

BRAND ✦ FANDOM



August 2024

 starcom

FANDOM
SERIES



Connections are curious things, especially the deep, meaningful ones we have with brands.

Decades ago, a 'brand' was a way for us to distinguish what we preferred to buy, to identify the shortest path to satisfaction. But over time, as marketing, technology, and society has evolved, the brand / consumer relationship has transformed from that original, transactional connection, to one that is now intertwined with a myriad of dynamics. We don't just *use* brands anymore – we engage with them, create with them, and play a powerful role in their rise or fall in the market. We're invested in them, because they are now an inextricable part of our identity.

And we follow them with the same fervor and fandom in the way that we obsess about sports teams, or our favorite musician.

In modern times, marketers often fixate on the elusive notion of 'brand love'. That deep, emotional bond that drives a competitive advantage. But looking at brand connection solely through an angle of affection ignores the other elements that play a critical role in sustaining and growing any relationship. The notion of 'brand fandom' assumes love but goes beyond it. Because true devotion is more complex...

In the third installment of Starcom's Fandom Series, we dive into the concept of Brand Fandom, to understand what the true drivers of devotion to brands are – and how marketers can reframe the lens around these complicated relationships to drive growth in today's culture.



Our Methodology

We know what fandom looks like in the sports and music space, but the ubiquity of brands in every aspect of life led us to wonder...

‘What creates *brand* fandom?’, and if we could uncover commonalities in the attachments to a variety of brands.

This report is underpinned by Starcom primary research, fielded in the fall of 2023. We conducted a quantitative and qualitative custom survey of 2,000 respondents, that was nationally representative across ages, gender, and ethnicities. Additional proprietary research was conducted in the spring of 2024 with 1,000 consumers (nat. rep) to explore further themes and findings.

Within this survey, we explored the relationship between 54 different attributes across 23 different brands representative of retail, apparel, footwear, alcohol beverages, QSR, CPG, media & entertainment, toy, technology, and auto categories.

Additionally, in collaboration with our research partner, Prodege, a Pearson regression analysis was conducted to determine the level to which each attribute is a driver (or predictor) of “Brand Fandom”.

Lastly, to supplement and further contextualize our findings around this topic, we also consulted industry leading sources, tech platforms, and social listening to analyze and unearth insight around what Brand Fandom means within culture today.

3 Lenses to our Exploration

PART 1
Fandom
Foundations



PART 2
Dimensions
of Devotion



PART 3
Assessment
& Actions





Brand Fandom Foundations

To understand the connection that consumers have to brands, we examined both how fandom shows up in the **present**, as well as the **past**, and what drives that first spark of a relationship.

Through analyzing consumer expectations, expressions, and the attributes that **drive** brand fandom, we uncovered three key dimensions that underpin these relationships:

Emotional | Functional | Cultural

Our analysis found that these three dimensions are also reflective of how / why consumers formed a strong brand bond in the first place.

A Culture of Constant Devotion

Monologues → Dialogues // Consumption → Creation

Fandom can show up as...



Brands used to define the terms of their relationship with consumers from afar (they produce / offer, we use), but technology has radically shortened that distance. **Access and engagement are now assumed**, as expectations for brands rise to new heights in the digital, always-on era. We don't just buy the brands we like nowadays; we **connect** with them – *through* them, we **play** with them, we **influence** them, and in the most passionate of cases, we **live** them.

Constant Access

Higher Expectations

81%

of 25–34 year olds follow brands on social media; (of those, 93% follow on Insta, 70% on TikTok)

63%

of people believe social media has raised the bar for how brands engage with consumers

And the expression of that fandom now runs the gamut. Some brand fans are lurkers – passively engaging online or reserving a show of their affection IRL. Other brand fans are loud – wielding their social currency to promote, advocate, and create content that pops in the feed. And others, are somewhere in between – dabbling in brand-enabled communities or loyalty programs (e.g. Nike Run Club, Dunkin' Rewards, etc.), and expressing their fandom in forms of buying or recreational behavior.

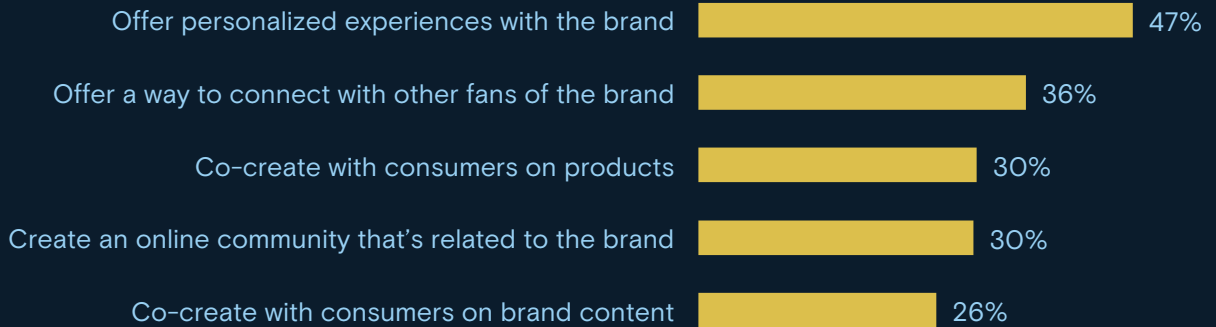
Understanding the drivers at the core of these fandoms is critical for the growth of brands.

"[Samsung] has always been present in my life, since I was a child, my TV was from this brand because it had an excellent reputation, to this day I use this brand..." – Male, 31, Black

Expectations Have Evolved

Fans want *more* than just transactions from brands

"What do you wish the brands in your life did more of?"



Actively engaging with your fans pays off

% of Fans who think brands that co-create are **more**:

88%

Relevant

83%

Inclusive

87%

Valuable



Expression Now Takes Many Forms



They create with it



They live it



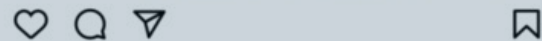
They celebrate it



They boast about it



They wear it



4,043 likes

ashleerosehartley Are you team flaming or team crunchy?! 🔥

I'm definitely team flaming hot. But I'm also team organic white cheddar Cheetos because those are the real MVPs. This isn't a @cheetos ad but wouldn't be mad if Cheeto emailed me because I've been a hardcore fan since childhood. Lol! These were in my lunchbox daily. I also felt cool as a kid when I could eat flaming hot Cheetos without a sip of water. We all use to have competitions..... and yes I would win because hot food is life. Also had to pair this look with the new @jefreestar @shanedawson eye palette because two of the colors in the palette are literally centered around Cheetos! I'll be posting close up shots of makeup soon but used the colors cheese dust, flaming hot, ranch, and cry on my couch for my eye look. ✨ .

Fandom is multifaceted... but **what truly drives it?**

We explored the dynamics of **23 brands' fandoms** across **54** different attributes to find out.

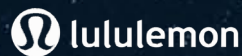
SEPHORA



BEST
BUY



SAMSUNG



DICK'S
SPORTING GOODS

amazon

ESSENCE

Butterfinger

max




Budweiser

THE
HOME
DEPOT



Walmart 

Kinder

LOWE'S



Out of 54 different factors, **36 matter.**

These attributes drive varying depths of brand fandom across **3 core dimensions**

EMOTIONAL

The internal and intrinsic factors that a brand fulfills in a relationship

FUNCTIONAL

The practical and utilitarian factors that a brand fulfills in a relationship

CULTURAL

The societal factors that a brand fulfills for individuals and communities

These dimensions also play a critical role in the foundation of fandom

Every relationship has a story – including the ones we have with brands. How we first notice them, use them, need them, and grow to love them varies from person to person, but the sparks remain the same. **The origin of a person's fandom for a brand is rooted in the same essence of the three dimensions that underpin present connections** – and that starting point guides the trajectory of how brand relationships evolve.

"Think about a favorite brand that you're a fan of, and that plays a meaningful role in your life."

*How did you **first start** to become familiar with this brand?"*

EMOTIONAL



Fandom is inherited, with brand connection rooted in memories

"Since I was a child, [Coca-Cola] has never been missing from our table, at family gatherings, lunches or dinners, it has always been the favorite drink."

- Male, 38, Hispanic

69%

FUNCTIONAL



Fandom is initiated, with brand connection rooted utility

"I recently achieved a milestone of getting accepted to professional school. As a gift, my mother got me a suit set [from Banana Republic]. Everyone commented on how good it looked, so I started shopping here more...now feel especially connected with it.."

- Female, 23, Asian

22%

CULTURAL



Fandom is inspired, with brand connection rooted discovery

"I first found out about [Aritzia] few years ago when I was shopping for a specific sweatshirt. I found a Reddit community where people talk about their products and have enjoyed it since."

- Female, 26, White

9%

To **sustain** – and **grow** – these sparks into deeper fandom though, requires brands to expand the dimensions they deliver on.



Brands whose fandoms start with...

Emotional connection need Functional fulfillment + Cultural relevance to maintain and evolve

Functional connection need Cultural significance to last / grow + Emotional resonance

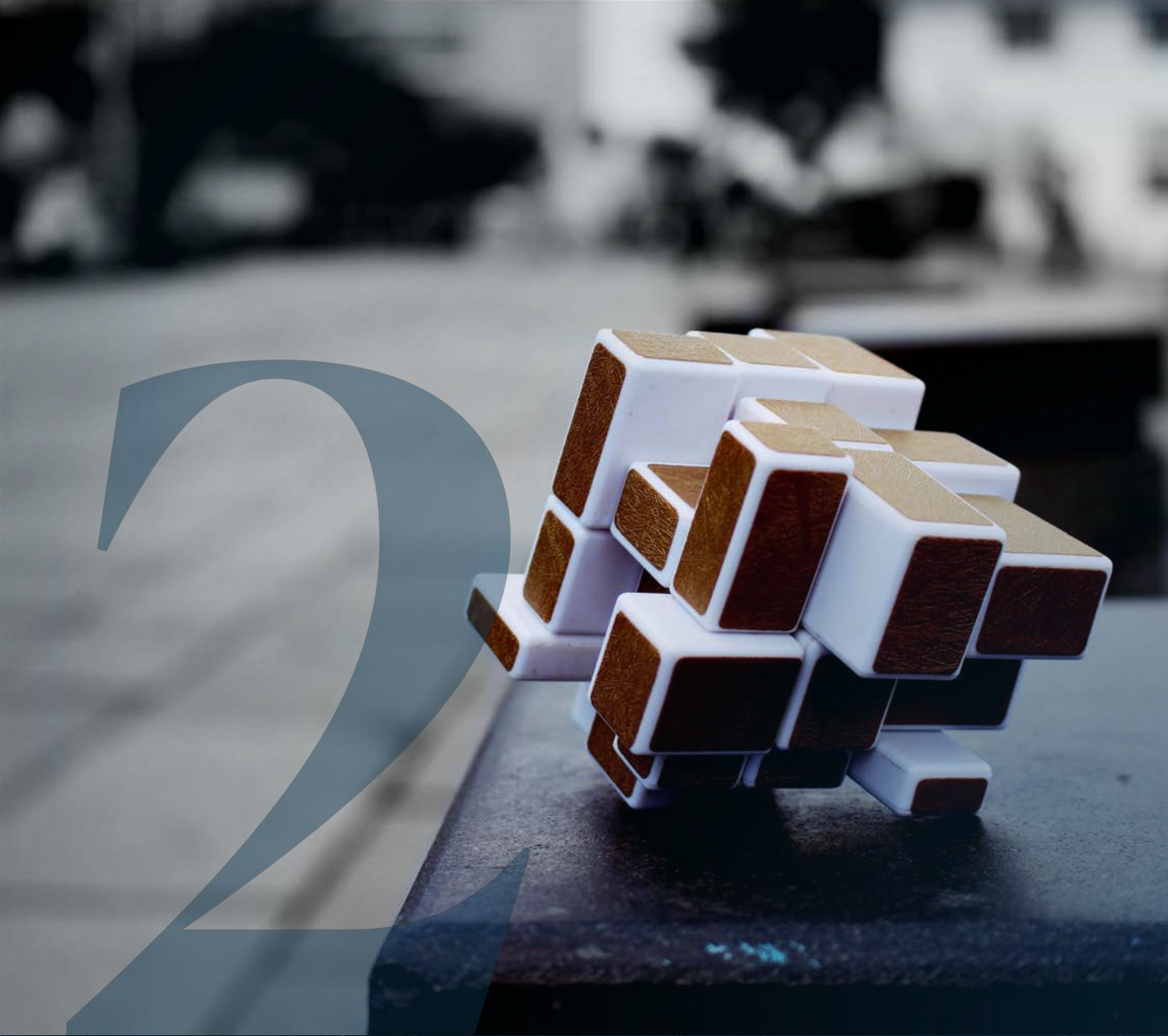
Cultural connection need Emotional stickiness + Functional satisfaction

*"When I was a kid I received my first set of **Legos** as a gift, what made me continue to be a fan of Lego is its versatility, creativity and the way it encourages critical thinking and problem solving."*
– Male, 50, Black

*"I've been a big fan [of **Patagonia**] for about 7 years when I started hiking, I like their commitment to quality and durability of their products, as well as their focus on sustainability and environmental conservation."*
– Male 29, Hispanic

*"**Nike** has been my favorite brand since I was a kid! I love their innovative designs and the fact that they are always creating new things! I feel part of a community when I wear a pair Nike sneakers, and I love that I can express my personal style with them!"*
– Female, 38, Hispanic

*"I would definitely consider myself a fan of **The Body Shop**. I started using their products in college because they were affordable, all-natural, and smelled amazing. Over the years, I have come to appreciate their commitment to ethical sourcing and sustainability. They seem like a company that aligns with my values and their products continue to be effective and high quality."* – Male, 29, White



Dimensions of Devotion

To further understand how **Emotion**, **Function**, and **Culture** drive brand fandom, we analyzed the strength of the **36 attributes** within each dimension. What we found, is that some attributes were stronger drivers within the dimensions than others, showcasing the layered complexity that makes up our our connections to brands.

Through this analysis, we developed a proprietary approach to diagnosing and benchmarking brand fandom to better understand the current state of consumer relationships and unlock growth opportunities for brands.

Fandom's Layered Complexity

Across 36 attributes analyzed, Culture is tablestakes, but deeper fandom comes from Emotional + Functional payoffs

Baseline Requirements



Strongest Drivers of Devotion

CULTURAL



<i>Tertiary</i>	<i>Secondary</i>	<i>Primary</i>
Has a distinct brand identity and brand voice that is unique	Is a brand that cares about social responsibility	Is a visionary/a leader for their respective industry
Everyone I know shops this brand	I look to this brand/retailer for what's coming next	Is a brand that makes the world better
Works with/collaborates with a lot of other brands		
Is a brand that is trendy		
Purposefully inclusive to many different consumers		
Highly visible – I see them everywhere		

EMOTIONAL



<i>Tertiary</i>	<i>Secondary</i>	<i>Primary</i>
Able to be customized and personalized to individuals	Is a brand that's 'in my corner' – it has my back	Is a brand I can trust
Has a strong brand story/history	Shopping/purchasing this brand says something good about me	Is a brand that treats customers well
Is classic/timeless	Is a brand that reflects my personal values	Makes me feel confident with my purchase decision
		I always have a positive experience with this brand
		They inspire a lot of trust from consumers
		Is committed to giving me value

FUNCTIONAL



<i>Tertiary</i>	<i>Secondary</i>	<i>Primary</i>
Is entertaining	Provides stress-free customer service	Is reliable
Creates/builds innovative new products and offerings	Meets my needs like no other brand can	Offers high quality products and services
	This brand notices and appreciates my loyalty	Makes it easy for me to shop with them/shop their products
	Sees me as a valued customer	Provides a consistent experience every time I interact with them
	Follows up and stays connected with me over time	Provides me with everything I need to make an informed decision
	Resolves my questions quickly	Helps me get the most out of my purchase

The Devotion Dial

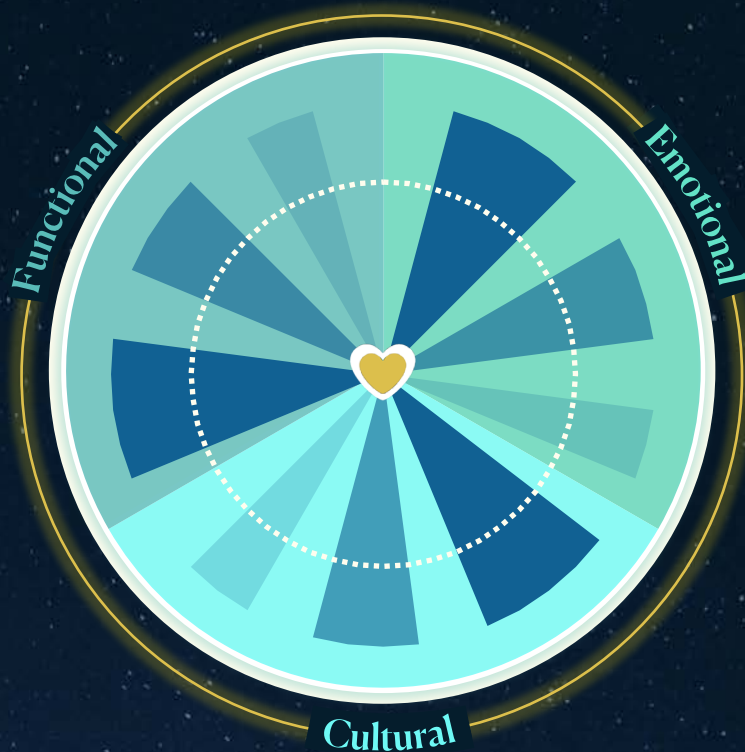
Starcom's Devotion Dial is a visual map of the strength of a brand's devotion across **36 core attributes** that underpin the three primary dimensions of fandom: **Functional, Emotional, Cultural**.

Backed by statistical correlations across brands, categories, and consumers, we set out to uncover what attributes are critical to fandom, what attributes are entryways into deeper fandom, and which attributes are tablestakes for any brand relationship in today's culture. Each slice of the dial represents distinct attributes that drive fandom. The darkest slices have attributes that are the strongest drivers of fandom, while the lightest slices have less strength.

The Devotion Dial assesses a brand's fandom to produce:

1 A visual map that diagnoses where there are strengths in the brand / fan relationship and where the brand has space to grow.

2 An index that is benchmarked against other competitors in the category / competitive set to assess broader fandom health in the market.



Brand Score by Driver Tier: Primary | Secondary | Tertiary

..... Category Average

Note: Fandom varies across consumers. As such, the Devotion Dial can be applied and analyzed by audiences for a more specific read or comparison.

Assessing a brand's strength in each dimension + in totality provides a measurable benchmark of fandom

ASSESSING DIMENSIONS

We've developed a proprietary method to score each dimension according to a weighted calculation of fandom attributes. That score indicates how much a brand is delivering on the attributes in the eyes of consumers and is plotted on the dial.

Emotional

The internal and intrinsic factors that a brand fulfills in a relationship

12 Total Attributes

Functional

The practical and utilitarian factors that a brand fulfills in a relationship

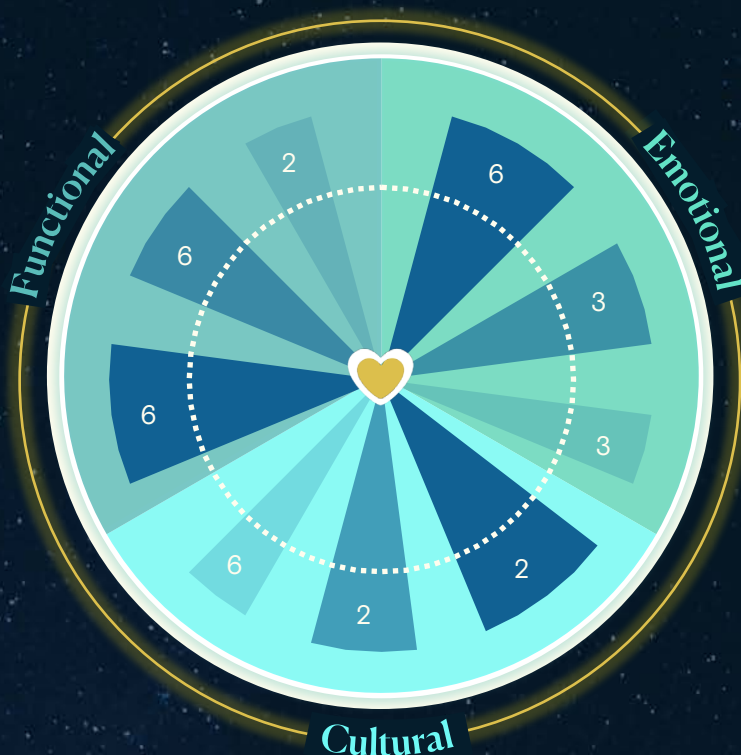
14 Total Attributes

Cultural

The societal factors that a brand fulfills for individuals and communities

10 Total Attributes

Primary | Secondary | Tertiary



INDEXING TO CATEGORY

The 3 dimensions' scores then fuel our proprietary **Devotion Index**, based on a category average of 5-7 competitors. This index reflects your brand's fandom strength in comparison to the rest of the category / competitive set.

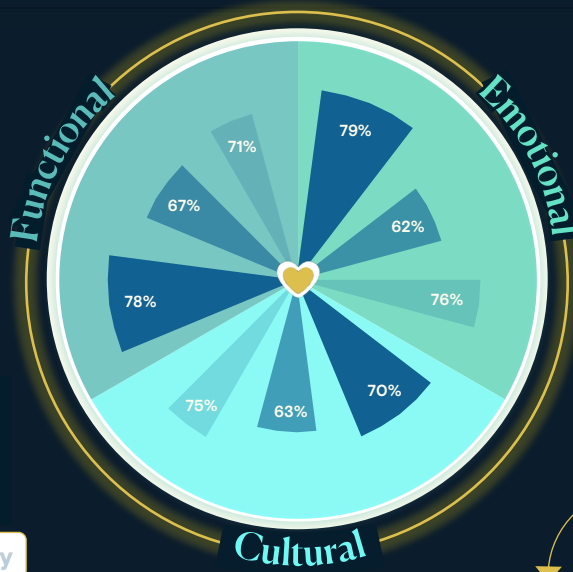
 **Devotion Index**

Use Case: Retail Category

Fandom Diagnoses by Brand

To further understand what is driving or detracting a brand's fandom, we can look at the **individual dimension scores by brand**. Understanding which of the **36 attributes** across the dimensions are key strengths in your fans' eyes, and which ones are falling short can illuminate clear opportunities for a brand to grow their fandom.

Each dimension's score is comprised of a proprietary weighting of attributes that accounts for their importance in driving fandom. Attributes within the darkest slices have the largest impact on driving fandom, and attributes within the lighter slices have lower impact on fandom, but are still baseline expectations for relationships to brands.



Each dimension's score can be further explored to assess individual attribute performance

Informed by a brand's scores on each of the 36 attributes across the 3 dimensions

Primary | Secondary | Tertiary

Strengths
Highest Scores

Emotional

Trust, Confidence, Service, Experience

Opportunities
Lowest Scores

Cultural

Corporate Social Responsibility (CSR)

BRAND IMPLICATIONS

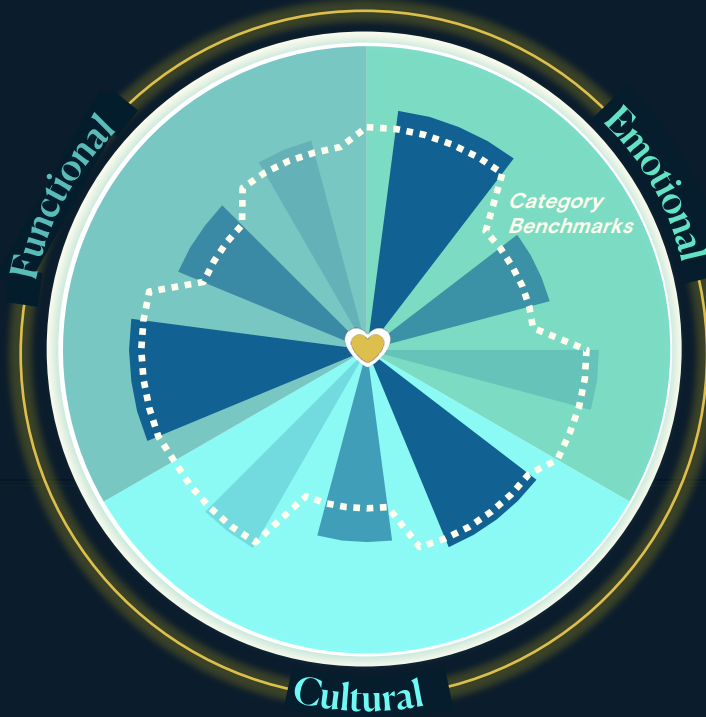
Elevate and amplify brand offerings as well as **brand actions** to deepen connection beyond commerce

Use Case: Retail Category

Fandom Competitive Benchmarking

Devotion Index

Calculated from a proprietary weighted score across each dimension and inclusive of tier.



114

BEST BUY

109

DICK'S
SPORTING GOODS

100

Average

amazon

100

THE
HOME
DEPOT

98

LOWE'S

95

TARGET

86

Walmart

Setting The Bar For Connection In The Category



Dick's Sporting Goods' House of Sports brings an innovative and experiential angle to shopping

Fandom in the retail category is driven first and foremost by **Function**.

Reliability, quality of products, and level of service are core drivers of devotion for consumers, yet not every brand excels in these areas.

Functional *innovation* – creating and building new products or offerings, is a baseline expectation – indicating how high the bar is for brands in this category to simply be in a consideration set, let alone a fan of that brand.

Delivering on these attributes tips into the **Emotional** dimension, with category fandom also driven by inspiring a high degree of trust with consumers, both on a 1:1 level, and from brands' broader presence in culture.

Cultural attributes, while still important to the fandom of brands in this category, play a more subtle role. Retail fandom is culturally tied in part by visibility (making fandom unmissable), as well as having a distinct brand identity – because *where* you shop, says something about *who* you are as a person.



Implications & Actions

In a world where brands rise and fall by the minute, the strength of a brand's fans is a sign of not just its current weight in the market, but also its potential for the future.

As such, brands should not take their fans for granted. Diagnosing the areas that fans have passion for today, as well as unmet desires from a brand is critical for future fandom – as well as business – growth.

Brand Fandom | TL;DR

'Fandom' was once reserved for sports and music – areas of life that naturally created community, fostered connection, and underpinned identity. As brands over time have expanded their presence and purpose in our lives, seeds of fandom have started to grow here as well, transforming relationships that were previously built on utilization into unique and passionate connections that help define our everyday.

Beginnings Matter

How a brand comes into a consumer's life makes a huge difference – an emotional connection underpins it, a functional need is met, or a cultural spark breaks through. Yet we often look at the present status of fandoms instead of understanding where a relationship started, and what might be waning / missing because of those origins.

Fandom is Nuanced

Brands can inspire more intense fandom by assessing where they are strong across emotional, functional, and cultural dimensions and identifying how – or if – they are delivering on baseline expectations, as well as devotion-driving attributes that build a deeper ties to the brand.

Fandom is Fluid

As marketers diagnose their brands' fandoms, it's important to remember that relationships with brands constantly change. Brands that pay attention to their dimensions of devotion are better equipped to leverage existing fanbases, nurture emerging ones, and spark new connections that will support growth in their category.

Brand Implications

Understanding where the fandom grew from can help contextualize the current state of a relationship, and how / why that fandom evolves + manifests in culture

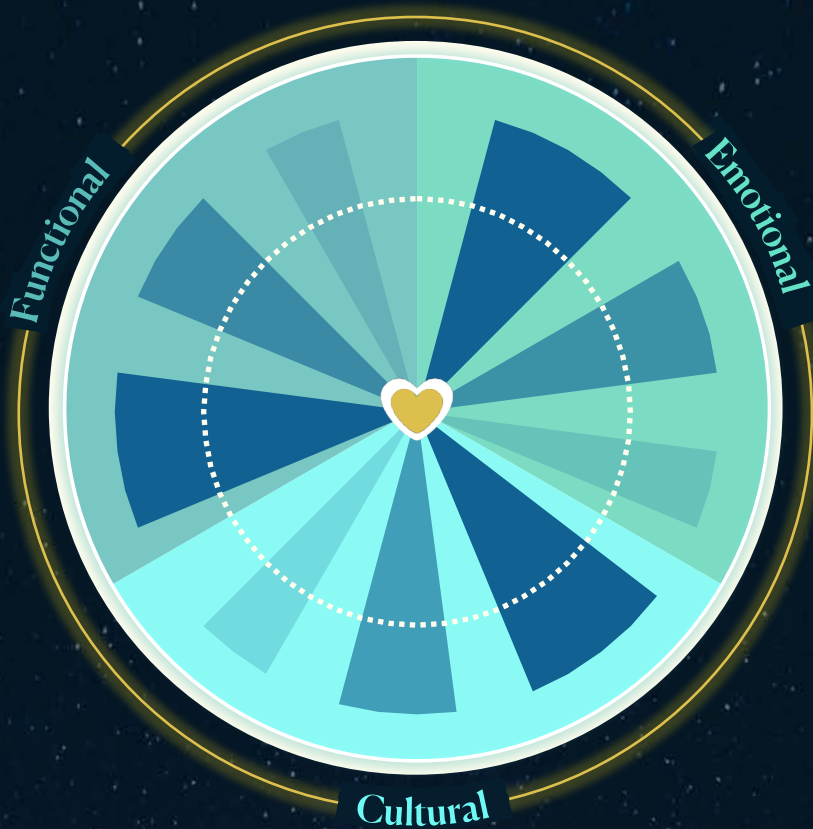
Brand Implications

Each dimension of fandom plays a unique – and equally important role. Culture is tablestakes for brands, while the number Functional and Emotional drivers a brand needs to meet increase for a relationship to deepen.

Brand Implications

Fandoms rarely grow or sustain on their own. Assessing connection on a regular cadence and in the context of competitors is key to building affection for the future.

Next Steps: Using The Devotion Dial For Your Brand



Category Fandom Benchmarks

How your brand stacks up in its category in terms of generating fandom, and where competitors have an edge in consumer relationships.

Fandom Elevation Opportunities

How to sustain existing fans by uncovering the attributes that make your brand beloved.

Barrier Identification

What barriers your brand has to attracting new fans or deepening the relationship with current ones.

Fan Passions / Pain Point Comparisons

Uncover which consumers are your most passionate fans and why / which consumers are fans of your competitors instead and why.

Contact Starcom Insights to diagnose your brand's fandom.



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Move People. Move Business.