

2025 SUMMARY

**CHARACTER**

INDUSTRY  
WHITE PAPER

## **PART 1. Character Content Usage Overview**

### **1. Survey Design**

The subjects of this survey were people aged 3 to 69 living in the country who had used character content (character products, character printing products, and digital character products) "at least once every 2–3 months" in the past year, and the survey was conducted separately for those aged 10–69 and 3–9.

The sampling frame for the survey was set at 940,000 panelists held by the survey conducting institution. Based on the "Content Usage Survey" conducted in 2024, the population was allocated by region, gender, and age. The survey was then distributed to target panelists through various methods including email, social media, and KakaoTalk notifications, and the target sample was secured based on character content usage.

The survey cycle is annual, and the response period for the content usage survey is from May 2024 to May 2025 (the past year), unless otherwise stated. Data collection was conducted in May–June 2025 (May 29, 2025 – June 13, 2025). The survey was conducted online using a questionnaire.

Table 1-1

Character User Survey Online Survey Design Ages 10–69

| Category                 | Content                                                                                                                                                                    |
|--------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Target Population        | • All citizens aged 10 to 69                                                                                                                                               |
| Survey Population        | • Those who have used character content (character merchandise, character printing products, digital character products) "at least once every 2–3 months" in the past year |
| Survey Area              | • Nationwide                                                                                                                                                               |
| Data Collection Methods  | • Online survey using a structured questionnaire                                                                                                                           |
| Sampling Frame           | • Utilizing the 940,000-member panel maintained by the survey conducting agency                                                                                            |
| Sample Extraction Method | • Proportional allocation by region/gender/age according to the 2024 "Content Usage Survey"                                                                                |
| Sampling Error           | • $\pm 1.8$ percentage points at a 95% confidence level                                                                                                                    |
| Valid Sample             | • 3,000 people                                                                                                                                                             |
| Data Collection Period   | • May–June 2025 (May 29, 2025–June 13, 2025)                                                                                                                               |
| Survey Administration    | • Korea Creative Content Agency                                                                                                                                            |
| Conducting the Survey    | • Hankook Research                                                                                                                                                         |

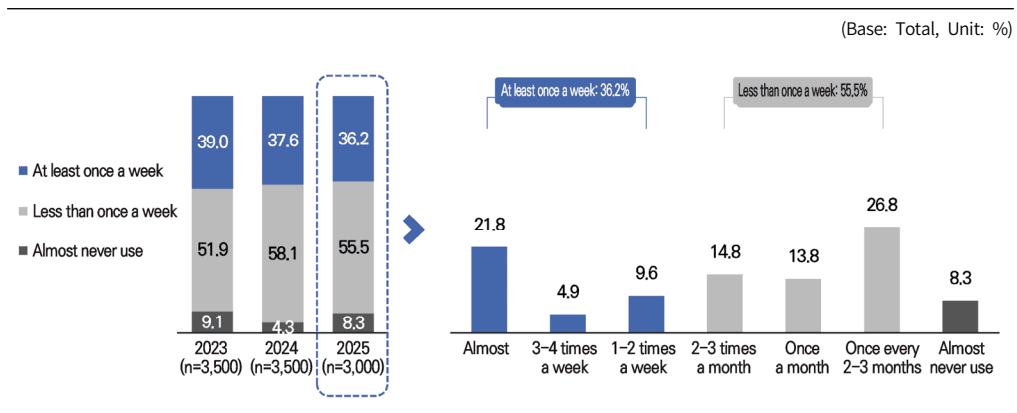
## 2. Character Content Usage Frequency

### 2-1. Character Merchandise Usage Frequency

Character merchandise usage frequency was 36.2% for "more than once a week" and 55.5% for "less than once a week". Among them, "once every 2-3 months" was the highest at 26.8%.

By respondent characteristics, the use of "more than once a week" is relatively high among women and those under 30.

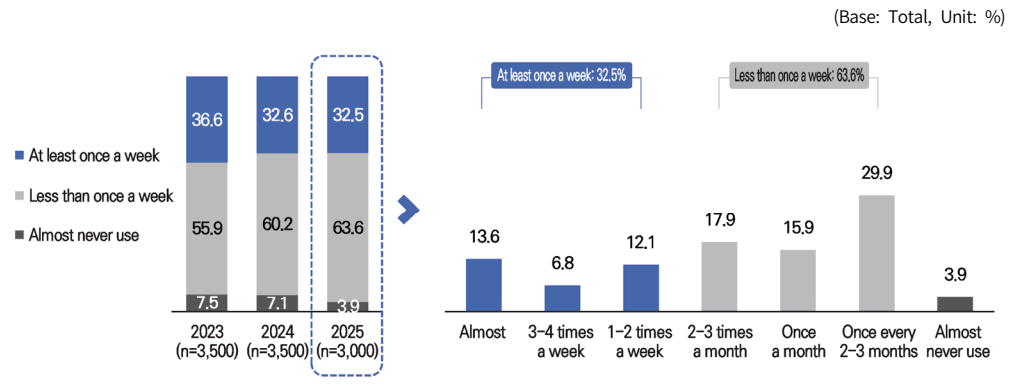
Figure 1-1 Character Merchandise Usage Frequency



### 2-2. Character Printing Products Usage Frequency

Character printing products usage frequency was 32.5% for "more than once a week" and 63.6% for "less than once a week", with 29.9% of respondents choosing "once every 2-3 months" as the most common frequency.

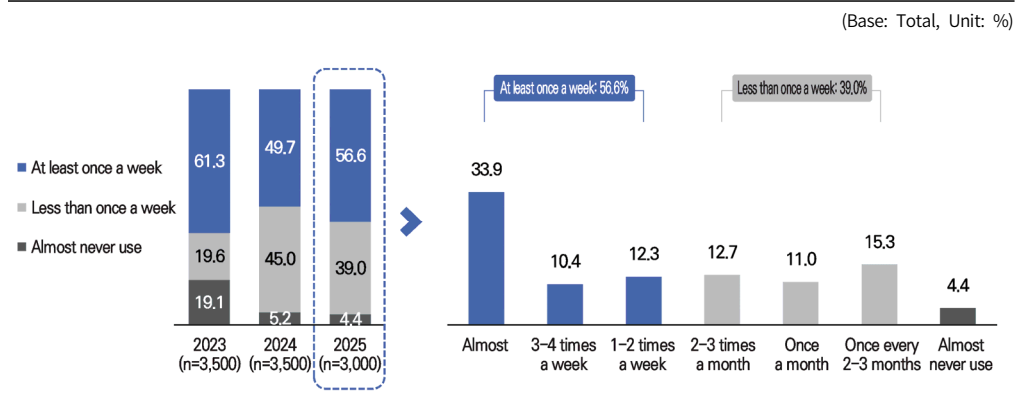
By respondent characteristics, the use of "more than once a week" is relatively high among women and those under 30.

**Figure 1-2** Character Printing Products Usage Frequency

### 2-3. Digital Character Products Usage Frequency

Digital character products usage frequency was 56.6% for "at least once a week" and 39.0% for "less than once a week", with 33.9% of respondents choosing "almost every day" as the most common frequency.

By respondent characteristics, the use of "at least once a week" was particularly high among women and those in their 20s.

**Figure 1-3** Digital Character Products Usage Frequency

### 3. Most Preferred Characters

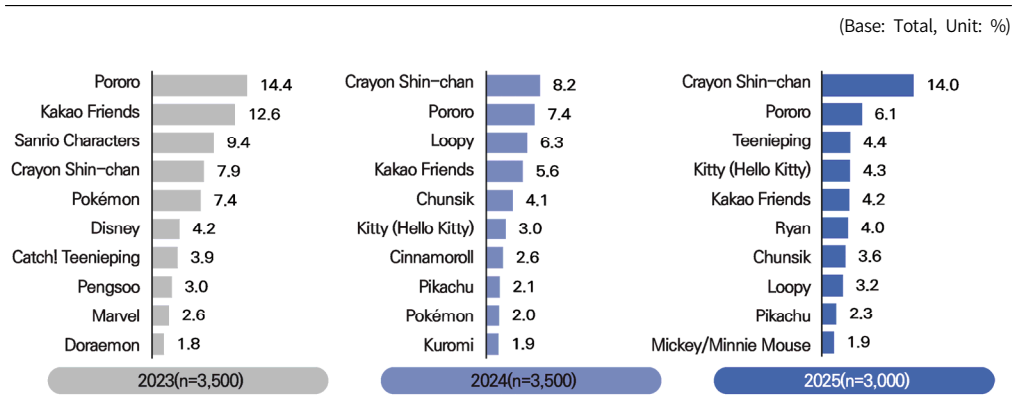
#### 3-1. Most Preferred Character (Ages 10–69)

The most preferred character was "Crayon Shin-chan" (14.0%), followed by "Pororo" (6.1%), "Teenieping" (4.4%), "Kitty (Hello Kitty)" (4.3%), "Kakao Friends" (4.2%), and "Ryan" (4.0%).

By respondent characteristics, "Crayon Shin-chan" was the most preferred among those aged 50 and under, while "Pororo" was the most preferred among those aged 60 and over.

Figure 1-4

Most Preferred Characters



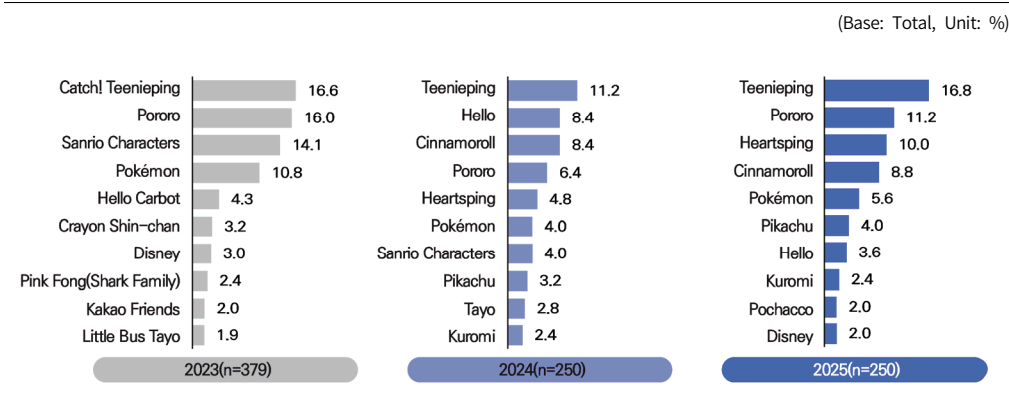
#### 3-2. Most Preferred Characters (Ages 3–9)

"Tennieping" was the most popular character at 16.8%, followed by "Pororo" (11.2%), "Heartsping" (10.0%), and "Cinnamoroll" (8.8%).

Girls preferred "Tennieping", while boys preferred "Pororo".

"Tennieping" was the most preferred character among both 3–5 year olds and 6–9 year olds.

Figure 1-5 Most Preferred Characters

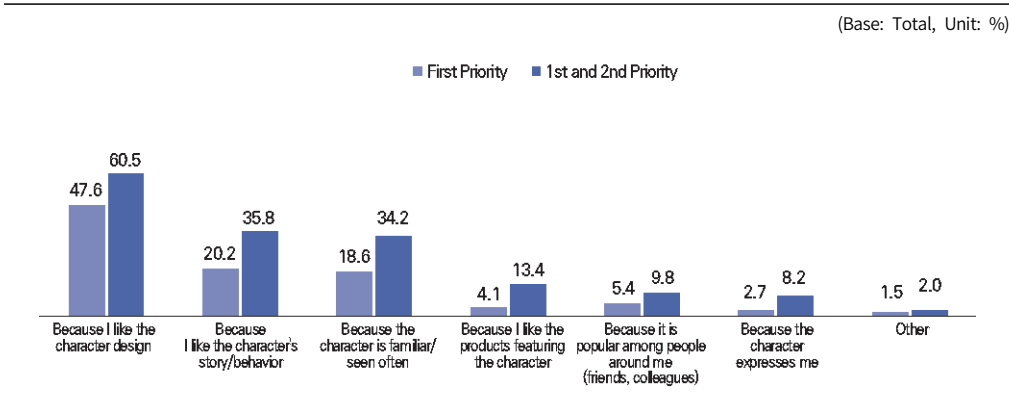


### 3-3. Reasons for the Most Preferred Character

The most common reason for preferring the most preferred character was "because I like the character design", which was the highest at 60.5%, followed by "because I like the character's story/behavior" (35.8%), and "because the character is familiar/I see it often" (34.2%) (based on 1st and 2nd choices).

By respondent characteristics, "because I like the character design" was relatively high among women and those under 30, "because I like the character's story/behavior" was relatively high among men and those under 30, and "because the character is familiar/I see it often" was relatively high among men and those in their 60s.

Figure 1-6 Reasons for the Most Preferred Character



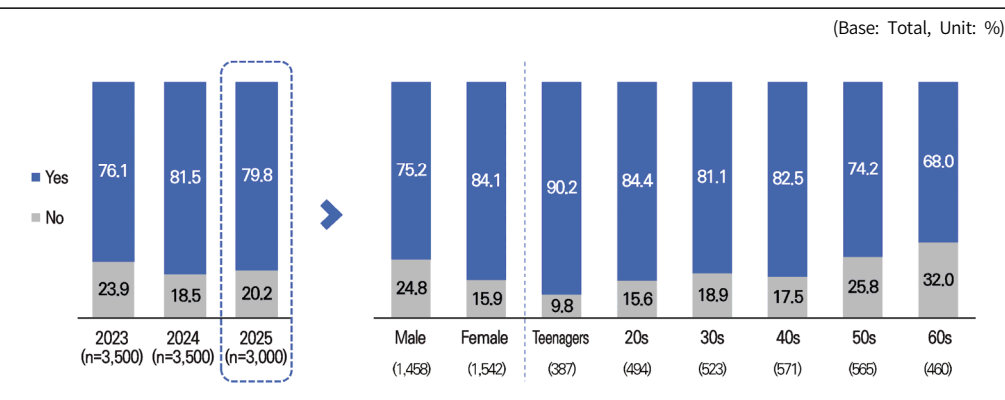
## 4. Character Purchase

### 4-1. Character Product Purchase Experience

79.8% of respondents reported having purchased character products in the past year.

By respondent characteristics, character product purchase experience was relatively high among women and those under 20.

Figure 1-7 Character Product Purchase Experience



### 4-2. Types of Character Merchandise Purchased

The most common type of character merchandise purchased was "dolls" 63.6%.

Next, "figures/plastic models/acrylic figures/keyrings" (53.2%), "DIY/hobby kits" (25.6%), and "infant/toddler toys" (14.8%) followed.

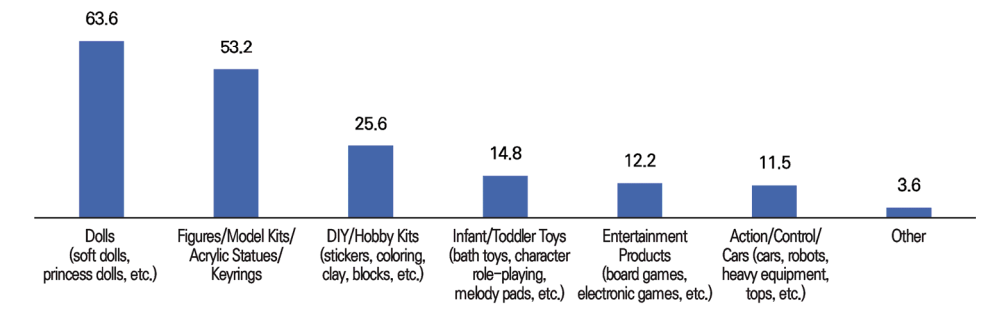
By respondent characteristics, the purchase rate of "dolls" and "DIY/hobby kits" was relatively high among women, while the purchase rate of "figures/plastic models/acrylic figures/keyrings", "entertainment products", and "action/control/cars" was relatively high among men.

By age group, the purchase rate of "dolls" was relatively high among teenagers, while the purchase rate of "infant/toddler toys" was relatively high among those in their 60s.

Figure 1-8

Types of Character Merchandise Purchased

(Base: Character goods purchase experience (n=2,393), multiple responses, unit: %)



4-3. Key Considerations for Character Merchandise Purchases

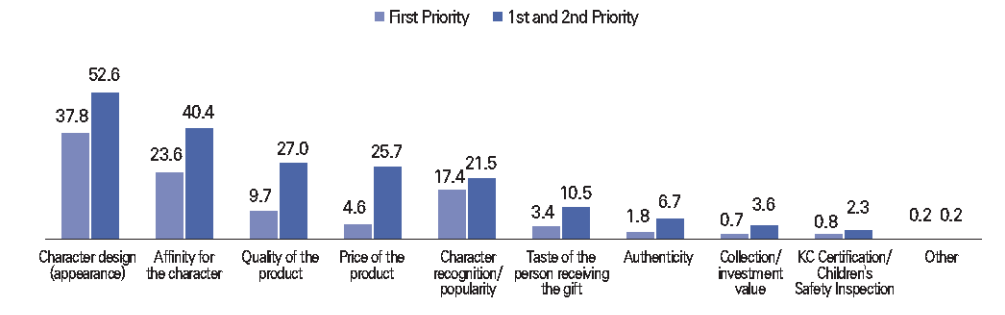
The key considerations when purchasing character merchandise were as follows: "Character Design (Appearance)" was the highest at 52.6%, followed by "Affinity for the Character" (40.4%), "Product Quality" (27.0%), "Product Price" (25.7%), and "Character Awareness/Popularity" (21.5%) (based on first and second choices)

By respondent characteristics, women were relatively more likely to consider "Character Design (Appearance)", while men were relatively more likely to consider "Affinity for the Character".

By age group, those in their 20s were relatively more likely to consider "Character Design (Appearance)" and "Affinity for the Character", while those in their 60s were relatively more likely to consider "Character Awareness/Popularity".

Figure 1-9 Key Considerations for Character Merchandise Purchases

(Base: Character Merchandise Purchase Experience (n=2,393), Unit: %)



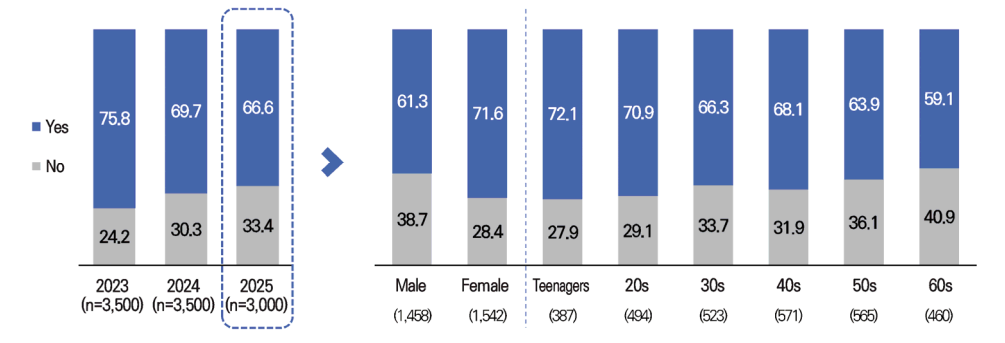
#### 4-4. Character Printing Products Purchase Experience

66.6% of respondents reported having purchased character printing products in the past year.

Looking at the characteristics of the respondents, purchase experience was relatively high among women and those under 20.

Figure 1-10 Character Printing Products Purchase Experience

(Base: Total, Unit: %)



4-5. Types of Character Printing Product Purchases

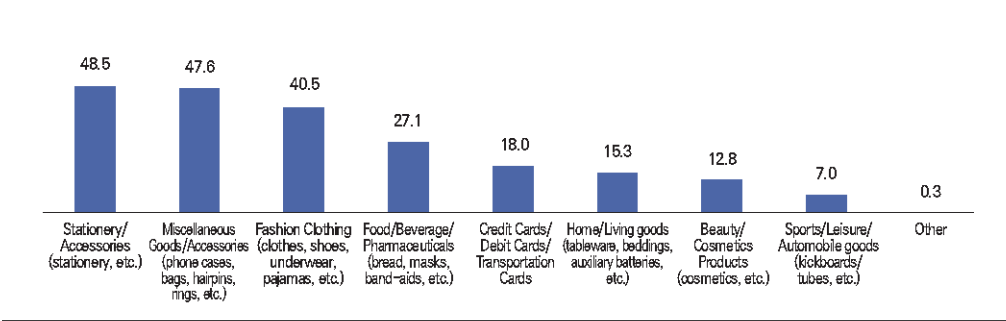
The most common types of character printing products purchased were "Stationery/Accessories" (48.5%) and "Miscellaneous Goods/Accessories" (47.6%). Next were "Fashion Clothing" (40.5%), "Food/Beverage/Pharmaceuticals" (27.1%), and "Credit Card/Debit Card/Transportation Card" (18.0%), in that order.

By respondent characteristics, women showed a relatively high purchase rate for "Stationery/Accessories", "Miscellaneous Goods/Accessories", and "Beauty/Cosmetics Products", while men showed a relatively high purchase rate for "Sports/Leisure/Automobile Products".

By age group, teenagers and people in their 40s showed a relatively high purchase rate for "Stationery/Accessories", people in their 20s for "Beauty/Cosmetics Products", people in their 30s for "Food/Beverage/Pharmaceuticals" and "Beauty/Cosmetics Products", and people in their 50s for "Fashion Clothing" and "Credit Card/Debit Card/Transportation Card."

Figure 1-11 Type of Character Printing Product Purchase

(Base: Character printing product purchase experience (n=1,998), multiple responses, unit: %)

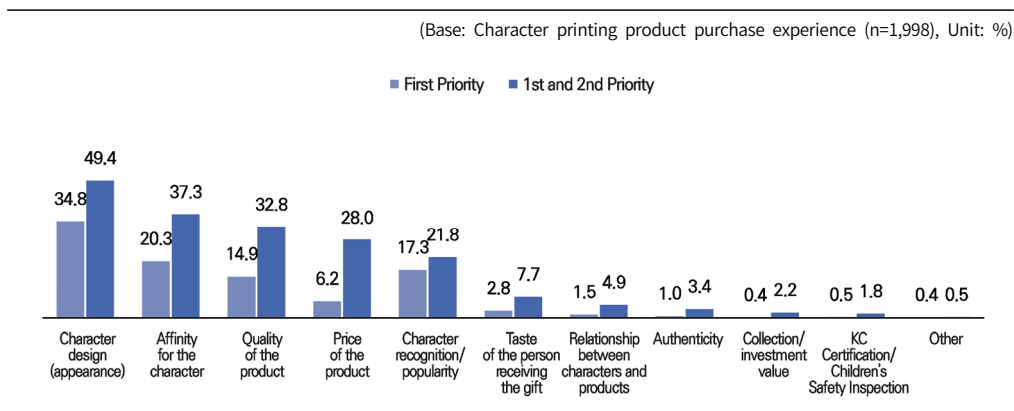


#### 4-6. Key Considerations for Character Printing Products

The main considerations when purchasing character printing products were as follows: "Character design (appearance)" (49.4%) was the most frequently mentioned, followed by "Affinity for the character" (37.3%), "Product quality" (32.8%), "Product price" (28.0%), and "Character awareness/popularity" (21.8%) (based on first and second choices). By respondent characteristics, women were relatively more likely to consider "Character design (appearance)", while men were relatively more likely to consider "Character awareness/popularity".

By age group, teenagers were relatively more likely to consider "Character design (appearance)" and "Character awareness/popularity", people in their 30s were relatively more likely to consider "Affinity for the character", and people in their 40s were relatively more likely to consider "Product quality".

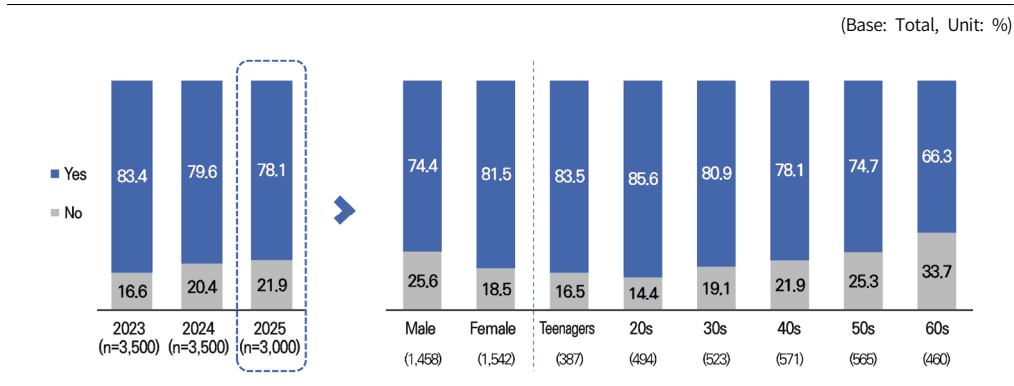
**Figure 1-12** Key Considerations for Character Printing Products



#### 4-7. Digital Character Products Usage (Purchase) Experience

78.1% of respondents reported having experience using (purchasing) digital character products in the past year.

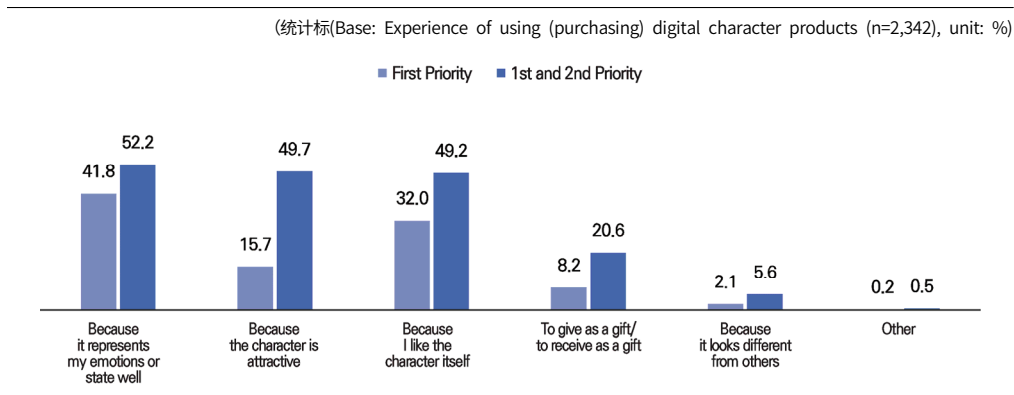
By respondent characteristics, experience using (purchasing) digital character products was relatively high in women and those under 20.

**Figure 1-13** Digital Character Products Usage (Purchase) Experience

#### 4-8. Reasons for Using (Purchasing) Digital Character Products

The most common reason for using (purchasing) digital character products was "because it represents my emotions or state" with 52.2% as the most common, followed by "because the character itself is attractive" (49.7%), "because I like the character itself" (49.2%), "because I want to give as a gift/received as a gift" (20.6%), and "because it looks different from others" (5.6%) (based on first and second choices).

By respondent characteristics, "because the character is attractive" was relatively high among those in their 20s, "because I like the character itself" was relatively high in the teens, and "because I want to give as a gift/received as a gift" was relatively high among those in their 60s.

**Figure 1-14** Reasons for Using (Purchasing) Digital Character Products

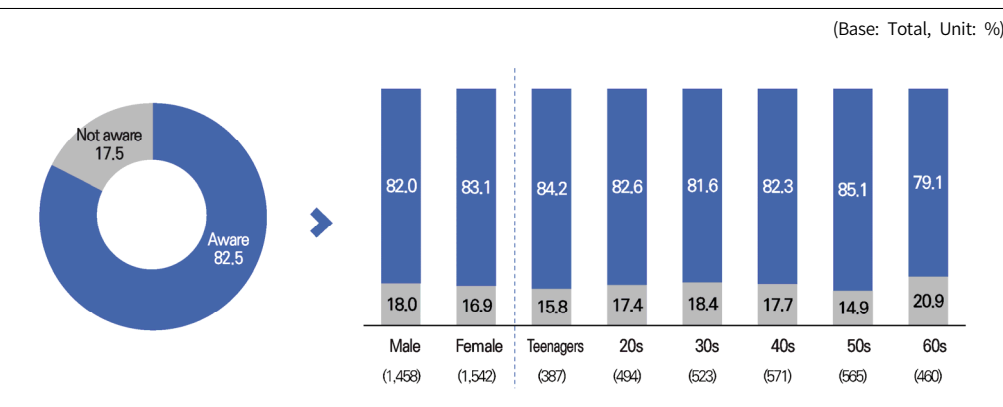
## 5. Characters as Part of Other IPs

More than 8 out of 10 respondents (82.5%) said they "know" whether the character utilizes an IP from another genre, while 17.5% said they "did not know".

By respondent characteristics, "knowing" was relatively high in the 50s.

Figure 1-15

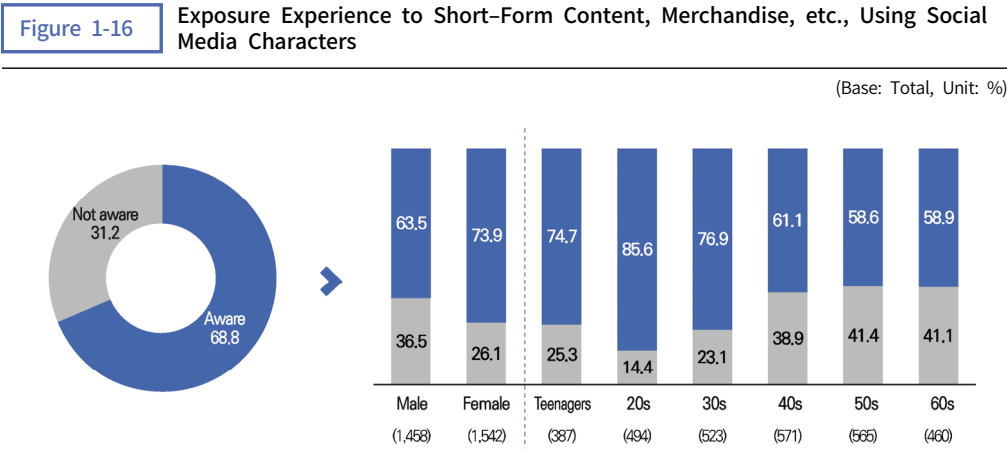
Characters as Part of Other IPs



## 6. Exposure Experience to Short-Form Content, Merchandise, etc., Using Social Media Characters

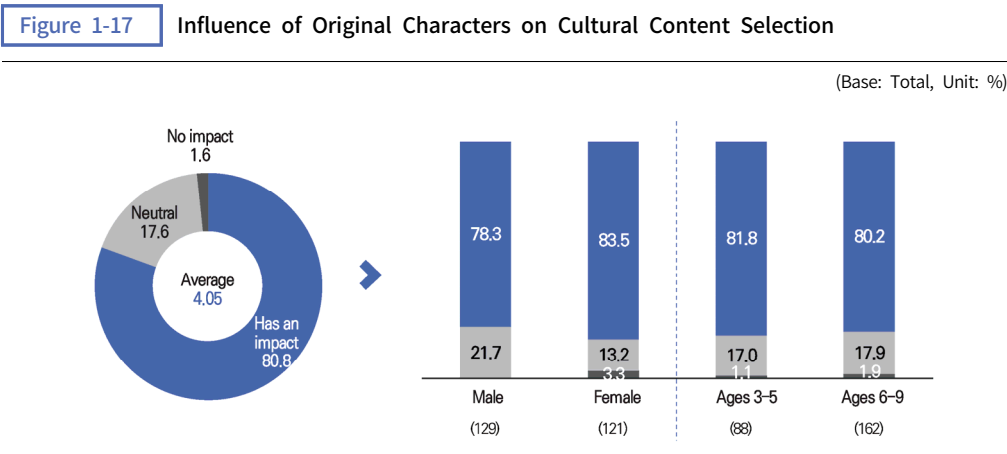
68.8% of respondents reported having watched short-form videos featuring social media characters or have come across merchandise and emoticons through corporate collaborations.

By respondent characteristics, the percentage of those who have had experience with social media characters was relatively high among women and those under 30.



7. Influence of Original Characters on Cultural Content Selection

80.8% of respondents reported that characters influence the selection of cultural content.



## Part 2. Character Support Programs

The Korea Creative Content Agency has promoted various production and distribution support programs to strengthen the capabilities of the Korean character industry and revitalize the licensing industry. The main contents of the support programs carried out in 2024 are as follows.

### 1. Strengthening Production Capabilities

#### 1-1. Support for the Development and Commercialization of New Character IPs

The support program for the development of new character IPs aims to strengthen creative capabilities and promote the revitalization of the licensing industry by providing step-by-step development and commercialization support for original character IPs. In 2024, a total of 15 new character IPs were developed and brought to market through this support project.

In addition, the capabilities of the implementing organizations were strengthened by operating a management support project in parallel with the selected project for the development support project for new character IPs. Production capabilities were strengthened through customized consulting and manual development training based on pre-demand surveys for each project, and promoted the activation of licensing business through events such as character licensing fairs and content IP markets. Promotion support for the results of the new character IP development project was also strengthened by distributing articles on outstanding companies.

## 1-2. Content IP Licensing Support

The support project for content IP licensing aims to activate the licensing business utilizing content IP. A total of 26 projects were selected to discover and activate content IPs suitable for diversified production, distribution, and consumption environments, support was provided for the development and marketing costs of projects that utilizing domestic content IPs to promote licensing business. The expansion of various genres of content IPs and the activation of additional businesses were promoted, contributing to strengthening the foundation of the licensing industry.

## 1-3. IP Licensing Build-up

IP licensing build-up is a support project aimed at discovering, producing, and strengthening business capabilities in the licensing field utilizing existing content IPs of small and medium-sized content companies and the platforms of public and private enterprises in related industries.

Among the industries where content IP licensing is possible, one theme park (Seoul Land) and 1 F&B (Daesang Corporation), and two distributors (Korea Railroad Logistics, GS Retail) participated in 2024. A total of four public and private companies collaborated to select two small and medium-sized IP companies through a competition, including two space-type and three package-type companies.

For the space type, Seoul Land collaborated with "NINIkids" from Book21 and "Cafe Tripin" from Korail Distribution worked with "Hello Jadoo" IP from AtoonZ. For the package type, Daesang Corporation collaborated with "Balloon Friends" from Project 624, "Storyway" from Korail Distribution, "Muduoji" from Blissol, and "Bunny Kong Ju" from Ocon for GS Retail.

Four platform companies and five small and medium-sized IP companies participated in the "2024 Content IP Market" held at the COEX from November 19 to 21. Support for licensing activation, including prototype production, promotional support, and expert consulting.

## 2. Distribution Support

### 1-1. Character Licensing Fair

The 23rd "Character Licensing Fair" is the largest character licensing market in Korea. It consists of a business-to-business (B2B) program for transactions between companies related to content IP, such as characters, animation, comics, games, and kidult content as well as a business-to-consumer (B2C) event.

In 2024, "Connect Content IP" event was held from July 18 to 21 at Seoul COEX, with the scale expanded from Hall A to Hall B1. A total of 218 companies participated in the exhibition, and various themed exhibition halls were operated, a pipe exhibition hall, a virtual character exhibition hall, a build-up planning exhibition hall, and an ESG experience hall.

In particular, the entrance fee was completely waived to encourage cultural enjoyment for all citizens, and efforts were actively made to revitalize the content IP industry.

In the K-Pop hall, idol characters reflecting sub-characters, metaverse worlds, and storytelling were showcased. The virtual character hall introduced the latest trends in digitalized virtual content IP. In the build-up planning hall, a meeting place was provided for related industry companies such as Daejeong Corporation, Korail, and GS Retail, and small and medium-sized content companies, promoting cooperation and mutual growth among small and medium-sized enterprises. In addition, ESG practices were implemented through the ESG hall, which operated an exhibition and experience program for merchandise by artists with developmental disabilities.

In the "Biz Matching Zone", 1:1 business meetings between participating companies and buyers were actively supported. In the "Consulting Hall", professional consultations were provided on financial systems related to content to overseas expansion, labor, and legal disputes.

The Character Licensing Fair continues to support the activation and export of domestic character licensing, while expanding its scope to cover all content genres as interest in the content IP industry grows.

## 1-2. Licensing Conference

"Licensing Con 2024", the only business conference in Korea in the field of content IP licensing, was held at COEX from July 18 to 19. To create an environment for in-depth discussion and communication, it was mainly conducted offline, and afterwards. Afterwards, content accessibility was enhanced by providing a rewatch service for the main sessions.

The theme of the 2024 conference, the sixth since 2019, was "Connecting and Expanding Diverse Licensing Business, Logging in with Content IP", focusing on the value of content IP as a key to licensing business. As content IP creates new markets through convergence with various industries, this conference was structured around discussions on the possibilities of connection and expansion, as well as practical business strategies.

The two-day event featured 23 speakers across 10 sessions, covering a wide range of topics including the latest trends in the domestic and international licensing market, genre-spanning IP expansion strategies, branded IP building cases, and startup business models. The event provided a platform for exploring strategic ways to utilize content IP and presenting insights for sustainable growth across the industry.

## 1-3. Operation of the Character IP Product Distribution Testbed

To expand the distribution channels for small and medium-sized character companies, pop-up stores were held at two large malls with high foot traffic (Lotte Mart Seoul Station and Suwon stores). A character IP promotion hall was also operated in conjunction with the Character Licensing Fair, a specialized character exhibition, and the newly launched World Webtoon Festival in 2024. Additionally, distribution support for small and medium-sized content companies was promoted by directly stocking their products in Toy's "R" Us, a specialized character distribution retailer(Toy's "R" Us Jamsil, Gimpo Airport, and Eunpyeong stores). Through these efforts, including the operation of pop-up stores, promotion halls, and three Toy's "R" Us stores sales expansion and IP brand value enhancement

for small and medium-sized content companies were supported through direct and indirect distribution support.

#### 1-4. Korea Content Awards – Character Category

The Korea Content Awards aim to discover excellent content in various genres of the cultural content industry and to encourage creativity and industry development through awards. A total of 28 works were submitted for the "2024 Korea Content Awards – Character Category", and after two rounds of expert and public evaluations, five works were selected as winners.

The President's Award was given to "Bebepfinn" from The Pinkfong Company, which became the first domestic character to top Netflix in 11 countries worldwide as of 2024, and achieved great success by reaching 10 million subscribers in just 14 months, the shortest period in history. The Minister of Culture, Sports and Tourism's Award was given to "Shuya", "Tomtomi", and "B Family", while the Korea Creative Content Agency President's Award was given to "Bbangbang's Diary."

The 2024 award ceremony was held on December 11 at COEX, with winners and related officials in attendance. The five selected characters received certificates and a certain amount of prize money.

### 3. Outlook

The domestic character market is continuously expanding, driven by the popularity of various genres of content, including characters and animations that have secured fandoms through social media, and the trend of appealing to diverse generations is becoming universal. Although characters targeting children and youth remain strong, consumption of characters based on social media with a strong female fandom or webtoons and games with a solid kidult fandoms, has also increased significantly recently.

Driven by these trends, the domestic character industry, which sharply declined after the COVID-19 pandemic, is now showing signs of recovery. Revenue in the domestic character industry, which had only slightly

increased in 2022, increased by 29% year on year (YoY) in 2023. Exports, which had been declining, rebounded for the first time, increasing by 25.4%. Although the main indicators of the domestic character industry remain at approximately 60% of the pre-COVID-19 level, the outlook is positive. This is supported by the global popularity of K-content, including K-pop, webtoons, games, and a trend of domestic characters appealing to a broader audience. A steady stream of such cases has emerged, including the alcoholic beverage “Cheongmyeongju”, released through a collaboration between Naver Webtoon’s “Return of the Blossoming Blade” and Daedong Yeoju, as well as events introduced by Lotte World based on the webtoon “Dark Moon” featuring the K-pop idol group ENHYPEN.

It is also notable that the licensing business utilizing character IP is more active than ever across various industries. In the convenience store industry, including GS Retail, CU, and E-Mart 24, IP collaborations that reflecting the latest trends are becoming increasingly competitive. Moreover, in areas like Seong-su-dong and The Hyundai Seoul, pop-up stores continue to be very popular. In *Trend Korea 2025*, “physical attraction” was identified as a key trend, and the combination of IP and experience is expected to see increased demand. This is supported by the fact that 100,000 visitors attended a pop-up store in March 2024 at The Hyundai Seoul, featuring three virtual idol groups (“Plave”, “Stellive”, “Isegye Idol”).

Accordingly, the industry will continue to make efforts to discover character IP in various content areas and to integrate and utilize it in various fields. In addition, the industry will continue to monitor changes in trends and seek new breakthroughs to appeal to both domestic and foreign consumers. Efforts will also focus on strengthening IP-based businesses through brand understanding and management.