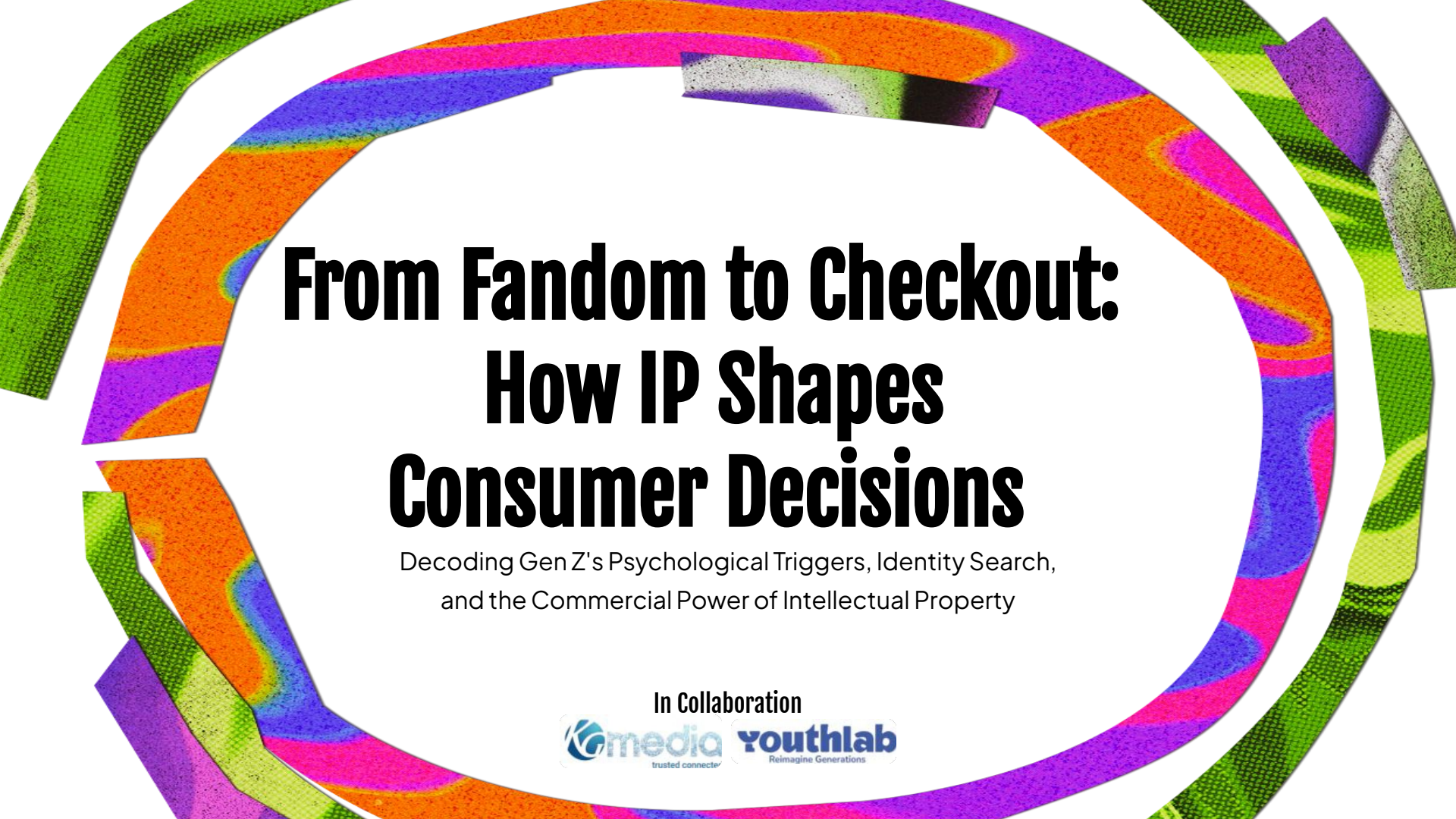




From Fandom to Checkout: How IP Shapes Consumer Decisions

Decoding Gen Z's Psychological Triggers, Identity Search,
and the Commercial Power of Intellectual Property

In Collaboration





THEY KNOW IT'S MARKETING. YET THEY STILL CHOOSE TO ENGAGE.

What makes a Brand x IP collaboration worth their attention?



The Research

A qualitative deep dive into how Gen Z consumers interpret and respond to brand-IP collaborations—from initial attention to trial and purchase.

Method: 16 In-Depth Interviews

Explored language, motivations, emotional triggers, barriers, and decision logic.

Participants

M/F, 18–27 y/o, residing in Jabodetabek, familiar with brand-IP collaborations, with a mix of buyers and non-buyers.

Discussion: From Attention to Action

Attention filters, IP familiarity, collaboration fit, perceived authenticity, and FOMO/anti-FOMO behaviour.

Output: Actionable Framework

IP selection cues, audience segments, message direction, and campaign opportunity areas.

PART I
THE GEN Z REALITY

For Gen Z, Identity Is Fluid and Contextual

Gen Z moves across different interests, communities, aesthetics, and social contexts. Rather than committing to one fixed identity, they continuously curate how they express themselves according to the moment, platform, and people around them.

This does not mean they are incapable of brand loyalty. Their connection to brands is simply less exclusive and more contextual: a brand or IP may feel relevant in one part of their lives without defining who they are as a whole.



The Pandemic Accelerated Digital Socialization During Their Formative Years.

Many Gen Zs experienced the pandemic during a defining transition—from adolescence to higher education, employment, or early adulthood. At a stage normally shaped by exploration, social connection, and growing independence, their world suddenly became restricted and uncertain.

COVID-19 did not create Gen Z's anxiety, nor did it affect everyone in the same way. However, it intensified existing pressures and reinforced an important lesson: stability could no longer be taken for granted.

This formative disruption continues to shape how they seek control, evaluate risks, and make decisions.

Their identities may be fluid—but the world shaping those identities has often felt deeply uncertain.



The 8-Second Attention Barrier

Gen Z has an exceptionally short attention span — shrinking to as low as **8 seconds** in the TikTok era. During in-depth interviews, they frequently demonstrate total ad and IP recall failure unless triggered by constant external stimuli. The implication for campaign design is fundamental.

Controlled Processing — FAILS

Long narrative ads, complex brand claims, and promotional noise trigger instant filtering. Gen Z simply does not have the bandwidth to digest complex messaging through deliberate attention.

"I had to watch the iPhone Safari ad 2-3 times just to finally get what it was about. It was about data privacy."
R. 24, First Jobber

Automatic Processing — SUCCEEDS

Visual anchors, familiar notification sounds, and recognizable IP icons trigger instant engagement, helping the message bypass the usual ad-filtering process

- ❑ **IP as a Visual Shortcut:** The IP icon is processed before the brand message — making it the most efficient attention-capture mechanism available to marketers targeting Gen Z.

What They Expect: Two Forms of Brand Value

1. Practical Confidence: Clear information, curated choices, and seamless experiences that boost decision confidence — reducing the cognitive load of choosing.

2. Emotional Lift: Lighthearted, comforting, and enjoyable experiences that offer a temporary escape from daily pressures — a welcome pause in an overwhelming world.

Gen Z's Attention Is Not Short— It Is Selective

Gen Z is surrounded by more content than they can consciously process. As a result, they have become highly efficient at filtering out messages that do not immediately feel relevant, distinctive, or personally meaningful.

In our interviews, participants often struggled to recall advertisements and IP collaborations without assistance. However, recognition emerged once they were shown a familiar character, visual element, or contextual cue.

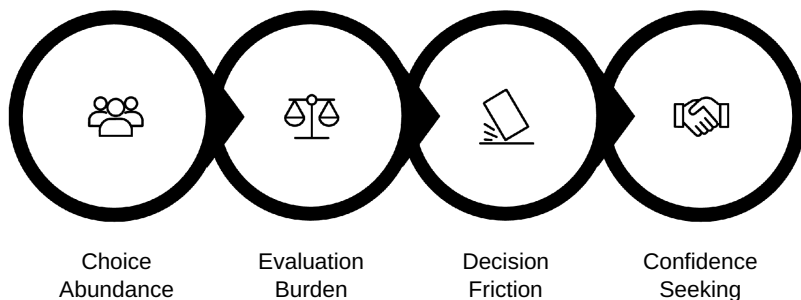
The message was not always forgotten. It simply failed to become memorable enough to retrieve without a trigger.



When Choices Multiply, Confidence Shrink

Gen Z rarely lacks information. What they often lack is a clear reason to choose.

The Decision Paradox



Abundant options and information make comparison increasingly difficult, creating a cycle that delays or prevents action.

Do not give Gen Z more information to process.

Give them clearer reasons to feel confident.

Desired outcome: greater confidence, a sense of control, and less anticipated regret.

“At first, you think, 'Oh, this is cute.' Then something even cuter appears. There's always a better option, because new things keep showing up on social media.

— S, F, 22 y/o, first jobber

From Overwhelm to Confidence: Making Gen Z's Choices Feel Easier

When options feel endless and competing claims begin to look alike, making a decision requires more cognitive and emotional effort.

Across our interviews, Gen Z participants were not simply looking for more reasons to buy. They looked for signals that could help them understand the difference, reduce the perceived risk, and feel more confident about their choice.

Brands can reduce decision friction by making the choice clearer, the evidence more credible, and the outcome easier to imagine.

Confidence—not information volume—is what moves them closer to a decision.





From Noise to Clarity: Confidence Moves Decisions Forward

Gen Z does not always need more information. They need clearer signals that make the decision easier to navigate. When options, reviews, and competing claims begin to look alike, additional information can increase the effort required to choose.

Across our interviews, Gen Z participants looked for signals that helped them identify meaningful differences, reduce perceived risk, and feel more confident about moving forward.

Three Confidence Signals

- | | | |
|----|---|--------------------|
| 1. | CLEAR | DIFFERENCE |
| | Identify what meaningfully sets the choice apart. | |
| 2. | CREDIBLE | REASSURANCE |
| | Reduce perceived risk through trusted evidence. | |
| 3. | PERSONAL | RELEVANCE |
| | Show how the choice fits their real-life context. | |

**More information creates awareness.
Clearer reasons create confidence.**



FOBO: The Fear That a Better Choice Is Still Out There

Among some participants, we observed a recurring tension: choosing one option meant giving up the possibility of finding something better.

Before purchasing, this could lead to prolonged comparison, delayed decisions, or hesitation to commit. After purchasing, the arrival of a new product, design, or collaboration could reactivate comparison and make satisfaction feel more fragile.

FOBO does not necessarily prevent the purchase. It makes confidence—and sometimes satisfaction—harder to sustain.

Too Popular to Feel Personal

While hype attracts many Gen Z consumers, we observed a contrasting response among some participants: they intentionally distance themselves from highly visible Brand × IP collaborations.

When a product feels mass-produced or becomes too widely adopted, it may lose its ability to express individuality. Their resistance is not necessarily a rejection of the IP itself—it is a rejection of sameness.

For these consumers, popularity builds awareness but can weaken personal relevance.

Popularity expands reach—but not always desire.



Imperfection Is the New Perfect

Perfect characters may be aspirational, but they can also feel distant. Across our interviews, Gen Z participants were drawn to characters with unusual traits, emotional vulnerabilities, and imperfect journeys.

These imperfections do more than create a distinctive visual identity. They give the IP emotional depth, make its struggles more relatable, and allow audiences to recognise parts of themselves within the character.

Imperfection is not about making a character less appealing. It is about making the character more emotionally believable.

Gen Z does not connect with imperfection because it is flawed. They connect with the permission it gives them to be unfinished.

Three dimensions of imperfection



Visual Distinctiveness

Unusual proportions, expressions, or design details make the character recognisable and less generic.



Emotional Vulnerability

Insecurities, fears, and contradictions make the character feel closer to real human experience.



Narrative Growth

Mistakes and struggles give the character room to learn, change, and become more meaningful over time.



When Familiarity Becomes Emotional Comfort

For some Gen Z consumers, familiar characters become more than entertainment—they become reassuring presences in everyday life.

Through repeated exposure and consistent characterisation, familiar IPs can become emotionally predictable. Participants know what the character represents, the feelings it evokes, and the memories associated with it.

The connection becomes stronger when the character is embedded in an everyday object or routine. A keychain, plush toy, or phone accessory can turn the IP into a small but meaningful source of familiarity and reassurance.

Important Nuance

The character does not replace real relationships. It acts as a familiar emotional cue—something known, personal, and easy to return to.

“*This keychain feels like more than an accessory. Having it with me feels familiar and reassuring.*”

Familiarity



Emotional Predictability



Everyday Presence



Personal Bond

Do not simply place the character on a product. Give it a meaningful role in the consumer's everyday life.

Fandom Feels Personal, Community Feels Organised

For participants, “community” often implied an organised group that required active participation. “Fandom,” by contrast, felt more personal, flexible, and self-defined.

They could consider themselves part of a fandom simply by liking a character, understanding its references, collecting its products, or following related content—without joining a formal group or publicly demonstrating their involvement.

Fandom allows Gen Z to belong on their own terms.





Gen Z's Loyalty Starts With the Fandom—Not the Brand

For many participants, the fandom—not the collaborating brand—was the primary reason they noticed and considered an IP collaboration.

Their emotional connection, familiarity, and trust already belonged to the artist or character. The brand initially benefited from that relationship, but it still had to demonstrate relevance, product quality, and respect for the fandom.

Attention may transfer immediately, loyalty does not.

Case Study

In a collaboration such as McDonald's × BTS, the fandom creates immediate attention and participation. However, the long-term value for McDonald's depends on whether the experience creates a positive and memorable association beyond the limited campaign period.

“*Aku beli karena BTS-nya, bukan karena sebelumnya suka sama brand-nya. Tapi kalau collab-nya bagus, aku bisa jadi lebih tertarik sama brand tersebut.*”

- F, 24 y.o, First Jobber

PART II
GEN Z & IP

Gen Z Sees the Sales Pitch—But Won't Mind

Participants may not use industry terms such as intellectual property, licensing, or brand extensions—but they understand how commercial collaborations work.

In everyday conversations, participants often grouped Brand Ambassador partnerships, licensed products, and IP collaborations under one familiar term: “collab.”

This simplified language did not signal a lack of commercial awareness. They understood that collaborations are designed to attract attention and drive sales.

Commercial intent was not automatically a dealbreaker. Participants remained open to collaborations when they received clear value in return—through emotional relevance, identity expression, product desirability, or a memorable experience.

Industry terminology



“Collab”



Consumer value evaluation

**Gen Z does not reject the sell.
They reject collaborations that
offer nothing beyond it.**





What Gen Z Really Expects From Brand Collaborations

In our interviews, respondents described pressures related to identity, social validation, uncertainty, and the fear of making the wrong choice. They do not expect every collaboration to create life-changing impact. They value smaller, more credible benefits that improve a decision or an everyday moment.

Instead, they seek two specific forms of brand value. First, practical confidence through clear information, curated choices, and seamless experiences that boost decision confidence. Second, emotional lift through lighthearted, comforting, and enjoyable experiences that offer a temporary escape from daily pressures.

A collaboration feels worthwhile when it reduces decision friction or creates a meaningful emotional reward.



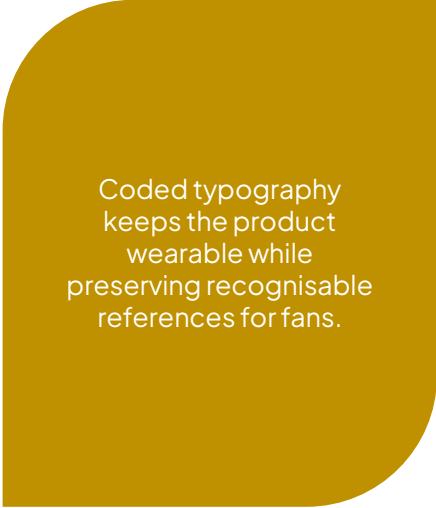
Subtle Signals Make Identity Visible to the Right People

For some participants, being recognised by the right people felt more meaningful than being noticed by everyone. They preferred design cues that signalled affinity without turning the product—or themselves—into an obvious advertisement.

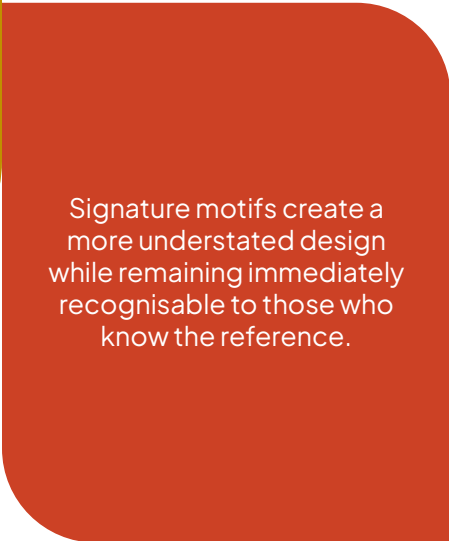
Colours, phrases, symbols, silhouettes, and signature motifs can function as insider codes. To outsiders, the product remains understated. To fans, the same cues create recognition, belonging, and a sense of shared understanding.

Exclusivity is not always created by scarcity. It can also come from selective legibility—the feeling that only people who understand the culture can read the signal.

The product does not need to announce the fandom. It only needs to be recognised by the people who matter.



Coded typography keeps the product wearable while preserving recognisable references for fans.



Signature motifs create a more understated design while remaining immediately recognisable to those who know the reference.



Popularity Wins Attention. Personal Meaning Builds Relevance.

Popularity may create awareness, but an IP becomes relevant when audiences can connect it to their identity, memories, aspirations, or values.

SELF	MEMORY	SOCIAL MEANING
Identity Signals The IP helps consumers express their taste, personality, belonging, or social identity—either openly or through subtle cultural codes.	Lived Nostalgia/Grew Up With it IPs connected to formative life stages can create familiarity, comfort, and lasting emotional affinity.	Trusted Discovery/Social Validation Interest in an IP can grow when it is introduced or endorsed by trusted creators, friends, family members, or communities.
Aspirational Icons Characters or figures can represent achievement, confidence, mastery, or the person consumers aspire to become.	Borrowed Nostalgia Consumers can feel connected to cultural moments they did not personally experience, but discovered through family, media, or online communities.	Shared Values IPs that reflect relevant values, cultural conversations, or social issues can create deeper emotional and ideological alignment.

People connect with an IP when it reflects something personal—not simply because it is popular.

**These routes to personal relevance are not exclusive to Gen Z. However, the memories, communities, cultural codes, and identity signals that activate them may differ across generations.*



PART III

BEYOND THE HYPE: WHAT MAKES AN IP STAY RELEVANT

Gen Z Recognises the Format Before Considering the Message

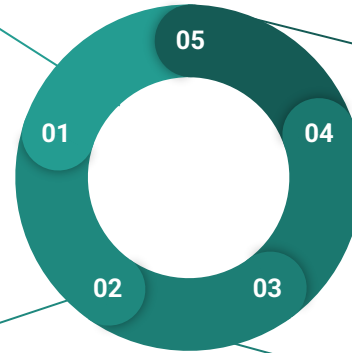
Repeated exposure has made familiar advertising cues easy to recognise at a glance. When a message feels predictable or generic, Gen Z may withdraw attention before fully considering what the brand is offering.

Repeated Format Exposure

Gen Z repeatedly encounters similar visual conventions, campaign structures, creator scripts, and promotional language across platforms.

Rapid Format Recognition

Familiar visual and verbal cues allow the content to be quickly identified as promotional.



Low Recall

Content is skipped, ignored, or left unengaged. This fast filtering reduces the amount of attention generic content receives.

Selective Filtering

Content is automatically excluded from their active attention span in an instant.

Instant Categorization

Content is flagged as overly familiar, predictable, or lacking new value.

Organic Fit Beats Manufactured Hype

Participants evaluated authenticity through the coherence of four connected dimensions: context, design, story, and values—not through the IP's popularity alone.

	Contextual Fit	Visual Integration	Narrative Authenticity	Value Alignment
What they evaluate	Does the collaboration make sense in real life—not only in advertising?	Do the brand and IP feel like one coherent visual system?	Does the collaboration respect the IP's personality and world?	Do the partnership's message and actions reflect consistent values?
Feels Organic	The IP, brand, product, and usage context have a clear and credible connection.	Recognisable codes from both partners are integrated through design, colour, typography, or product details.	The IP retains its original personality while the product is introduced through a relevant and believable story.	The values are visible in the product, campaign mechanics, brand behaviour, and partner selection.
Feels Gimmicky	The IP appears to have been selected mainly for its popularity, with little connection to the brand or product.	The character or logo appears to have been added superficially, with one identity dominating the other.	The message feels excessively sales-driven, exaggerated, or inconsistent with the IP's established character.	The collaboration borrows a popular issue or social value without supporting it through credible action.

Popularity earns attention. Coherence earns credibility.

Popularity Creates Attention. Personal Fit Creates Preference.

Popularity can bring a collaboration into consideration, but personal fit helps determine whether attention becomes preference.

Personal Fit Creates Preference

When a collaboration reflects consumers' identity, personal style, interests, values, or lifestyle, it becomes more personally meaningful.

The IP no longer feels like a popular name attached to a product. It becomes a tool for self-expression—or a reflection of how consumers see themselves and want to be seen.

This alignment can make a less popular collaboration more desirable than one currently receiving greater attention.

“ I would choose Mercedes merchandise because it fits my personal style better, even though Red Bull is currently more popular.

—F, 21 year old, student

Popularity without Relevance Creates Attention

A popular IP can generate awareness, curiosity, and conversation. However, popularity alone does not guarantee that consumers will find the collaboration personally meaningful.

When the collaboration does not connect with their identity, interests, lifestyle, or emotional relationship with the IP, attention may not develop into preference.

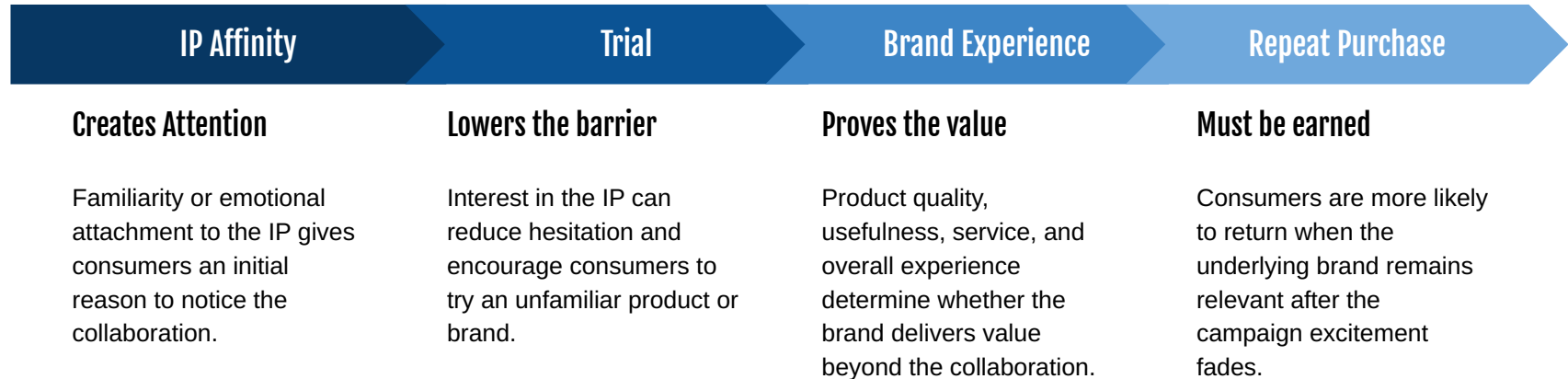
Consumers may like both partners separately but still feel no reason to choose the collaboration.

“ I'm not interested in the Real Madrid x Marvel collaboration because I don't connect with the characters—even though I support Real Madrid.

—M, 21 year old, student

IP Can Earn the First Purchase. The Brand Must Earn the Next.

Once the novelty faded, participants said their willingness to return would depend on product quality, usefulness, service, and continued relevance.

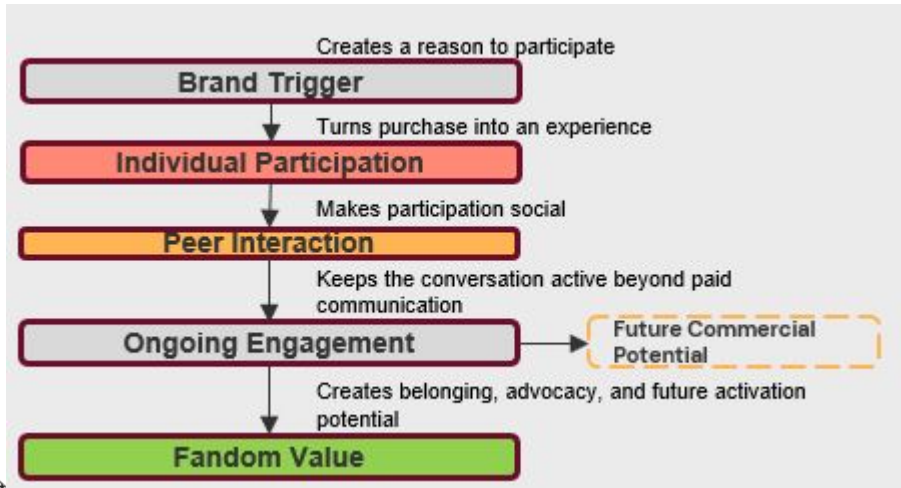


Gen Z loyalty is conditional—not absent. It is continuously re-assessed as needs, alternatives, trends, and experiences change. An IP collaboration can bring consumers into the brand, but it does not automatically transfer their loyalty.

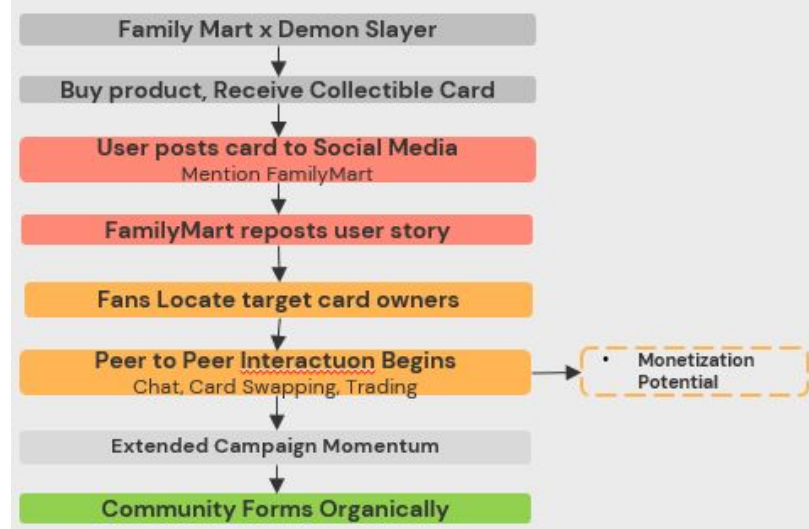
The Brand Starts the Moment, the Community Sustains It

IP and collectible elements can trigger initial participation. But the campaign gains longer-lasting value when consumers begin interacting with one another.

As audiences search, trade, compare, share, and discuss, the campaign evolves from a brand-led activation into a socially sustained experience.



CASE STUDY: Family Mart x Demon Slayer



The strongest collectible mechanics give consumers something to complete, compare, or exchange.



Scarcity Makes an Item Desirable. Community Recognition Turns It Into Social Currency.

Exclusive ownership can generate visibility, social validation, and status within a fandom.

A “flex post” can function as an organic endorsement—often perceived as more credible than conventional advertising.

When fans publicly share scarce or exclusive items, their posts can generate social proof and trigger curiosity or FOMO among other members of the community. Scarcity creates attention, but community recognition gives the item its status value.

Bragging rights become more valuable when ownership is recognized within the fandom’s internal status system. Having a rare variant, attending an exclusive event, or discovering an item early can become a shared reference point within the community.

At this stage, the brand is no longer perceived merely as a seller. It becomes part of the symbols, conversations, and rituals that shape the subculture.

PART IV
IMPLICATIONS FOR BRAND



Small Moments, Meaningful Impact

Sense of Relief

A brief emotional escape

Familiar characters, playful visuals, and the experience of discovering or purchasing a collaboration can offer a welcome pause from everyday pressure.

Sense of Control

A small sense of personal agency

Familiar characters, playful visuals, and the experience of discovering or purchasing a collaboration can offer a welcome pause from everyday pressure.

Sense of Joy

Simple delight without the pressure

Collaborations can work as accessible micro-rewards—creating anticipation, surprise, and enjoyment without requiring a major or complex experience.

Gen Z does not always expect brands to solve their biggest problems. Sometimes, they simply value small experiences that make everyday life feel lighter, more personal, and more enjoyable. The opportunity is not to promise transformation, but to create a welcome emotional pause in their daily lives.



Create Emotional Value – Without Overpromising

IP collaborations can create moments of comfort, joy, familiarity, and emotional relief—but they should not be positioned as solutions to anxiety or complex emotional challenges.

Gen Z is more likely to appreciate brands that understand their role honestly than brands that make emotional promises the product cannot credibly deliver.

Do not overstate the impact

Position the collaboration as support –not a solution

Avoid presenting the IP or product as a friend, emotional cure, or answer to complex personal struggles.

Instead, describe its role proportionately: a small source of comfort, familiarity, entertainment, or everyday enjoyment.

Show the experience, not the claim

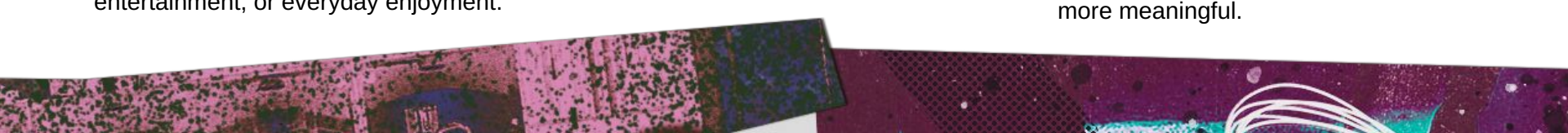
Let the product experience demonstrate its emotional value

Rather than making broad emotional promises, show how the collaboration fits naturally into moments that feel lighter, more enjoyable, familiar, or personal.

Use empathetic but proportionate language

Acknowledge emotions without exploiting them

The tone should feel understanding and human, but should not exaggerate sadness, anxiety, loneliness, or vulnerability to make the campaign feel more meaningful.



Eliminating Decision Paralysis Through 'Uncomparable' Value Positioning

Respondents continuously demonstrate deep option-comparison behaviour, evaluating multiple alternatives to validate their purchase as the **best possible choice** and **eliminate post-purchase regret**.

To overcome FOBO and decision paralysis, brands must leverage unique IP elements to establish an uncomparable positioning that removes alternative options from consideration. By shifting focus from feature-level comparisons to non-replicable value, the collaboration gives Gen Z the clear logical justification needed to eliminate post-purchase regret.



FROM FANDOM TO CHECKOUT —AND BEYOND

1 INTRODUCING THE COLLAB

Build awareness by making the collaboration and its value immediately clear.

3 CONVERTING INTEREST INTO ACTION

Offer a product or experience that feels worth trying, buying, and sharing.

6 ASSESSING THE IMPACT

Evaluate sales, brand lift, brand fit, and learnings for the next niche or IP opportunity.

2 BUILDING RELEVANCE & CONFIDENCE

Use familiarity, shared values, identity signals, and community validation to make the collab relevant and reassuring.

4 FACILITATING ORGANIC CONNECTION

Create spaces for like-minded fans to connect, without making the community feel managed or branded.

5 EXTENDING THE MOMENTUM

Continue beyond peak hype to engage anti-FOMO audiences on their own terms.

Beyond Campaign Metrics: Measuring Sustained Post-Collab Value

IP collaboration evaluation must not stop at short-term sales lift, reach, or engagement rate. Brands must also measure **residual value**—lasting shifts in brand perception, ongoing community affinity, and sustained consumer behaviour after collaboration momentum fades.

Pre-Campaign
Baseline



During Campaign



Post-Campaign
1 month



Post-Campaign
6 month



Trigger Sequel Campaign

This timed activation captures the anti-FOMO consumer

Short-Term Metrics

- Sales lift during campaign window
- Reach and impressions
- Engagement rate and UGC volume
- Store traffic and app acquisition

Residual Value Metrics

- Lasting shifts in brand perception
- Ongoing community affinity post-campaign
- Sustained consumer behaviour change
- Learnings for next niche or IP opportunity

❑ Collaboration success is not defined by how high the campaign spikes. It is measured by how much brand value remains after the hype subsides

Thank You

