

LINE

Y-Economy Study

A major opportunity to reach
consumers' minds and hearts in 2020

Three reasons why Y Series on LINE TV

provide a unique opportunity for advertisers
and marketers

Y Series are not a new phenomenon but **its development has been impressive** in recent years culminating with the launch of the latest episode of 2gether during the confinement period.

Y Series are **strongly associated to LINE TV**. The main reasons of LINE TV dominance are **the large number of series, the fast updates, and re-runs; 92% watch Y series on LINE TV**.

The **unique characteristics of Y Series audience and watching behavior** define **a new opportunity to reach consumers** in an increasingly cluttered world.

1

The audience of Y Series is on the rise but also diversifying.

Y Series are not limited to a narrow group of sexual minorities. They reach all age groups and genders with a skew towards middle- and higher-income groups.

2

Y Series Economies are powered by Fandom.

The large group of Y Series fans is acting as **a promoter of Y Series and Y actors**. Fans are ready to participate in events and to support brands and products associated to Y Series. They also work hard to convince more mainstream consumers.

3

Y Series are driven by human emotions and touch deeply the watchers.

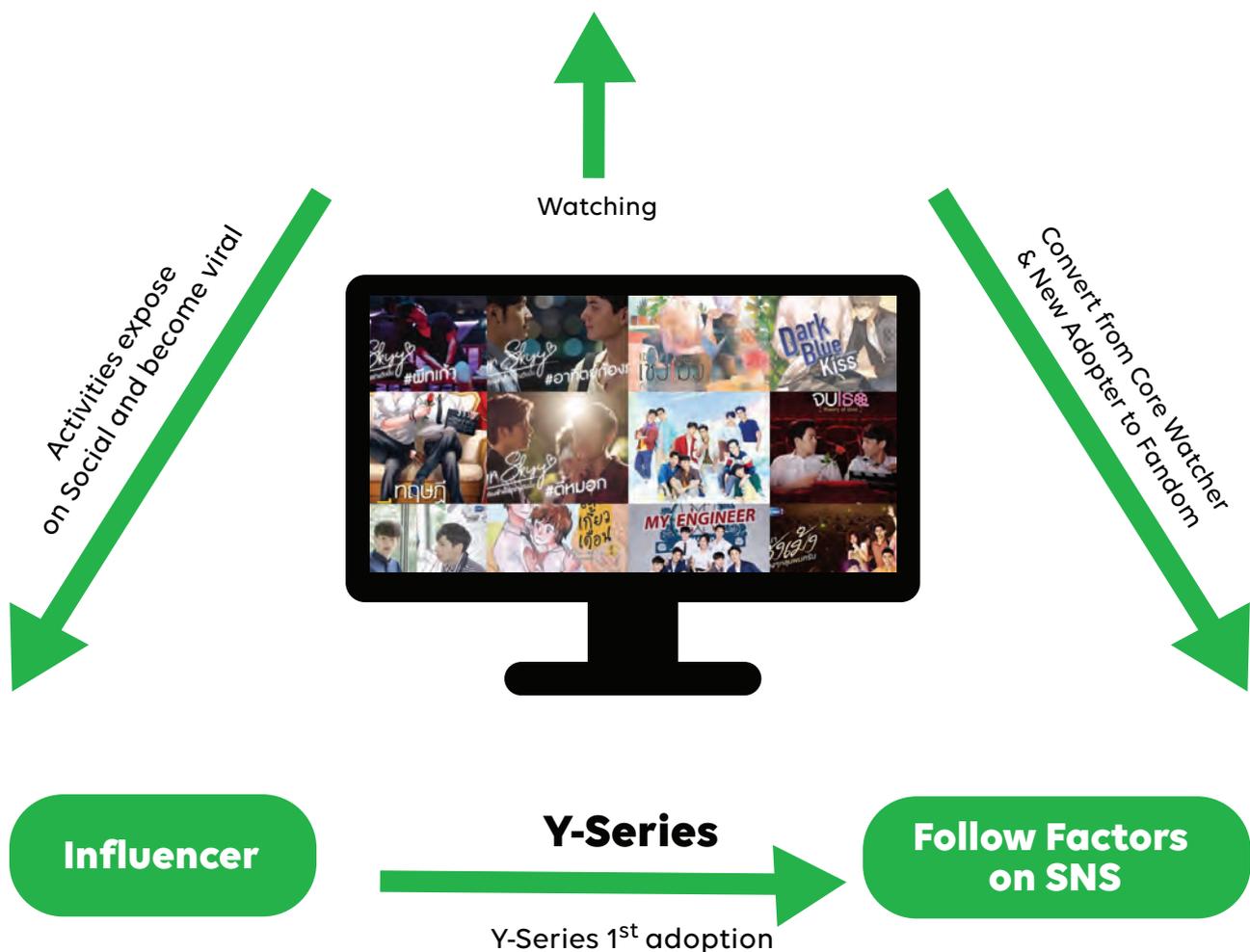
Y Series deal with the tensions between personal aspirations and family and society and the hope of a reconciliation. Y Series are highly self-relevant for watchers ensuring a high level of attention and interest.

Y Series viewership works as a circular system.

Y Series viewership works as a circular system. Fandom activities are fed by Y Series and Y actors. The fans positive reviews reach influencers and generate new adoptions. The flow of posts on social networks comfort the fans that they are part of a success story.

FANDOM'S ACTIVITIES

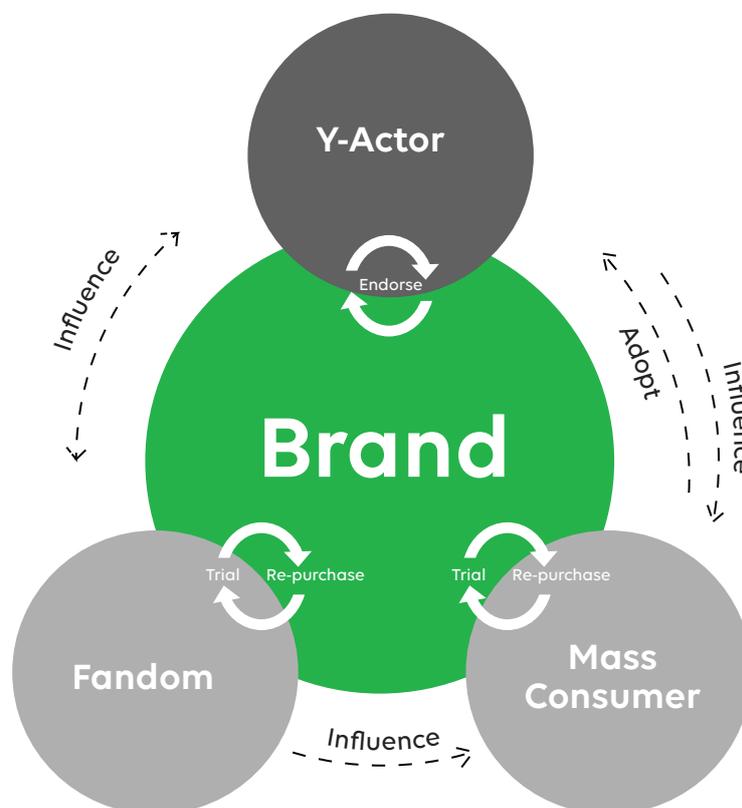
- Talk, Read, Comments and review on SNS
- Watch/Make React on YT
- Watch/Watch OPV clip



Who will seize the opportunity?

There is still a broad space to seize or better seize the opportunity of the Y Ecosystem :

- Y Series watchers expect to **see more brands and products associated to Y actors and Y Series**. Interestingly any category fitting with the target group can be successful. This includes FMCG brands, fashion, and also services premium brands or luxury items.
- Fans are **ready to pay and contribute to Events** as long as they are given proper access to Y actors and given the consideration they deserve as active promoters of Y Series. Y Series fans want brands to contribute to the acceptance of Y Series. This can be part of the purpose that consumers expect from brands in 2020. Y Series provide an opportunity to project a modern and inclusive image.



1

The irresistible growth of Y Series



The production of Y Series has been increasing since 2014. This year was a turning point when the first season of Lovesick the Series was aired on Saturday and Sunday nights on MCOT HD, a free TV channel.

The 2020 confinement has seen Y Series reaching a new level with the latest episode of 2gether. Time Out described the 13 weeks of airing as “a global phenomenon no one expected”: “ the #2gethertheSeries hashtag topped global trends on Twitter—the preferred social media of Boys Love fans—and triggered millions of virtual conversations about the series in various languages, from Thai to Chinese to English. The series were so popular that its lead actors garnered more than a million Instagram followers from all over the world in just a few weeks”.

A broad and diverse audience skewed to medium and high-income groups

The survey conducted in October 2020 by Nielsen Media Research describes the broad audience of Y Series:

- Female audiences dominate as 78% of watchers are women
- The split by age group is quite diverse:

Gender



Age Group



- The level of education is high as **77% are bachelor's degree or higher**
- Two groups of occupation dominate: **57% are white collar, 14% student**
- **54% single and 77% have children**
- Interestingly **49% of Y series watchers belong to the highest income group A**
(Household income above Thai Baht 50,000 in up country urban and above Thai Baht 60,000 for Greater Bangkok).

The quantitative survey identifies three groups based on involvement towards Y series:

Y SERIES AUDIENCE AT A GLANCE

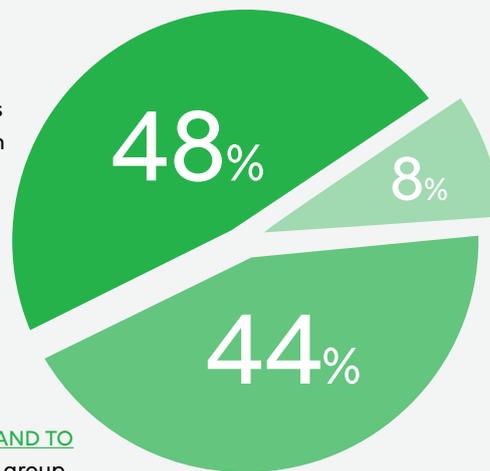
Overall, those who watch Y series are educated and earn a proper income. The age range also disperses above 23 years old.

HEAVY AUDIENCE

- A SUPPORTER NO MATTER WHAT ACTIVITIES OR EVENT THEY ARE
- Is a subject matter expert in Y series
- Dominates the Y series industry with The share at 48%
- Want Y series and actors to be accepted more widely

MEDIUM AUDIENCE

- A GROUP OF OPPORTUNITY TO EXPAND TO
- UPC audiences are identified in this group. They eager to participate in an events and activities but most of activities are in GBKK area.
- The household income average is also higher than heavy group (+5,678 THB)



LIGHT AUDIENCE

- A TREND FOLLOWER residing in GBKK and age more than other groups
- Influence to watch by TV program Browsing
- This group doesn't go out of their way for Y actor much
- These people also watch Korean series and tend to find Korean series more exciting and unique

- **Heavy watchers** : they support all activities, are expert in Y series and want Y series and actors to be accepted more widely (48% of total sample)
- **Medium audience** : more often living up country, enjoying as the heavy watchers a high level of income (44% of total sample)
- **Light** : they tend to be trend followers, live more often in Bangkok, are slightly older. They will not go out of their way for Y actors and are fans of Korean series (8% of total sample)

Y Series catch the imaginations and the feelings of viewers better than other Series

The first contact with Y Series is described differently by core watchers/ newcomers and by fans in the qualitative project:

- Core watchers and new adopters mention recommendation by friends and interest for actors and stories as main triggers.
- The first motivation of fans is deeper and more personal: they were already fans of K Pop, Y novels and Y cartoons. They relate their interest in Y Series to their personal life and to situations reflecting real life. They feel a good personal chemistry with Y Series actors.

Y Series compete mainly compete with Korean series. If Korean Series are relatively strong on storyline, Y Series catch the imaginations and touch the feelings.

The qualitative research identifies different criteria for selection of specific Y Series among fans, follow different criteria among fans, core watchers and new adopters:

Y Series Selection Criteria	FANDOM	CORE WATCHER	NEW ADOPTER
<ul style="list-style-type: none"> • Actors and Actor Chemistry Appearance and types are very important and would effect how they select the next series to watch. Acting skills is less important here, as fans will always support whoever they like 	✓	✓	✓
<ul style="list-style-type: none"> • Story & Plots Good storyline will help keep them watching 	✓	✓	✓
<ul style="list-style-type: none"> • Teasers / Trallers Help drive interest. Need to have climax that make watcher imagine / wanting to know more 	✓	✓	
<ul style="list-style-type: none"> • Producer / Director Top Mentions: WabiSabi, GMM, Nadao, P Champ 	✓		
<ul style="list-style-type: none"> • Novel Significant no. of fans are coming from Y-novel fanbase. They take pride in this wider recognition of making a novel into a series, and would follow to see if it matches their expectation 			
<ul style="list-style-type: none"> • Social Media Trends / Clip React Helps a lot in terms of discovering new stuff and spreading news / Trends 		✓	✓

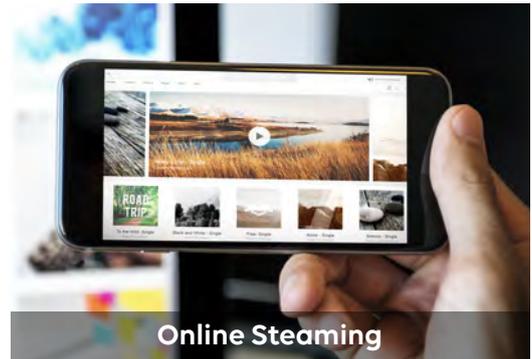
Fans take pride in knowledge of novels and directors showing their expertise in Y Series.

4

Watching is associated to LINE TV. The relationship with Y Series is a journey.

The qualitative study establishes a clear distinction between watching series (any series) on TV Versus watching on mobile (or tablet, computer, or smart TV):

General Watching Behaviour



SHARE ► 20%

80%

DEVICE ► Traditional TV set

Mobile, Tablet, Computer and Smart TV
(depending on its convenience)

HOW ► **Unintentional moments**

- A part of family activity
 - while dining, cooking etc
- Adding Background noise
 - while working, cooking or dressing

Free will

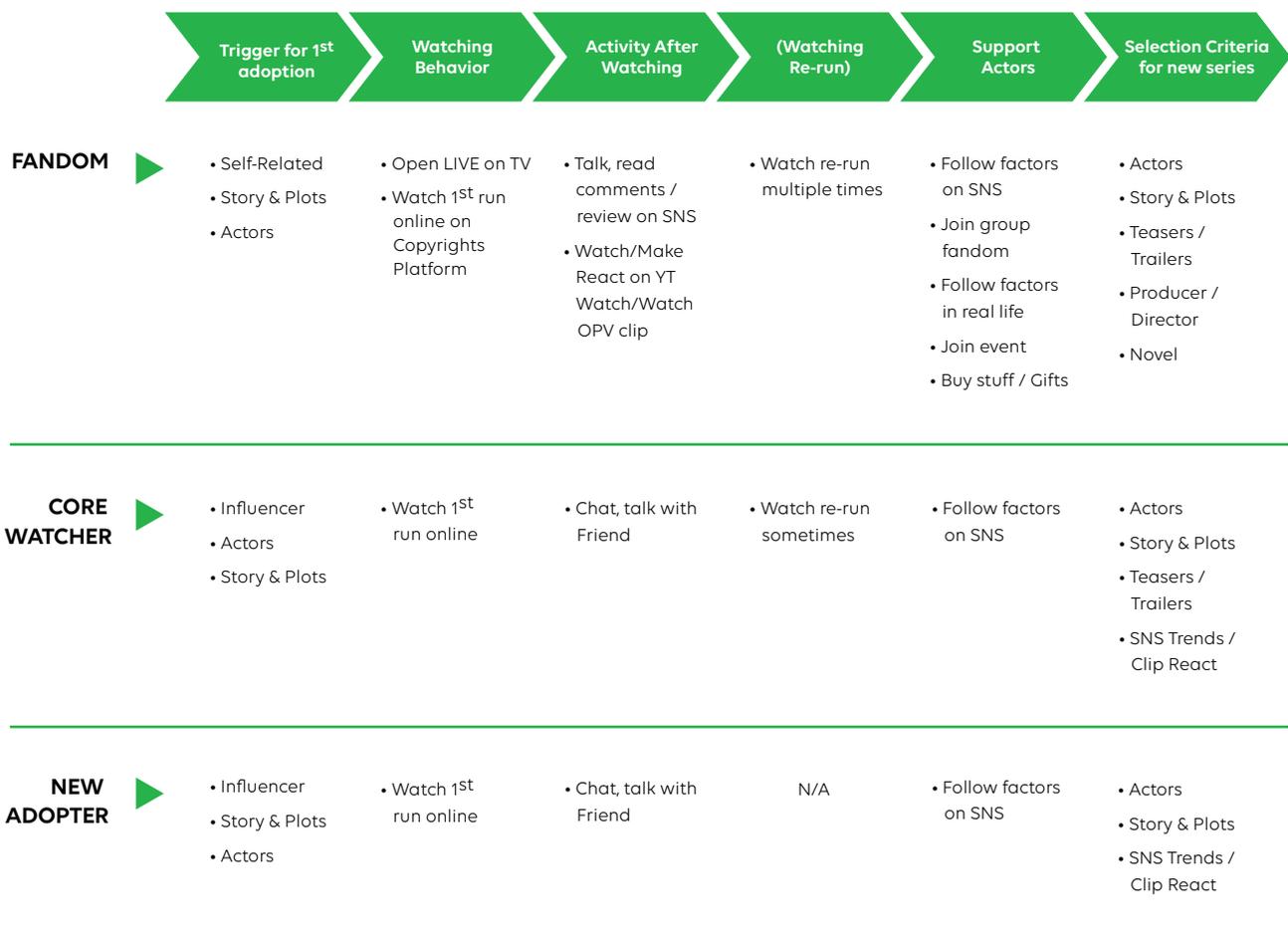
- Whenever, wherever
- Desired contents
- Self-Entertain / Way to relax
- Life-fulfilment

Watching Y Series is strongly associated to LINE TV. From the quantitative survey, 92% watch Y series on LINE TV, 70% watch Y series from LINE TV and 28% watch from Live TV program. Watching one time is not enough: all respondents claim to watch other Y Series, to watch Y Series several times, to read comments and to follow actors Instagram accounts.

The watching behavior differs across groups:

- The fans open TV to put high ratings, they tweet, watch online line multiple times on copyright platform once available.
- Core watchers and newcomers watch online on copyright platform once available.

The relationship with Y Series goes beyond passive watching and involves multiple activities after watching. It can be described as a journey:



Theories of celebrity worship : what type of fans are the Y Series fans?

Previous studies have analyzed what is now known as “celebrity worship” (McCutcheon, 2002). They tend to conclude that two main types of underlying motivations can be identified: **entertainment-based motivation and intense attachment:**

- **Entertainment-based motivation** represents the casual admiration that people hold toward the celebrity and the entertainment values a celebrity provides that give pleasure to the public. Many consumers enjoy learning about the celebrity, discussing with others about the celebrity, and deriving satisfaction knowing the celebrity's life story and recent moves (McCutcheon et al., 2002). This can be related to the playful motive characterized by the desire to relax (Zuckerman 2006).
- **Intense attachment toward the celebrity** is another motivational dimension. People who exhibit this motivation perceive that they are personally connected with the celebrity. They think constantly about the celebrity and associate parasocially with the celebrity. When the celebrity succeeds (or fails), they share his or her joy (or sadness). In short, the intense attachment bond transmits what the celebrity feels, encounters, and experiences to the fans. Driven by the need for achievement and lifetime pursuit, the aspirational motive is characterized by the consumer's aspirations as well as the successful and glamorous lifestyles portrayed in the media (e.g., watching Dallas, Ang 1996). Consumers who desire to be the likes of the celebrities may gratify their urge through conscious efforts to build and maintain a relationship with the celebrity.

Those results seem to indicate that the **fans of Y Series are driven by intense attachment and by the aspirational motive** while the core watchers belong to the **entertainment-based motivation and the playful motive.**

This explains why Y Series fans are **major actors of the Y Series development**

Y Series Fans influence willingly mass consumers through contents and # hastags. **They can be considered as a media promoting the Y Series or as “Evangelists” of the Y Series.** They are **active influencers.** They talk, react, comment and review on SNS. As those SNS are the main drivers of the core watchers the feedback from the fans defines the behavior of core watchers and may even contribute to move some of them to the Fandom area.

The traditional theories of how celebrities influence may not reflect the full impact of Y Series and Y actors. Two traditional theories have been developed to explain the influence of celebrities.

- The **source credibility** (Hovland, Janis and Kelley 1953) describe celebrities as credible spokespersons or opinion experts in the brands they endorse, thereby providing consumers with a degree of confidence in the advertising message, raising its level of acceptance, and exerting a positive impact on attitude change and behavioral compliance.
- Another approach to endorser effect lies in the **source attractiveness** explanation (McGuire 1985). It recognizes the likable, attractive, and meaning-embedded aspects of the celebrities that render them aspirational figures to many. By promoting source attractiveness, consumers may associate the endorsed brand with positive evaluations based on their positive opinions of the celebrity.

However, the theory of cultural meaning seems to be more relevant to understand the Y Series impact.

The theory proposed by McCracken in different articles (1986, 1988) argues that the endorsement process depends upon the **symbolic properties of the celebrity endorser**. Celebrity endorsement is, in fact, a special instance of a more general process of meaning transfer. From McCracken: "Consumers are constantly finding gender, class, age, life style, time, and place meanings in their possessions, and using these meanings to fashion aspects of the self. They are constantly taking possession of cultural principles in consumer goods that help define and fashion the home, the family, and other aspects of the world in which they live.

Assessing the cultural meaning of Y Series and Y actors : reconcile individual aspirations and family values?

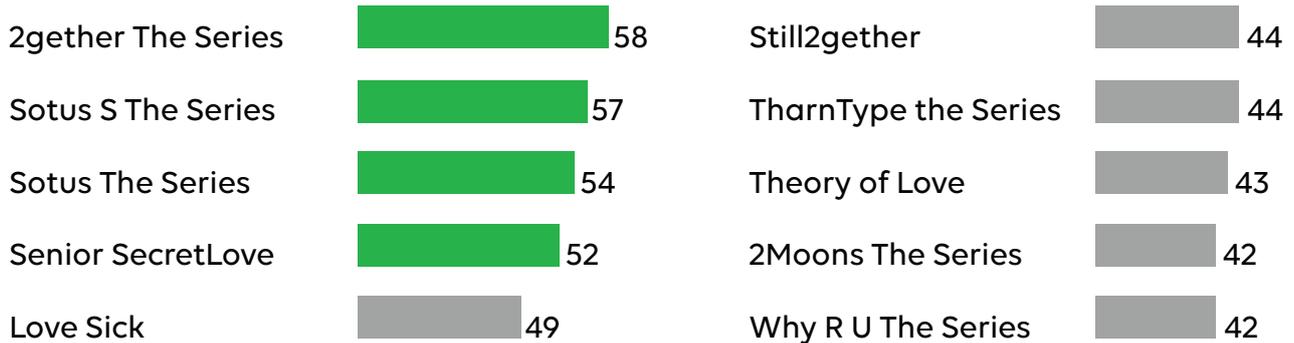
The Y actors are as cute, young, and good- looking. Poowin Bunyavejchewin, Researcher at the Institute of East Asian Studies Thammasat University, adds that "Pan-East Asian soft masculine young male stars in Y films and dramas are likely to satisfy complex human desires since their appearances possess both feminine and masculine natures".

The range of Y actors is broad with only three of them (Bright, Win and Singto) enjoying a slightly higher level as favorite actors. They are in fact nearly interchangeable, which facilitates the identification process.

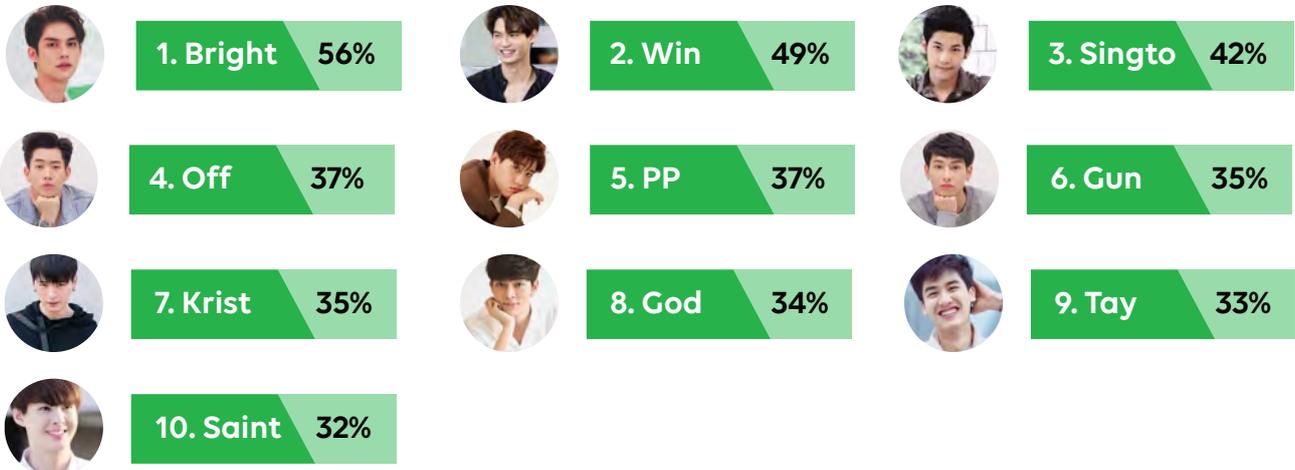
THE POPULARITY OF 2GETHER THE SERIES AND SOTUS S THE SERIES ARE COMPARABLY THE HIGHEST

Accordingly, Bright and win are the most followed Y actors.

Top Watched Y Series



Top 10 Favourite Actors



Both men and women are frustrated with the stereotyped description of women, men, gays, and transgenders in traditional Lakorns. This does not fit any more with the current reality. The social role of Y Series seems to focus on solving the tension between individual aspirations and family values.

The social acceptability seems particularly important for Y watchers. It is the main reason to support CSR activities. Y watchers would like to expand the social scope of Y Series to more diverse environment, more variety in storylines, more occupations portrayed.

Advertising in Y Series generates a positive image for brands and products

The table below shows that brands advertising in Y series are seen very positively.

- Y watchers feel that Brand (especially Corporate Brand) using Y-Series actors as Presenter has more visionary than others.
- Fans extends the positive view of actors to brands. They realize that it is part of a marketing strategy but stay open to the Brand.
- The only negative element -Fake- is mentioned by Adult Fans and is linked to the perception that some brands may take advantage from the popularity of Y-Series actors even if the brand does not fit with the actor. They add at the end that it is, anyway, understandable.

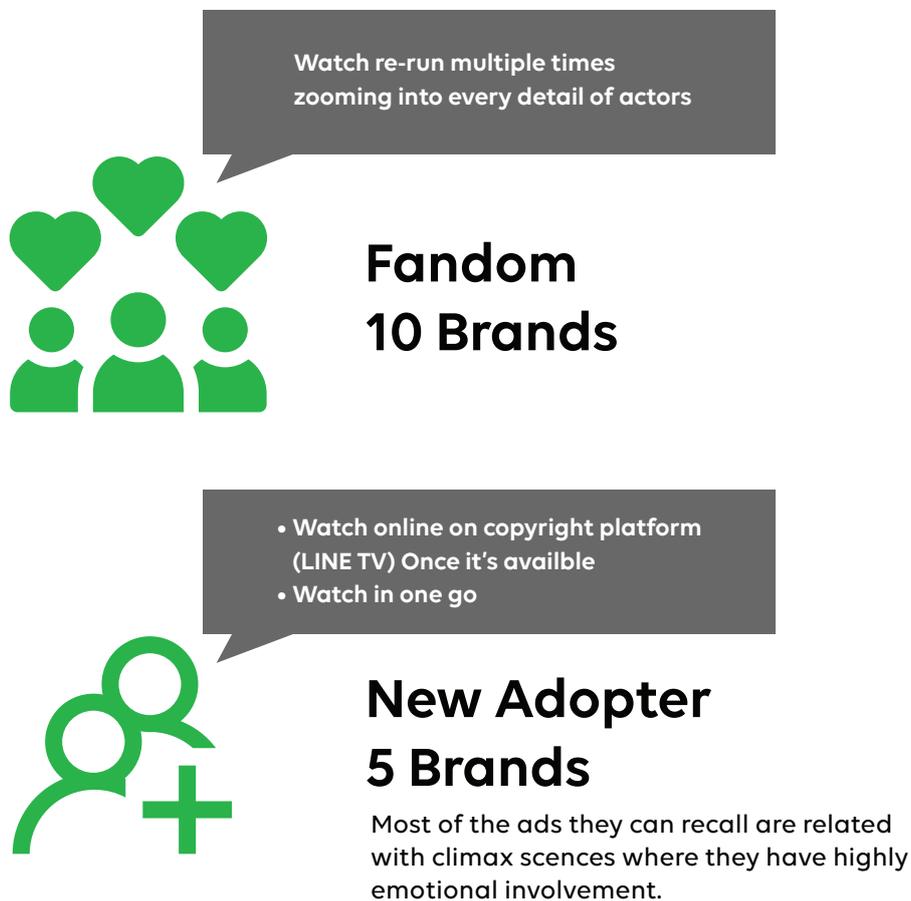
Brand Image	FANDOM	CORE WATCHER	NEW ADOPTER
Trendy	✓	✓	✓
Cheerful	✓	✓	✓
New lifestyle	✓	✓	✓
Popular	✓	✓	✓
Diverse	✓	✓	
Supportive	✓	✓	
Brave	✓		
Playful			
Belongingness	✓		
Brand I proud to buy/use			
Friendly		✓	
Open minded		✓	
Sincere		✓	
Suits my lifestyle			
Fake	✓		

Widely mention ↑

Advertising in Y Series heavily motivates heavy users to support and purchase -even if the product does not meet their needs- while light and medium users are more reachable by tie-in ads. The brand recall is higher among fans

Y-Commerce : Advertisement in Y Series

"Fandom is able to recall Brand from Product Tie-in advertisement in Y Series better than New Adopter because their watching behavior"

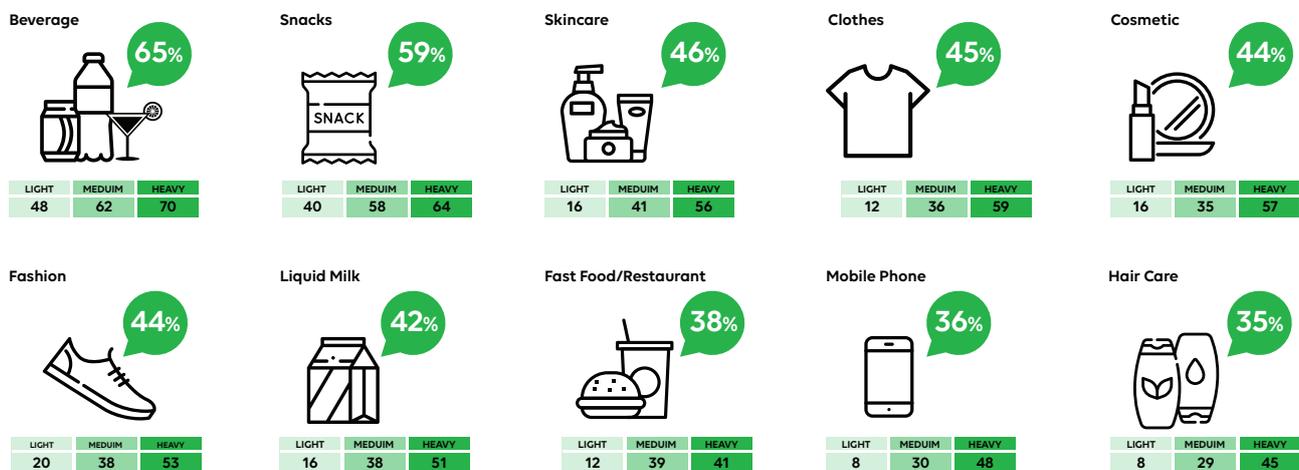


There is a feeling that the range of brands and categories advertising is too limited : mainly food supplements and non-certified cosmetics. Most of recalled Brands use product Movement, product Experience and special Scene technique. No one recalls Brands using Product Placement technique, even they are aware that this kind of ads exists in Y Series.

The strengths and weaknesses of each approach are as follows:

	Product Movement	Product Experience	Special Scene
Strength			
Eye-Catching/Noticeable	✓	✓	✓
Memorable	✓	✓	✓
Go viral easily	✓		✓
Able to generate sales right away. (With the right context)	✓	✓	✓
Weakness			
Cause to negative feeling easily	✓	✓	
Feel like being forced	✓	✓	

The categories purchased from tie-in ads are as follows



Overall, tie-In Advertisement in Y Series is the most effective tool for Brand to raise its awareness. It is not only Y watchers are able to recall but Brand/Product also become go viral easily to mass consumer.

Product tie-in can be done without having to show Brand openly. Fans can notice products which Y actors use and would look to buy them as they would do with products that actors use in real life or post on their social media. The categories purchased from tie-in ads are as follows.

Product endorsement by Y actors : a potential not yet fully exploited

The close relationship with the Y actors suggests a strong potential for product endorsement. As for advertising, the fans are ready to buy any product endorsed by Y actors. The feeling, however, is that the proposed products and brands do not fit with the incredibly positive perceptions of the actors.

Y watchers are ready to switch if brands/ products are comparable to what they already use. If brands and products are less attractive compared with what they use the light users may skip while the fans may buy only one time.

Best Practice : How to leverage Y actors to Product Endorsement

1

Current Brand



Brand Y



Current brand and Brand Y offer the same thing.

2

Current Brand



Brand Y



- Brand Y use Y-Series as Brand Presenter.
- Y-Watchers will absolutely buy it and willing for the 1st trial.
- It is easier to convert them from trial users to become Brand's Promoter and loyalty customer if Brand/Product is qualified.

The categories for brands endorsed by Y actors are the same as those purchased from advertising.

Y watchers would wish to see Y actors endorse products closely related to their daily life e.g. FMCG, fashion, well-known Cosmetic, Food & Beverage, Watch, Jewelry.



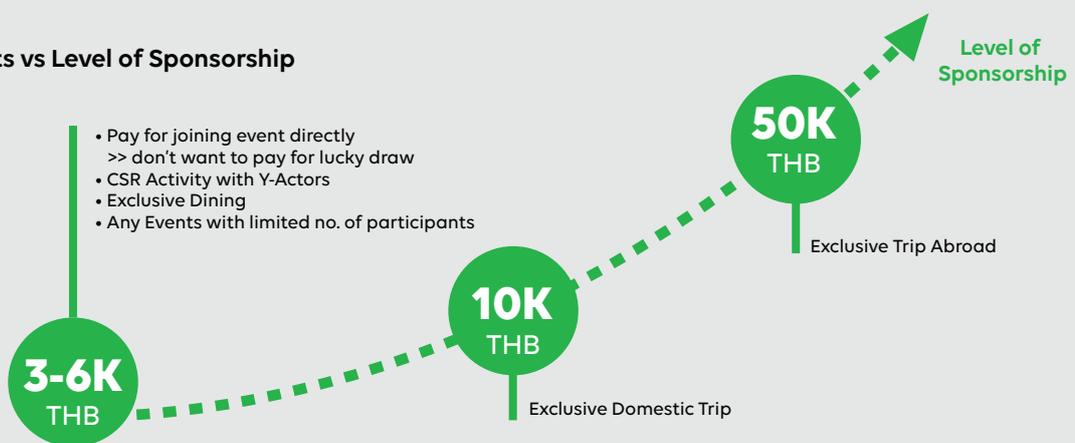
The feedback on Y-Commercial events and activities is mixed

- **Top Spender activities** are mainly disliked. The feeling is to be forced by brands. The attitude of staff during event is seen as unfriendly as they do not allow the fans to spend time with the Y actors.
- **Lucky draw** : this is seen as less expensive than the top spender activity but there is some uncertainty.

In fact, the fans would like to be considered for their contribution to the Y Series. The expectations are not unrealistic, and the fans are ready to pay if they can get close to the actors.

The more Exclusive the event is, the more supportive Y watchers will become

Ideal Events vs Level of Sponsorship



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The analysis uses the results of a qualitative research conducted through focus groups among core target groups (young and adults), fans (young and adults) and newcomers to the Series. The results are backed by a quantitative project conducted by Nielsen Media Research among 300 Y Series watchers

Qualitative research

5 focus groups two hours long, each with 4 participants conducted on August 19th and 20th 2020

Core (young)	18 - 25 years old	Watch 5 - 6 Y Series in past 10 months	
Core (adult)	26 - 35 years old	Watch 5-6 Y Series in past 10 months	
Fandom (young)	18 - 25 years old	Watch at least 8 Y Series in past 10 months	Engage with activities related to Y Series and Y actors
Fandom (adult)	26 - 35 years old	Watch at least 8 Y Series in past 10 months	Engage with activities related to Y Series and Y actors
New adopter	26 - 45 years old	Recently adopts Y Series	

Online survey conducted by Nielsen Media Research : Sample size N=300 Length of interview 25 minutes / Geographical scope: Bangkok and Up-Country Urban / Conducted 4-12 September 2020

Target criteria : Age 15-59 years old / Male and female / SES A, B, C. / Smartphone owners / Watch Y Series program