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ASEAN SEI-KATSU-SHA STUDIES 2022

Into the Fandom

How tribes of fans will be the next power in ASEAN society?

Are you into a fandom?

The COVID-19 pandemic that began in 2020 has had a massive impact on the thinking and behavior of *sei-katsu-sha* —a term Hakuhodo uses to describe people not simply as consumers, but as fully rounded individuals with their own lifestyles, aspirations and dreams. Among the positive changes it has brought about is an increase **in ASEAN *sei-katsu-sha* enjoying fandoms**.

In ASEAN, **the people who are passionate fans of idol singers, manga, sports, hobbies, and so on, and the world/culture formed by these fans are called a "fandom."** Take, for example, one who became so obsessed with an actor from another country that they started studying the language, or another who started making their own pet food out of concern for their sick cat and ending up selling it commercially. Our research on *sei-katsu-sha* here at Hakuhodo Institute of Life and Living ASEAN (HILL ASEAN) has found that **fandoms are of great importance to ASEAN *sei-katsu-sha***. What fandom are you into?

"The fandom I'm now most into"
Photos by ASEAN *sei-katsu-sha* interviewed by HILL ASEAN

Q What does your fandom mean to you? (Open-ended question)

ASEAN Fandom *sei-katsu-sha*

Japan Fandom *sei-katsu-sha*

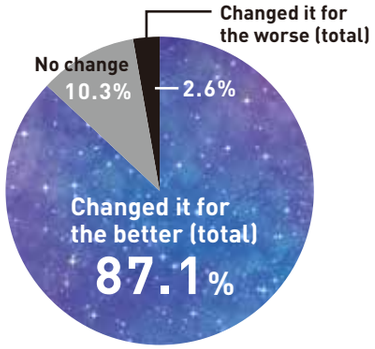
Source: HILL ASEAN Quantitative Study (2022) *Open-ended responses analysed and output as word clouds

Being in a fandom gives positive energy to ASEAN *sei-katsu-sha*

As part of our survey, we asked respondents the degree to which the fandom they're currently most into affects their lives. **Around 87 percent of ASEAN *sei-katsu-sha* who are part of a fandom replied that it had changed their lives for the better**. On finding a personal passion, most people are positively affected by it and their fellow enthusiasts. Indeed, one thing that was particularly striking when HILL ASEAN interviewed ASEAN *sei-katsu-sha* was that those with a keen interest in something became very animated when they talked about it. When ASEAN *sei-katsu-sha* spoke about their fandom and what they loved, they would all break into a smile and overflow with energy. As we interviewed them for our research, their infectious enthusiasm often puts us in a positive frame of mind as well. We discovered that finding a fandom you can really get into has numerous benefits. It changes people's lifestyle and way of thinking for the better. It empowers them to take on new challenges. And it enables them to discover a new side of themselves.

Q How has your fandom changed your life?

ASEAN Fandom *sei-katsu-sha*



Source: HILL ASEAN Quantitative Study (2022)
Base: ASEAN Fandom *sei-katsu-sha*

K-POP Fandom *sei-katsu-sha* Thailand

"My favorite boy band **taught me what love is**. Love isn't just about romance. It's also something you feel towards your friends and parents. But first you have to learn to love yourself. Their songs, dances, and messages to their fans convey **the importance of loving yourself before you can love others**."

"**My social network has expanded** thanks to my fandom. Everything has been a new experience for me, like putting together plans to hold my own fandom event and dealing with corporate partners. **Being an active member of a fandom can give you business experience**. My fandom has benefited me in two ways. I've expanded my personal network and gained lots of experience. And I've taught myself how to use Photoshop."

C-POP Fandom *sei-katsu-sha* Malaysia

Block toy Fandom *sei-katsu-sha* Vietnam

"In my fandom's online community, total strangers share information and ideas and chat just like friends, so I now find it easier to talk to people. As a result, I've become **more outgoing in the real world** as well. I've **become more eager to make new friends** to find out if they share my interests and point of view."

The Big Question

How tribe of fans become the next power?

HILL ASEAN sheds light on ASEAN Fandom *sei-katsu-sha*, as we call the region's fandom enthusiasts, and ASEAN fandom communities.

What ASEAN Fandom *sei-katsu-sha* are actually like

- Triggers for joining their fandom
- Actions they do in their fandom
- Motivations for their fandom
- The benefits they gain
- Brand fandoms

How Fandom communities in ASEAN are structured

- Functions of the *sei-katsu-sha* who make up the community
- The community's purpose

Recommendations for brands & businesses in ASEAN

How to collaborate with ASEAN Fandom *sei-katsu-sha*

How to build a brand fandom

The future forecast of fandoms in ASEAN

What services will cater to ASEAN Fandom *sei-katsu-sha* in the future?

Why are fandoms proliferating in ASEAN?

Two factors appear to be behind the increase in the number of ASEAN *sei-katsu-sha* who are into fandoms. People are spending more time at home due to COVID-19. And social media has made it easier than ever to connect with people and make your voice heard.

More time at home due to COVID-19

Q What triggered you to get into your fandom?

"COVID-19"	"To kill time"	"To connect with people"
40.7%	45.6%	41.5%

Source: HILL ASEAN Quantitative Study (2022) Base: ASEAN Fandom *sei-katsu-sha*

The ability to easily connect and have fun with fellow fans on social media

"I love sharing my collection on social media. **People who comment and send messages tell me they want to do the same, they want to meet, and to share their collection too.** There's a special satisfaction once you're done."
Movie Fandom *sei-katsu-sha*, Philippines

"What made me happier than anything was when I shared a picture I'd taken of my favorite band member and they liked the post. **It's gratifying to know the person in the photo is a little bit grateful.**"
Idol singer Fandom *sei-katsu-sha*, Indonesia

Free video sharing & streaming services

"When I don't know how to play a new game, **the first thing I do is look for a video explaining the rules.** There are lots of relevant videos on YouTube."
Board game Fandom *sei-katsu-sha*, Singapore

"**I first became interested in him when I saw him in a movie on WeTV.** I then did some research on him and found out he was one of the greats."
Chinese actor Fandom *sei-katsu-sha*, Thailand

Spread of messaging and content-creation apps

"**I post my workouts on my social media channel.** Fitness isn't just about the numbers on the scale. Think of it as a mean of finding inner peace."
Fitness Fandom *sei-katsu-sha*, Singapore

"**I made a video for my favorite artist's birthday.** I edited it myself by splicing video clips of him with messages from fans. The video is great and so meaningful."
Local artist Fandom *sei-katsu-sha*, Malaysia

The definition of "fandom" used in this study

What is "fandom"? (Definition by HILL ASEAN)

Passion and admiration toward something that influence changes into someone's lifestyles and evoke a feeling of camaraderie with others who share a common interest

In determining what constitutes fandom, HILL ASEAN attaches particular importance to **whether or not people engage with others who share their passion**. Take muscle training enthusiasts, for example. If they quietly work out on their own, we define muscle training as their hobby. We don't consider them part of a fandom. On the other hand, if they post their workouts on social media, or if they interact with other muscle training enthusiasts online and recommend proteins to each other, we define them as muscle training Fandom *sei-katsu-sha* who enjoy their fandom.

Definitions of other fandom-related terms used in this booklet

Fandom *sei-katsu-sha*: *Sei-katsu-sha* who enjoy a fandom.

Fandom subject: The subject of Fandom *sei-katsu-sha*'s interest—whoever or whatever the Fandom *sei-katsu-sha* is into.

Fandom community: The collective term for the individuals making up a fandom. Communities vary considerably in size and nature. Some are well defined, taking the form of an organized fan club or group. Others are so nebulous that Fandom *sei-katsu-sha* may not even be conscious of them.

Study design

Quantitative survey (questionnaire)

Methodology: Online survey
Sample size: 4,900
Target population: Male and female Fandom *sei-katsu-sha** aged 20–49, SEC A–C
Survey area: Thailand, Indonesia, Malaysia, Philippines, Vietnam, Singapore, Japan
Survey period: Survey period: December 2021–January 2022

Qualitative survey (interviews)

Methodology: Online interviews
Sample size: 36 (6 from each country)
Target population: (1) Male and female Fandom *sei-katsu-sha** aged 20–49, SEC A–B, 4 from each country
(2) Fandom key opinion leaders (KOLs), 2 from each country
Survey area: Thailand, Indonesia, Malaysia, the Philippines, Vietnam, Singapore
Survey period: September–November 2021

***Definition of "Fandom *sei-katsu-sha*" in these surveys: *sei-katsu-sha* who have been devoted to a fandom for at least six months and have engaged in multiple fandom activities.**

Note: The information on respondents in this booklet is valid as of September 2021.

What fandoms are ASEAN Fandom *sei-katsu-sha* most into today?

Q What fandoms are ASEAN *sei-katsu-sha* most into today?

Here is a word cloud analysing the data on ASEAN Fandom *sei-katsu-sha*'s open-ended responses about what fandom they are now most into. Among the most frequently recurring keywords are, or relate to, football, drama, video sharing/distribution platforms, cooking, artists, movies, and tech brands.

*ASEAN Fandom *sei-katsu-sha*'s open-ended responses analysed and output as a word cloud
Base: ASEAN Fandom *sei-katsu-sha*

Q What type of fandom have you most been into during the pandemic?

Top 10, by country *Base:ASEAN Fandom *sei-katsu-sha*

Idols/Celebrities | Content | Hobbies | Brands (%)

	ASEAN TOTAL		Thailand		Singapore		Malaysia		Vietnam		Indonesia		Philippines		Japan	
1	K-POP	7.6	K-POP	10.6	Manga/ animation	9.0	Media	7.6	Game	7.7	Cooking	9.3	Game	8.6	Local POP (J-POP)	14.0
2	Game	7.3	Media	8.0	Game	8.0	K-POP	7.4	Cooking	7.6	Game	8.3	K-POP	7.7	Manga/ animation	11.3
3	Cooking	7.3	Cooking	7.9	K-POP	7.0	Movie	7.4	Manga/ animation	7.3	K-POP	6.9	Media	7.7	Game	10.7
4	Manga/ animation	7.1	Manga/ animation	7.4	Drama	6.6	Manga/ animation	7.3	Sports	6.7	Drama	6.3	Manga/ animation	6.9	K-POP	8.0
5	Media	6.2	Game	5.6	Tech brands	5.9	Cooking	7.0	Tech brands	6.4	Movie	5.9	Cooking	6.6	Media	6.1
6	Drama	5.5	Movie	4.9	Cooking	5.4	Drama	6.1	K-POP	6.3	Media	5.4	Drama	6.1	Sports viewing	4.1
7	Movie	5.3	Plants	4.0	Media	5.0	Game	5.7	Fashion brands	5.3	Tech brands	5.4	Movie	5.6	Other famous people	3.9
8	Tech brands	4.9	Drama	4.0	Movie	4.4	Other famous people	4.4	Beauty & personal care brands	4.7	Manga/ animation	5.0	Plants	4.3	Cooking	3.9
9	Sports	4.0	Tech brands	4.0	Sports	4.4	Sport brands	4.3	Other famous people	4.4	Other famous people	4.4	Fashion brands	3.7	Movie	3.7
10	Other famous people	3.7	Other famous people	3.9	Sport brands	4.1	Tech brands	4.0	Drama	3.7	Sports	4.3	Sport brands	3.6	Outdoor	3.6

*Other famous people = YouTubers, VTubers, TikTokers, content creators, influencers, cooks, writers, etc.

The three types of fandom that ASEAN Fandom *sei-katsu-sha* have been most into during the pandemic are, in descending order, K-pop, games, and cooking. While many of the top choices **can be enjoyed at home, cooking (self-catering, confectionery making, and bread making) marks a step change for the ASEAN region with its culture of eating out. Also noteworthy is how people have come to enjoy fandoms that are potential secondary income sources**, such as growing plants, which ranked seventh in Thailand. "Brand fandoms" devoted to tech brands and sporting goods brands also rank near the top.

In Japan, J-pop fandoms placed first, but in ASEAN people tended to enjoy overseas artists and content more than the local ones.

Creative and dynamic ASEAN Fandom *sei-katsu-sha*

How do ASEAN Fandom *sei-katsu-sha* go about enjoying their fandom? Each of the ASEAN Fandom *sei-katsu-sha* that HILL ASEAN encountered during its research took their own unique, creative and dynamic approach to involvement in their fandom.

K-pop Fandom
sei-katsu-sha
Thailand

"I work at a office. But I organized an event for several hundred people in honor of my beloved boy band. I even tried producing my own original merchandise."

"I'm such a big fan of one Chinese actor that I'm studying Chinese and I've started doing business with China."

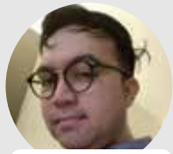
Chinese actor Fandom
sei-katsu-sha
Thailand

Cosplay photography Fandom
sei-katsu-sha
Philippines

"My hobby is cosplay photography. I donate all the money I make selling the photos. I even tried organizing an event with input from the content owners."

"I produce merchandise from my own fan art. I hope my friends will enjoy this lovingly made merch."

Anime Fandom
sei-katsu-sha
Indonesia



Luxury watch Fandom
sei-katsu-sha
Singapore

"As a self-proclaimed ambassador for my favorite watch brand, I correct mistaken reviews on social media and explain the brand's attractions when I get together with other watch-lovers offline."

"I love my cat so much that I got totally into making homemade pet food. I ended up opening my own store."

Cat Fandom
sei-katsu-sha
Vietnam

Local artist Fandom
sei-katsu-sha
Malaysia

"I'm an active member of my favorite Malaysian singer's fan club. It delights me to be able to help out his parents, wife, and kids as well."

"I imported a board game that was new to Indonesia at the time. I started inviting friends and friends of friends to play, until we became Indonesia's No. 1 board game club."

Board game Fandom
sei-katsu-sha
Indonesia

That's how creative and dynamic ASEAN Fandom *sei-katsu-sha* are. Next, let's explore what they're actually like.

ASEAN Fandom *sei-katsu-sha* join fandoms in search of excitement and a sense of connection

For many ASEAN Fandom *sei-katsu-sha*, the trigger for getting into their fandom was a desire to make life more exciting, relieve stress, kill time, etc. In other words, they **wanted to enjoy themselves or to blow off steam**. Notably, scores related to **the desire to connect with people were also high**. This demonstrates that **people enter the world of fandom** not just for their own enjoyment but also **because they want to interact with others**.

Q What events or triggers sparked your interest in the fandom?

ASEAN Fandom *sei-katsu-sha* (%)

1	I want to make life more exciting	52.8
2	I want something to relieve stress in life, ex. work/study	51.3
3	I want to kill time and boredom	45.6
4	I want to connect with people	41.5
5	COVID-19	40.7

Japan Fandom *sei-katsu-sha* (%)

1	I want to make life more exciting	43.9
2	I want something to relieve stress in life, ex. work/study	30.0
3	I want to kill time and boredom	29.7
4	COVID-19	21.9
5	I want something to fill the loneliness	18.7

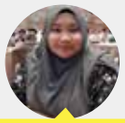
*Top five responses

Something to brighten up the day

"I first got to know them when I was a student. I was constantly studying, and I wanted **something to brighten up my days**."

K-pop Fandom *sei-katsu-sha*
Thailand

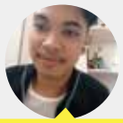
A source of comfort in stressful times



"Every day was a struggle. I was looking for **a source of comfort**."

Fantasy literature Fandom *sei-katsu-sha*
Malaysia

The trigger: The pandemic



"**My income took a hit because of the pandemic, and a member of my family actually caught it**. So I often got depressed. I was looking for a way to blow off steam at such times."

Action figure Fandom *sei-katsu-sha*
Philippines

Getting the most out of their fandom with fellow fans, rather than just enjoying watching by themselves

Q What activities do you engage in related to your main fandom?

ASEAN Fandom *sei-katsu-sha* **are avid networkers within their Fandom community**. They share information with fellow fans and join social media groups. Japan Fandom *sei-katsu-sha*, in contrast, are primarily consumers. They watch videos and follow fan accounts for personal enjoyment.

ASEAN Fandom *sei-katsu-sha* (%)

1	Share news, information, and posts related to fandom on SNS (RT, repost, etc.)	44.7
2	Watch official movie relating your fandom posted online	43.8
3	Watch/read tips, facts, and information on fandom online	43.5
4	Enjoy photos about fandom	43.0
5	Follow fan account	40.1
6	Enjoy fan art posted online	39.1
7	Enjoy reading tips/how-to posts and post online	39.0
8	Join SNS group relating to my fandom (Facebook group, etc.)	38.9
9	Buy/receive official goodies/freebies/merchandising	35.7
10	Watch unofficial/fan-made movie posted online	33.5

Japan Fandom *sei-katsu-sha* (%)

1	Watch official movie relating your fandom posted online	44.9
2	Enjoy photos about fandom	41.7
3	Follow official account	37.1
4	Watch/read tips, facts, and information on fandom online	36.0
5	Share news, information, and posts related to fandom on SNS (RT, repost, etc.)	34.3
6	Buy/receive official goodies/freebies/ merchandising	30.0
7	Go to fandom store	28.4
8	Visit official event relating to fandom (concert, fan meeting, etc.)	27.6
9	Watch unofficial/fan-made movie posted online	22.6
10	Create fan account on SNS	20.7

*Top ten responses

"**I buy everything and anything that features him** in the ad or on the package."

Chinese actor Fandom *sei-katsu-sha*
Thailand

"**I organized a long-distance tour and signed up some friends**. I was careful to ensure it was a safe, enjoyable trip, and everyone said they loved it, which was gratifying."

Motorcycle Fandom *sei-katsu-sha*
Vietnam

"I've formed an unofficial fan club for my favorite movies. We don't just have fun together. **I even collected donations with fellow fans**."

Movie Fandom *sei-katsu-sha*
Philippines

Q What are your motivations for actions related to your fandom?

For ASEAN Fandom *sei-katsu-sha*, achieving personal growth is the motivation.

ASEAN Fandom *sei-katsu-sha* (%)

1	Learning new things	55.0
2	Feeling happy/self-care	51.2
3	Contributing to/supporting what I am into	49.0
4	Making new friends/networking	46.2
5	Simply enjoying	44.3

Japan Fandom *sei-katsu-sha* simply want to have fun.

Japan Fandom *sei-katsu-sha* (%)

1	Simply enjoying	55.6
2	Feeling happy/self-care	44.3
3	Contributing to/supporting what I am into	35.6
4	Killing time/boredom	22.6
5	Making new friends/networking	22.3

*Top five responses

Fandoms offer benefits not easily available in everyday life

The benefits that ASEAN Fandom *sei-katsu-sha* derive from their fandom are not limited to simply feeling good and having fun. They also gain other benefits they cannot easily get in their daily life, such as making more friends, becoming more outgoing, and learning new things. Japan Fandom *sei-katsu-sha*, on the other hand, are more likely to cite benefits like having fun, getting motivated, and feeling more upbeat.

An abundance of joy and excitement
to get you through the daily grind

K-pop Fandom
sei-katsu-sha
Vietnam

"Watching the girls puts me in a really happy, peppy mood. It makes me feel young again. Dancing to their music **is a way to blow off steam. It boosts my spirits and lets me fuel up on good vibes.**"

Learning and being inspired
in ways you normally couldn't

Cat Fandom
sei-katsu-sha
Vietnam

"I'd just gotten a cat which happened to be sick. That motivated me to start learning how to cook for cats. **I needed to study up on cats so I would know how to take care of mine.**"

You can be yourself. And be a kid again

Board game and anime Fandom
sei-katsu-sha
Indonesia

"Superhero anime used to be my favorite, and watching it brings back great memories. It **reminds me of the happiest days of my life.**"

You can bond with people
who are neither family nor neighbors

Football and anime Fandom
sei-katsu-sha
Singapore

"Talking with the people in my fandom community always reminds me of my family. **I feel a strong bond with the people in my fandom**, even when they're older than me."

Discovering a side of yourself you never knew about

Local artist fandom
sei-katsu-sha
Malaysia

"When our fandom community found itself without a leader, I needed to be more active, so I started speaking out more. **I'd always thought I was shy, but I discovered an outgoing, talkative side of myself.**"

A new purpose in life
unrelated to career or family

K-pop fandom
sei-katsu-sha
Thailand

"If my favorite artist were to disappear from the face of the earth, my daily routine would revert to the same humdrum back-and-forth between work and home...**The joy would go out of my life. I wouldn't want to do anything anymore.**"

Q What benefits do you receive from your fandom?

ASEAN Fandom *sei-katsu-sha* (%)

1	Positive attitude	54.5
2	Full of joy	46.2
3	Have more friends	45.0
4	Learned more about own country history and culture	44.6
5	More sociable	43.1
6	Learned more about foreign history and culture	41.2
7	Able to enjoy life more	40.5
8	Feel more motivated	39.6
9	Became more open-minded	39.5
10	Support each other in the fandom	39.0

Japan Fandom *sei-katsu-sha* (%)

1	Able to enjoy life more	34.4
2	Feel more motivated	32.6
3	Full of joy	31.6
4	Have more friends	30.6
5	Positive attitude	29.1
6	Became more interested in new things	28.4
7	Can appreciate living in the moment	27.7
8	Can enjoy more things with my family and friends	27.7
9	Discovered a new side of myself	26.0
10	Gained a new personality	22.4

*Top ten responses

Q Why do you continue to be passionate about your fandom?

The highest scoring answer to the question "Why do you think you continue to be passionate about your fandom?" was "Can get a sense of belonging." "Generous support among fans in the fandom community" and "A lot of interaction between fans" also scored high. **These findings show that connecting with others and being mutually supportive are the reasons ASEAN Fandom *sei-katsu-sha* remain committed to their fandom.** For Japan Fandom *sei-katsu-sha*, by contrast, their fandom is a way to free themselves from the stress and fatigue of the daily grind. It has a cathartic effect by letting them forget about the real world.

ASEAN Fandom *sei-katsu-sha* (%)

1	Can get a sense of belonging	49.1
2	The lessons that fandom topics give me are great	46.2
3	Generous support among fans in the fandom community	44.4
4	A lot of interaction between fans	42.5
5	The fandom frees me from stress	41.9
6	The fandom is constantly teaching me new perspectives and ideas	33.8
7	The fandom lets me immerse myself in a different world	31.6
8	Fandom topics are constantly being updated	26.9
9	Able to agree with the purpose of the fandom topic	25.4
10	Money can be made in relation to the fandom topics	24.8

Japan Fandom *sei-katsu-sha* (%)

1	The lessons that fandom topics give me are great	40.1
2	The fandom frees me from stress	38.3
3	The fandom lets me immerse myself in a different world	36.6
4	The fandom is constantly challenging me	30.9
5	A lot of interaction between fans	28.0
6	Fandom topics are constantly being updated	27.1
7	The fandom helps me forget about the real world	27.0
8	The fandom is constantly teaching me new perspectives and ideas	23.3
9	Generous support among fans in the fandom community	22.9
10	Able to agree with the purpose of the fandom topic	18.7

*Top ten responses

ASEAN Fandom *sei-katsu-sha* play their own role in the Fandom community. They love pursuing their passion with fellow fans

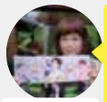
For ASEAN *sei-katsu-sha* who belong to a fandom, friends who share their passion are important. So is the community where they meet fellow fans—what HILL ASEAN calls a "Fandom community." Fandom communities come in many different forms. They may be categorized by subject, by country, or by preference. *Sei-katsu-sha* play different roles within the fandom community depending on their abilities, what they want to enjoy, and their motives for joining. They pursue their passion while having fun engaging with fellow fans.

The *sei-katsu-sha* that make up a Fandom community

The characteristics of ASEAN Fandom communities

Equality — An ideal, equal society free of hierarchy

Fandom communities have no disparities. Everyone is equally free to have fun. Their membership is highly diverse, especially with the proliferation of online communities. Nationality, gender, age, and economic status are irrelevant. **These communities are, in a way, utopias for ASEAN *sei-katsu-sha*, who face numerous challenges in life and struggle with many forms of inequality.**



Chinese actor Fandom *sei-katsu-sha* Thailand

"Our fan club is divided into groups based on behavioral patterns, but everyone is equal. A particular individual may attract the spotlight by virtue of their position, but **all members are equals in the fan club**."

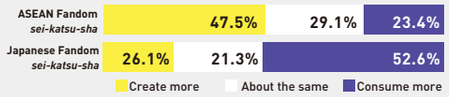
Board game Fandom *sei-katsu-sha* Singapore

"There's an administrator at the heart of the community, but otherwise **it's not hierarchically structured**."

Creativity — Enjoy creating with others more than consuming

ASEAN *sei-katsu-sha* are **eager to create stuff** as a way of getting more out of their fandom. They make videos, plan events, and produce and sell merchandise. Such activities **result in a more vibrant community**.

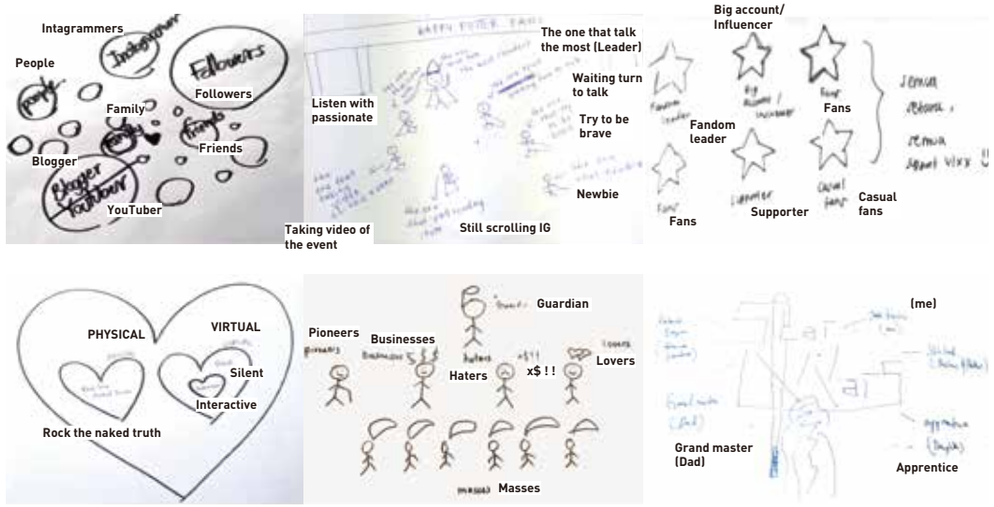
Q Do you consume or create within your fandom?



K-pop Fandom *sei-katsu-sha* Vietnam

"I sell my own handmade items to the community, **not to make money but because I enjoy it**. The community makes me feel younger and more motivated. It's a source of fresh strength."

"Conceptual diagram of Fandom community" drawn by ASEAN Fandom *sei-katsu-sha*



A second family

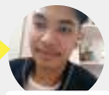
Genuine mutual support with no expectation of getting something in return

Sharing as they do a love of the same thing, community members **enjoy even stronger bonds of trust and mutual support with each other than with family members and real-world friends**. They aid each other from pure motives. They even advise and help each other in matters unrelated to the fandom subject.

Local artist Fandom *sei-katsu-sha* Malaysia

"When a fan or a member of their family falls ill, we'll all go visit them or donate money. **They're like a second family**. They're everything to me—and I'm not exaggerating."

"I can only meet fellow fans virtually these days. But **I can still confide in them when I have a personal problem**. They're just like family."

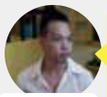


Action figure Fandom *sei-katsu-sha* Philippines

The power of numbers

The thrill of changing the world as part of something bigger

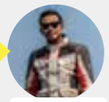
ASEAN Fandom *sei-katsu-sha* **love having an impact and changing the world with their many fellow fans**. They can accomplish collectively what they could never do alone. That gives them a thrill unavailable in their ordinary lives.



Volleyball Fandom *sei-katsu-sha* Thailand

"Our goal is to get the Thai team into the Olympics. So **in conjunction with the most knowledgeable fans, we send positive, creative comments to the players and coaches**." (Administrator of the Thai national volleyball team fan club, made up of 20,000 specially chosen fans)

"Before going on a tour with my fellow bikers, **we make a pile of stuff to donate**, like old clothes that are still in good condition. **Then when we get to our destination, we give it away to poor people living there**."



Motorcycle Fandom *sei-katsu-sha* Thailand

ASEAN Fandom *sei-katsu-sha* seek faithful corporate partners that are committed to problem-solving

ASEAN Fandom *sei-katsu-sha* seek more from a brand than just a business relationship. They want it to **work with the fandom amicably and in good faith**. They expect the brand itself to be a committed member of the fandom. That does not just mean being aware of the fandom subject and helping the community expand. It also means co-creating the brand, product, or service together and solving problems facing the fandom and *sei-katsu-sha*.

Q How you want brands to support your fandom?

ASEAN Fandom *sei-katsu-sha* (%)

1	Collaborate with fan community to co-create something new	51.6
2	Feature my fandom in advertising campaign	47.8
3	Feature my fandom in products	47.3
4	Collaborate with fandom to contribute to local causes	47.0
5	Sponsor big events related to fandom	43.6
6	Feature my fandom in giveaways or merchandise	41.0
7	Sponsor small events related to fandom	40.2
8	Support activities originated by Fandom community	39.5
9	Collaborate with fandom to contribute to global causes	31.4
10	None apply	3.6

*Top ten responses

ASEAN Fandom *sei-katsu-sha* value brands that support their fandom and are willing to pay more for them

Q How much extra are you willing to pay for products/services of companies and brands that support your fandom?

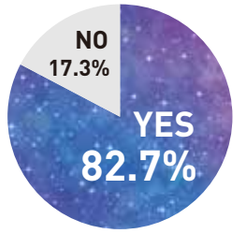
88.2% are willing to pay more than they would for other products

Brand fandom participation among ASEAN Fandom *sei-katsu-sha*

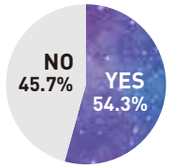
What percentage of *sei-katsu-sha* who belong to a fandom are part of a brand fandom? **Over 80 percent of ASEAN Fandom *sei-katsu-sha* identified themselves as fans of a particular brand** in the HILL ASEAN survey.

Q Is there any brand you are passionate about?

ASEAN Fandom *sei-katsu-sha*



Japan Fandom *sei-katsu-sha*



Movie Fandom *sei-katsu-sha* Philippines

Footwear brand "When it comes to design and comfort, no other brand comes close!"

Block toy brand "This brand fosters positive thinking and encourages fans to try harder. It gives fans something to be interested in, so they don't end up losing interest in life and having no likes and dislikes."

Block toy Fandom *sei-katsu-sha* Vietnam

Luxury watch Fandom *sei-katsu-sha* Singapore

Luxury watch brands "Each brand becomes more fascinating the deeper you delve into its brand story (craftsmanship and history)."

Reasons for becoming a brand's fan

The 3 key factors that induce ASEAN *sei-katsu-sha* to become brand fans

Well-designed, high-quality products or services
Can always be expected to deliver new, exciting, and stylish products or services

Emotional value and action
Is the brand constantly challenging itself? Is it worthy of respect? Does it contribute to society?

Attractive fan community
Strength of the brand's bonds with fans, and how cool its activity platform is

Q What are your reasons for supporting your favorite brand?

ASEAN Fandom *sei-katsu-sha* (%)

1	They make high-quality products or services	56.7
2	They constantly launch new products and services	45.4
3	It is a brand that I admire	41.3
4	I like myself using the brand	40.2
5	Because they actively incorporate consumer ideas	39.1
6	The design and image are cool	38.7
7	Because it is useful to society	37.7
8	Because they have goals and challenges that I want to support	37.0
9	It is unique and original	37.0
10	Because they boldly take on new challenges	36.5

*Top ten responses

Summary

ASEAN Fandom *sei-katsu-sha* and Fandom communities

ASEAN Fandom *sei-katsu-sha* 4 Keywords

Triggers

Social ties & everyday fulfillment

Become deeply involved out of a desire to enjoy each day, bond with people, and alleviate loneliness.

Benefits

Personal development & growth

Get more than just fun and positive vibes out of the fandom. Also learn new things, are stimulated, and make friends they can rely on.

Action

Dynamism of interacting with peers

Don't just enjoy being active in the fandom. Value being able to swap info within the community and interact with others.

Expectations of corporate partners

A genuine win-win relationship

Expect any company or brand collaborating with the fandom to be sincerely committed to growing the fandom and solving its problems.

ASEAN Fandom communities 4 Keywords

Equality

A utopia where all are equally respected. Their shared passion precludes discrimination and bias.

Creativity

Have fun together by collaborating and being creative: planning events, producing merchandise, etc.

A second family

Genuine mutual support with no expectation of something in return. Implicitly trust each other like family. Even advise and help each other in matters unrelated to the fandom subject.

The power of numbers

Exert their influence for the sake of the fandom subject, and society at large, by coming together and making their numbers felt. Relish changing the world for the better.

Background

ASEAN Fandom *sei-katsu-sha* vs. Japan Fandom *sei-katsu-sha*

	ASEAN Fandom *sei-katsu-sha*	Japan Fandom *sei-katsu-sha*
	Me, you and our fandom A happy world for me, you, and our fandom where we can all have fun and grow	**Me and my fandom** A fun world for just me and my fandom
Purpose	To fill a hole in their life	Simply to have fun and relieve stress
Action	Don't just have fun. Try to affect the world around them with their fellow fans	Mainly focused on personal enjoyment
Social ties	Seek a sense of belonging and have fun with others	Can enjoy alone
Fandom's relationship to everyday life	Extension of everyday life	Separate from everyday life

Because their fandom is their

MATTER-VERSE

The ideal community that fulfills the most cherished hopes of *sei-katsu-sha*.

ASEAN *sei-katsu-sha* join a fandom for a host of different motives: for excitement and anticipation, to alleviate stress and worry, to socialize with others, to enrich their lives. They thus get many benefits out of their fandom beyond simply killing time and purely having fun. These include bonding closely with others and enjoying a sense of belonging, finding opportunities for personal growth, being part of a hierarchy-free community where people spontaneously help each other, and being able to influence the world around them by taking action with their peers. **For ASEAN *sei-katsu-sha*, a fandom is an ideal world that fulfills these and other cherished hopes unlikely to be fulfilled in actual society**.

To denote such fandoms that seize the hearts of ASEAN *sei-katsu-sha*, HILL ASEAN has coined the term "MATTER-VERSE," meaning the ideal community where ASEAN *sei-katsu-sha*'s most cherished hopes are fulfilled.

The Three "Matters"

The three hopes *sei-katsu-sha* seek to have met in their fandom

Verse = Universe

A hierarchy-free utopia	A community where people gather and help each other in mutual trust

Conceptual diagram of the MATTER-VERSE

ASEAN *sei-katsu-sha* bring what most matters to them—their most cherished hopes—to their fandom. Which suggests that **those hopes have little chance of being fulfilled in actual society**. The ASEAN region faces many daunting economic, political, and ecological challenges that are beyond *sei-katsu-sha*'s ability to solve on their own. Therefore, fandom **functions as a new, utopian economic zone and living space, where the things that most matter to ASEAN *sei-katsu-sha* are addressed**.

What a brand must do to engage with ASEAN Fandom *sei-katsu-sha* and their MATTER-VERSE

Find a good match: Choose a fandom that speaks your brand's language

Deciding to collaborate with a fandom simply because it's large and well-known won't get you very far. ASEAN Fandom *sei-katsu-sha* are hard-nosed about brands that team up with them. They may ask themselves "Why has this brand chosen our fandom?", or "How will teaming up with it benefit the fandom?" When selecting an ASEAN fandom to engage with, **examine carefully whether your brand purpose and product features are compatible with what matters to the fandom: why they do what they do and what their stance is. Your brand activities will be more effective if your philosophy is in harmony with the fandom's. They will feel grateful to the brand and be more inclined to support it**.

Don't collaborate. Collabor-act: Establish a united front with the community dedicated to achieving what matters to it

When working alongside a fandom as a brand, **be supportive of the fandom subject and back the goals and things that matter to the community. Establish a united front to achieve those goals**. These may vary greatly depending on the fandom: becoming better known, winning the finals, gaining wider support for social issues. At any rate, **set a win-win goal that your brand is uniquely positioned to contribute to that will also benefit the fandom. And display a commitment to pursuing it together**. ASEAN Fandom *sei-katsu-sha* will view your brand as a partner if it toils alongside them in pursuit of their goal. They will become more attached to it.

Ignite the fandom: Utilizing brand asset to make Fandom community more vibrant

ASEAN Fandom *sei-katsu-sha* are constantly on the lookout for partners to help expand their fandom by giving it a boost. So ask yourself **what you're uniquely positioned to do as a brand. What actions can you take to galvanize the fandom? How can you help them achieve the things that matter to them?** Say you're an automobile brand, for example. You could donate vehicles for transporting donated supplies to a fandom committed to helping the poor. If you're a food brand, you could provide dietary health management support to a team backed by a fandom. **Many of the things that matter in ASEAN *sei-katsu-sha's* MATTER-VERSE are not capable of immediate fulfillment. Brand actions should therefore preferably last for the longer term rather than being one-offs**.

The necessary steps to building a brand fandom

Make *sei-katsu-sha* matter: Welcome them as partners in building the brand

Don't let your brand belong to your company alone. Turn it into **something that your company and your brand fandom grow together**. Granting the fandom partial ownership of the brand will give ASEAN Fandom *sei-katsu-sha* a deeper sense of mattering to the fandom. It will enhance their commitment to the brand.

Matter to *sei-katsu-sha*: Be a brand whose purpose they can identify with—one they want to love and support

Constantly taking on new challenges as a fandom gives ASEAN Fandom *sei-katsu-sha* a sense of personal growth. It stimulates their hope to grow. If your brand fandom is to continue to matter to *sei-katsu-sha*—if it is to remain the object of their interest and support—it's **important to be aware of their medium and-long-term issues and identify challenges**. And don't forget to craft a brand story that people want to share and know more about. That's essential to growing the brand's Fandom *sei-katsu-sha*.

Solve what matters to *sei-katsu-sha*: Solve their problems and fulfill their hopes

Sei-katsu-sha have things that matter to them: problems they wish to solve, desires they wish to fulfill. These range from the personal to the societal. A fair number of ASEAN Fandom *sei-katsu-sha* take action to achieve what matters to them with their fellow fandom members. When building a fandom as a brand, **identify social issues where your brand's strengths can be applied. Make an ongoing commitment to enriching *sei-katsu-sha* and society with the fandom**.

The future of ASEAN Fandom *sei-katsu-sha*

HILL ASEAN expects that ASEAN Fandom *sei-katsu-sha* will continue actively enjoying fandom activities even after the end of the COVID-19 pandemic. What kind of services will they invent themselves or receive from brands in the fandoms of tomorrow? Here is the future of ASEAN Fandom *sei-katsu-sha* as forecast by HILL ASEAN.

"Fandom apartments" for those to whom the same things matter

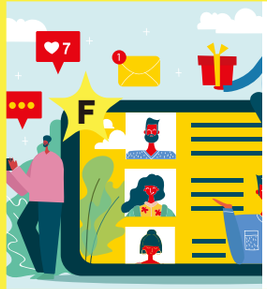
The ASEAN of the future will see the advent of **housing complexes for *sei-katsu-sha* affiliated with a particular fandom**. There may be a dedicated apartment building for a coffee fandom, for example, or a special residential zone for a Shiba dog fandom. The facilities and services provided will be tailored to the fandom. An apartment building for wine-lovers might come with a shared wine cellar. A shared house for idol singer fans might have a theater in the common area where residents can enjoy watching videos together. **Living with people who love the same things will greatly improve quality of life**.

A separate economic zone with its own "Fandom currency" exclusive to the community

The bigger the fandom, the bigger its economic heft. Fandoms with massive memberships and plenty of energy will **create their own economic zones with their own virtual currency usable only within the community**. This currency will be effective in facilitating activity among fans and stimulating greater communication. It will be used for selling NFT artwork, buying and selling fan-made merchandise, paying gratuities for valuable information, and remunerating providers of special skills and services. In the process, such fandoms will become too big for brands to ignore.

Fandom Inc.

Some fandoms will incorporate their communities as businesses. **Fans will become shareholders to raise money for activities. The funds generated through their activities will be distributed among the shareholders and plowed back into the fandom. They may also be invested in supporting the fandom subject**. Incorporation will have many benefits. It will make fans more serious about their activities, for example. It will also enable closer coordination with the administrator or owner of the fandom subject. (On the other hand, in some fandoms incorporation will create inequalities between the largest shareholder and everyone else. Thus, a sense of unfairness will spread in what was previously a utopia.)



"Matter-matching AI system" for brands and fandoms

Services will emerge that **use AI to match brands looking for exposure with fandoms seeking a backer**. A company may be looking for a fandom to promote its toothpaste brand, for example, while a fandom may be looking for a brand to support it. An AI system will automatically analyze whether the two parties are compatible in purpose, style, and image. It will be **a win-win situation. The brand will sell more product and the fandom will attract more attention**.

A "find my passion AI service" recommending the perfect fandom based on what matters to you

Want to get into something but not sure what you're suited to? Thinking of trying something but worried you'll be wasting your time if it ultimately fails to tickle your fancy? Well, there will be a service for such *sei-katsu-sha*; the one that recommends the right fandom for anyone. **An AI system will analyze what matters to them based on social media posts, online shopping history, and other behavioral data**. It will then recommend the best fandom for them.

"Matter-verse insurance"

Is your favorite star no longer single? Has your favorite band just broken up? Has your favorite football club been relegated to a lower league? An **insurance policy that provides coverage for adverse fandom events** like these will be popular among ASEAN Fandom *sei-katsu-sha*. Benefits will be paid out to fans who have to take time off work to get over their shock. Some people may spend the lump-sum payment on finding a new fandom.

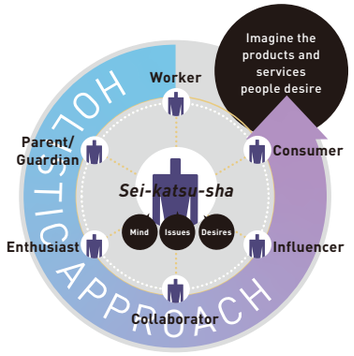
"Fandom academy" a place of mutual instruction

People who are into a fandom connected with another country often study the country's language and history. They get into its food, fashion, and makeup. So, their thirst for knowledge grows. The ASEAN fandom communities of the future will **develop both online and offline "fandom academy" functions: places of learning where fans and experts provide instruction.** Learning and teaching new things will **strengthen bonds between fans. It will also fulfill their desire to feel they matter**.

What is Hakuhodo Institute of Life and Living ASEAN?

A think tank dedicated to studying *sei-katsu-sha*

Hakuhodo Institute of Life and Living ASEAN (HILL ASEAN) was established in 2014 as the Hakuhodo Group's think tank in the ASEAN region.
By studying the new lifestyles of *sei-katsu-sha*—our term for the holistic person—emerging in this region and sharing marketing ideas about them, we hope to to help companies with their marketing efforts in ASEAN countries.



Hakuhodo's *sei-katsu-sha* Insight philosophy

At Hakuhodo, we describe people not simply as "consumers" but as *sei-katsu-sha*—fully rounded individuals with their own lifestyles, aspirations, and dreams.

"Consumer" is a producer-centric term that refers only to one facet of people's lives.
Human beings don't exist solely to consume. They do much more than just shop. They are workers, residents, citizens, somebody's son or daughter, and perhaps also a parent.
At Hakuhodo, we use the term *sei-katsu-sha* to go beyond the consumer to understand the whole person and develop marketing approaches based on their true desires.

Why study ASEAN *sei-katsu-sha*?

The formation of the AEC (ASEAN Economic Community) has given further impetus to the flow of people and goods within the region and heightened interest in ASEAN as one big market.

ASEAN is a patchwork of countries that differ in language, religion, and cultural background. However, identifying commonalities among ASEAN *sei-katsu-sha* that transcend these differences makes it possible for us to gain a bird's eye view of the entire ASEAN market.

Determining what ASEAN *sei-katsu-sha* have in common also serves as a useful yardstick for understanding how each country differs.

Gain a bird's-eye view of the overall ASEAN market as it becomes more integrated through the AEC

Understand what makes each country's *sei-katsu-sha* distinctive

Survey, research, and presentation
Hakuhodo Institute of Life and Living ASEAN (HILL ASEAN)
Farhana E. Devi Attamimi (Indonesia)
Yuko Ito
Tomoka Takada
Eka Harithsyah (Indonesia)
Wannarat Wisawasukmongchol (Thailand)
Alicia Soehardjono (Indonesia)
Supapen Chirakwanchay (Thailand)
Adison Thanathamphithak (Thailand)
Thanchanok Surathanee (Thailand)
Rinnatha Thanlap (Thailand)
Sanu Pratomo (Indonesia)
Kumiko Horiba (Singapore)
Louis Chan (Singapore)
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Rafi Ong (Philippines)
Summer Siao (Philippines)
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Masafumi Mizutori

Online forum planning and management
Winter Egency

Survey work
YI Consulting
Feifei Suo

Overall direction
Hakuhodo International
Hideaki Sato