A Digital Creative Industry, Webtoons:
With a Focus on the Thai Webtoon Market

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Abstract

This study aims to explore the current state and challenges of the webtoon industry as a unique creative industry, focusing on the case of Thailand. First, it examines the characteristics and trends of the Webtoon market in Thailand, and how it contributes to the cultivation of a new creative industry. The study's findings show that there is a dynamic relationship between the entry of major Korean webtoon platforms and the Thai publishing companies aided by an influx of Chinese capital that entered the market and established themselves as latecomers. In addition, the Thai-drama adaptations of Korean webtoons in Thailand have led to the transmedia adaptation of webtoons in the Thai market, thereby highlighting the potential of Thailand-based transnationalization of webtoons. This study illuminates how Thai webtoons function as a symbol of transnational cultural movement and elucidates their contribution to the creation of a new creative industry.

Keywords: *Digital Creative Industry, Glocalization, Digital Platform, Webtoon, Thailand, Soft Power*

Introduction

Webtoons are digital comics that emerged in South Korea in the early 2000s. Webtoon is a combination of the words "web" (for internet) and "cartoon" and refers to comics primarily designed for consumption in the digital phone environment (Han, 2015; Kang, 2018). All digital content in the form of cartoons are called digital comics, of which webtoons are a subset. While defining webtoons precisely is challenging, the amendment of the Promotion of Cartoons Act passed by the South Korean National Assembly on February 27, 2023, provided a legal definition for webtoons (Ministry of Culture, Sports and Tourism, 2023). According to this amendment, cartoons are "a work depicting the world of imagination in one, or two or more compartmentalized frames with pictures and text," digital cartoons are "cartoons on paper or any other tangible medium processed and compiled in the form of a digital file," and webtoons are "cartoons produced on information and communication networks for distribution through information and communication networks." Additionally, for countries wherein cartoons are primarily consumed and produced, "manga" refers to Japanese comics, "comics" to American comics, while "webtoon" specifically refers to Korean comic content. Regarding format, webtoons have a screen-scrolling format where scenes transition through the act of scrolling, unlike traditional comic books where pages have to be physically turned. In other words, webtoons are digital comics produced in Korea, or even internationally created in the Korean style, where the work is read through screen-scrolling.

Webtoons, based on platformization and casual consumption, can proliferate in a transmedia and transnational manner (Jin, 2023). First, webtoons, especially in Korea, are predominantly supplied by major internet service providers, such as Naver and Daum. These providers' platforms are significant beyond merely being a medium between creators and users. They have a social role in creating a new ecosystem in the cultural market (van Dijck, 2013), and leverage digital technology to create spaces for webtoons, encompassing technological, socio-cultural, and business perspectives (Jin, 2015). Second, webtoons are being proliferated based on transmedia storytelling, which reproduces webtoons into various media formats. Transmedia storytelling is a media experience where a fictional work is developed and provided through multiple channels (Jenkins, 2006). Media development serves as the foundation that makes webtoons a source of creativity and backbone for diverse genres, creating recursive consumption through other media. Third, webtoons are transnational media, which is media consumption in Korea and other regions worldwide, in conjunction with Hallyu, which is the global popularity of other media forms of Korean content, such as Korean popular music (K-pop). The Korean webtoon platforms mentioned above have been offering services in foreign languages, including English, since the early 2010s (Jang and Song, 2017), and as of 2024, webtoons are translated and provided in various languages, including English, Chinese, Indonesian, and Thai, spreading webtoon culture and providing a new business model in the creative industry, where host countries produce webtoons domestically and distribute them both domestically and internationally.

This study aimed to explore the current state and challenges of the overseas webtoon industry as a unique creative industry (compared to Korea) against the abovementioned backdrop, concentrating on the case of Thailand. In quantitative terms, Thailand accounts for approximately 8% of Korean webtoon consumption (Korea Creative Content Agency, 2020), which is not a significant market. However, this study focuses on Thailand because of its anticipated sustained growth in digital content (Kishimoto, 2017), including webtoons (Yang, 2021), the robust presence of transmedia features (such as the Thai-drama adap-

tations of Korean webtoons), and the established support system from the public sector, including government support for the digital creative industries, for movement within the Thai industry (Skyllstad, 2011). This study also examines how the aforementioned plat-formization of webtoons, transmedia, and transnational consumption are manifested in Thailand, and how it contributes to the cultivation of a unique creative industry. Precisely, this study aims to summarize the characteristics and trends of the Thai webtoon market. Subsequently, it will examine how webtoon platforms in Thailand are modelling a unique digital content ecosystem and how the combination of webtoon platforms and demand in Thailand leads to the transmedia adaptation of webtoons in Thailand, investigating the po-tential of Thai webtoon transnationalization. This study highlights how webtoons, a genre that has been relatively overlooked, are produced and consumed and its development across various media to emphasize its position as an emerging creative industry. This study is the first to examine the Thai webtoon market, focusing on the global trends of platformi-zation, transmedia, and transnational consumption.

Characteristics of the Thai Webtoon Market
General Characteristics

The Korea Creative Content Agency (2022) estimates the size of the global webtoon indus-try as approximately 1.566 trillion won, with approximately 9,326 webtoon artists as of 2021. Analyzing the export of webtoons from South Korea to different countries, Japan and North America were the destinations with the highest numbers, accounting for 40.1% and 22.3%, respectively. Thailand accounts for 6.3%, which is a slight decrease from the previ-ous year; however, it ranks fifth globally and is the top destination in Southeast Asia. The entire comic market in Thailand, including print comics, digital comics, and webtoons, stood at 45 million dollars in 2019 (Figure 1), with minor fluctuations yearly (Korea Creative Content Agency, 2020). However, the proportion of digital comics (Figure 2), including web-toons, grew from 4.7% in 2015 to 9.5% in 2019, and may reach 16.5% by 2024 (ibid.). Owing to the decline in the print comics market, the overall market size is predicted to decrease to 41 million dollars in 2024.

Figure 1. Size and growth rate of Thailand's comic market (2015–2025) (Units: in millions dollars, %).
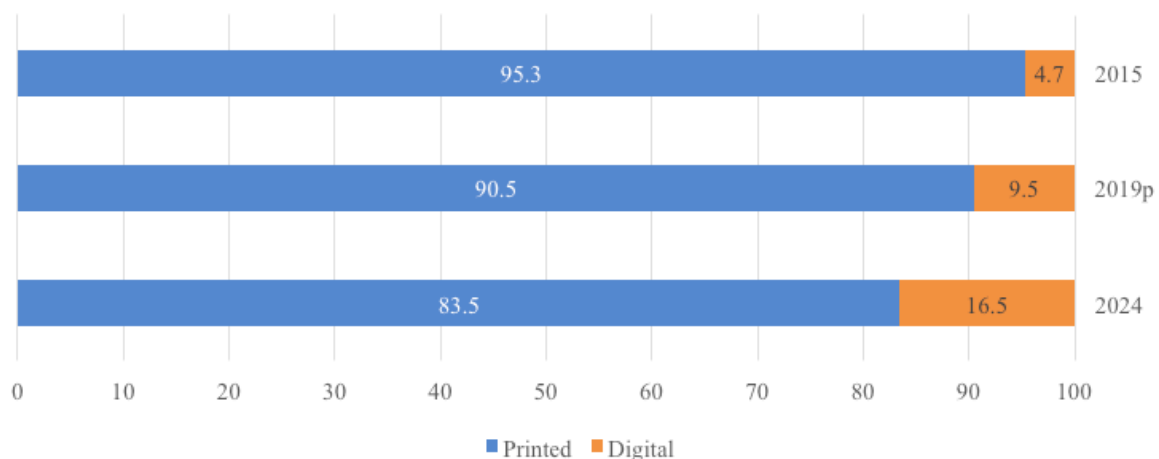
Figure 2. Comparison of market share of different sectors of Thailand's comic market (2015 vs. 2019p vs. 2024 by percentage.

Thailand's webtoon market observed the entry of Naver Webtoon, Korea's largest webtoon platform, in 2014, under the name "Line Webtoon." As of March 2022, it has successfully established itself in the Thai market, boasting over 3.5 million monthly active users and recording a maximum of 172 million monthly views. Later, Kakao Webtoon, a competitor of Naver Webtoon in Korea, also entered the Thai webtoon market. The Kakao Webtoon app, launched in June 2021, remarked significant success by generating 370 million Thai Baht revenue within merely four days of its release. It secured the highest spot in the daily download rankings on the Thai application store and Google Play Store in August, making it the highest-grossing webtoon app in Thailand.

Significant Thai Webtoon Industry Operators
Four Korean webtoon operators and three Thai webtoon operators are considered most prominent in the Thai webtoon industry (KOFICE, 2023). Each operator exhibits differences in the nationality, genre, and characteristics of the webtoons offered, such as providing content aside from webtoons (Figure 3). Understanding these operators' characteristics is vital to comprehend the characteristics and strategies of webtoon services in Thailand. First, Line Webtoon is the largest webtoon operator in Thailand. Line is the name of the messenger application by Naver and is the global service brand for Korea's Naver Webtoon. As mentioned earlier, Line Webtoon entered Thailand in 2014 as the first webtoon company and actively sought local Thai talents, gaining high recognition and becoming a significant influencer (Bangkok Post, 2022). Line Webtoon's genres include romance, romance fantasy, drama, action, fantasy, queer, comedy, thriller, horror, and Thai works. It also offers web novels, albeit not mainstream. A representative Thai webtoon is "Loveless Heroine (วันทอง ไร้ใจ)," based on a classic Thai folklore, which gained significant attention from its early serialization. As of May 2023, it surpassed 50 million views, securing second rank in the romance fantasy category. Additionally, "Teen Mom (คุณแม่วัยใส)" is about a 17-year-old female protagonist's unexpected pregnancy, childbirth, and related experiences. It garnered significant attention because it addressed societal issues related to teenage sexual experiences and Thailand's childbirth rates. In transmedia development, it was adapted into an eight-episode Television series in 2017.

Company name	Nationality	Details	Operation system	Website
Line Webtoon	Korea	-Korea's Naver Webtoon -Many popular webtoons in each sector and many Thai webtoons by local authors -Few, but provides web novels	Web browser, iOS, Android	https://www.webtoons.com/th
KaKao Webtoon	Korea	- Features a few works by local authors	Web browser, iOS, Android	https://th.kakaowebtoon.com
Comico	Korea	-Provides Korean and Thai webtoons, as well as webtoons imported from China and Japan -Also offers web novels and sells e-books	Web browser, iOS, Android	https://www.comico.in.th
WeComics	Thai	-Former Ookbee Comics -Provides Korean and Thai webtoons, as well as imported webtoons from China	Web browser, iOS, Android	https://www.wecomics.in.th
Sanook Comics	Thai	-The webtoon page of Sanook, Thailand's largest portal site -Provides works by local Thai authors	Web browser	https://comics.sanook.com
Read Awrite	Thai	-Thai e-book company Meb's venture -Provides works by local Thai authors -Provides webtoons as well as web novels and derivative work such as fan fiction	Web browser, iOS, Android	https://www.readawrite.com/
Joylada	Thai	-A social app in a chat-message format, ventured by Ookbee, a Thai e-book company -The main content is novels in the form of a chat conversation, but Chinese webtoons are also provided	Web browser, iOS, Android	https://www.joylada.com

Figure 3. Table of Major Players in the Thai Webtoon Industry (by the author).

Second, Korea's Kakao Webtoon entered the Thai market in June 2021. Within four days of launching its application, it recorded a revenue of 370 million won, and ranked first in Thailand's daily application download ranking. It uses simple genre classification compared to Line Webtoon, and comprises romance fantasy, romance, action, drama, Yaoi, and horror. As of 2024, there are five publicly available Thai webtoons on Kakao Webtoon, among which "Love Destiny (บุพเพสันนิวาส)" has the highest viewing of 8.5 million views. The initial work is a popular television series of the same name. Several television dramas produced are increasingly based on webtoons; however, "Love Destiny" is unique because it is a webtoon based on a television series. Another work gaining attention in Thailand is "Finding my Bias through Time Slip (ข้ามเวลาตามหาเมน)," which is a collaboration of a Korean author and a Thai illustrator.

Third, Comico is a webtoon service brand operated by NHN Comico Corporation, a subsidiary of Korea's industrial technology company, NHN. Before entering the Thai market,

Comico found success in Japan. However, recent financial setbacks from illegal replication and distribution caused withdrawal considerations from the Thai market (Kim Y., 2023). Comico is different from Line Webtoon and Kakao Webtoon because it provides Japanese and Chinese webtoons with Thai translations, and Thai webtoons constitute 15% of Comico's content as of 2019. Genres include romance, fantasy, drama, Boys' Love (BL), horror or mystery, action, comedy, and everyday life. Particularly noteworthy is the prevalence of BL works, with 37 out of the top 50 popular works falling under this genre as of May 2023. Although it sold e-books as well, Comico discontinued its web novel services in December 2022 and shifted to content IP acquisition through its in-house studio.

Fourth, the Thai company WeComics emerged as Ookbee Comics, which was a platform that provided both e-books and webtoons, and was split from the e-book platform. WeComics attracted investment from Tencent, one of China's top three webtoon platforms, and provides Korean, Thai, and numerous Chinese webtoons. It is unique because it offers a page where general users can submit their own creations, fostering active communication among readers. Genres include action or adventure, romance, daily life drama, BL, Girl's Love (GL), horror, mystery or thriller, and others. As of May 2023, among the top 10 most popular works across all genres, six are Korean works and four are Chinese works.

Sanook Comics, launched in 1998, is a webtoon site created by Thailand's largest portal site, Sanook. Unlike other platforms, it does not have a separate webtoon app and operates in its initial platform format, the web. It exclusively features works by Thai authors, and the works have different characteristics than general Korean webtoons, such as inconsistent "quality" across the works, uncolored illustrations, cut divisions similar to traditional published comics, and short lengths of two to three pages. Sanook Comics does not provide a scheduled list of publications for each day, and all publications are not regular. Genres include romance, action or adventure, comedy, daily life drama, horror, fantasy or science fiction, youth, GL, BL, and time slip.
ReadAWrite is an app developed by the Thai e-book company Meb Corporation PCL, featuring works from local Thai authors. It features webtoons and also web novels, and derivative work such as fan fiction. Similar to Sanook Comics, ReadAWrite has irregular publication schedules for all serialized content without specific daily schedules. The platform does not classify the works into genres but into original comics, doujinshi, illustrations, and fan art. The term "doujinshi" is from the Japanese word "同人誌 (doujinshi)" which refers to the overall derivative artwork.

Finally, Joylada is an e-book app with a chat-message format, ventured by Ookbee, a Thai e-book company. In addition to chat-based novels, it serializes Chinese web novels, chat-based idol fan fiction featuring pictures of actual people, and Chinese webtoons. As it is an application provided by Ookbee, it is interconnected with WeComics, which is a spin-off from Ookbee Comics, and allows users to access certain works from WeComics through Joylada.

Webtoons Perception and Consumption Patterns in Thailand
A pilot survey conducted in (month) 2023 showed that Thais perceive "webtoons" as mobile-friendly comics of diverse genres serialized in full color with a vertical scrolling format. Among actual service providers, the term "webtoon" is explicitly used only by the

Korean Line and Kakao Webtoons, while other service providers mainly use online cartoons or comics. Unlike the substantial association of K-pop or Korean dramas with Hallyu content from actual-life figures, illustrations-based webtoons are not recognized as a part of Hallyu. However, the recognition of webtoons as Hallyu's sub-content is actively increasing as transmedia productions of dramas based on webtoons.

Macromill Group (2022) conducted an online survey on 600 webtoon consumers to highlight its consumption by Thais. Female readers accounted for 56%, significantly higher than male readers. The age distribution showed that readers in their 20s and 30s constituted the largest proportion with 55%. Regarding employment, 52% were office workers, predominantly living in Bangkok and metropolitan areas. The preferred genre among Thai webtoon readers was action (18%), followed closely by romance, science fiction/fantasy, mystery, and adventure. Male readers showed a higher preference for action (30%), while female readers favored romance (22%). Teenagers had a significantly higher preference at 29% for the BL (Yaoi) genre. The primary channels through which Thai readers first encountered webtoons were advertisements on social media platforms like Facebook and Twitter. They commonly enjoyed webtoons before bedtime, while commuting, or during mealtimes. Many Thai readers accessed illegally distributed webtoons for reasons such as slow updates of translated new chapters already published in Korea, unavailability of desired works or chapters on official platforms in the Thai language, and dissatisfaction with the quality or speed of translations.

New Digital Content Ecosystem Created by the Thai Webtoon Platforms
Creation of a Webtoon Ecosystem in Thailand
The popularity and spread of webtoons through webtoon operators in Thailand have led to significant changes in various industries for digital content production and consumption, developing a new digital content ecosystem centered around webtoons. The increasing webtoon consumption stimulates the desire to create works and produce commercial webtoons that set successful Korean webtoon authors as role models. Additionally, this process involves the adaptation of genres traditionally more popular in Thailand, such as BL, into webtoons, a longing for domestic webtoons, and attempts at cultural exports with webtoons.

Japanese manga, which is traditionally popular in Thailand, and Korean and Chinese webtoons, which are gaining new popularity, provoke the necessity and desire for domestic webtoon production, as observed in Thailand mobile applications rankings. As of May 2023, the top-ranking apps in the Android OS popularity chart in Thailand are all related to webtoons, with the top five being Kakao Webtoon, (Line) Webtoon, Comico, Naver Webtoon, and Shueisha Manga Plus, which is related to comics albeit not a webtoon app. Notably, How To Draw Comics ranks eighth and Draw Cartoons 2 ranks twelfth. Moreover, although not in the rankings, Cartoon Video and GIF Maker was introduced on "Trending up." These apps are required for creating comics or webtoons, suggesting that the experience of consuming webtoons is translating into creative endeavors.
Furthermore, this actuates the birth of a new profession: professional webtoon author. Traditionally, Thailand has excelled in animation and cartoon creation, while comics were creative works done by fans as their hobby. However, with the popularity of webtoons and the

introduction of revenue models through operators in Thailand, webtoons are being recognized as a source of income that allows individuals who have debuted as webtoon authors to earn money, and as an opportunity for their work to be adapted into television series or published in international markets. Webtoons are now perceived as a means to become a creator. Additionally, authors of popular webtoons in Thailand are considered celebrities.

Webtoon operators aiming to discover new works and webtoon authors, especially local authors, are also interested in cultivating Thai webtoon authors and provide various opportunities. Line Webtoon and Comico regularly offer debut opportunities for Thai amateur artists within their webtoon services and receive positive responses by publishing completed works of amateur artists. Through such initiatives, operators can offer works that cater to local needs and utilize author discovery as a marketing opportunity to enhance the awareness and reach of webtoons. Moreover, they can ensure diversity through transmedia adaptation of high-quality webtoons and export them to their home country. For example, Ookbee Comics (now WeComics) recruits talent to publish works online, pays comic royalties based on views, and provides publishing and other assistance for emerging artists. Moreover, they translate Thai webtoons and export them to Indonesia, and may export them to Viet Nam, the Philippines, and Malaysia soon.

The Thai webtoon ecosystem has birthed a distinctive genre—BL, which is a genre depicting love between men with significant popularity in Thailand and is being produced in various forms of media (Baudinette, 2023). The BL genre in Thai television series, called "Series Y" (shortened from Yaoi) is significantly popular in Thailand and internationally. This upcoming field may gain as much attention as Hallyu (K-pop) in the future. The term "Y Economy" has emerged, and the Thai Ministry of Commerce has expressed active promotion of such Y content as a key export product. While BL may not yet be considered mainstream in the Thai webtoon market share, it is gradually growing. Among the 30 most popular webtoons recently in Thailand, 14 are from the BL genre, showing high preference. While Korean operators Line Webtoon and Kakao Webtoon relatively focus less on BL, Thai operator WeComics that China invested in, and Sanook Comics, feature the BL genre works prominently, ranked as major hits, suggesting local demand.

Transmediation of Thai Webtoons

The revenue model of webtoons is divided into two main markets: the primary market includes paid content, international content, and publishing; the secondary market includes transmediation, represented by one source multi-use (OSMU), where various derivative products such as advertisements, television series, movies, and games are created. Traditionally, OSMU's proportion in revenue was low. However, with the growing over-the-top (OTT) market, it is now regarded as a way to increase income. Moreover, it may re-promote the webtoon genre through the diversification of webtoons into other genres. The trends and consumption of OSMU in Thai webtoons can be observed through the popularity of Korean dramas based on Korean webtoons in Thailand, and the revival of the original Korean webtoon; the adaptation of Korean webtoons into Thai television series; and recently, the adaptation of Thai webtoons into Thai television series (Kim K., 2022)).

Examples of Korean webtoon-based Korean television series that gained much popularity in Thailand are "Business Proposal" and "Gangnam Beauty." "Business Proposal," a webtoon-

based television series produced and aired in Korea in 2022, received global appreciation as it was also simultaneously streamed on Netflix, an OTT platform. Following its airing, the original webtoon saw a tenfold increase in views in Thailand and was ranked first on Kakao Webtoon for two consecutive weeks. "Gangnam Beauty," serialized on Naver Webtoon from 2016, was also produced into a Korean television series, gaining much attention in Korea and Thailand. Later in 2022, it was announced that a local production company in Thailand was to adapt this webtoon into a television series titled "Beauty Newbie." There have been cases where webtoon-based television series or movies become significantly popular in the international market, leading to a local remake. However, this was noteworthy because it was the first time the webtoon rights were sold, and the adaptation was produced locally. Recently in Thailand, an increasing interest in the creation and consumption of domestic webtoons is observed, many of which have gained popularity. These webtoons are increasingly being adapted into television series in the OSMU format, representative works being "Teen Mom," "Love Destiny," and Loveless Heroine." "Teen Mom" was serialized on Line Webtoon in 2015, and has over 250 million views. The story is regarding a female student with unplanned pregnancy with her high school boyfriend, who decides to raise the child on her own after entering college. The reflection of the reality of Thai society, delicate psychological depictions, solid storyline, and the pretty illustration style that reminds the readers of Japanese manga are factors that contributed to its popularity. Propelled by its popularity, it was adapted into a television series in 2017, which was widely appreciated, leading to the production of a second season. This work was translated into numerous other languages and provided globally, and it was particularly popular in Japan. However, it struggled in Korea as the issue of teenage pregnancy was perceived to have been handled lightly, and unnecessary exposure and potentially provocative scenes brought discomfort. This work was well-received, and the first ever case to prove the potential and marketability of Thai webtoon authors.

"Love Destiny" was serialized on Kakao Webtoon in 2022. It was the first outcome of Kakao Webtoon's project to discover Thai webtoon authors, and was a collaboration between Korean and Thai authors. As of July 2023, it had more than 8.8 million views. The television series based on the original novel of the same name was aired on Thailand's three main terrestrial channels and gained remarkable popularity. The final episode recorded a viewership of 18.6%, which was the highest since the digital television transition in 2015. This work, also adapted into a musical and a webtoon, had changed the protagonist from a Thai woman to a Korean woman who loves Thai culture, and provided more theatrics to the story. This joint project between Korean and Thai authors is significant as it showcases the diverse possibilities of future Thai original IP.

Although not in an OSMU format, "Loveless Heroine," which was serialized on Line Webtoon, is significant. It first began to be serialized in 2021, and as of July 2023, it had 534 million views. Its narrative is from the perspective of the female protagonist in Thailand's popular traditional tale, "Khun Chang Khun Phaen." It received tremendous appreciation from the viewers. In the original novel, Wantong, the female protagonist, is a passive character forcibly controlled by the two dominant male protagonists. She is a tragic female character executed for possessing "two loving hearts" rather than serving one man. The webtoon depicts Wantong as a modern woman, who is independent, a feminist, and creates her own

destiny. The webtoon received acclaim for its beautiful art style and well-crafted narrative, establishing high completeness. The author, Chayaporn Puapornpanit (nickname/pen name: Mu), is considered a model case of a successful transition from an unknown Thai author to a webtoon author.

Conclusion

This study examined the webtoon industry's evolution into a new creative industry through platformization, transmediation, and transnational diffusion, with a focus on the Thai webtoon industry. There is a dynamic relationship in the Thai webtoon market between the entry of major Korean webtoon operators as platforms that formed the basis for developing Thai webtoons and the Thai publishing companies aided by an influx of Chinese capital that entered the market and established themselves as latecomers. While Korean webtoons dominate consumption, the recent surge in webtoon popularity has sparked a desire for domestic production, with its foundation being support from webtoon platforms. The trend of transmedia consumption is also reflected in Thailand, where the transmedia development trend is towards OSMU, where various media formats come together. Despite being small in number, Thai webtoons are translated into multiple languages and disseminated through global platforms for consumption. Several works have been popular overseas, suggesting a potential increase in overseas dissemination of Thai webtoons.

Regarding future possibilities and tasks for Thai webtoons, the Thai webtoon market may grow steadily based on expert opinions who have analyzed the future growth of Thailand's digital comic market, including webtoons, and the sustained high rankings of webtoon and comic-related apps in the Thai app market. However, with increased competition from Korean platforms, the entry of Chinese webtoon platforms, and the emergence and growth of locally produced webtoons, the webtoon market is expected to diversify. To ensure stable revenue generation and foster creative industries, strategies such as content diversification, discovering content tailored to the Thai market, collaboration with both local and foreign authors, effective promotion, and encouraging fan participation is essential.

The webtoon operators in the Thai market face several challenges, such as illegal distribution, which is reflected in actual data. Illegal distribution is hypocritical and has ambiguous advantage of dissemination and disruption. While illegal distribution helps increase awareness of the relatively unfamiliar genre of webtoons, it poses a significant obstacle to establishing webtoons as a genre and building a proper ecosystem. This is the case of Comico, the aforementioned Korean operator, who is contemplating market withdrawal owing to accumulated losses from illegal distribution. The greatest task in responding to illegal distribution is transitioning a black market into a white market. For example, Kakao Webtoon quickly captured the interest of Thai readers who wanted works previously illegally distributed in fragments. The timely announcement of licenses upon the launch of the service was also beneficial. However, blocking illegal distribution through unconditional crackdowns may only result in the loss of fans, which calls for a cautious approach. A balance must be found between blocking illegal distribution and satisfying fan demands while maximizing revenue. In the long run, diplomatic efforts, including government initiatives for copyright management systems in Thailand, and efforts by the webtoon platforms to raise awareness of copyright protection, are crucial. Thai market could strategically

consider alternative forms of revenue generation, such as increasing the proportion of the secondary market through OSMU and holding events, than solely rely on webtoon subscription revenue.

Acknowledgements

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