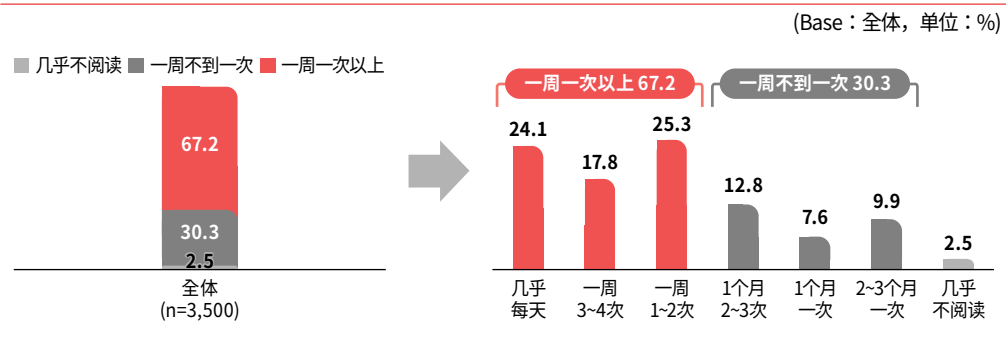
(1) 网络漫画阅读频率

在询问所有用户网络漫画阅读频率时，有67.2%的受访者回答“一周一次以上”。

除10~19岁年龄层以外，从20~29岁年龄层以后，随着年龄层的降低，“一周一次以上”阅读网络漫画的比率趋于增加。

网络漫画用户 (n=3,411) 网络漫画阅读频率“一周一次以上”的为69.0%，自2020年以来呈上升趋势(2020年63.4% → 2021年66.9% → 2022年69.0%)。

图 1 网络漫画阅读频率



注 1) 2020年和2021年的调查仅向网络漫画用户提问，而2022年的调查则向所有用户提问。
2) 2020年和2021年的调查中“4个月~1年一次”在2022年被视为“几乎不阅读”，2~3个月一次以上阅读网络漫画的人被选定为网络漫画用户。

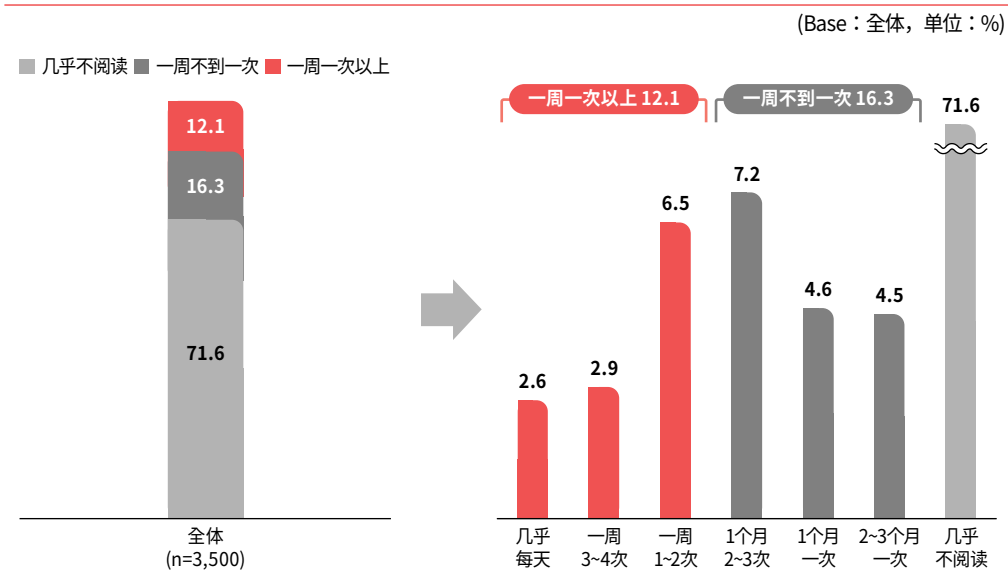
(2) 出版漫画阅读频率

在询问所有用户阅读出版漫画的频率时，12.1%的人回答“一周一次以上”，所有用户中有71.6%的人回答“几乎不阅读”出版漫画。

与女性相比，男性“一周一次以上”阅读出版漫画的比例相对较高，10~19岁年龄层和30~39岁年龄层“一周一次以上”阅读出版漫画的比例相对较高。

在出版漫画用户(n=994)中，“一周一次以上”阅读出版漫画的比率为42.6%，2020年以后呈持续上升趋势(2020年28.8% → 2021年33.8% → 2022年42.6%)。

图 2 出版漫画阅读频率



注 1) 2020年和2021年的调查仅向出版漫画用户提问，而2022年的调查则向所有用户提问。

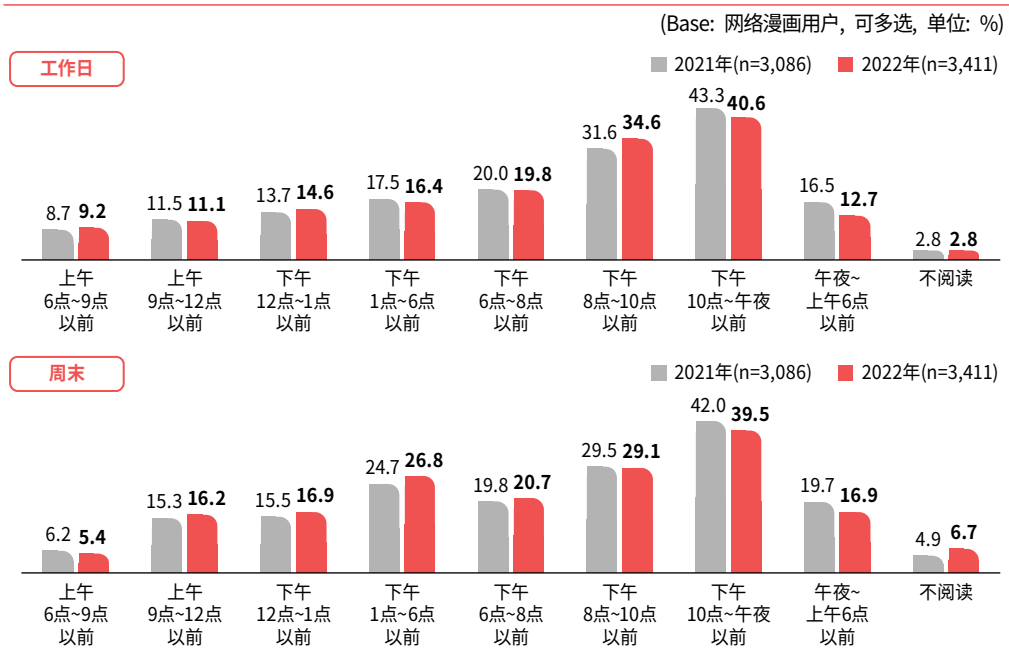
注 2) 2020年和2021年的调查中“4个月~1年一次”在2022年被视为“几乎不阅读”，2~3个月一次以上阅读出版漫画的人被选定为出版漫画用户。

2) 整体网络漫画阅读经历

(1) 阅读网络漫画的时间段

对网络漫画用户 (n=3,411) 的网络漫画阅读时间段进行的调查结果显示，“工作日”和“周末”的“下午10点~午夜以前”(工作日为40.6%，周末为39.5%)的回答比率占据首位。

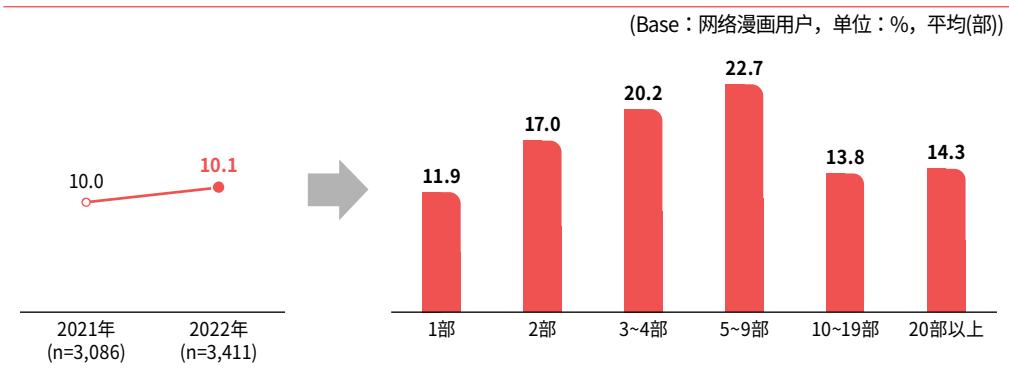
图 3 网络漫画阅读时间段



(2) 每周阅读的网络漫画作品数量(基于集数)

网络漫画用户(n = 3,411)基于集数每周的平均阅读作品部数为10.1, 与上一年处于同一水平。

图 4 每周阅读的网络漫画作品数量(基于集数)



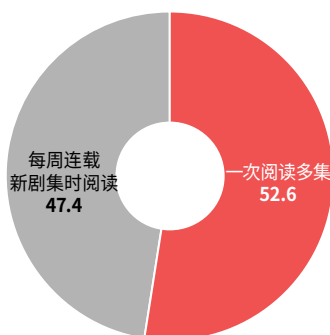
注) 2021年的问题“您每周定期阅读多少部网络漫画作品(基于集数)?”在2022年修改为“您每周平均阅读多少部网络漫画作品(基于集数)?”。

(3) 阅读网络漫画的首选方式

网络漫画用户(n=3,411)在回答阅读网络漫画时的首选方式时，“一次阅读多集”的比率为52.6%，每周连载新剧集时阅读”的比率为47.4%。

图 5 阅读网络漫画的首选方式

(Base: 网络漫画用户(n=3,411), 单位: 平均(%))



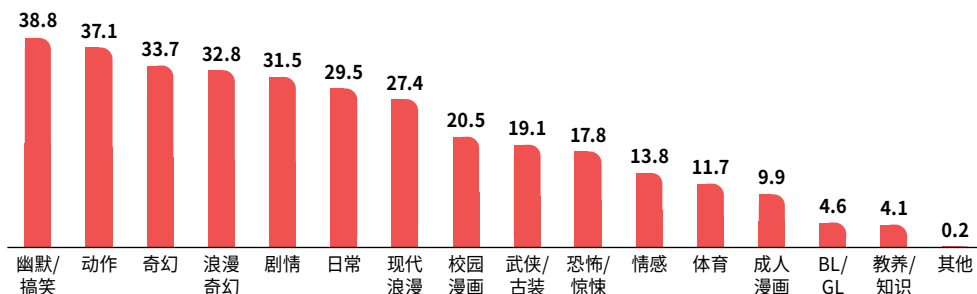
注) 2022年新问题项。

(4) 爱看的网络漫画类型

在网络漫画用户(n=3,411)平时爱看的网络漫画类型(以第1+第2+第3为准)中，“幽默/搞笑”以38.8%占据首位。其次为“动作”(37.1%)，“奇幻”(33.7%)等。

图 6 爱看的网络漫画类型

(Base: 网络漫画用户(n=3,411), 可多选, 单位: %(以第1+2+3为准))



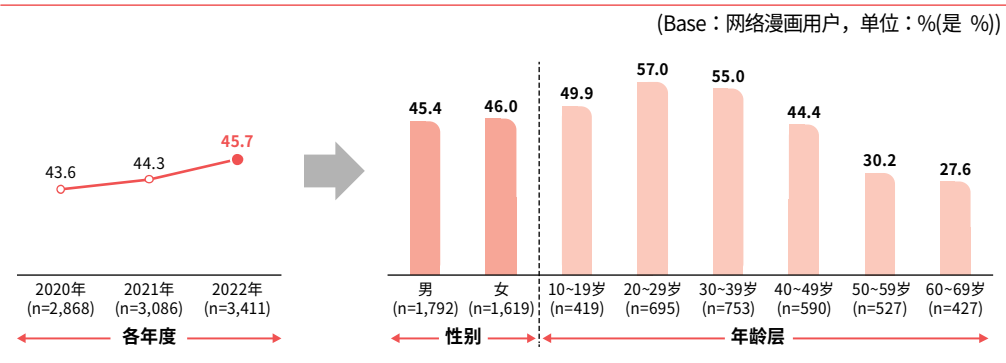
注)与前一年相比选项有较大变化，而且问题由排序回答变为可多选的问答，因此无法进行直接比较。

3) 网络漫画付费阅读

(1) 网络漫画付费支付经历

在网络漫画用户中(n=3,411)，45.7%的用户表示有为网络漫画付费的经历，自 2020年以来呈增长趋势。

图 7 网络漫画付费支付经历

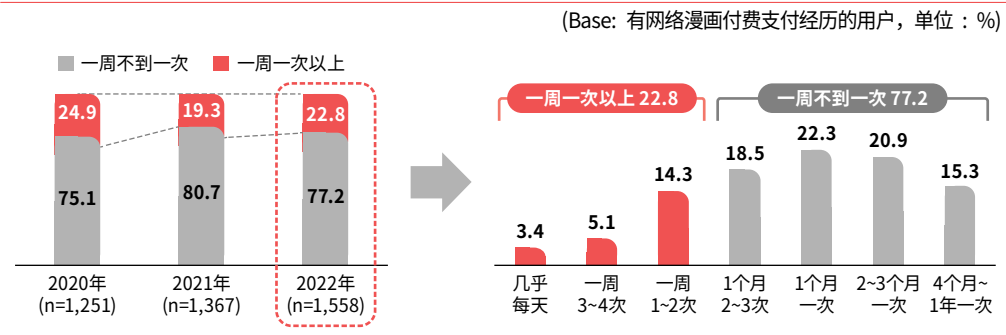


注) 2021年的问题“最近一年您是否付费阅读过网络漫画？”在2022年修改为“最近一年您是否付费阅读过(租借、收藏)网络漫画？”。

(2) 网络漫画付费支付频率

在有网络漫画付费支付经历的用户(n=1,558)中，网络漫画付费支付的频率“一个月一次”以22.3%占据首位。网络漫画付费支付频率为“一周一次以上”的比率为22.8%，较上一年有所上升。

图 8 网络漫画付费支付频率

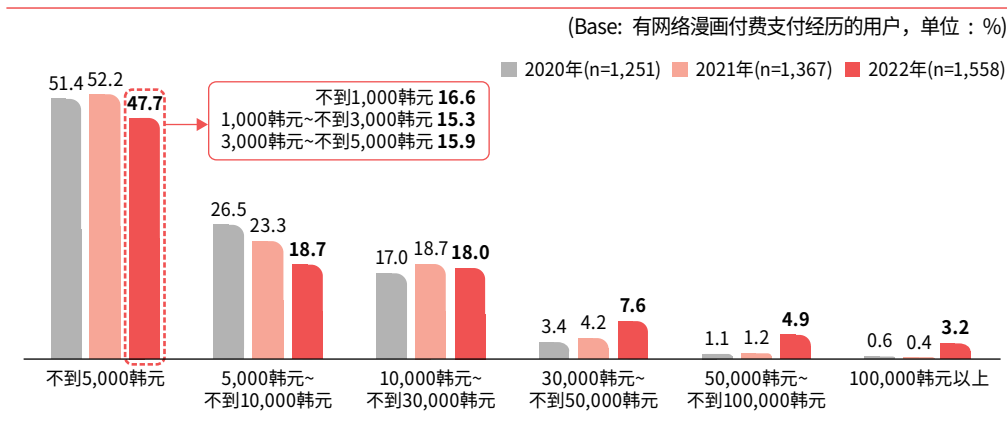


注 1) 从2020年的“4~6个月一次”变更为2021年的“4个月~1年一次”。
2) 2021年的问题“您多久付费阅读一次网络漫画？”在2022年修改为“您多久付费阅读(租借、收藏)一次网络漫画？”

(3) 网络漫画平均月支出

在有网络漫画付费支付经历的用户(n=1,558)中，月均支出“不到5,000韩元”以47.7%占据首位，比上一年减少了4.5%p。

图 9 网络漫画平均月支出



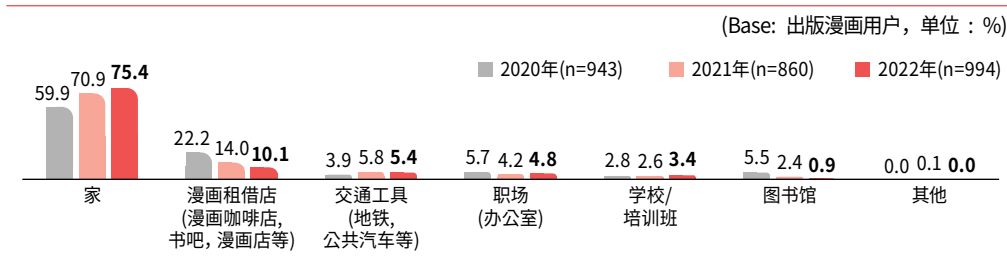
4. 出版漫画阅读

1) 整体出版漫画阅读经历

(1) 出版漫画的主要阅读场所

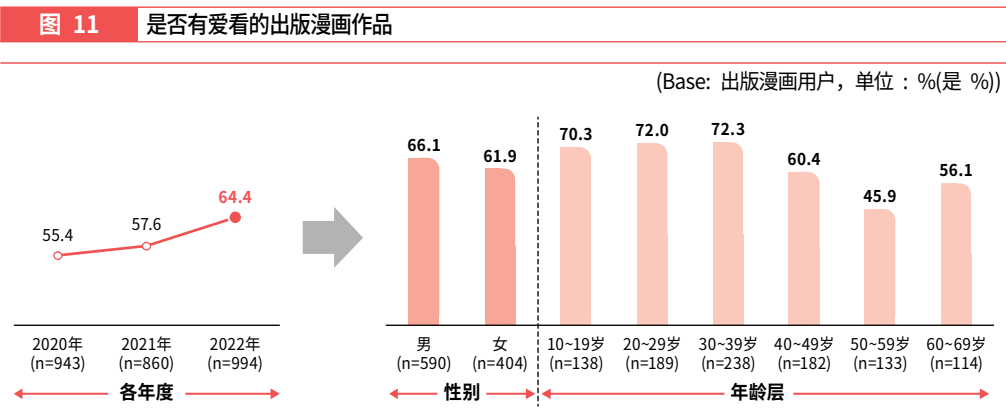
在出版漫画用户(n=994)阅读出版漫画的主要场所中，“家”以75.4%占据首位，自2020年以来持续呈增长趋势。其次为漫画租借店(漫画咖啡店，书吧，漫画店等)，占10.1%，自2020年以来持续呈下降趋势。

图 10 出版漫画的主要阅读场所



(2) 是否有爱看的出版漫画作品

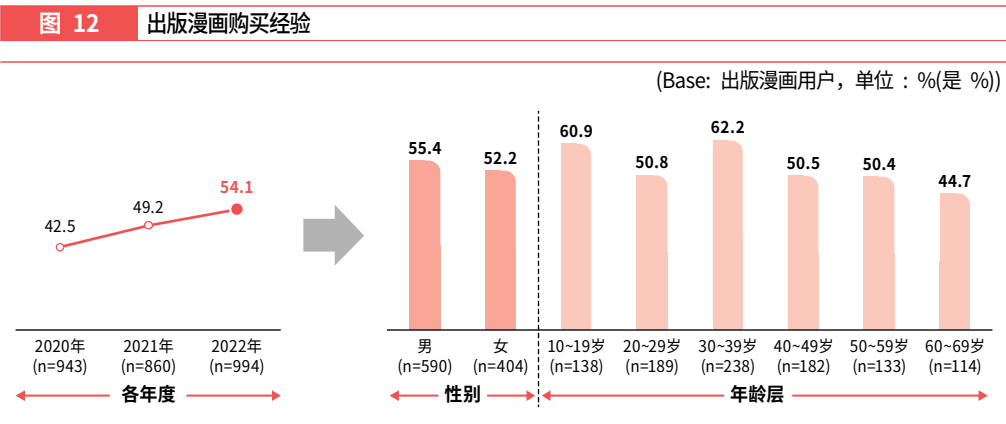
在出版漫画用户(n=994)中，对是否有平时爱看的出版漫画的提问回答“是”的比例为64.4%，自2020年以来持续呈增长趋势。



2) 出版漫画的购买

(1) 出版漫画购买经验

在出版漫画用户(n=994)中，对是否购买过出版漫画的提问回答“是”的比例为54.1%，自2020年以来持续呈增长趋势。

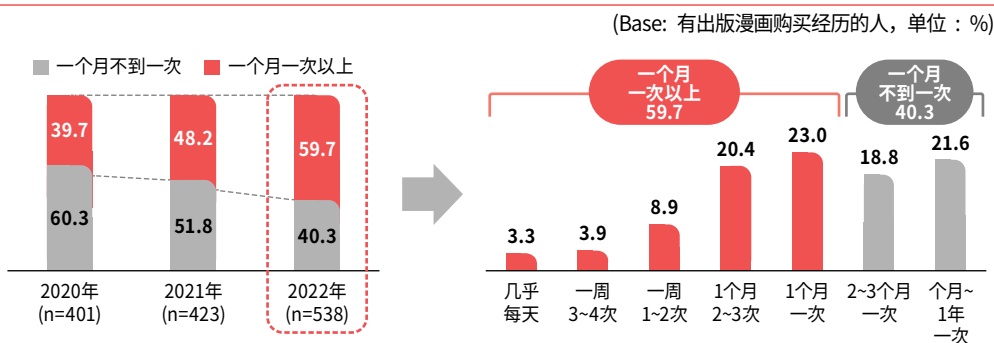


(2) 出版漫画购买周期

在出版漫画的购买周期中，“一个月一次以上”占59.7%，自2020年以来呈持续增长的趋势。

在有出版漫画购买经历的人(n=538)中，出版漫画的购买周期为“一个月一次”的比例最高，为23.0%。

图 13 出版漫画购买周期

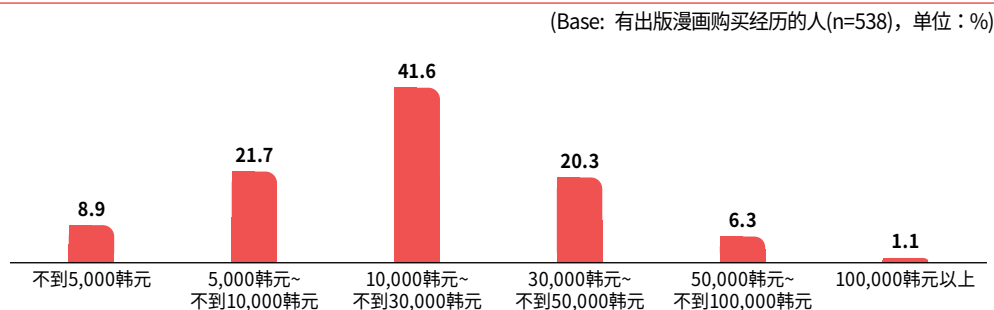


注) 相比上一年修改了选项区间。

(3) 购买出版漫画的平均月支出

在有出版漫画购买经历的人(n=538)中，购买出版漫画的月均支出“10,000韩元以上~30,000韩元以下”以41.6%占据首位。其次“5,000韩元以上~10,000韩元以下”为21.7%，“30,000韩元以上~50,000韩元以下”为20.3%。

图 14 购买出版漫画的平均月支出

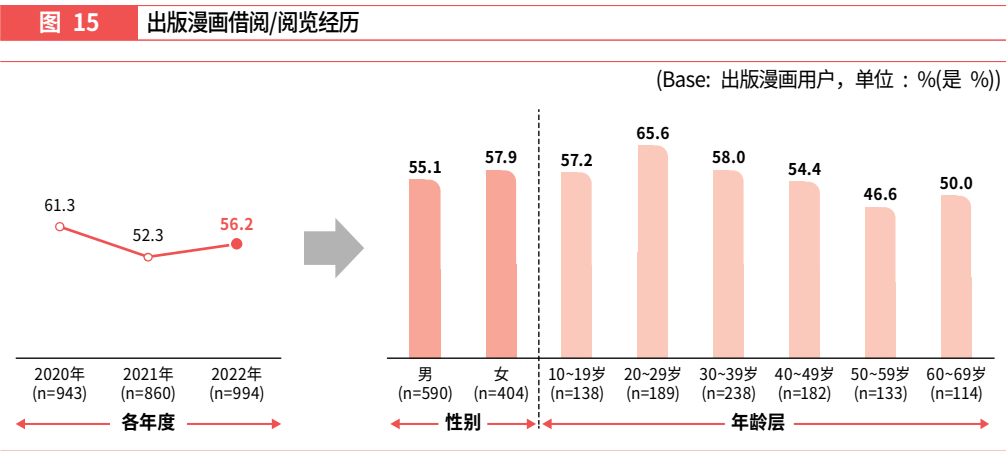


注) 相比上一年修改了选项区间。

3) 出版漫画的借阅/阅览

(1) 出版漫画借阅/阅览经历

在出版漫画用户(n=994)中，对是否借阅/阅览过出版漫画的提问回答“是”的比例为56.2%，比上一年增加了3.9%p。

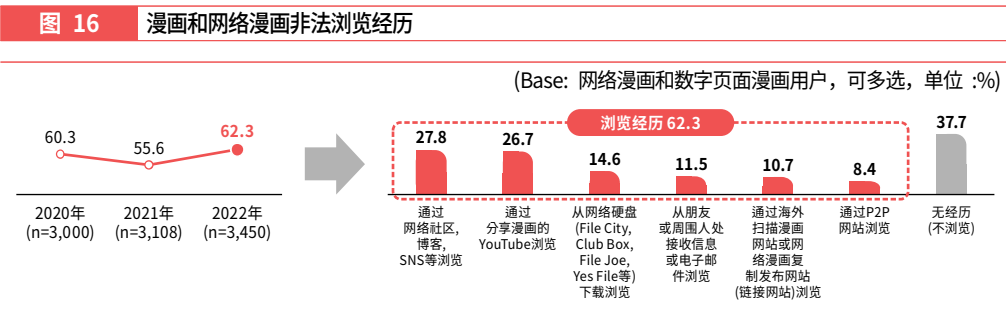


5. 漫画和网络漫画非法浏览

1) 漫画和网络漫画非法浏览经历

漫画和网络漫画非法浏览经历为62.3%，较上年有所上升。

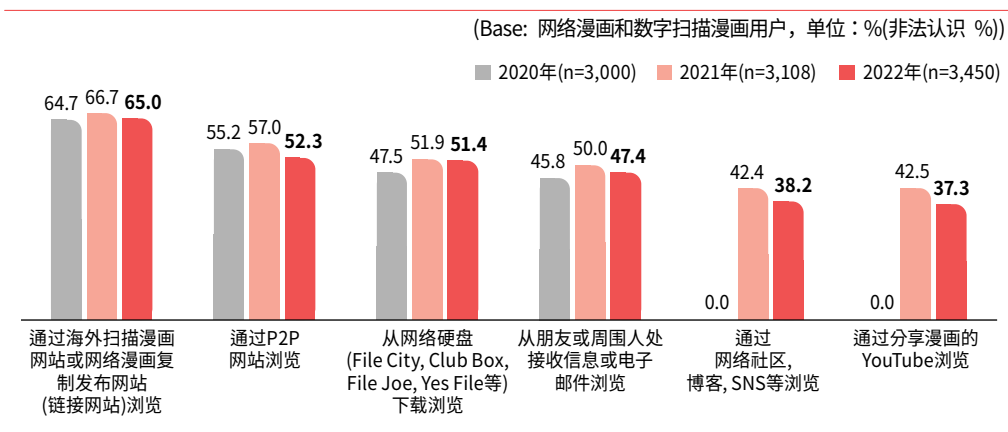
在非法浏览类型方面，占比较高的是“通过网络社区、博客、SNS等浏览”，为27.8%，以及“通过分享漫画和网络漫画的YouTube浏览”，为26.7%。



2) 对漫画和网络漫画非法性的认识

在漫画和网络漫画的非法浏览方式中，认为“通过海外扫描漫画网站或网络漫画复制发布网站(链接网站)浏览”是违法的认识占比最高，为65.0%。

图 17 对漫画和网络漫画非法性的认识



第2节 漫画产业扶持情况

1. 加强制作能力

1) 创作与制作扶持

(1) 多样性漫画制作扶持

这是一个通过扩大韩国漫画创作生态系统来加强漫画多样性的项目，也是一个大力扶持非活跃类型和替代性质的漫画而非热门类型漫画的项目。制作扶持分为短篇(最少120页)和中篇(最少200页)，并举行了项目征集，共收到223部作品。通过公平的盲选,共选出并扶持了65部优秀的新锐多样性漫画项目。

为解决必须完成内容(原稿)制作、出版和发行的扶持项目结构的困难现实，原稿制作和出版发行分别被分为多样性漫画制作扶持项目和漫画独立出版项目进行。

入选作品通过SNS宣传视频制作和作品审查促进了多样性文化生态系统的创建。

(2) 创作初期阶段扶持(漫画策划开发)

这是一个旨在扶持创作者实际上最需要的新作品的初期准备过程,以便让有潜力的创意不被埋没并开发成优秀的漫画IP的项目。

与上一年不同的是，项目扶持规模(课题数)大幅扩大，并通过减少制作量和加强对开发和取材的扶持,重组和推动项目以生产高质量的内容,以便创作者能够更加专注于策划和开发。

此外，选定的策划开发作品90个新课题已完成版权登记，以保障创作者的权利。同时还进行了按对象分类的战略性推广，部分作品已在大型平台上连载发表，并取得了在各类征集赛中获奖等优异的成绩。

(3) 漫画独立出版扶持

该项目旨在确保以网络漫画为中心的漫画发行市场的多样性,通过扶持以创作者为中心的漫画出版来加强作家出版能力和扩大市场。针对可以流通及出版形态的单行本原稿,根据扶持规模提供至少600万韩元至1000万韩元不等的补贴。共有43个课题通过优秀漫画独立出版咨询成书出版。

为了扩大出版物的发行,该项目通过SNS宣传视频制作和独立漫画专业平台及书店推广宣传了优秀的出版漫画。

2) 专业人才培养

(1) 网络漫画创作体验馆和地区网络漫画校园建设及运营

该项目始于通过建立一个宣传网络漫画创作和消费文化的地区据点来建立专业教育基础设施,以及创建一个培养当地人才以及扶持弱势群体享受文化的基于地区的良性循环漫画生态系统。网络漫画创作体验馆分为扶持培养预备创作者的据点型体验馆和支持青少年职业体验教育的地区型体验馆,以培养地区人才。

尽管目前新冠肺炎疫情形势严峻,但各地区仍策划各种非面对面的教学方法,通过确保体验馆运作的连续性来促进稳定运行。

此外还通过规划运营访问式网络漫画创作体验中心,为因环境限制或特殊条件无法接受网络漫画教育的社会福利设施等弱势群体提供网络漫画教育,致力于解决文化异化盲区。

截至2021年底,2015年开始的网络漫画创作体验馆和2017年开始的地区网络漫画校园项目的累计使用人数为21万人,创造了2,100个新工作岗位。

(2) 专业人才培养

专业人才培养项目通过扩大网络漫画创作基础和阶段性培训计划,对培养动漫产业核心人才具有重要意义。

K-Comics Academy是一个漫画专业培训项目,致力于通过为未来漫画家、现任漫画家和行业工作者提供策划、制作、商务实践等各种加强能力的培训项目来促进数字内容制作。

由于新冠疫情,该项目通过面对面和非面对面的培训,共开发了65个讲座,526小时的常规教育和13个新的视频讲座,并免费提供了高质量的漫画和网络漫画培训课程。

3) 培养弱势阶层漫画家

(1) 建立及运营青年残疾人网络漫画学院

该项目在全国残疾人福利设施中创建和运营网络漫画教育环境,以解决文化弱势群体的教育不平等问题,并为残疾青年创造就业机会。9家依法设立的残疾人福利设施继续运营机构和2家新机构总共11家机构获得了补贴,用于购买网络漫画培训设备和用于培训项目运营。共有497人在青年残疾人网络漫画学院完成了学习。

此外,为了改善对残疾人的认识和促进残疾人艺术家的创作,还举办了“残疾人网络漫画故事会”。在故事会的第一部分中,结合网络漫画学院学员在实际培训现场经历的事例,传达了网络漫画培训的必要性和意义。在第二部分中,探索了网络漫画学院学员的职业道路,并讨论了网络漫画等文化艺术领域的残疾人培训政策方向。

青年残疾人网络漫画教育不仅限于单纯的休闲,而是要通过各种持续的扶持活动,扩展为残疾人自力更生和就业的基础。

(2) 网络漫画老年人指导

以想要重新走上网络漫画创作之路的老年人和因职业经历中断而陷入困境的创作者为对象,通过故事及数码领域专家的小组指导来分享系统化的经验,以此来扶持网络漫画制作和作品化。

按数字和故事领域划分,筛选出14位导师和14位职业生涯中断的中年漫画家学员,共28人。按照2:2的比例进行匹配,共7个小组进行了小组课题任务。

根据保持社交距离等级的调整,考虑到创作者的安全,为了在不跨区域的非面对面方式下让代际合作更加紧密,已努力通过举办在线网络活动等来提高项目的完成率。

在小组指导中,导师和学员忠实履行了各自的角色,共制作了14部原创网络漫画作品。

2. 流通扶持

1) IP扩散扶持

(1) 漫画IP推广扶持

该项目于2018年新成立，旨在持续发掘具有竞争力的漫画IP并建立公正的漫画欣赏文化。该项目包括三个详细项目，分别是杜绝使用网络漫画非法流通网站运动、漫画IP商业化洽谈会以及优秀漫画故事IP后续宣传扶持。

从2021年8月到2021年12月进行的杜绝网络漫画非法流通网站的活动通过YouTube视频、网络广告、主要车站电子屏幕、车厢内视频播放以及线下展台等多种渠道，敦促网络漫画非法共享网站用户改善认识。

2021年的漫画IP推介活动以“内容知识产权(IP)商业化洽谈会”的名称，共分两场举行，韩国漫画IP持有企业与各类内容公司之间进行了商务配对。

第一场活动为了防止新型冠状病毒的扩散，进行了在线推介及视频商务配对，并与相关活动(BCWW)对接，提高了协同效应。第二场活动以现场推介和面对面的商业配对方式进行，为希望使用漫画IP制作内容的内容制作公司提供了商业机会。达成327个商业配对和6份合同签订

优秀漫画、故事IP后续推广扶持是通过前一年的内容知识产权(IP)洽谈会进行二次内容签约时，对后续推广(宣传、营销)进行支持的项目，2021年共进行了6类作品的宣传。

(2) 国际项目企业培育

为振兴引领韩国漫画海外扩张的平台企业，2021年通过构建漫画海外平台及运营支持，扶持了计划在海外新构建平台或正在运营的8家企业。特别是，通过与KOTRA(大韩贸易投资振兴公社)合作，使被选入该项目的企业能够受益于KOTRA海外扩张支持，创造了协同效应以支持漫画平台的海外扩张。

漫画经纪人培养扶持是为促进优秀的韩国漫画、网络漫画IP的商业化，选定正在计划或正在将二次内容商业化的企业来补贴参与人员人力成本的项目，2021年总共补贴了11家企业。

(3) 新技术相关漫画内容制作扶持

支持将国产漫画IP与AR/VR/MR等沉浸式新技术相结合的新型融合型内容的新技术联动漫画内容制作扶持项目于2020年新设,结束于2021年。2021年有四部作品被选中制作了漫画IP和新技术相结合的二次内容。

2) 海外扩张扶持

本项目目前正在进行三个项目,通过扶持适合出口的优秀韩国漫画的翻译来扩大进军海外的机会;带领韩国漫画进军全球市场及构建海外网络;以及以主要海外战略市场为对象的商务扶持及网络漫画品牌化。

(1) 漫画海外出口及国内外营销扶持

虽然2020年因新冠疫情计划参加海外市场及海外推介活动的日程均被取消,但对使用国内漫画和网络漫画IP的内容的需求却爆发式增长,2021年举行了线上或线上线下双重化活动,以支持海外扩张。

以韩国联合馆的形式参加了海外市场“纽约漫画展(10月)”,并在中国(7月)、美国(8月)、法国(9月)、日本(10月)举办了四场海外推介会,共支持了44个IP。

此外,为了配合因新冠疫情而出现的数字化转型,通过元宇宙“Zepeto”对项目进行了宣传,还在“Getter Town”创建了线上展览体验中心。

从2019年开始的企业自主型漫画海外推广扶持项目,支持企业自主参加海外市场及举办海外推介活动等,2021年共支持了6家企业。部分企业因新冠疫情而改为在线活动,为宣传和出口漫画和网络漫画做出了努力。

表 2 2021年漫画海外市场及海外推介推进结果

项目	国家(活动名称)	举办日期	参加企业	咨询件数
推介	中国(2021 K-Story & Comics in China)	7.8.~7.9.	13家	197件
	美国(2021 K-Story & Comics & Characters in America)	8.10.~8.31.	10家	91件
	欧洲(2021 K-Comics & Animation in Europe)	9.27.~10.1.	7家	169件
	日本(2021 K-Story & Comics in Japan)	10.29.~11.5.	10家	53件
市场	北美市场宣传推广(纽约漫画展)	10.7.~10.28.	8家	38件

(2) 韩国漫画海外展示及漫画交流扶持

在马来西亚吉隆坡和日本大阪举办了名为“ON, WEBTOON”的在线漫画展。在“ON, WEBTOON”中, ON具有开启、继续、全部、在线等多重含义, 同时还包含慰劳的意义, 向全世界厌倦新冠疫情的人们传递韩国网络漫画的快乐和温暖。

通过与韩国驻马来西亚大使馆和大阪韩国文化院合作, 向两国介绍了最近在世界范围内流行并通过各种OTT平台以电视剧和电影形式提供服务的5部热门韩国网络漫画, 获得了当地韩流粉丝的极大好评。

此外, 作为欧洲漫画强国的比利时为纪念韩比建交120周年, 在每年9月举办的“比利时国际漫画节”上邀请韩国作为主宾国举办特别展。在比利时漫画中心和比利时韩国文化院的协助下举办的漫画特别展从近代漫画开始的1909年到当下数字漫画网络漫画的全盛期, 将韩国漫画112年的历史按时期整理, 介绍了约50位漫画家和90部作品, 并举办了各种附带活动, 宣传韩国漫画的历史和文化, 为进军未来可能成为主要网络漫画消费地区的欧洲市场开辟了道路。

(3) 出口作品翻译支持

在以电视剧、电影等网络漫画原著为基础的二次创作正在积极制作并获得全球好评的情况下, 该项目为23家优秀动漫出口企业的46部作品提供翻译、推广、营销、本地化一站式综合支持, 促进了漫画出口并增强了全球竞争力。

针对国内出版社、代理公司、网络漫画平台、漫画家等有可能进入海外漫画出口新市场但因缺乏经验和专业知识等原因难以直接开展国际业务的经营者, 对作品的优秀性、进军海外的时效性和推进计划的具体性作出评价后, 为减轻企业的翻译负担, 对项目的翻译、校对、排版等给予了支持。



2022 CARTOON INDUSTRY WHITE PAPER