2023 ANIMATION INDUSTRY WHITE PAPER

SUMMARY

ENGLISH / 中文

Animation

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SUMMARY

Animation

PART 1. Animation User Trends

1. Survey Design

The subjects of the survey are people aged between 3 and 69 living across the country who have used animation content "more than once every 2 to 3 months" in the past year.

The sampling frame of the survey was based on the 1.17 million individuals from the national survey panel held by the survey conducting agency(Global Research Co., Ltd.), and the population composition ratios by region, gender, and age from Statistics Korea's resident registration demographic data as of May 2023 and the character user survey from the previous three years. An online survey was distributed to assess content usage rates. The survey was conducted until the target sample was completed depending on whether or not animation content was used.

Surveys are conducted annually, with the response standard being from June 2022 to May 2023, unless specified otherwise. Data were collected through an online survey method during the period of June to July 2023(June 2 to July 14, 2023).

The collected data underwent a thorough editing and refining process verified by professionals. Data with questionable reliability were either supplemented or discarded. In addition, the results of four small focus group interviews(FGI) were conducted to collect individual cases on the actual use of animation were used as a reference when interpreting the online survey results.

Table 1 Design of Online Questionnaire Survey on Animation Users

Division	Content
Target Population	All citizens aged from 3 to 69
Survey Population	Those who used animation content “at least once in two to three months” in the recent one year among all citizens aged from 3 to 69
Survey Area	Nationwide
Data Collecting Method	Online survey using structured questionnaires
Sampling Frame	Resident registration demographic status provided by the Ministry of Public Administration and Security as of May 2023 Used the 1.17 million people from the nationwide survey panel held by the survey agency as a sampling frame
Sampling Method	Proportionally allocated by gender/age/region
Sampling Error	±1.62%p at 95% confidence level
Valid Sample	3,500 people(post-weighted to 3,500 after surveying 3,682 people) To increase the reliability of the sample for children(ages 3 to 9), post-weighted 500 respondents aged 3 to 9 to 379 based on the ratio of respondents aged 3 to 9 compared to all respondents in the previous year.
Data Collecting Period	June – July 2023(June 2 – July 14, 2023)
Survey Host	Korea Creative Content Agency
Survey Agency	Global Research Co., Ltd.

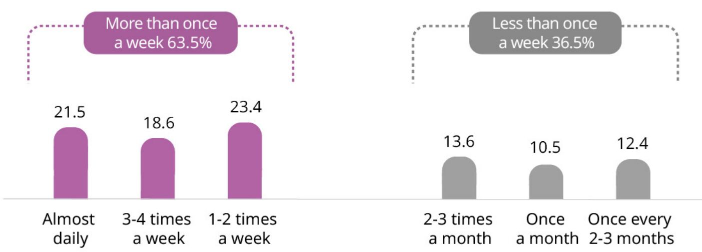
2. Frequency of Use of Animation Contents

According to a survey on the frequency of using animation content, 63.5% of respondents reported using it "More than once a week," with steady growth observed since 2021. Looking at respondent characteristics, the rate of animation use "More than once a week" tends to increase as the age group gets younger, and was especially highest among those aged 3 to 9.

Figure 1 Frequency of Use of Animation Contents

01 Frequency of Using Animation

(Base: All, Unit: %)



3. Media Used for Viewing Animation in the Past Year

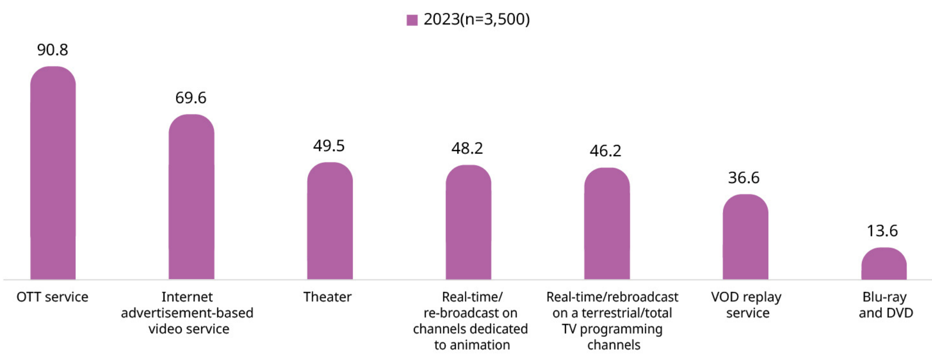
3-1. Animation Viewing Preferences by Platform

As a result of a survey on the route used when watching animation, “OTT service” ranked the highest at 90.8%(duplicate responses possible). This was followed by “Internet advertisement-based video service(69.6%),” “Theater(49.5%),” and “Real-time/rebroadcast on channels dedicated to animation(48.2%).”

Examining the respondents’ characteristics, relatively high number of those in their 20s use “OTT services,” those aged 3 to 9 use “internet advertisement-based video services” and “Theater,” “Real-time/rebroadcast on channels dedicated to animation.” Additionally, individuals in their 60s exhibit a preference for “Real-time/rebroadcasts on terrestrial/total TV programming channels” when watching animation.

Figure 2 Animation Viewing Preferences by Platform

(Base: All, Multiple Responses, Unit: %)



1) New in 2023.
2) Until 2022, it was generally divided into TV monitors, smart devices, and theaters based on the device used, but by 2023, it was generally divided into animations on OTT/VOD/TV channels and animation in theaters based on the route of using animation. Time series analysis is impossible.

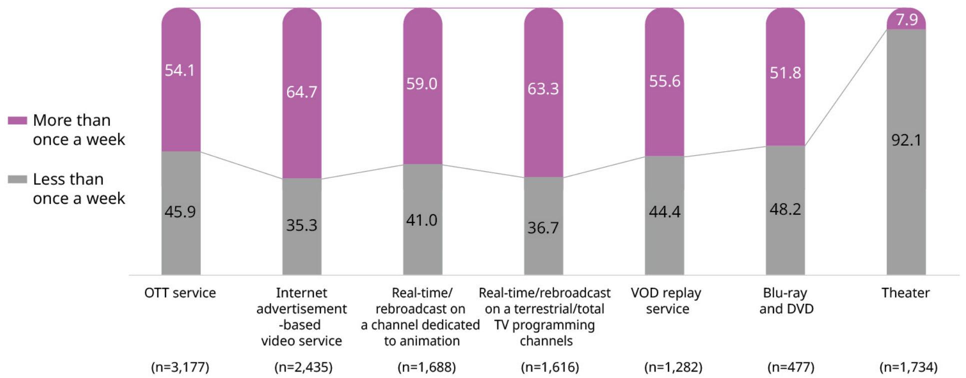
3-2. Frequency Animation Usage by Media

As a result of a survey on the frequency of animation usage by usage channel, the channel with the highest frequency of viewing “More than once a week” was via “Internet advertisement-based video service” with 64.7%. This was followed by “Real-time/rebroadcast on terrestrial/total TV programming channel(63.3%),” “Real-time/rebroadcast on channels dedicated to animation(59.0%),” “VOD replay service(55.6%),” “OTT service(54.1%),” “Blue Ray and DVD”(51.8%), and “Theater”(7.9%).

Looking at respondent characteristics, the proportion of those aged 3 to 9 who watched animation “More than once a week” was relatively high in all usage channels except “Theater”, and “Theater” was relatively high among those in their 20s and 60s.

Figure 3 **Frequency of Animation Usage by Media**

(Base: User by Respective Animation Use Route, Unit: %)



1) New in 2023.

4. Regulary Watched Animation Genres

As a result of a survey on animation genres that people regularly enjoy(Based on 1st+2nd+3rd Ranks), “Science Fiction/Fantasy/Adventure” was the highest at 44.1%, followed by “Comedy(41.5%),” “Drama(40.2%),” “Action(38.2%),” respectively. While the response “Comedy” has been continuing since 2021, “SF/Fantasy/Adventure” and “Family/Children” have shown a decrease.

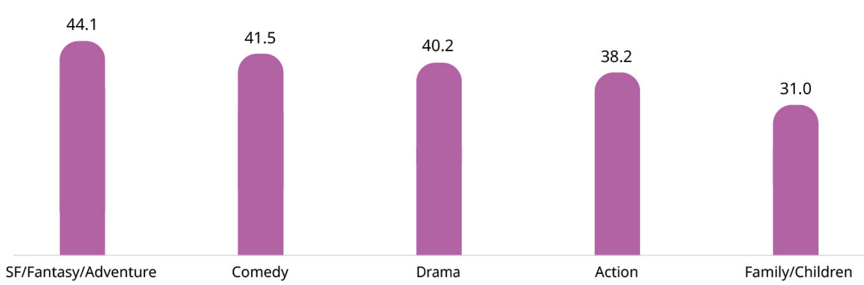
Analyzing the respondents’ characteristics, men tended to prefer “Science Fiction/Fantasy/Adventure,” “Action,” and “Crime/Thriller/Mystery,” while women tended to prefer “Comedy,” “Drama,” “Family/Children,” and “Mellow/Romance.”

In terms of age, the proportion of those in their 50s who enjoy watching “SF/Fantasy/Adventure” and “Action” was the highest, followed by “Comedy” among teenagers, “Drama” among those in their 60s, and “Family/Children” among those aged 3 to 9 appeared relatively high. Except for those aged 3 to 9, younger age groups tend to enjoy watching “comedy”, while older age groups tend to enjoy watching “drama.”

Figure 4 Usual Favorite Animation Genre

03 Top 5 Favorite Animation Genres

(Base: All, Duplicate Responses, Unit: %(based on 1+2+3 rankings), top 5)



5. Selection Criteria when Using Animation

As a result of a survey on selection criteria when using animation(Based on 1st+2nd+3rd Ranks), “Because I like the story” was the highest at 57.3%, followed by “Because I like the characters(42.3%)” and “Because it is popular(40.7%). %),” “Because I like the original work(37.0%)”, etc.

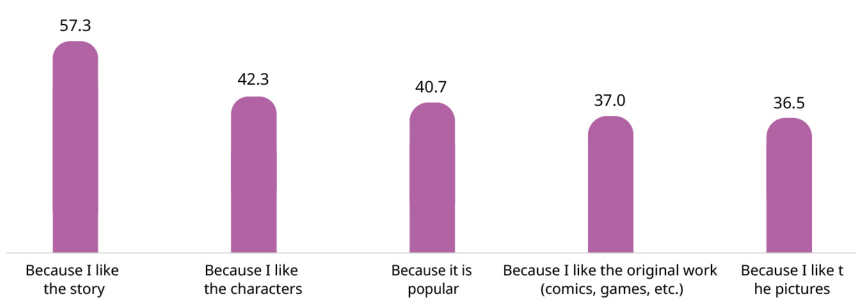
When Examining respondent characteristics, female participants showed a relatively higher preference for “Because I like the story” and “Because I like the artwork,” while male respondents leaned toward “Because I like the original work.”

In terms of age groups, “Because I like the story,” “Because I like the original work,” and “Because I like the genre” are relatively high among those in their 60s, “Because I like the characters” among respondents aged 3 to 9, “Because it is popular” among teenagers, and “Because I like pictures” among those in their 30s and 30s were relatively high.

Figure 5 Selection Criteria when Using Animation

04 Top 5 Selection Criteria when Using Animation

(Base: All, Duplicate Responses, Unit: %(based on 1st+2nd+3rd ranks), top 5)



6. Animation-related Information Acquisition Media

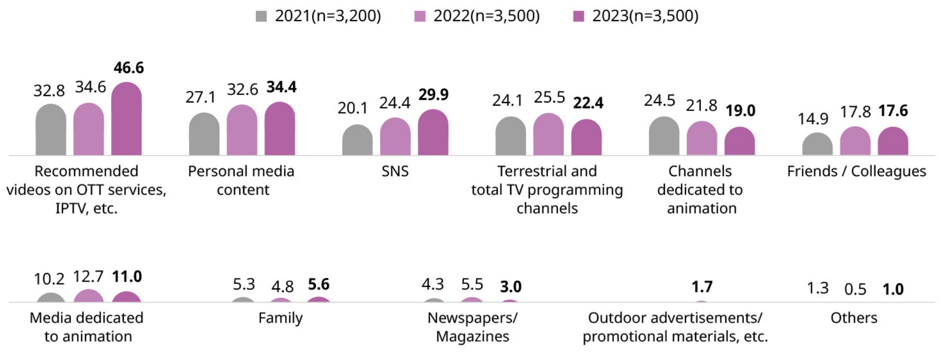
As a result of a survey on animation users' animation-related information acquisition media, it was found that the most information was obtained through "Recommended videos on OTT services or IPTV(46.6%)"(Based on 1st + 2nd Ranks). This was followed by "Personal media content(34.4%)," "Social media(29.9%)," and "Terrestrial and total TV programming channels(22.4%)."

While the usage of "Recommended videos on OTT services, IPTV, etc.," "Personal media content," and "Social media" have continued to increase since 2021, "Channels dedicated to animation" have tended to decrease, and "Terrestrial and total TV programming channels." Furthermore, these trends indicate a decrease compared to the previous year.

When examining the respondent characteristics, the proportion of people in their 60s tend to rely relatively heavily on "Recommended videos from OTT services or IPTV" and "Terrestrial and total TV programming channels" for information Whereas those in their 20s have a relatively high rate of acquiring information through "Personal media content" and "Social media," while for users among ages 3 to 9, "Channels dedicated to animation" and "Friends/Colleagues" were relatively high.

Figure 6 Animation-related Information Acquisition Media

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



1) In 2023, the “Related Events/Festivals/Exhibitions, etc.” and the “Advertisement/Promotional Materials” were deleted.
2) “Outdoor advertisements/promotional materials, etc.” added in 2023.
3) OTT services: Netflix, Disney Plus, YouTube, TVING, Coupang Play, etc.
4) IPTV: SK Btv, KT Genie TV, LG U+tv
5) Personal media content: YouTube, Afreeca TV, Kakao TV, etc.
6) Channels dedicated to animation: Tooniverse, Animax, Talent TV, etc.
7) Social media: Facebook, Instagram, Twitter, Naver Band, etc.
8) Media dedicated to animation: Webzines, blogs, cafes, galleries, etc.

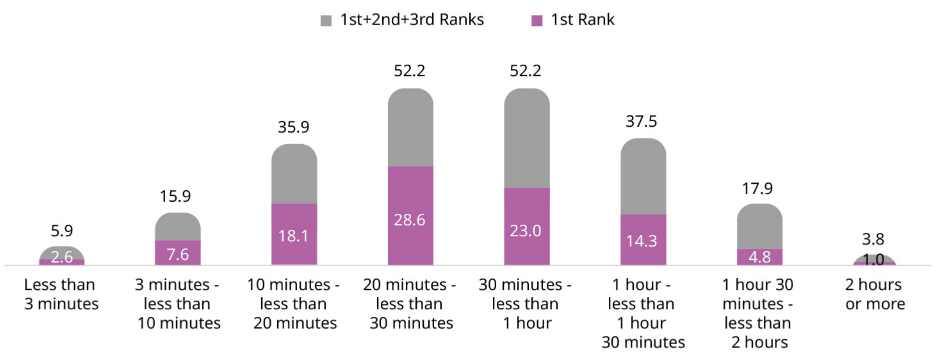
7. Preferred Length of Running-time for Animation Contents

As a result of a survey on the length of running-time preferred when watching animation(Based on 1st+2nd+3rd Ranks), “20 minutes to less than 30 minutes” and “30 minutes to less than 1 hour” were the highest at 52.2%. This was followed by “1 hour to less than 1 hour and 30 minutes(37.5%)” and “10 minutes to less than 20 minutes(35.9%).”

When examining the characteristics of respondents the proportion of people in their 60s preferring works of “30 minutes to less than 1 hour” is relatively high. Additionally, people in their 50s tend to favor works with a duration of “1 hour to less than 1 hour and 30 minutes.”

Figure 7 Preferred Lengths of Running-time for Animation Contents

(Base: All, Unit: %)



1) New in 2023

8. Preference for New Creative Original Animation

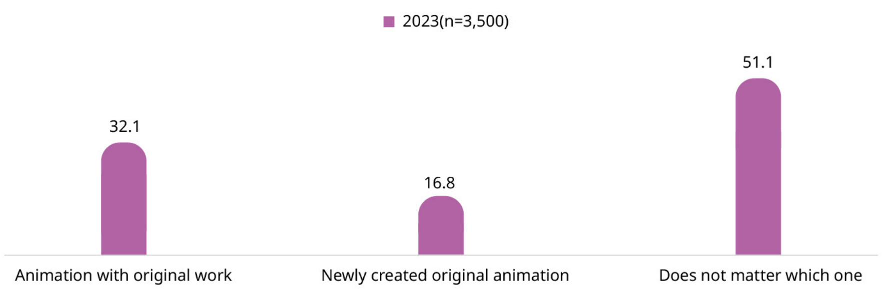
As a result of a survey on preferences for newly created original animation, “animation with original works(32.1%)” showed a higher preference rate than “newly created original animation(16.8%).”

Meanwhile, 51.1% of the respondents said “Does not matter which one.”

Looking at respondent’s characteristics, the proportion of people in their 60s preferring “Animation with original work,” those in their 20s preferring “Newly created original animation,” and those in their 30s preferring “Does not matter which one” was relatively high.

Figure 8 Preference for New Creative Original Animation

(Base: All, Unit: %)



1) New in 2023

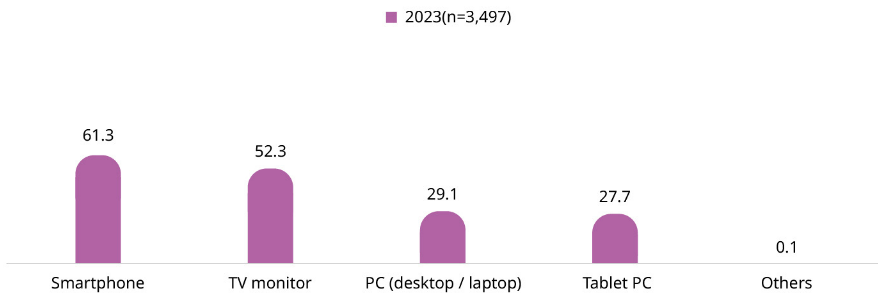
9. Animation Viewing Device

As a result of a survey on the devices used when watching animation, the highest number of cases of watching using “smartphones” was 61.3%, followed by “TV monitor(52.3%),” “PC(29.1%),” and “Tablet PC(27.7%).”

When analyzing the characteristics of respondents, the proportion of those in their 20s have a relatively high preference for watching on “Smartphones,” while those aged 3 to 9 show a higher preference for “TV monitors” and “Tablet PCs.” On the other hand, individuals in their 60s tend to favor “PC” for their viewing.

Figure 9 Animation Viewing Device

(Base: OTT/VOD/TV Channel Animation Users, Duplicate Responses, Unit: %)



1) New in 2023

10. Animation Viewing Channels(OTT Service/Channels Dedicated to Animation)

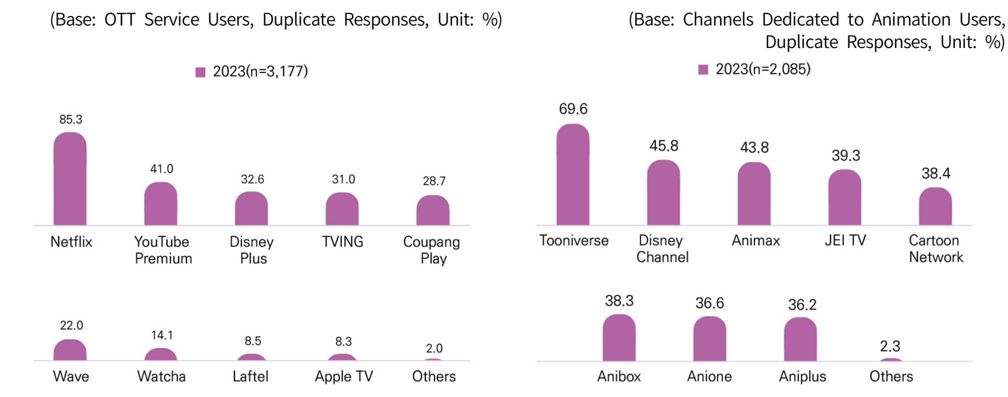
As a result of a survey on the platform used when watching animation through OTT services, “Netflix” was the highest at 85.3%, followed by “YouTube Premium(41.0%),” “Disney Plus(32.6%)”, and “TVing”(31.0%), respectively.

Examining respondent’s characteristics, there is a relatively high percentage of individuals in their 50s watching animation on “Netflix”, while those in their 3 to 9 years old preferred “Disney Plus” and “YouTube Premium”, and those in their 20s showed higher preferrence for watching animation on “TVing” and “Wave.”

As a result of a survey, “Tooniverse” was the highest at 69.6%, followed by “Disney Channel(45.8%),” “Animax(43.8%),” and “JEI TV(39.3%),” respectively.

Looking at respondent characteristics, the proportion of those aged 3 to 9 and teenagers watching animation through “Tooniverse” is relatively high, while the proportion of those aged 3 to 9 watching “Disney Channel” and “JEI TV”, and teenagers watching “Animax,” “Cartoon Network,” “Anibox,” “Anyone,” and “Aniplus” is relatively high.

Figure 10 Animation Viewing Channels(OTT Service/Channels Dedicated to Animation)



1) New in 2023

11. Pay-per-view Animation Usage

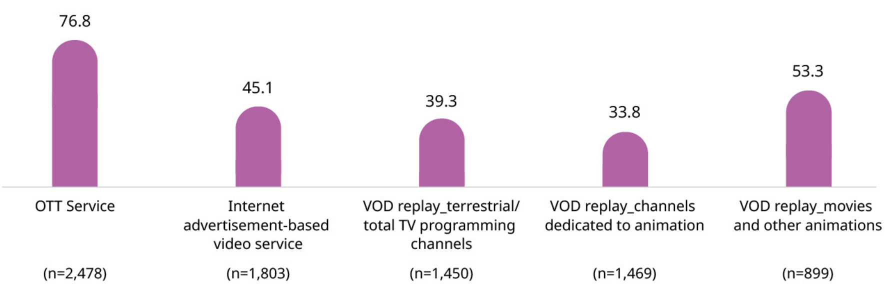
11-1. Pay-per-view Animation Service Usage

As a result of a survey on the experience of using pay-per-view services for watching animation, “OTT service” was the most popular at 76.8%, followed by “VOD replay_movies and other animations(53.3%),” “Internet advertisement-based video service(45.1%),” and “VOD replay_terrestrial/total TV programming channels(39.3%).”

Analyzing respondent characteristics, those in their 20s have a relatively high level of experiencing pay-per-view service on “OTT services,” “VOD replays_movies and other animation content,” and “Internet advertisement-based video services.” Conversely, those in their 40s have a relatively high level of using “VOD replays_terrestrial/total TV programming channels” and “VOD replay_channels dedicated to animation.”

Figure 11 Pay-per-view Animation Service Usage

(Base: Users per Animation Use Media, Unit: %)



1) New in 2023

11-2. Pay-per-view Animation Payment Method

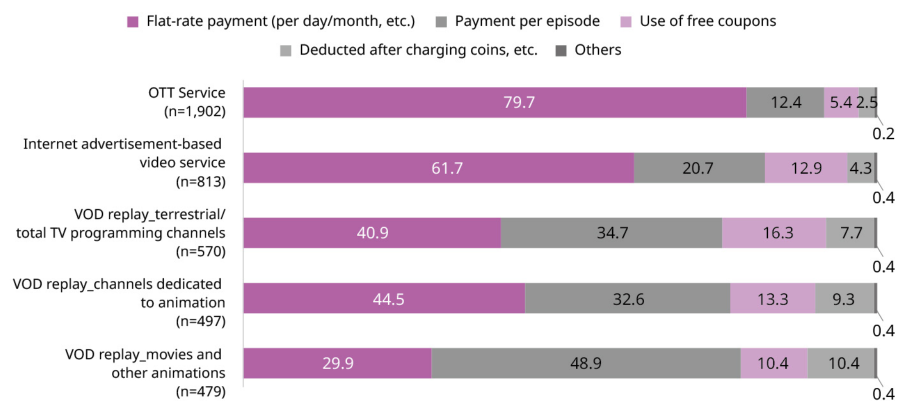
As a result of a survey on the payment methods mainly used when watching animation, “OTT service,” “Internet advertisement-based video service,” “VOD replay_terrestrial/total TV programming channel,” “VOD replay_channels dedicated to animation,” the rate of using “Flat-rate payment” was the highest, and in particular, “OTT service” showed the highest rate of using “Flat-rate payment” at 79.7%.

On the other hand, “payment per episode(48.9%)” was the highest for “VOD replay_movies and other animations.”

Examining respondent characteristics, those who in their 20s and those in their 30s responded “Flat-rate payment” for “OTT service” and “Internet advertisement-based video service,” “VOD replay_terrestrial/total TV programming channel,” and “VOD replay_channels dedicated to animation” the most while those who in their 60s responded “Payment per episode” the most for “VOD replay_movies and other animations.”

Figure 12 Pay-per-view Animation Payment Method

(Base: Pay-per-view Service Users per Animation Use Media, Unit: %)



1) New in 2023

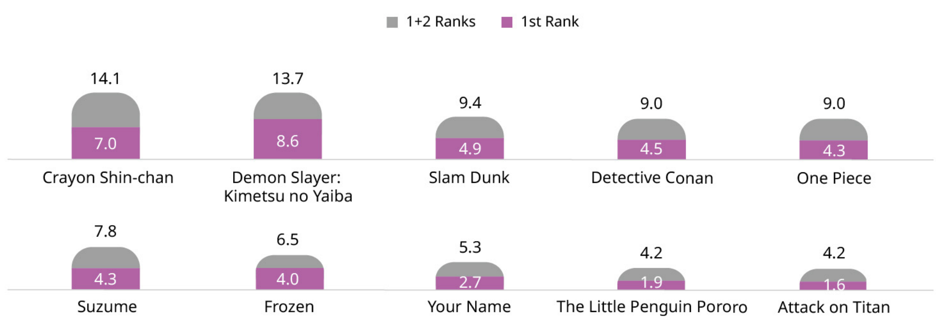
12. Titles of Popular Animation

As a result of a survey on animation works enjoyed watching on OTT/VOD/TV channels(Based on 1st+2nd+3rd Ranks), "Crayon Shin-chan(14.1%)" was the the most popular, followed by "Demon Slayer: Kimetsu no Yaiba(13.7%)," "Slam Dunk(9.4%)," "Detective Conan(9.0%)," and "One Piece(9.0%)."

Investigating respondent characteristics, the percentage of those in their 20s who enjoyed watching "Crayon Shin-chan," "Demon Slayer: Kimetsu no Yaiba," and "Detective Conan" was relatively high, while the proportion of those in their 40s who enjoyed watching "Slam Dunk" and those in their 30s enjoyed "One Piece" appeared relatively high.

Figure 13 Titles of Popular Animation

(Base: OTT/VOD/TV Channel Animation Users, Duplicate Responses, Unit: %(Based on 1st+2nd+3rd Ranks), Top 10)



1) New in 2023
2) Subjective question.
3) Only showed top 10 animations.

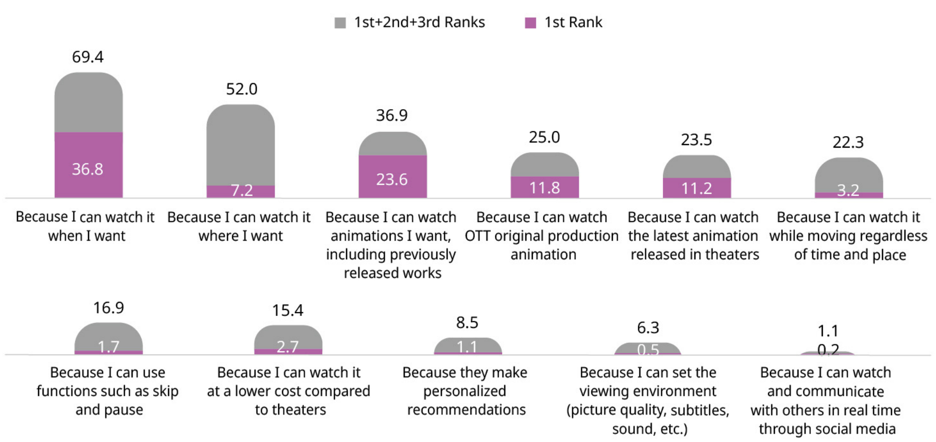
13. Reasons for Watching Animation Via OTT Service

As a result of a survey on the reasons for watching animation via OTT services(based on 1st+2nd+3rd Ranks), "Because I can watch it when I want" was the highest at 69.4%, followed by "Because I can watch it where I want(52.0%)" and "Because I can watch animations I want, including previously released works(36.9%)."

Looking at respondent characteristics, the response was relatively high among those in their 60s, "Because I can watch it when I want," among those in their 30s, "Because I can watch it where I want," and among those in their 20s, "Because I can watch animations I want, including previously released works." Among teenagers, the response "Because I can watch OTT original production animation" was relatively high.

Figure 14 Reasons for Watching Animation Via OTT Service

(Base: OTT 서비스 통한 애니메이션 시청 경험자, Unit: %)



1) New in 2023

14. How Animation Selection Works on OTT Services

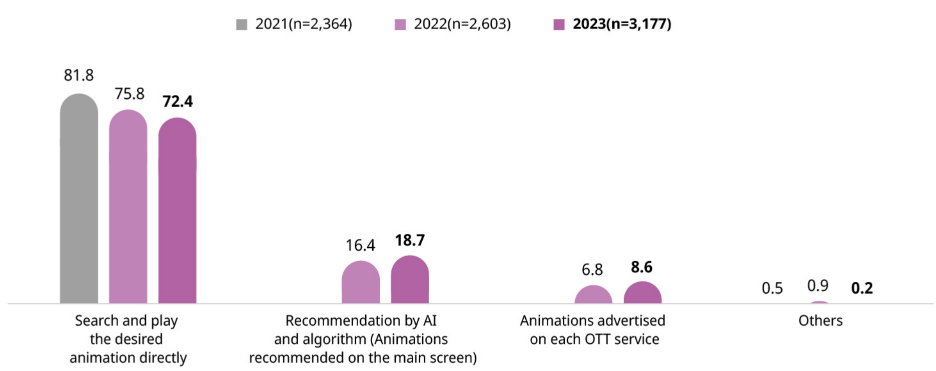
As a result of a survey on how animation selection works on an OTT service, “Search and play the desired work directly” ranked the highest at 72.4%, followed by “Recommendation by AI and algorithm(18.7%)”, and “Animations advertised on each OTT service” at 8.6%.

While the rate of “Search and play the desired work directly” decreased slightly compared to the previous year, the rate of selecting “Recommendation by AI and algorithm” and “Animations advertised on each OTT service” increased slightly compared to the previous year.

Examining respondent characteristics, those in their 40s displayed a relatively high preference for “Search and play the desired work directly,” while those aged 3 to 9 had a relatively high rate of selecting through “Recommendation by AI and algorithm,” and those in their 60s had a relatively high rate of selecting through “Animations advertised on each OTT service.”

Figure 15 How Animation Selectino Works on OTT Services

(Base: Users with Experience of Watching Animation Using OTT Services, Unit: %)



1) “Select and play content recommended(advertised) within the service” in 2021 was subdivided into “Recommendation by AI and algorithm” and “Animations advertised on each OTT service” in 2022.
2) “Select and play content recommended(advertised) within the service” was 17.7% in 2021

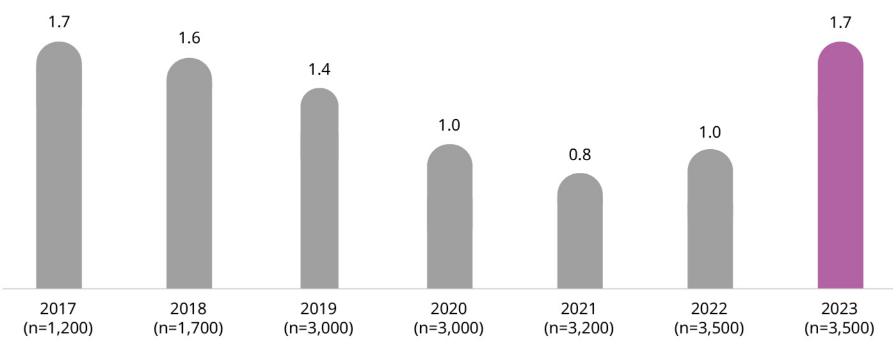
15. Number of Theater Animation Viewings

According to a survey on the average number of times users saw animations in theater over the past year, it was found to be about 1.7 times. The average number of viewings has continued to decline every year since 2017, but turned to an upward trend in 2022, and rose 0.7 times in 2023 compared to the previous year.

Looking at respondent characteristics, the average number of times users saw animations was relatively high among 3-9 year olds and teenagers.

Figure 16 Number of Theater Animatino Viewings

(Base: All, Unit: Times)



16. Monthly Average Expense on Animation

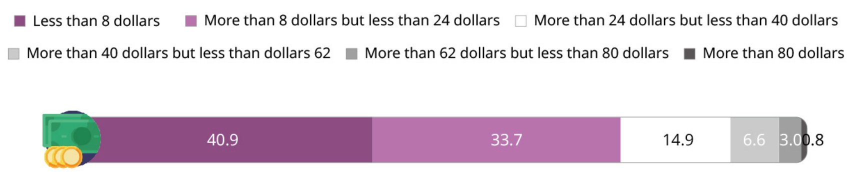
As a result of a survey on the average monthly amount that users would spend to watch animation, "Less than $8" was the highest at 40.9%, followed by "about $8 to less than $24" at 33.7%, "$24 to less than $40" at 14.9%.

Looking at respondent characteristics, the response, "Less than $8" was relatively high among those in their 30s, and the response, "$8 to less than $24" at 33.7% was relatively high among those in their 50s and 60s.

Figure 17 Monthly Average Expense on Animation

05 Monthly Average Expense

(Base: All, Unit: %)



1) 2022 average exchange rate: 1 U.S. dollar = 1,290 won(Woori Bank)

17. Animation IP Extended Content Usage

For the preferred types of animation using other genre's content IPs, the preference for animation using "Comics(webtoons/paper comics)" was the highest at 62.9%, followed by "Character(38.7%)," "Movie(36.8%)," and "Publication(35.0%)."

Preferences for animation using IP were relatively high for those in their 50s for "Comics," for those aged 3 to 9 for "Character," and for those in their 60s for "Movies."

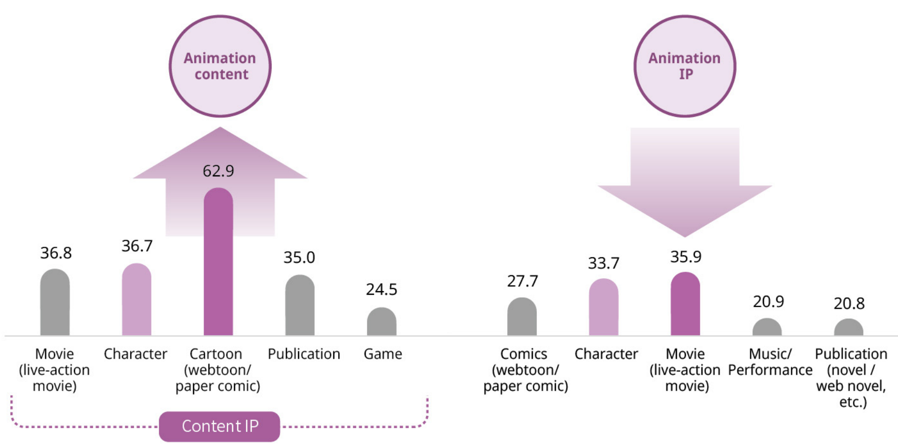
As a result of a survey on the experience of using content of other genres using animation IP, "Movie" was the highest at 35.9%, followed by "Character(33.7%)," "Comics(27.7%)," and "Music/Performances(20.9%)," respectively.

Looking at respondent characteristics, the use of "Movie" was relatively high among those in their 60s, the use of "Character" and "Music/performance" was relatively high among those aged 3 to 9, and the use of "Comics" was relatively high among teenagers.

Figure 18 Animation IP Extended Content Usage

01 TOP 5 preferred types of animation using other genre's IP
(Base: All, Duplicate Responses, Unit: %(Based on 1st+2nd+3rd Ranks), Top 5)

02 TOP 5 experience of using other genre's content derived from animation IP
(Base: All, Duplicate Responses, Unit: %, Top 5)



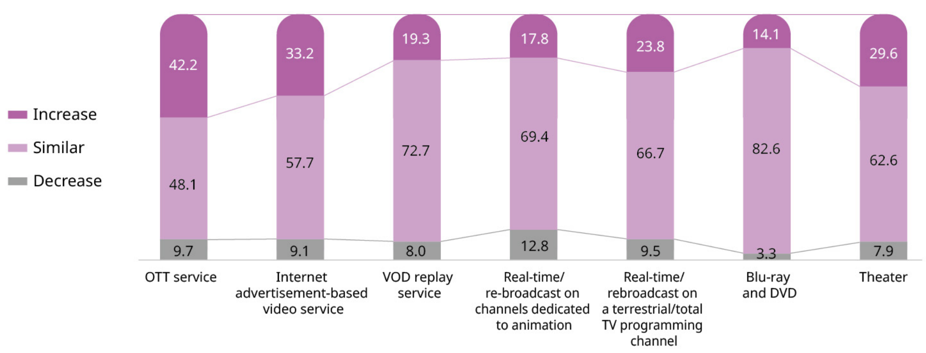
18. Predictions on Future Animation Usage Changes

As a result of a survey on changes in the use of animation in the future, the response that usage time will "increase" was highest for "OTT services" at 42.2% followed by "Internet advertisement-based video service(33.2%)," "Theater(29.6%)," "Real-time/rebroadcast on channels dedicated to animation(23.8%)," "VOD replay service(19.3%)," and "terrestrial/total TV programming channels(17.8%)," "Blu-ray and DVD(14.1%)."

By respondents' characteristics, those in their 20s responded "OTT services," those in their teens responded "Internet advertisement-based video service," "Channels dedicated to animation," and "Blu-ray and DVD," and there was a relatively high response among those aged 3 to 9 who responded "VOD replay service" and "Theater" and among those in their 60s who responded that the time spent using "Terrestrial/comprehensive channels" would increase.

Figure 19 Change in Duration of Watching Animation

(Base: All, Unit: %)



1) New in 2023

PART 2. Animation Content Support

1. Support for Strengthening Production Capabilities

1-1. Animation Bootcamp

Animation Boot Camp initiative has been promoted since 2017 with the purpose of advancing the development of of pre-production plans for animations and providing support for primary production phases. For approximately five months, we offered coaching sessions led by experts in various fields, including dedicated coaching producers, scenario and translation experts, and investment firms. This comprehensive support was designed to enhance the quality of the animation project in the planning stage and its competitiveness in attracting investment. Dedicated PD coaching and expert mentoring were provided to support story sophistication and complete planning and development, and through indirect support, bibles and trailers were produced to attract investment. A total of 18 projects were selected, and the final 16 projects were completed. Through the Demo Day event, which is the final competition pitching event, one best project, <Baby Age>, three excellent projects <Dark Side>, <Mr. Ryu Dodal>, and <Jam, Jams!>, were selected for recognition.

1-2. Independent Animation Production Support

Under the umbrella of the 2022 Independent Animation Production Support Project, we extended our support to facilitate the production of three independent feature-length animations, including Ice Cream Studio's <Aegi-Yeonggam>, and 12 independent short animations, including Studio Mantae's <The Room of Ghost>.

1-3. Domestic animation production support

The Domestic Animation Production Support Project was launched to assist main production and series completion of projects that have completed the pre-production. Considering the characteristics of the animation content production field, which demands a timeline of more than two years from initial content planning to full production, this support was subdivided into initial main story → main story → seasonal work production support, contributing to the revitalization of content production by animation industry.

In the initial main feature section, we carried out a project geared toward facilitating the initial main video production stage for full-scale investment attraction and joint production after planning and development with the goal of producing animations longer than three minutes within the agreed period. In 2022, a total of 20 works were supported, including ENPIX Plus's <Kyle and Fugly Friends>.

Within the main section, we implemented a project to support the completion of projects that are in the production stabilization stage after pre-production with the goal of producing animations longer than 80 minutes series within the agreed period based on. Under this initiative, we provided support for the production of 13 works, including Durufix's <My Daughter is a Zombie> and Campfire Aniworks's <The Bigfoots on

Topsy-Turvy Island>, achieving meaningful results such as exporting to the global market and broadcasting.

Seasonal Support project, designed to bolster the global competitiveness of domestic animation, focuses on supporting the main production of subsequent seasons for projects that have already completed their main production and initial screening. We supported four works, including Anyzac's <Zombie Dumb Season 3> and Studio TNT's <Hero Circle Season 2>, proving the excellence of content in domestic and international markets.

1-4. Next-generation animation production support

The Next-Generation Animation Production Support Project supports animations that implement various expression techniques, planning, or production methods regardless of platform, such as holographic videos for performances, animations for installation exhibitions, and interactive VR videos, with the purpose of increasing the diversity of animation and discovering next-generation animation.

In 2022, a total of twenty-one animations were produced through the Next Generation Animation Production Support Project. Using various technologies such as independent metaverse, AR, VR, and NFT, various animations such as Dongwoo A&E's <Ring Ring Wondercle> and Alimoli Studio's <Explorers in Dreams> were produced, and works such as Studio Animal's <Chaotic Melody> and Neotany Media's <Petit and Bella> are being aired through multi-platform services, uploaded to various platforms, such as YouTube, TikTok, Instagram, and Facebook.

1-5. IP-Driven Animation Production Support

The IP-Driven Animation Production Support is a newly launched in 2022 aimed at endorsing animations utilizing domestic IP from various genres, such as webtoons, novels, and games. The total business budget is KRW 2 billion. With the objective of producing series exceeding 40 minutes in length, we increased the diversity of animation by supporting the production of seven works, including Toonymotion's <Becoming the Monarch Season 1>, whose original IP is a webtoon, and Crazy Bird Studio's <Toltori and Tolryongi>, which utilizes the character brand.

1-6. Fostering Animation Human Resources

The Animation Human Resources Fostering Project is designed to cultivate professionals who can seamlessly transition into the animation industry through a field-oriented training program for animation professionals. It operated practice-based animation courses using the Unreal Engine and 2D/3D animation field experts training course.

We issued a recruitment announcement targeting aspiring animation trainees and production companies interested in animation. A total of 35 companies, and selected and matched 45 trainees who have shown interests. Our team of instructors, comprised of animation experts, provided expert mentoring on using the Unreal Engine for animation, animation directing and production theory, metaverse 3D modeling training, and individual and team project production to strengthen trainees' capabilities through corporate on-site training by animation professionals and their competitiveness for employment. Fifty-one percent of the people selected through this process became regular employees, making a contribution to the growth of human resources and job creation within animation production companies.

2. Support for Distribution

2-1. Domestic Animation Screening Event

In 2022, we organized both offline and online screenings of outstanding domestic animations. Online screenings were promoted to provide culturally vulnerable groups with opportunities to experience various cultures and bridge regional cultural gaps and were attended by 71 children's centers and after-school academies for youth across the country and watched by 12,876 people.

In addition, an animation screening was held at the animation gathering held for two days on October 8 and 9 at the Children's Cultural Center of the National Asia Culture Center, showing two full-length animations: <Willvengers: Mysterious Camping> and <Chun Tae-il>, and six short animations, including <Saturday's Apartment> and <Bad Buddy> and were watched by 384 children in the Gwangju and Jeollanam-do regions. During the same period, a total of 26 works by Korean animation directors who are attracting attention overseas were screened at the Busan International Film Festival under the theme of <Must-See Korean Animation Artists>, receiving a great response from filmmakers and general audiences.

In addition, a total of 44 works from five sections of Korean independent animation were screened at the Canadian Fantasia Film Festival held in Montreal, Canada, garnered significant acclaim within the local community. <Chun Tae-il> won the bronze prize in the feature-length category, and <Amen A Man> won the bronze prize in the short-length category. Five works were awarded prizes, including the gold prize.

2-2. Support for the Submissions of Independent Animations to Overseas Film Festival

We supported submissions to overseas film festivals to enhance the competitive edge of domestic independent animation creators in international markets and bolster the foundation for their global market presence. We encouraged the creation and production by the domestic animation creators, putting profound impact on inspiring creativity and elevating the global recognition of Korean animation.

In 2022, 2,163 films were submitted to 230 film festivals overseas, and 244 films were screened at 144 film festivals and won awards in 43 categories at 24 film festivals.

Notably, Director Moon Soo-jin's <Persona> was the first domestic animation work to compete in the short film competition section of the Cannes Film Festival, and Director Choi Yu-jin's <Love Spark> was featured in an animation screening of at the Ukraine War Refugee Camp in Hungary hosted by Japan's TBS broadcasting station and heightened global awareness of Korean animation.

2023
动画
产业白皮书

摘　要

Animation

第一章　动画用户动向

1. 调查设计

本次调查的对象是居住在全国的3~69周岁的国民中，在最近一年内“2~3个月1次以上”使用过动画内容的人。

调查中将调查执行机构((株)全球调查)所拥有的全国调查面板117万名作为抽样框，考虑到截止2023年5月统计厅对居民登记人口统计资料的各地区、性别、年龄段人口结构比率以及之前三年动画用户实况调查的内容使用率，发送在线问卷调查电子邮件，然后根据是否使用动画内容，直到完成目标样本为止。

调查周期为每年一次，如果没有特别提及，有关文化产品使用调查内容的回答标准，则定为2022年6月~2023年5月(最近一年)期间。资料收集是在2023年6~7月期间(2023.6.2.~7.14.)通过在线问卷调查的方法进行的。

收集到的资料根据专业的验证过程经过了编辑和整理，在此过程中针对资料的可信度存疑的情况，将补充或废弃对应资料。另外，还对4个小组进行了小规模焦点小组访谈(Focus Group Interview，FGI)，通过对动画片使用情况的个案收集，对在线问卷调查结果的解释提供了参考。

表 1 动画用户线上问卷调查设计

区分	内容
目标募集群体	3周岁~69周岁全体国民
调查募集群体	3周岁~69周岁全体国民中最近一年内“2~3个月使用一次以上”动画内容的用户
调查地区	全国
资料收集方法	通过结构化的问卷表进行线上问卷调查
抽样框	截至2023年5月，由行政安全部提供的居民登记人口统计现状。 将调查执行机构所拥有的全国调查面板117万人用于抽样框。
抽样方法	性别/年龄段/各地区按比率分配
标本误差	95%可信水平上 ±1.62%p
有效标本	3,500名(对3,682名进行调查以后以3,500名赋予后期加权值) 为了提高婴幼儿(3~9岁)对象的标本可信度，以上一年度全体受访者对比3-9岁受访者的比率为准，将3~9岁段年龄500名作为318名赋予后期加权值。
资料收集期间	2023年6~7月(2023.6.2.~ 7.14.)
调查机构	韩国文化产业振兴院
调查执行	(株)全球调查

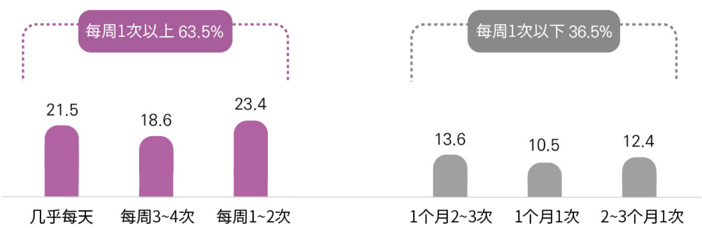
2. 动画内容使用频率

对动画内容使用频率的调查结果显示，“每周1次以上”占63.5%，2021年以后呈持续小幅增长。从受访者的特点来看，年龄段越低，“每周1次以上”的动画片使用率越高，尤其在3~9岁人群中去比率最高。

图 1 动画内容使用频率

01 动画使用频率

(Base: 全体, 单位: %)



3. 动画内容使用途径

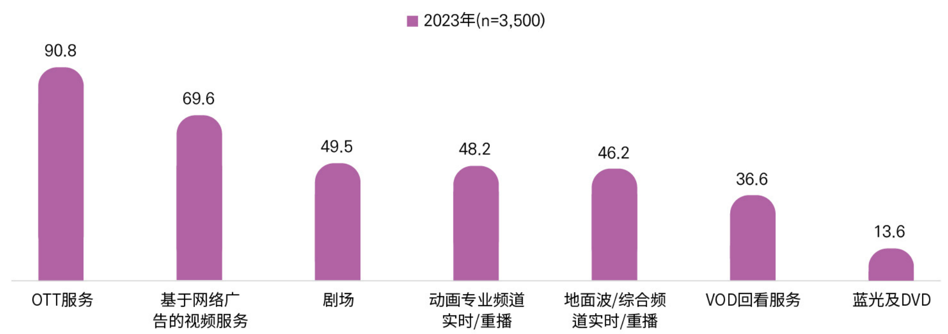
3-1. 动画使用途径

对观看动画片时所使用途径的调查结果显示，“OTT服务”最多，占90.8%(可重复回答)。其次是“基于网络广告的视频服务(69.6%)”、“剧场(49.5%)”、“动画专业频道实时/重播(48.2%)”等。

从受访者的特点来看，在20岁段的人群中通过“OTT服务”，3~9岁的人群中通过“基于网络广告的视频服务”、“剧场”和“动画专业频道实时/重播”，60岁段人群中通过“地面波/综合频道实时/重播”观看动画片的比例相对较高。

图 2 动画使用途径

(Base: 全体，重复回答，单位: %)



1) 2023年新设问项。
2) 截止2022年，以使用设备为基础大致分为电视显示器、智能设备和剧场，但2023年以动画使用途径为基础大致分为OTT/VOD/TV频道动画和剧场动画，因此无法进行时间序列分析。

3-2. 按使用途径的动画使用频率

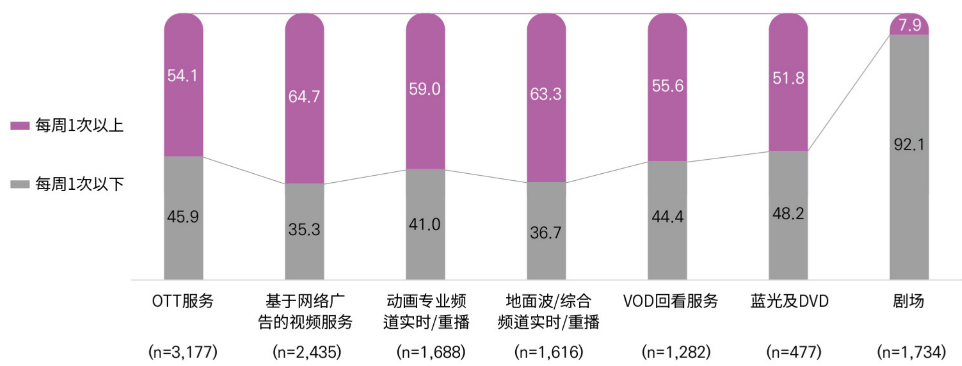
对各使用途径动画使用频率的调查结果显示，“每周1次以上”观看的频率最高的途径是“基于网络广告的视频服务”，占64.7%。其次是“地面波/综合频道实时/重播(63.3%)”、“动画专业频道实时/重播(59.0%)”、“VOD回看服务(55.6%)”、“OTT服务

(54.1%)”、“蓝光及DVD(51.8%)”、“剧场(7.9%)”等。

从受访者的特点来看，在3-9岁人群中在除“剧场”以外的所有使用途径中，“每周1次以上”观看动画片的比例相对较高，“剧场”在20岁段和60岁段人群中相对较高。

图 3 按使用途径的动画使用频率

(Base: 各动画使用途径的用户，单位: %)



1) 2023年新设问项。

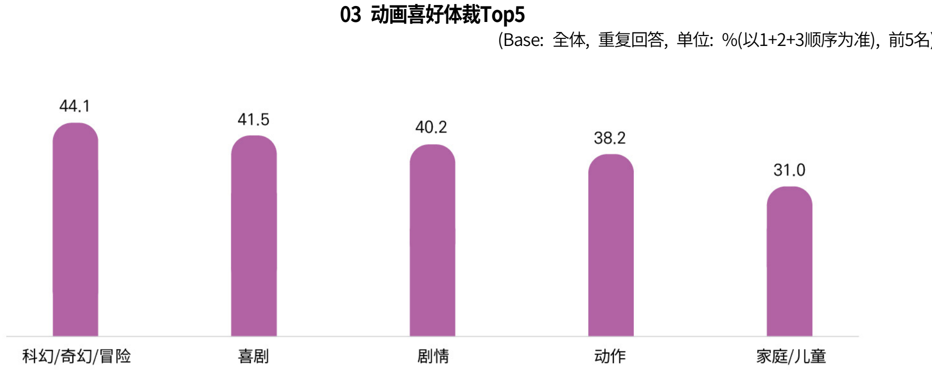
4. 平时喜欢看的动画体裁

对平时喜欢看的动画体裁(以1+2+3顺序为准)的调查结果显示，“科幻/奇幻/冒险”最高，占44.1%，其次是“喜剧(41.5%)”、“剧情(40.2%)”、“动作(38.2%)”等。“喜剧”的回答在2021年以后呈持续增加的趋势，而“科幻/奇幻/冒险”和“家庭/儿童”则呈减少趋势。

从受访者的特点来看，男性喜欢看“科幻/奇幻/冒险”和“动作”、“犯罪/惊悚/悬疑”，而女性则更喜欢看“喜剧”、“剧情”、“家庭/儿童”、“爱情/罗曼史”体裁。

从年龄来看，在50岁段人群中喜欢看“科幻/奇幻/冒险”和“动作”的比率较高，在10岁段人群中喜欢看“喜剧”，60岁段人群中喜欢看“剧情”，3~9岁的人群中喜欢看“家庭/儿童”的比率相对较高。除3~9岁外，年龄段越低，越喜欢看“喜剧”，年龄段越高，越喜欢看“电视剧”。

图 4 平时喜欢看的动画体裁



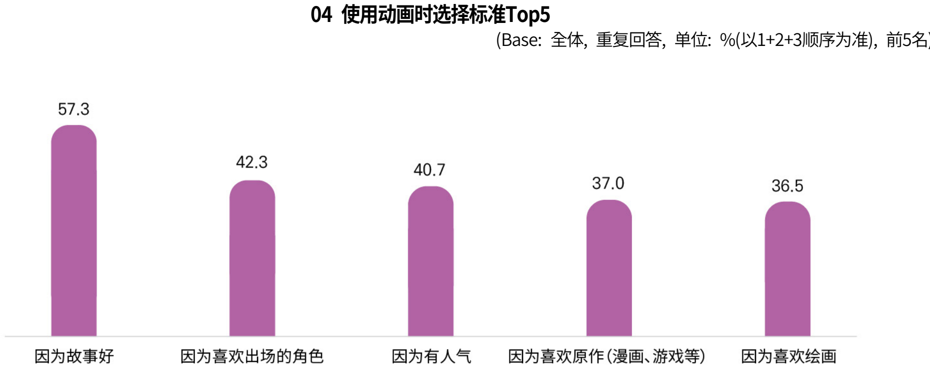
5. 使用动画时选择标准

对使用动画片时的选择标准(以1+2+3顺序为准)的调查结果显示，“因为故事好”最多，占57.3%，其次是“因为喜欢出场的角色(42.3%)”、“因为有人气(40.7%)”、“因为喜欢原作(37.0%)”等。

从受访者的特点来看，女性回答“因为故事好”和“因为绘画好”，男性回答“因为喜欢原作”的相对较多。

从年龄来看，在60岁段人群中回答“因为故事好”、“因为喜欢原作”和“因为体裁好”的相对较多，3~9岁人群中回答“因为喜欢出场的角色”、10岁段人群中回答“因为有人气”、20岁段和30岁段人群中回答“因为喜欢绘画”的比率相对较高。

图 5 使用动画时选择标准



6. 获取动画相关信息的途径

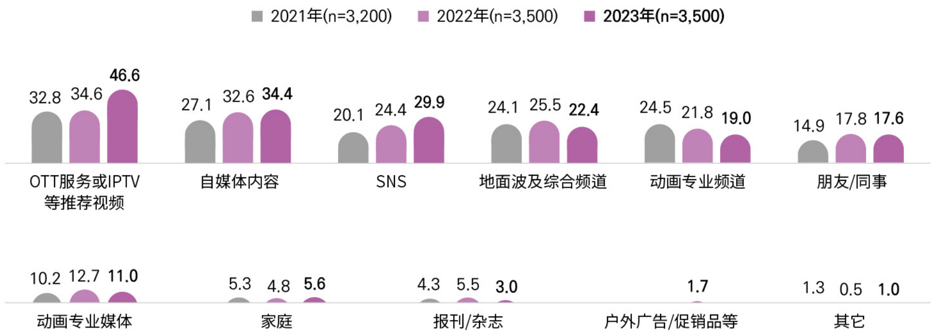
对动画用户们获取动画相关信息的途径的调查结果显示，通过"OTT服务或IPTV等的推荐视频(46.6%)"的回答最多(以1+2顺序为准)。其次是"自媒体内容(34.4%)"、"SNS(29.9%)"、"地面波和综合频道(22.4%)"等。

"OTT服务或IPTV等的推荐视频"、"自媒体内容"、"SNS"自2021年以来呈持续增加趋势，而"动画专业频道"则呈减少趋势，"地面波和综合频道"也同比减少。

从受访者的特点来看，在60岁段人群中通过"OTT服务或IPTV等的推荐视频"和"地面波及综合频道"获取信息的比率相对较高，在20岁段人群中通过"自媒体内容"和"SNS"，在3-9岁人群中通过"动画专业频道"和"朋友/同事"获取信息的比率相对较高。

图 6 动画相关信息取得途径

(Base: 全体, 重复回答, 单位: %(以1+2顺序为准))



1) 2023年 删除“相关活动/庆典/博览会等”选项及“广告/宣传品”选项。
2) 2023年 新增“户外广告/促销品等”选项。
3) OTT服务: Netflix、Disney Plus、Youtube、Tiving、Coupang Play等
4) IPTV: SK Btv、KT Genie tv、LG U+tv
5) 自媒体内容: Youtube、Africa TV、kakao TV等
6) 动画专业频道: Tooniverse、Animax、才艺TV等
7) SNS: Facebook、Instagram、Twitter、NAVER BAND等
8) 动画专业媒体: 网络杂志、博客、社区、画廊等

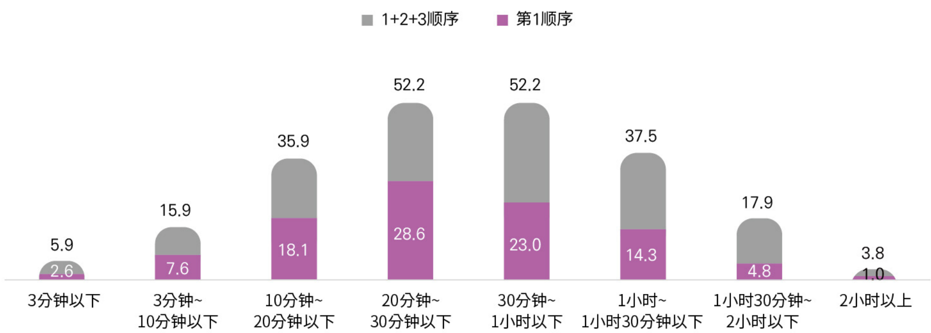
7. 喜欢的动画作品长度

对观看动画片时喜欢的作品长度(以1+2+3顺序为准)的调查结果显示，“20分钟~30分钟以下”和“30分钟~1小时以下”的比例最高，达到52.2%。其次是“1小时~1小时30分钟以下(37.5%)”、“10分钟~20分钟以下(35.9%)”等。

从受访者的特点来看，在60岁段人群中喜欢“30分钟~1小时以下”作品的比率相对较高，在3-9岁人群中喜欢“10分钟~20分钟以下”和“20分钟~30分钟以下”，在50岁段人群中喜欢“1小时~1小时30分钟以下”的比率相对较高。

图 7 喜欢的动画作品长度

(Base: 全体, 单位: %)



1) 2023年新设问项。

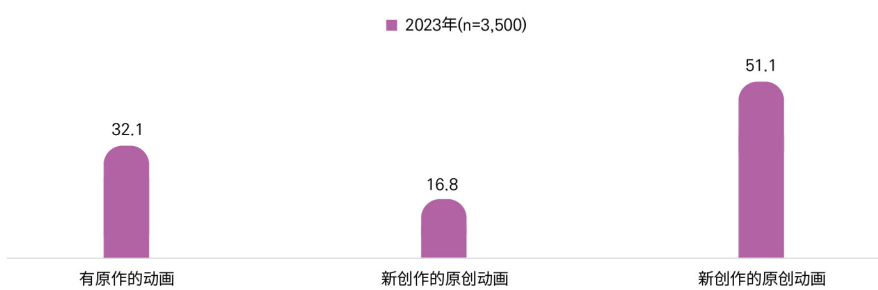
8. 新创作原创动画喜欢度

对新创作原创动画片喜欢度的调查结果显示，对“有原作的动画片(32.1%)”的喜欢度比率高于“新创作的原创动画片(16.8%)”。另外，51.1%的人认为“都无所谓”。

从受访者的特点来看，在60岁段人群中喜欢“有原作的动画片”，在20岁段人群中喜欢“新创作的原创动画片”的比例相对较高，而在30岁段人群中回答“都无所谓”的比例相对较高。

图 8 新创作原创动画喜欢度

(Base: 全体, 单位: %)



1) 2023年新设问项。

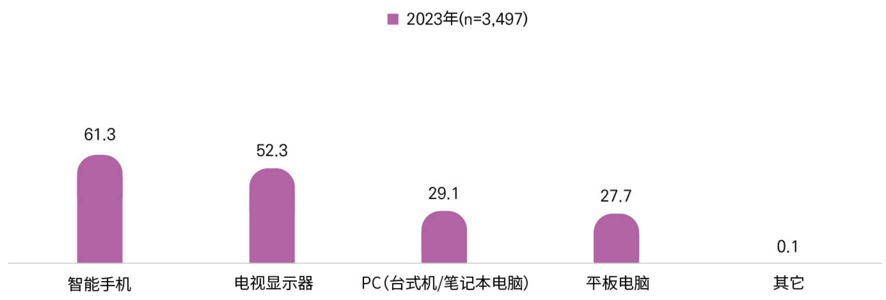
9. 观看动画时使用设备

对观看动画片时使用设备的调查结果显示，使用“智能手机”观看的比率最高，占61.3%。其次是“电视显示器(52.3%)”、“PC(29.1%)”、“平板电脑(27.7%)”等。

从受访者的特点来看，在20岁段人群中使用“智能手机”观看的比例相对较高，在3-9岁人群中使用“电视显示器”和“平板电脑”观看的比例相对较高，在60岁段人群中使用“电脑”观看的比例相对较高。

图 9 观看动画时使用设备

(Base: OTT/VOD/TV频道等动画用户，重复回答，单位：%)



1) 2023年新设问项。

10. 动画观看频道(OTT服务/动画专业频道)

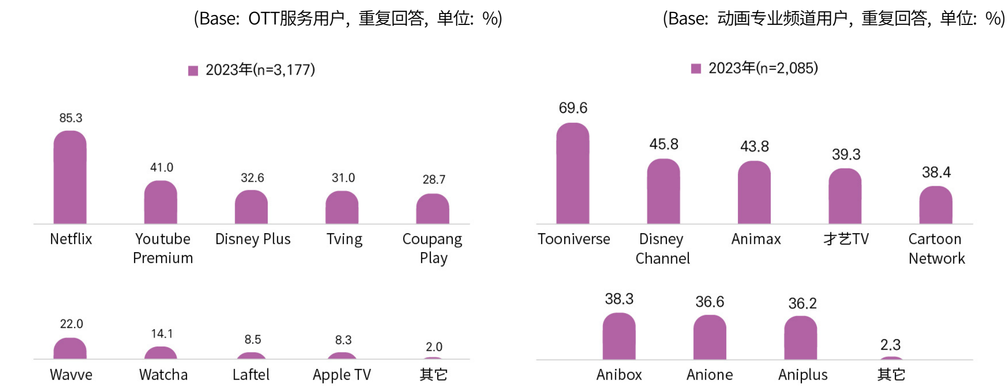
对通过OTT服务观看动画片时使用平台的调查结果显示，“Netflix”最高，占85.3%，其次是“Youtube Premium(41.0%)”、“Disney Plus(32.6%)”、“Tiving(31.0%)”等。

从受访者的特点来看，在50岁段人群中看通过“Netflix”，在3-9岁人群中通过“Disney Plus”和“Youtube Premium”，在20岁段人群中通过“Tiving”和“Wavve”观看动画的比率相对较高。

对通过动画专业频道观看动画时所使用频道的调查结果显示，“Tooniverse”最高，占69.6%，其次是“Disney Channel(45.8%)”、“Animax(43.8%)”、“才艺电视(39.3%)”等。

从受访者的特点来看，在3-9岁和10岁段人群中用“Tooniverse”观看动画片的比率相对较高，在3-9岁人群中用“Disney Channel”和“才艺电视”，在10岁段人群中用“Animax”、“Cartoon Network”、“Anibox”、“Anione”、“Aniplus”的比率相对较高。

图 10 动画片观看频道 – OTT服务 / 动画专业频道



1) 2023年新设问项。

11. 动画付费结算现状

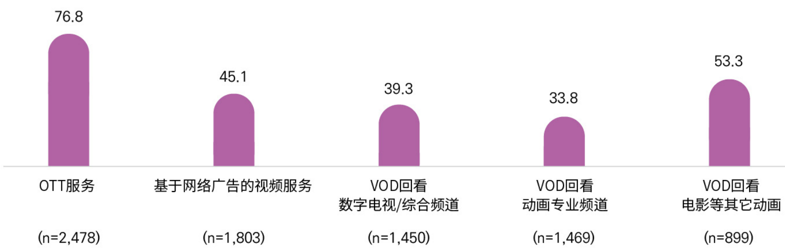
11-1. 动画付费使用经验

对观看动画片时付费使用经验的调查结果显示，“OTT服务”最高，占76.8%。其次是“VOD重播_电影等其它动画(53.3%)”、“基于网络广告的视频服务(45.1%)”、“VOD回看_地面波/综合频道(39.3%)”等。

从受访者的特点来看，在20岁段人群中“OTT服务”、“VOD重播_电影等其它动画内容”和“基于网络广告的视频服务”的付费使用经验相对较高，在40岁段人群中“VOD回看_地面波/综合频道”和“VOD回看_动画专业频道”的付费使用经验相对较高。

图 11 动画付费使用经验

(Base：按动画片使用途径的用户，单位：%)



1) 2023年新设问项。

11-2. 动画付费结算方法

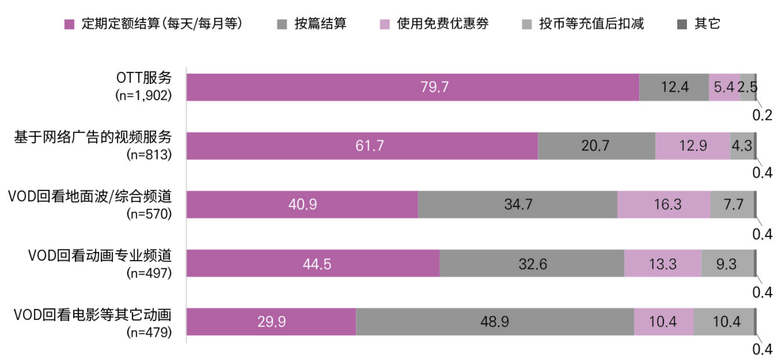
对观看动画片时主要使用的支付方式的调查结果显示，"OTT服务"、"基于网络广告的视频服务"、"VOD重播_地面波/综合频道"、"VOD重播_动画专业频道"均为通过"定期定额付费"的方式结算的比例最高。尤其是"OTT服务"的"定期定额付费"的比率最高，为79.7%。

相反，"VOD重播_电影等其他动画片"中"按篇付费(48.9%)"的比率最高。

从受访者的特点来看，在20岁段人群中"定期定额付费""OTT服务"和"基于网络广告的视频服务"、"VOD重播_地面波/综合频道"、在30岁段人群中"定期定额付费""VOD重播_动画专业频道"的比例相对较高；在60岁段人群中"按篇付费""VOD重播_电影等其它动画片"的比例相对较高。

图 12 动画付费结算方法

(Base：按动画片使用途径有付费使用经验的人，单位：%)



1) 2023年新设问项。

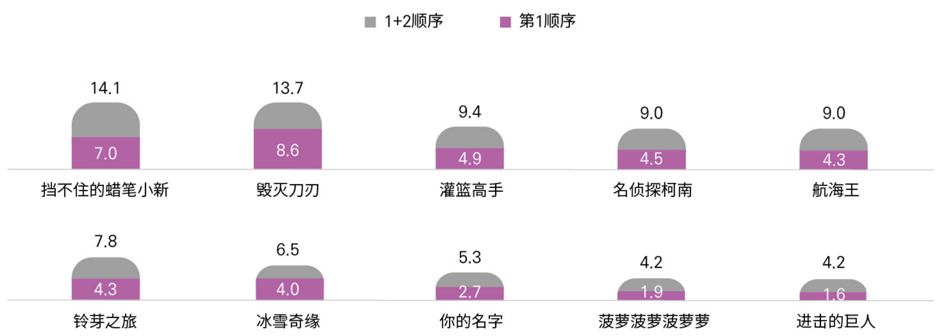
12. 看得有趣的动画作品名

对通过OTT/VOD/TV频道等看得有趣的动画作品(以1+2+3顺序为准)的调查结果显示，喜欢“挡不住的蜡笔小新(14.1%)”的人最多。其次是“毁灭之刃(13.7%)”、“灌篮高手(9.4%)”、“名侦探柯南(9.0%)”、“航海王(9.0%)”等。

从受访者的特点来看，在20岁段人群中喜欢看“挡不住的蜡笔小新”、“毁灭之刃”和“名侦探柯南”的比率相对较高，在40岁段人群中喜欢看“灌篮高手”，在30岁段人群中喜欢看“海贼王”的比率相对较高。

图 13 看得有趣的动画作品名

(Base: OTT/VOD/TV频道等动画用户，重复回答，单位: %(以1+2+3顺序为准)，前10名)



1) 2023年新设问项。
2) 主观式问项。
3) 仅列出排名前十的选项。

13. 通过OTT服务观看动画的理由

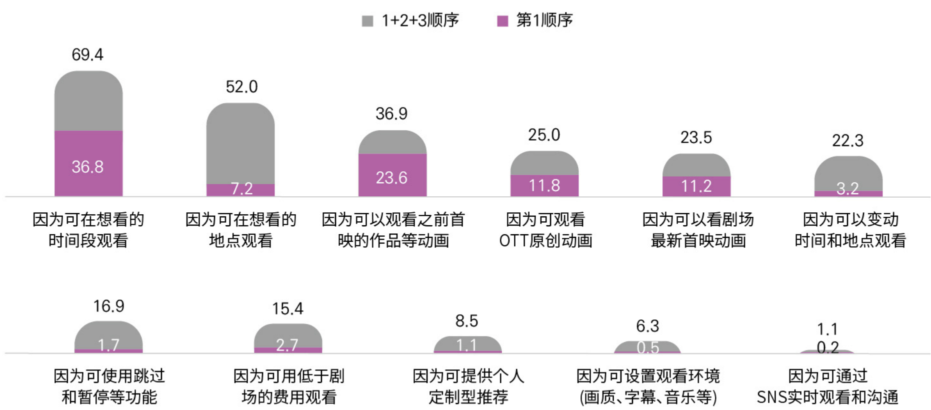
对通过OTT服务观看动画片的理由(以1+2+3顺序为准)的调查结果显示，回答“因为可在自己喜欢的时间段观看”的比率最高，达到69.4%。其次是“因为可在自己喜欢的地方观看(52.0%)”、“因为可以观看之前上映的作品等自己喜欢的动画片(36.9%)”等。

从受访者的特点来看，在60岁段人群中回答“因为可在自己喜欢的时间段观看”的比率相对较高，而在30岁段人群中回答“因为可在自己喜欢的地方观看”，在20岁段人群

中回答“因为可以观看之前上映的作品等自己想看的动画片”，在10岁段人群中回答，“因为可以观看OTT原创动画片”的人相对较多。

图 14 通过OTT服务观看动画的理由

(Base：通过OTT服务看过动画片的人，单位：%)



1) 2023年新设问项。

14. OTT服务动画作品选择方法

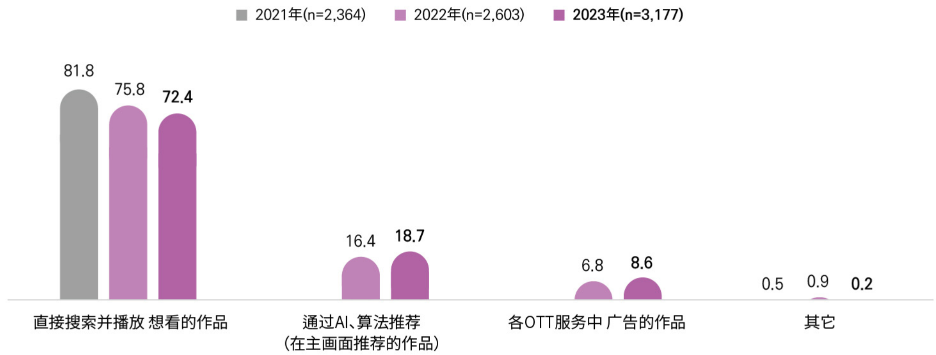
有关通过OTT服务对观看动画片时作品选择方法的调查结果显示，“直接搜索并播放想看的作品”的比率最高，占72.4%，其次是“通过AI、算法的推荐(18.7%)”、“各OTT服务中广告的作品(8.6%)”等。

回答“直接搜索并播放想看的作品”的比率同比小幅下降，而选择“通过AI、算法推荐”和“在各OTT服务上广告的作品”的比率同比小幅增加。

从受访者的特点来看，在40岁段人群中回答“直接搜索并播放想看的作品”的比率相对较高，在3-9岁人群中“通过AI、算法推荐”、在60岁段人群中通过“OTT服务广告作品”选择的比率相对较高。

图 15 OTT服务动画作品选择方法

(Base: 通过OTT服务看过动画的人, 单位: %)



1) 2021年"选择播放服务内推荐(广告)的内容",在2022年细分为"通过AI、算法的推荐"和"在各OTT服务中广告的作品"。
2) 2021年"选择播放服务内推荐(广告)的内容"占17.7%。

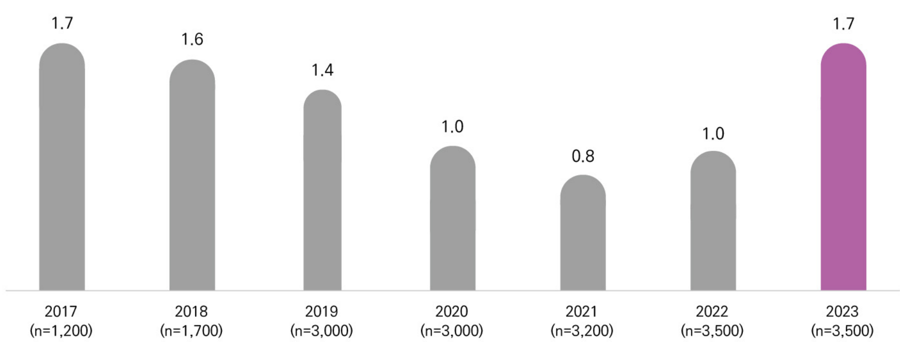
15. 在剧场观看动画的次数

最近一年在剧场观看动画片的平均次数调查结果显示,约为1.7次。 平均观影次数自2017年以来逐年呈下降趋势,2022年转为上升趋势,2023年同比上升了0.7次。

从受访者的特点来看,在3-9岁和10岁段人群中剧场动画片平均观看次数相对较高。

图 16 剧场动画观看次数

(Base: 全体, 单位: 次)



16. 观看动画时月平均可消费金额

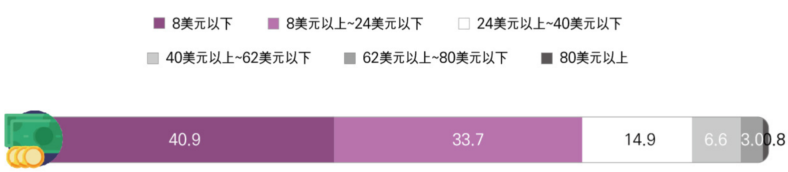
对观看动画片可支付的月均金额的调查结果显示，“约8美元以下”(1万韩元以下)最多，占40.9%，其次是“约8美元~24美元以下”(1万韩元以上~3万韩元以下(33.7%)、“约24美元~40美元以下”(3万韩元以上~5万韩元以下(14.9%)等。

从受访者的特点来看，在30岁段人群中回答“约8美元以下”(1万韩元以下)的相对较高，在50岁段和60岁段人群中回答“约8美元~24美元以下”(1万韩元以上~3万韩元以下(33.7%)的相对较高。

图 17　动画收看时月平均可消费金额

05 月平均可消费金额

(Base: 全体, 单位: %)



1) 2022年平均汇率为1美元兑1290韩元(友利银行)

17. 动画IP衍生作品使用现状

对应用其它体裁IP的动画喜欢类型的调查结果显示，应用“漫画(网络漫画/纸质漫画)”的动画喜欢度最高，为62.9%。其次是“卡通(38.7%)”、“电影(36.8%)”、“出版(35.0%)”等。

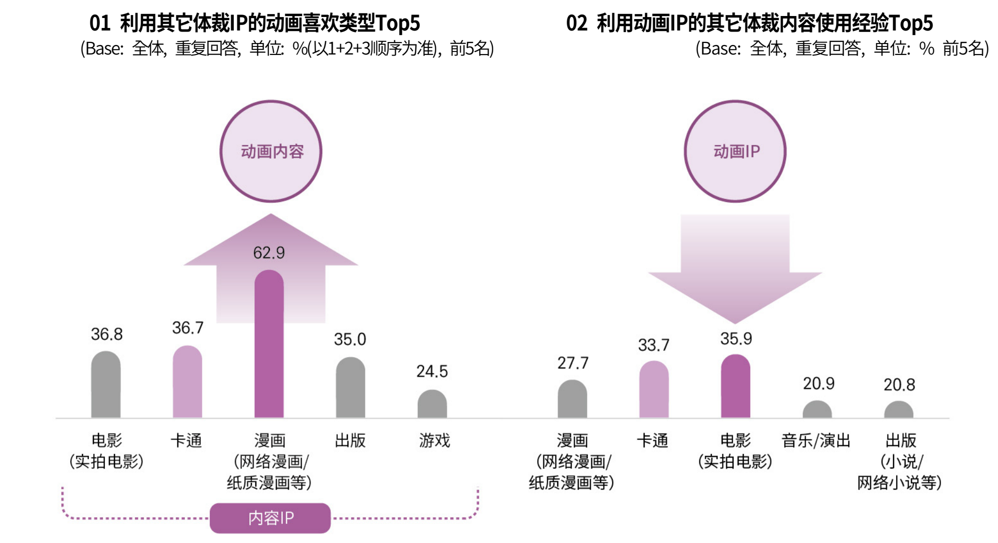
从受访者的特点来看，在50岁段人群中喜欢“漫画”，在3-9岁人群中喜欢“卡通”，在60岁段人群中喜欢利用“电影”IP的动画的比率相对较高。

对应用动画片IP的其它体裁内容的使用经验的调查结果显示，“电影”最多，占35.9%，其次是“卡通(33.7%)”、“漫画(27.7%)”、“音乐/演出(20.9%)”等。

从受访者的特点来看，在60岁段人群中使用“电影”的经验相对较高，在3-9岁的人群

中使用“卡通”和“音乐/演出”，在10岁段人群中使用“漫画”的比率相对较高。

图 18 动画IP衍生作品使用现状



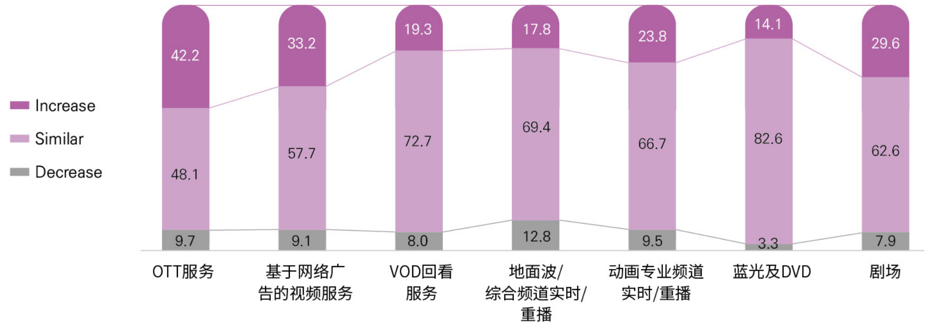
18. 今后使用动画的变化

有关今后使用动画的变化的调查结果显示，在使用时间“会增加”的回答中，“OTT服务”最多，占42.2%。其次是“基于网络广告的视频服务(33.2%)”、“剧场(29.6%)”、“动画专业频道实时/重播(23.8%)”、“VOD回看服务(19.3%)”、“数字电视/综合频道实时/重播(17.8%)”、“蓝光和DVD(14.1%)”等。

从受访者的特点来看，在20岁段人群中使用“OTT服务”，在10岁段人群中使用“基于网络广告的视频服务”、“动画专业频道”和“蓝光和DVD”，在3-9岁的人群中使用“VOD重播服务”和“剧场”，在60岁段人群中使用“地面波/综合频道”使用时间会增加的回答相对较高。

图 19 动画观看时间变化

(Base: 全体, 单位: %)



1) 2023年新设问项。

第二章　动画内容支援现状

1. 支持加强制作能力

1-1. 动画启动训练营

动画启动训练营是从2017年开始推进的，目的是以预制阶段动画片为对象，完成企划案开发，并为正式制作提供事前制作支持。为期约5个月的训练营通过专业领域的辅导，包括专属导演制片人、编剧和翻译专家、投资者等领域的专家，强化了动画项目策划阶段的完整性和吸引投资的竞争力。训练营提供了故事深化支持，并通过专职制片人的辅导和专家指导来完成策划开发。通过间接支持，进行了为吸引投资而制作的项目指南和预告片的制作。共有18个项目被选定，最终有16个项目完成，通过最终的竞争路演“演示日”活动，评选出1个最佳项目《Baby Age》，以及3个优秀项目《Dark Side》、《Mr.Darakryu》、《JamJams!》。

1-2. 支持独立动画制作

独立动画制作支持项目旨在培育新兴的独立动画创作者和制作公司，支持动画的薄弱领域以及促进多样性。该项目的预算与前一年相同，总额为10亿韩元。在短片领域，为完成故事结构的短篇动画制作，每个课题最多提供4,000万韩元的支持；在长片领域，为已完成初步策划的项目的动画制作，每个课题最多提供1亿韩元的支持。

通过2022年独立动画制作支持项目，支持了Ice Cream Studio的《小灵感》等共3部独立长篇动画和Studio Mantae的《幽灵之屋》等共12部独立短篇动画的制作。

1-3. 支持韩国动画制作

韩国国产动画制作支持项目旨在支持完成前期制作的项目的正片制作和系列完成。考虑到动画内容制作现场需要超过2年的时间的特点，该项目将支持分为初期正片、正片和季度作品制作支持，为活跃动画企业的内容制作做出了贡献。

初期正片部门是为了支持策划和开发后吸引实质性投资和进行共同制作的初期正片视频制作阶段的项目而推进的业务。在协议期内支持制作3分钟或更长的动画是其目标。2022年该项目支持了Enfix Plus的《凯尔和丑八怪的朋友们》等总共20部作品。

正片部门是为了支持在前期制作之后处于制作稳定阶段的项目的完成而进行的项目。其目标是支持在协议期内制作80分钟以上的连续剧，如DURUFIX的《女儿变成了丧尸》和Campfire Aniworks的《大脚丫恐龙家族》等，共支持了13部作品，在全球市场上的出口、播放等方面取得了有意义的成果。

已完成制作和上映的项目，通过支持后续季度的主要制作进行季度制作支持，是为了增强国产动画在全球竞争中的竞争力的支持项目。支持了ANYZAC的《僵尸世界 第三季》、Studio T&T的《英雄奔跑大赛 第二季》等4部作品，证明了其在国内外市场的内容优秀性。

1-4. 支持新一代动画制作

新一代动画制作支持项目旨在增强动画的多样性和发掘新一代动画。该项目支持在平台上实现各种表现技巧、策划或制作方法的动画，包括演出用全息视频、装置展览用动画、交互式虚拟现实视频等。

通过2022年新一代动画制作支持项目，共制作了21部动画。使用各种技术，如自研元宇宙、AR、VR、NFT等，制作了多样的动画，包括Dongwoo A&E的《叮铃铃Wonderkle》、Alimolis Studio的《梦中探险队》等。这些作品通过上传到YouTube、TikTOK、Instagram、Facebook等各种平台，如Studio Animal的《糟糕的旋律》、Neotany media的《Petit & Bella》等作品，正在进行多平台服务。

1-5. 支持应用IP的动画制作

支援应用IP的动画制作项目是2022年的新设项目，旨在支持利用网络漫画、小说、游戏等其它体裁的国产IP制作的项目。项目预算共计20亿韩元，以系列作品为准，目标是制作40分钟以上的动画，通过支持源IP为网络漫画的Toonimotion的《从基层士兵到君主第一季》和利用卡通品牌的CrazyBirdStudio的《机灵鬼和小精灵》等共7部作品，加强了动画的多样性。

1-6. 培养动画人才

培养动画人才项目是通过对动画专业人才的现场定制培训项目，培养能够立即投入产业现场的实务专业人才的项目，该项目运营了利用虚幻引擎的动画实践基础课程和2D/3D动画现场专业人才培养课程。

以对动画感兴趣的学员和制作公司为对象发布了招聘公告，最终选定35家企业，并招募了45名学员进行匹配。通过由动画专家组成的讲师团队进行培训，涵盖了虚幻引擎的动画应用、动画导演和制作理论、元宇宙3D建模教育，以及个人项目和团队项目的专业指导。此外，进行了由动画行业实践人员提供的企业现场培训，以提升学员的能力和就业竞争力。通过这个过程，51%的选拔人员成功转为正式员工，为动画制作公司的人才储备和就业岗位创造做出了贡献。

2. 支持流通

2-1. 韩国动画展映会

2022年度举办了网上展映会以及在国内外线下举办了优秀韩国动画片展映会。为了向文化弱势群体提供更多体验文化的机会并缩小地区之间文化差距，线上展映会在全国71家儿童中心和青少年课后班中展开，共有12，876人观看。

此外，在国立亚洲文化殿堂儿童文化院于10月8日至9日举办的为期两天的“动画大盛宴”活动中举办了动画放映会。在该活动中播放了《威本联盟:可疑的野营大骚动》、《泰壹》2部长篇动画以及《星期六的多户住宅》、《坏朋友》等6部短篇动画作品，吸引了384名来自光州·全南地区的儿童观看。同时，在釜山国际电影节上，以“一定要看的韩国动画艺术家”为主题，播放了26部备受海外关注的韩国动画导演的作品，受到了电影从业者和普通观众的热烈欢迎。

此外，在加拿大蒙特利尔举行的加拿大奇幻电影节上，韩国独立动画片共放映了5个部分共44部作品，获得了当地观众的高度好评，其中长篇部分的《泰壹》获得了铜奖，短篇部分的《A MEN A MAN》获得了金奖等共计5部作品荣获奖项，成绩斐然。

2-2. 支持独立动画参加海外电影节

海外电影节参展支持项目旨在宣传国内独立动画创作者的内容竞争力，加强其在国际市场的知名度，为其市场拓展奠定基础。通过活跃国内动画创作者的创作和制作活动，激发了创作热情并提高了国内动画的知名度，显示出实质性的效果。

2022年有2，163部作品参与了230个国际电影节的展出，其中244部作品在144个电影节上进行了放映，最终在24个电影节的43个类别中获得了奖项。

尤为值得一提的是，文秀珍导演的《角质》，首次作为韩国动画入围戛纳国际电影节短片竞争单元，而导演崔有珍的《爱之火花》则在由日本TBS电视台主办在匈牙利举办的乌克兰战争难民营动画展上展出，提高了韩国作品的国际知名度。

2023 ANIMATION INDUSTRY WHITE PAPER

Ministry of Culture, Sports and Tourism

KOREA CREATIVE CONTENT AGENCY