

Hakuhold Institute of Life and Living ASEAN presents ASEAN *Sei-katsu-sha* Studies 2022

## Analysis of Fandom in ASEAN: Enjoying a passion with others

From groups of fans simply having fun to MATTER-VERSEs:  
New utopian economic zones and living spaces

Tokyo—May 19, 2022—Hakuhold Institute of Life and Living ASEAN (HILL ASEAN) held ASEAN SEI-KATSU-SHA FORUM 2022, announcing findings from surveys and research into the attitudes and behavior of ASEAN *sei-katsu-sha*—Hakuhold's term for the holistic person—as well as implications for marketing. The topic was “Into the Fandom: How tribes of fans will be the next power in ASEAN society?”

A “fandom” is generally defined as: “People who are passionate fans of singers, manga, sports, hobbies, and so on, and the world/culture formed by these fans.” In Japan, the phenomenon has recently been expressed using the new coinage “*oshikatsu*,” which means “to enthusiastically support a singer, actor, etc., that one feels particular devotion to.”

HILL ASEAN conducted quantitative research on and interviewed “Fandom *sei-katsu-sha*” passionate about their fandoms in six ASEAN countries and Japan\*1 to shed light on the what triggered them to join their fandom, the activities they engage in with fellow fans, the benefits they receive from their fandom, and the structure and significance of their fandom communities.

\*1 Countries studied: Thailand, Singapore, Indonesia, Malaysia, Vietnam, Philippines, Japan (quantitative survey only in Japan)

Our findings showed that ASEAN *sei-katsu-sha* gain not just fun and relief from the stresses of life from their fandoms. Fandoms also offer fans a place to explore their creativity; a sense of belonging, with connections with others that are like a second family; and the power of numbers, which enables them to change world. Moreover, ASEAN Fandom *sei-katsu-sha* are all equal within their community. A society free of hierarchy is, in a way, an ideal society, and fandoms are a place of comfort and support to Fandom *sei-katsu-sha*.

Meanwhile, HILL ASEAN nominated three hopes that ASEAN *sei-katsu-sha* seek to have met in their fandom: “To matter,” “To have something that matters” and “To have my hopes that matter fulfilled.” It became clear that ASEAN Fandom *sei-katsu-sha* are passionate about their fandoms because they are unlikely to receive or have met in actual society the benefits and value they gain from their fandoms.

Growing economic disparity due to the COVID-19 pandemic and political, environmental and gender issues. These and other social issues that are beyond *sei-katsu-sha*'s ability to solve on their own exist in ASEAN. We believe that in ASEAN, fandoms are **utopias with new economic zones and living spaces, where all is equal and egalitarian.**

From these findings, HILL ASEAN coined the term **MATTER-VERSE**—meaning an ideal community that fulfills the most cherished hopes of *sei-katsu-sha*—to denote the fandoms that seize the hearts of ASEAN *sei-katsu-sha* in ways unlikely to be achieved in actual society.

This report looks at some of the quantitative research.

### The characteristics of ASEAN Fandom communities

1. Creativity: Community members express creativity while working together to plan events and produce merch to enjoy together
2. A second family: Pure, mutually supportive relationships in which community members trust each other like family and even advise and help each other in matters unrelated to the fandom subject
3. The power of numbers: Community members gather, collaborate and leverage their collective power to exert influence on behalf of the fandom subject and society. Through this, they experience the thrill of changing the world
4. Equality: A utopia where all community members are equal and respected without discrimination or prejudice because they are bonded by their shared passion

### The three “matters” ASEAN *sei-katsu-sha* seek to have met in their fandom

1. To matter
2. To have something that matters
3. To have their hopes that matter fulfilled

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

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

## Brand fandoms

- Around 83% of ASEAN Fandom *sei-katsu-sha* responded affirmatively to the question: “Is there any brand you are passionate about?” (Compared to around 54% of Japan Fandom *sei-katsu-sha*).
- Three reasons we identified for becoming a fan of a brand were: (1) Well-designed, high-quality products or services, (2) Emotional value and action, and (3) Attractive fan community.

HILL ASEAN will continue to support the marketing activities of companies in ASEAN through research into the attitudes and behavior of ASEAN *sei-katsu-sha*.

<https://hillasean.com>

A special webpage has been created for this research on the HILL ASEAN website. It contains detailed survey findings, commentary on the research content, implications for marketing, and other information. Please refer to it in addition to this press release.

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### Media contacts:

Fran Miller and Shiho Takahashi  
Corporate Public Relations Division  
Hakuhodo Inc.

[koho.mail@hakuhodo.co.jp](mailto:koho.mail@hakuhodo.co.jp)

## Reference data (From quantitative research)

### Type of fandom they have most been into during the pandemic (Single response)

- The three types of fandom that ASEAN Fandom *sei-katsu-sha* have been most into overall were K-pop, games and cooking. Games included many mobile games that can be enjoyed on a smartphone.
- Cooking appearing in the top 3 in ASEAN marks a step change for the region, where people don't frequently cook for themselves. Many *sei-katsu-sha* challenged themselves to cook as a hobby during the pandemic and showed off their creations on social media.
- The appearance in the rankings of fandoms that offer potential secondary sources of income by selling things they produce as a hobby, such as growing plants, is particular to ASEAN.

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

	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, TikTokkers, content creators, influencers, cooks, writers, etc.

### Triggers or events that sparked their interest in their fandom

- The top 3 responses in ASEAN and Japan are identical. Rather than connecting with others, Japan Fandom *sei-katsu-sha* rank COVID-19 and loneliness higher as triggers for joining their 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

## Activities they engage in related to their main fandom

- In addition to sharing news, information and content, ASEAN Fandom *sei-katsu-sha* enjoy interacting with fellow fans. For the most part, Japan Fandom *sei-katsu-sha* gave the highest rankings to activities they enjoy on their own.

### 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

## Their motivations for actions related to their fandom

- ASEAN Fandom *sei-katsu-sha* want to learn new things in their fandoms, while Japan Fandom *sei-katsu-sha* simply enjoy them.

### 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

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

### 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

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

\*Top five responses

## Why they continue to be passionate about their fandom

- ASEAN Fandom *sei-katsu-sha* place importance on connecting with others in their fandom, including getting a sense of belonging and mutual support among fans (even in relation to matters other than the fandom subject). Japan Fandom *sei-katsu-sha*, on the other hand, seem to mainly enjoy escaping from actual society and enjoying things on their own, such as stress relief and a sense of immersion.

#### 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

### How they want brands to support the fandom they are passionate about

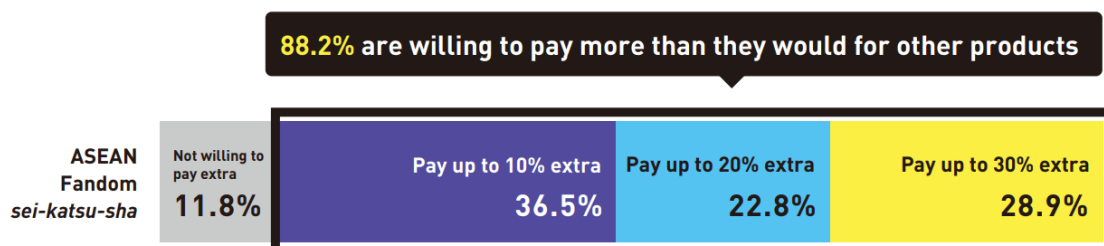
- ASEAN Fandom *sei-katsu-sha* strongly expect that companies and brands will collaborate with their fandom. Moreover, in ASEAN, fandoms themselves sometimes approach brands, which has led to new initiatives and support. Many Fandom *sei-katsu-sha* feel gratitude toward brands that have supported their fandom, which has the benefit of raising unaided recall of the brand.

#### 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

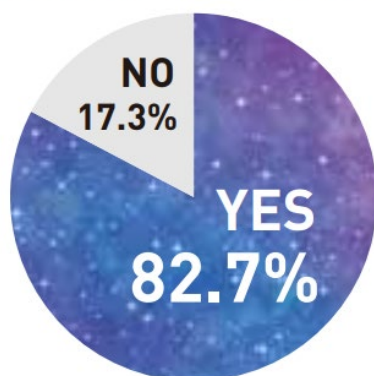
### How much extra they are willing to pay for products/services of companies and brands that support their fandom



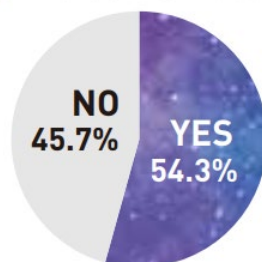
## They have a brand they are passionate about

- Around 83% of ASEAN Fandom *sei-katsu-sha* are members of a brand fandom (compared to around 54% of Japan Fandom *sei-katsu-sha*).
- Their reasons for supporting the brand include not only the brand's high-quality products and services, but also its attitudes, including because they boldly take on new challenges and are useful to society, and their co-creativity with fans, including because they actively incorporate *sei-katsu-sha*'s ideas.

### ASEAN Fandom *sei-katsu-sha*



### Japan Fandom *sei-katsu-sha*



## Their reasons for supporting their favorite brand

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

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

\*Top ten responses

Definition of fandom-related terms in this news release (Definition by HILL ASEAN)

#### Fandom

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.

#### MATTER-VERSE

An ideal community that fulfills the most cherished hopes of ASEAN *sei-katsu-sha*. 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 challenges that are beyond *sei-katsu-sha*'s ability to solve on their own. Therefore, fandoms function as new, utopian economic zones and living spaces, where the things that most matter to ASEAN *sei-katsu-sha* are addressed.

**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.



## Outline of quantitative research

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

## Outline of qualitative research

Methodology: Online interviews  
Survey area: Thailand, Vietnam, Malaysia, Indonesia, Singapore, Philippines  
Target population: 36 samples total (6 from each country)  
(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 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.

## ■ About Hakuhodo Institute of Life and Living ASEAN

Established as an in-house think tank studying *sei-katsu-sha* in 2014, HILL ASEAN was incorporated in Thailand in March 2017. It supports clients’ marketing activities in ASEAN with insights into and proposals for ASEAN *sei-katsu-sha*.

Institute Director: Devi Attamimi  
Location: Bangkok, Thailand  
Research & other activities: Research and analysis from the local perspectives of each ASEAN nation, Forums in ASEAN countries

Details of the findings of this study, commentary on the research content and implications for marketing can be found on a dedicated page on the Hakuhodo Institute of Life and Living ASEAN website:

<https://hillasean.com/>

## ■ About Hakuhodo

Founded in 1895, Hakuhodo is an integrated marketing solutions company headquartered in Tokyo, Japan. With offices in 20 countries and regions, and over 10,000 specialists working in Japan and around the world, Hakuhodo is the world’s second largest advertising agency according to *Ad Age*’s “Agency Report 2022.” It is the core advertising company of the Hakuhodo DY Group.

*Sei-katsu-sha* insight is the foundation for Hakuhodo’s thinking, planning, and brand building. It reminds us that consumers are more than shoppers performing an economic function. They have heartbeats. They are individuals with distinct lifestyles. Hakuhodo introduced this term in the 1980s to emphasize its commitment to a comprehensive, 360-degree perspective on consumers’ lives.

With *sei-katsu-sha* insight as its cornerstone, Hakuhodo combines creativity, integrative capabilities, and data and technology to play a leading role in evolving companies’ marketing activities and generating innovation for the digitalized era. This enables the company to impact and provide value to *sei-katsu-sha* and society.

Renowned for its creativity, Hakuhodo has won the Grand Prix at Cannes Lions International Festival of Creativity twice, and was named Network of the Year at ADFEST 2021.

To learn more, visit: [www.hakuhodo-global.com](http://www.hakuhodo-global.com)