

BRANDS BUILT FOR FANDOM

DESIGNING
FOR DEVOTION
IN A FRACTURED
CULTURE



SOON
FUTURE STUDIES

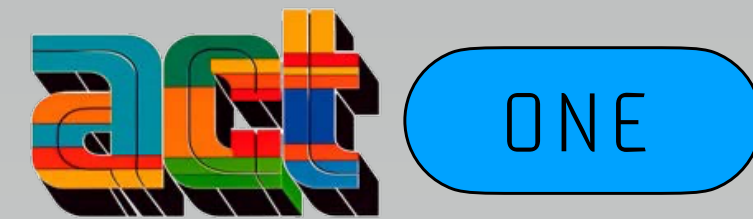


EXPERIENTIAL

SXSW

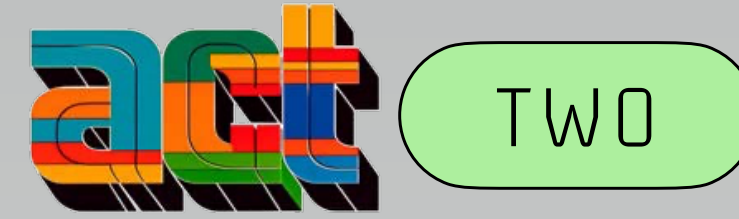
2026 MARCH 18
AUSTIN, TEXAS

THE REPORT IS STRUCTURED ACROSS THREE ACTS:



WHY FANDOM BECAME EVERYTHING

The environmental forces
reshaping fandom's conditions



HOW FANDOM ACTUALLY WORKS

The structural mechanics of how
communities actually form and operate



BUILDING CULTURE, NOT CULTS

A practical framework for determining
whether fandom is the right strategic
pursuit for your organisation at all



WHY FANDOM BECAME EVERYTHING

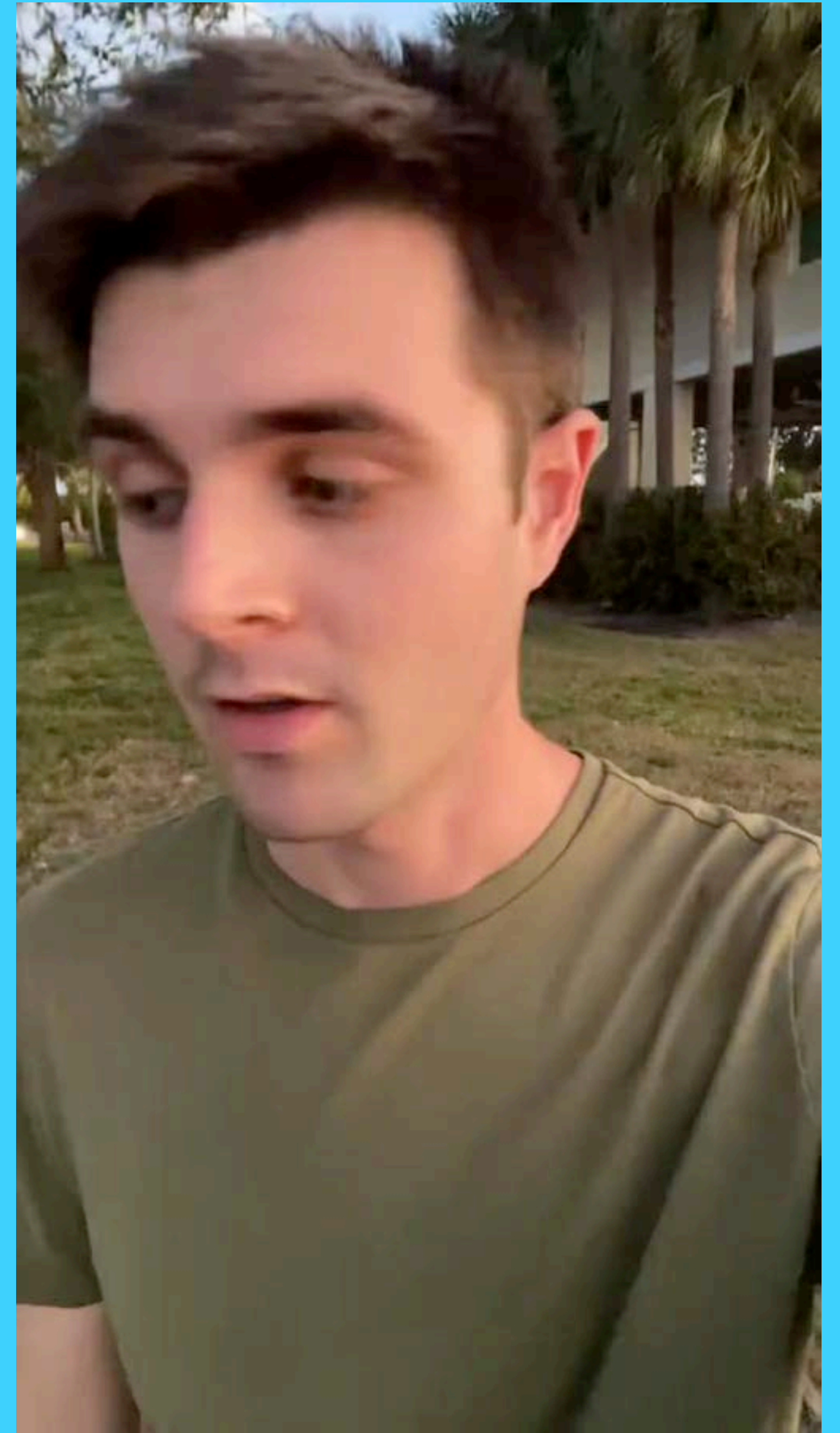
THE ENVIRONMENTAL FORCES
RESHAPING FANDOM'S CONDITIONS



THE FRACTURED ARENA

“The bar and restaurant economy is now age 55 and up because young people have no money to go out.”

— ZACH ABROAD, TIKTOK





Look at the numbers:

• PATREON

OVER
**\$10
BILLION**

paid creators since launch, with annual payouts now exceeding \$2 billion.

• ONLYFANS

PROCESSED
**\$7.2
BILLION**

in gross revenue in fiscal 2024, paying creators \$5.8 billion.

• DISCORD

230M
MONTHLY ACTIVE USERS

Marvel Rivals approx. 4.1 Million Discord members.



The business model flipped. It used to be:



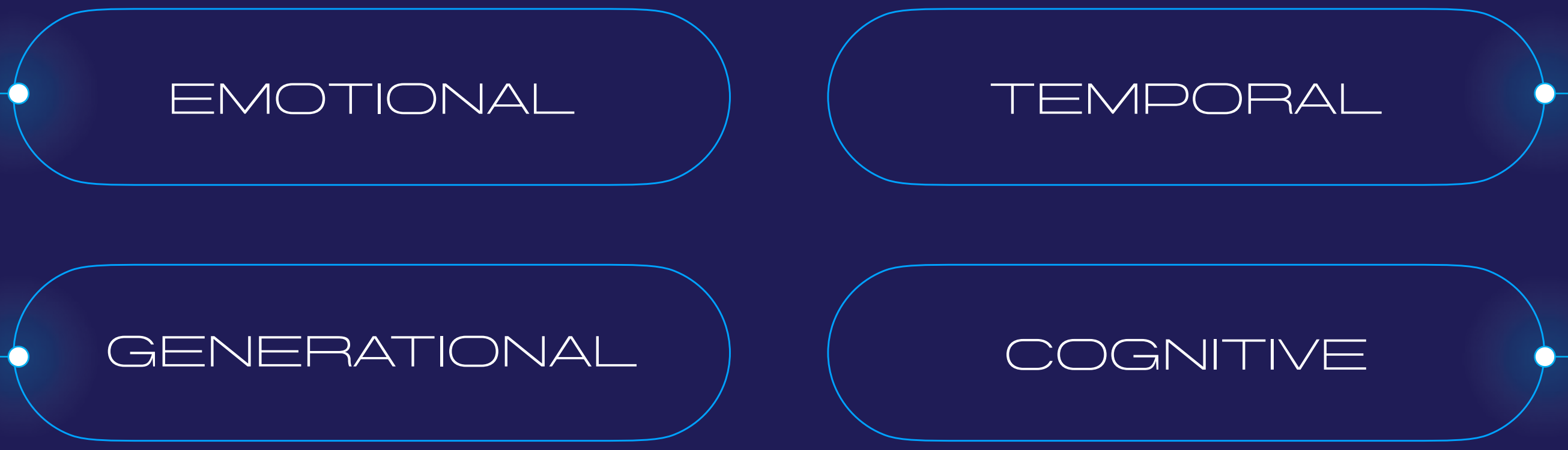
Now it's:



FANDOM ISN'T THE SIDE EFFECT, IT'S THE ENGINE.



Modern fandom operates under four simultaneous compression forces:



Together they create constant, exhausting presence.
The gaps between events disappeared.

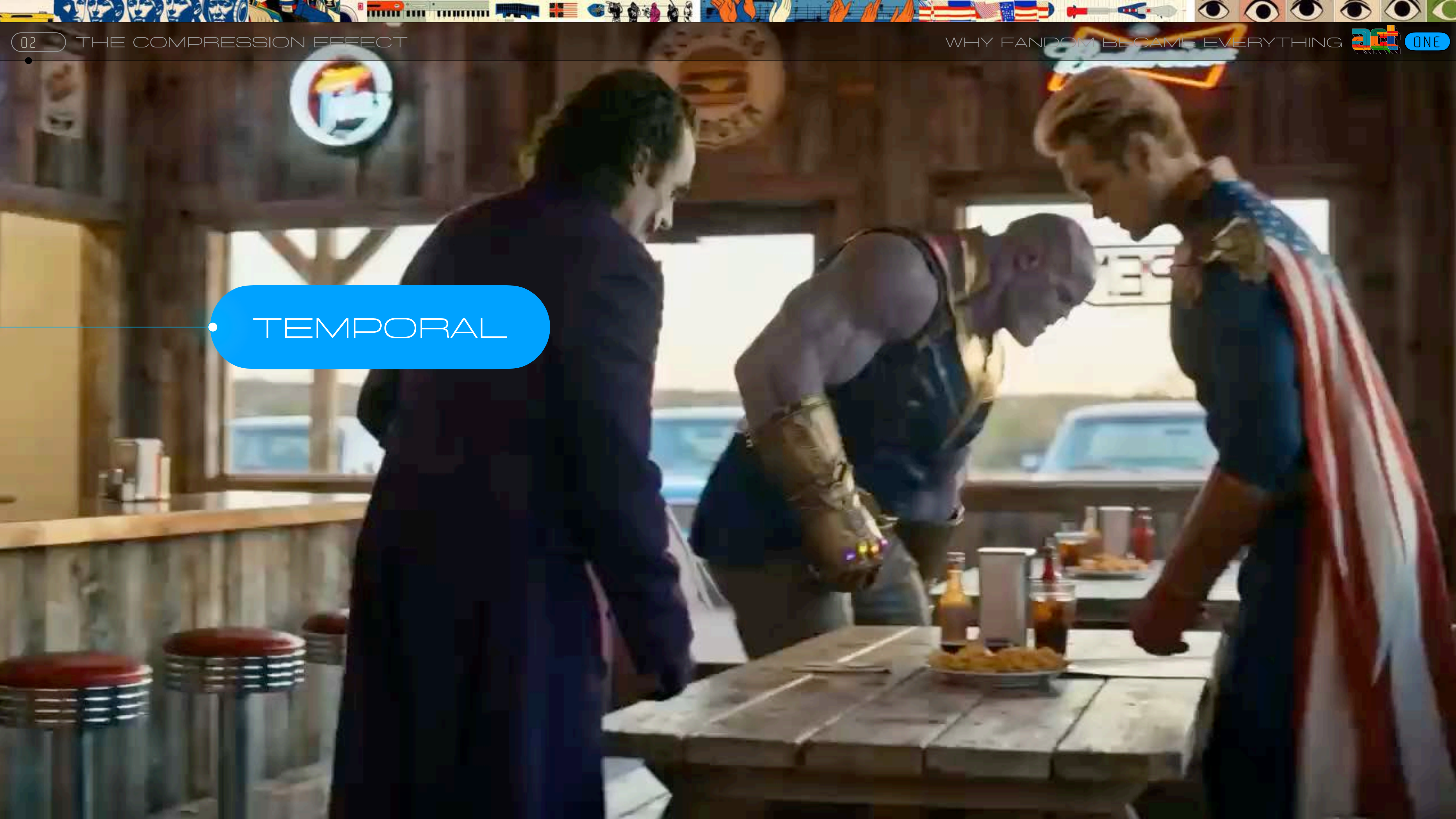


EMOTIONAL

"I WAS OFFLINE FOR SIX HOURS AND MISSED EVERYTHING."



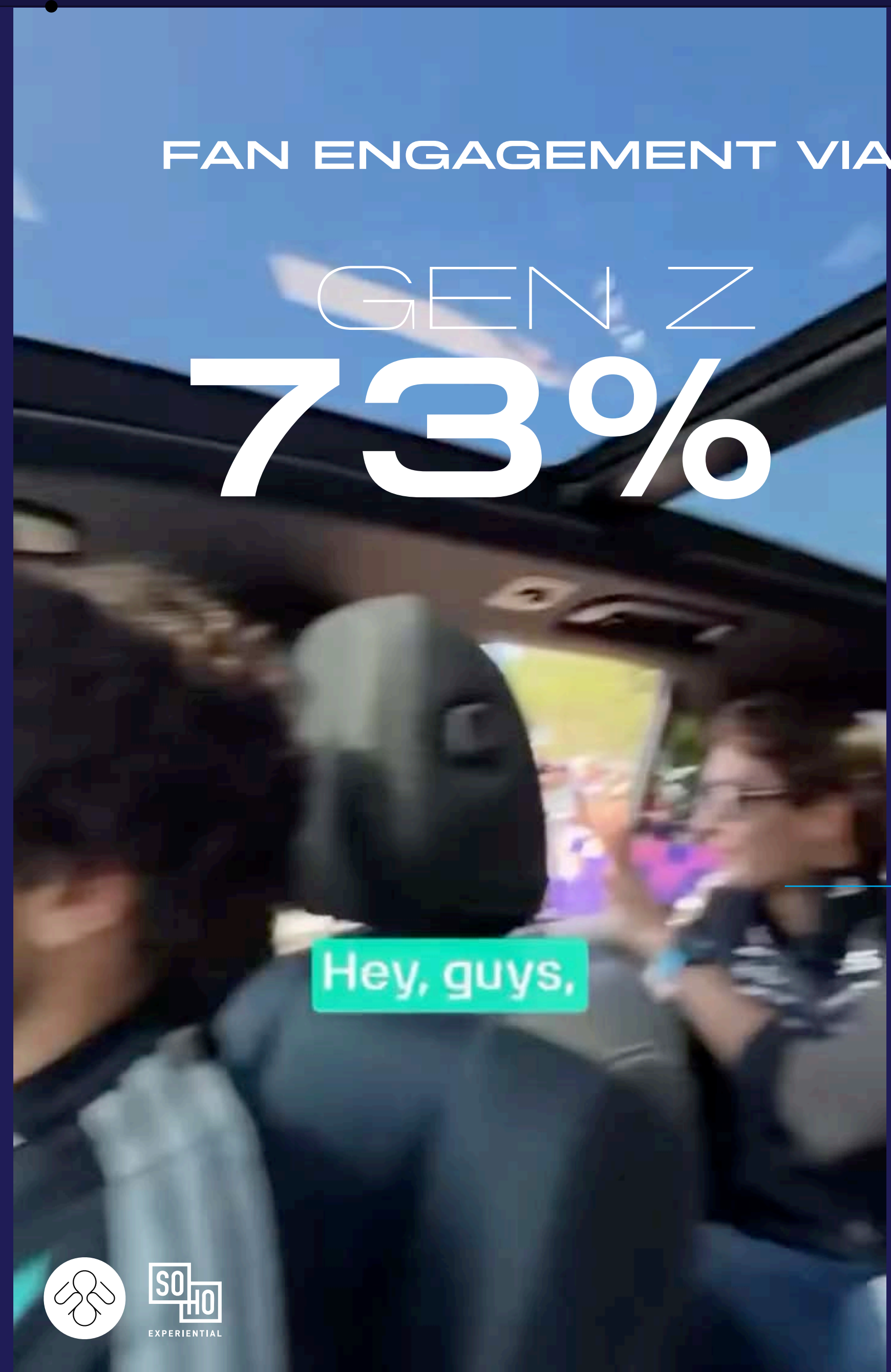
• TEMPORAL





FAN ENGAGEMENT VIA SHORT-FORM VIDEO

GEN Z
73%



GENERATIONAL

GEN X
11%



61%
PREFER
LONG-FORM CONTENT
AND TRADITIONAL
BROADCASTS



COGNITIVE

The cognitive cost is severe: shifting between abstract tasks requires

10 TO 20 MINUTES

for the brain to fully reload context.



POV: onboarding the Gen Z new hire

When you get into the benefits portal



THE ALGORITHM DOESN'T JUST LEARN YOUR PREFERENCES. IT ASSIGNS YOUR IDENTITY.

1,200 TIKTOK USERS WHO ENGAGED WITH A SINGLE PIECE OF FAN CONTENT WITHIN 10 DAYS:

73% FYP SHIFT TO MAJORITY FANDOM CONTENT

AVERAGE TIME FROM FIRST ENGAGEMENT TO SELF-IDENTIFYING AS A FAN:

18 DAYS





THE ALGORITHM BUILDS THE OBJECT

STAGE 1

STAGE 2

STAGE 3

RECOMMENDATION



PREDICTION



ASSIGNMENT



TIKTOK IS THE SPEED ENGINE

YOUTUBE IS THE DEPTH ENGINE

INSTAGRAM CLUSTERS IDENTITY

FANDOMS WITH NO CENTRAL OBJECT



• **The culture casino is open.**

The question is whether your brand is the house, the chip, or the thing people came to do before someone put a price on it.

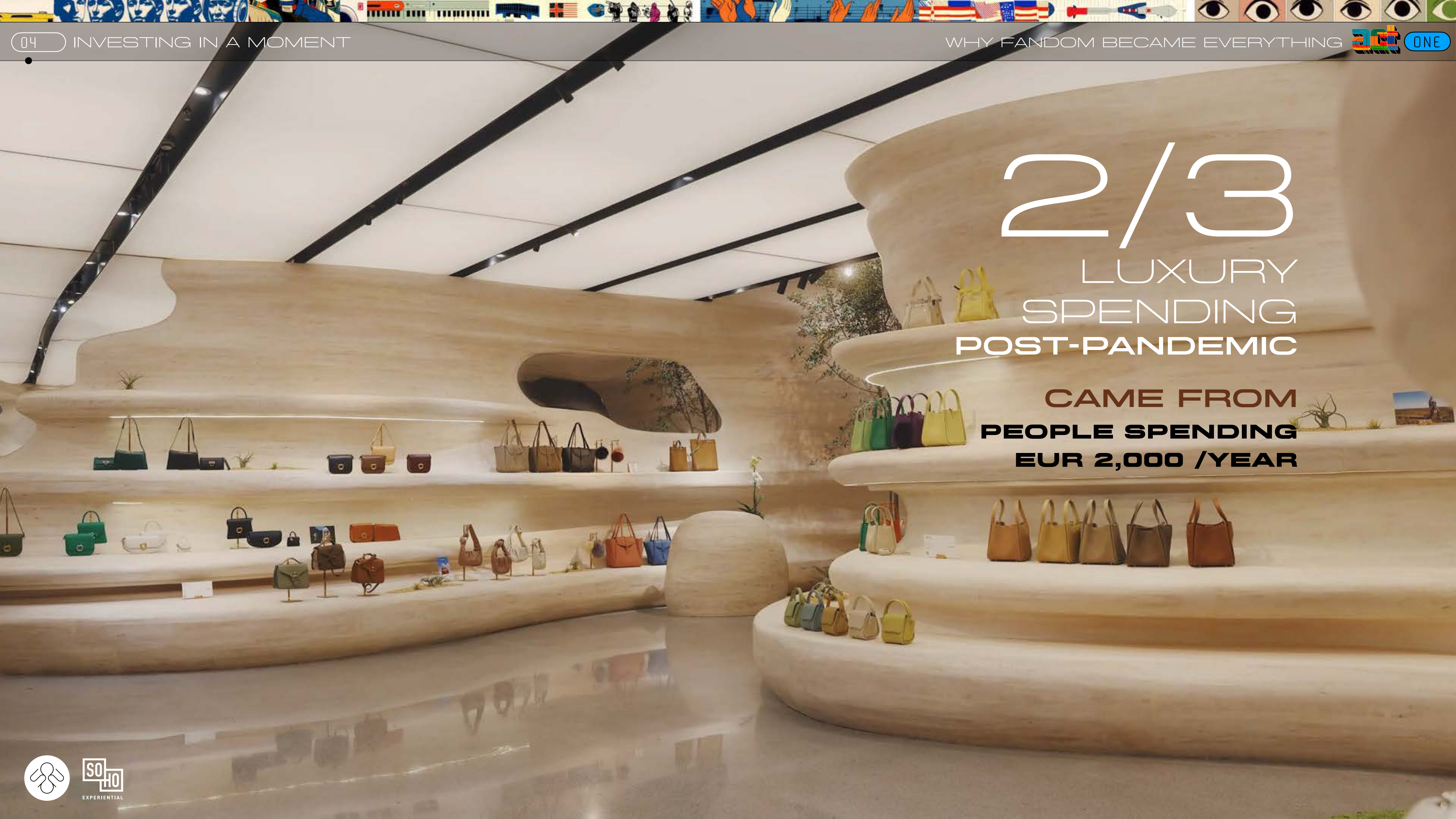




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LUXURY SPENDING POST-PANDEMIC

CAME FROM PEOPLE SPENDING EUR 2,000 /YEAR



INVESTING IN A MOMENT

LIVE PREDICTIONS

SXSW Culture · SXSW 2026

Will AI be mentioned in the first 10 minutes of 'Brands Built for Fandom'?"

85% chance ▲ 2% Polymarket

4%
2%
0%

Buy Yes 85¢
\$100 → \$118

Buy No 15¢
\$100 → \$667



THE FRICTION THESIS

"Fandom has never been about perfection. It's about participation in something that has the potential to fail."

- **JASON SNYDER, FOUNDER, ARTISTS & ROBOTS**



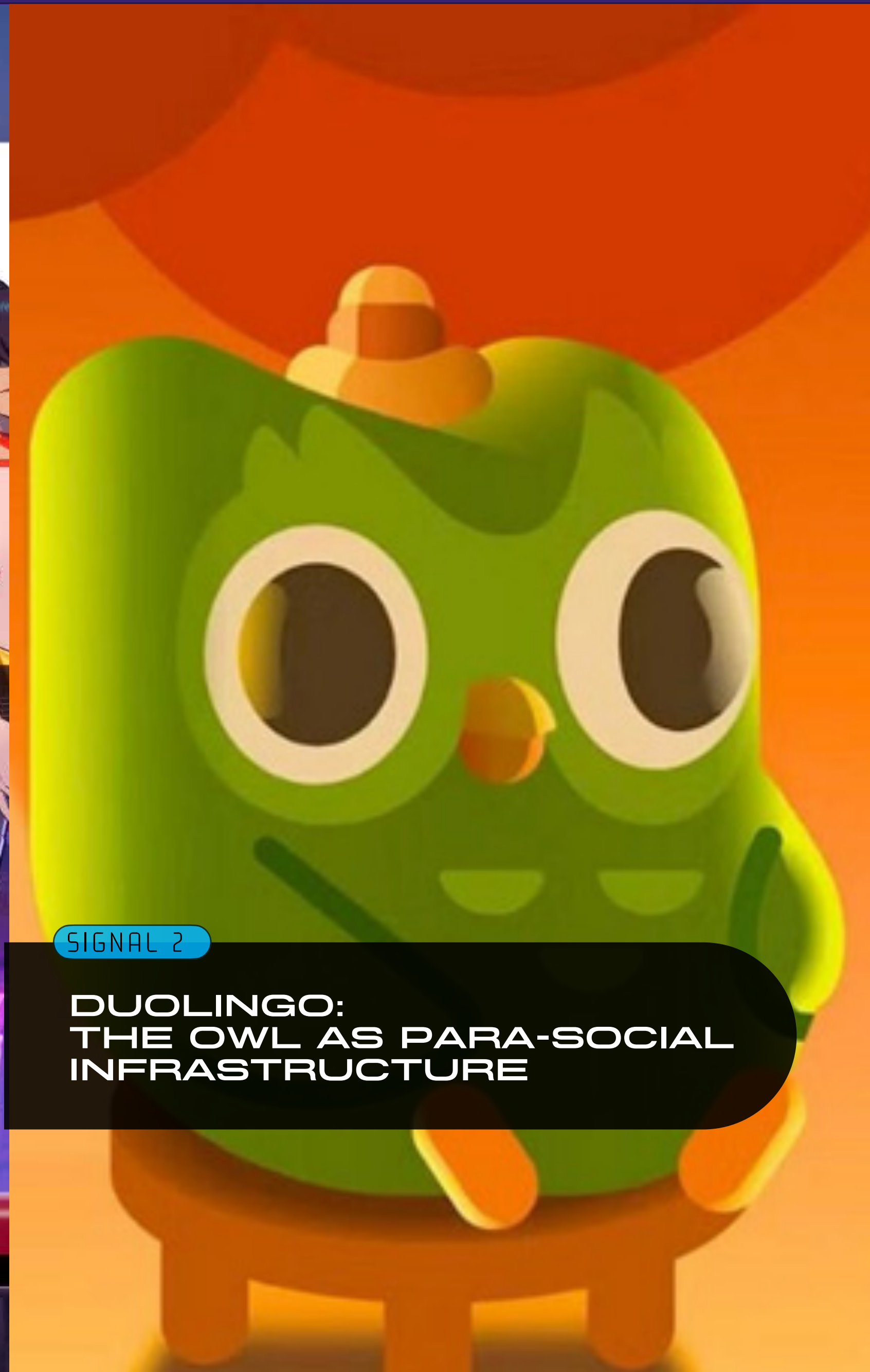
"I was there when"
replaces
"I know everything about."

- The moment becomes the unit of cultural currency.



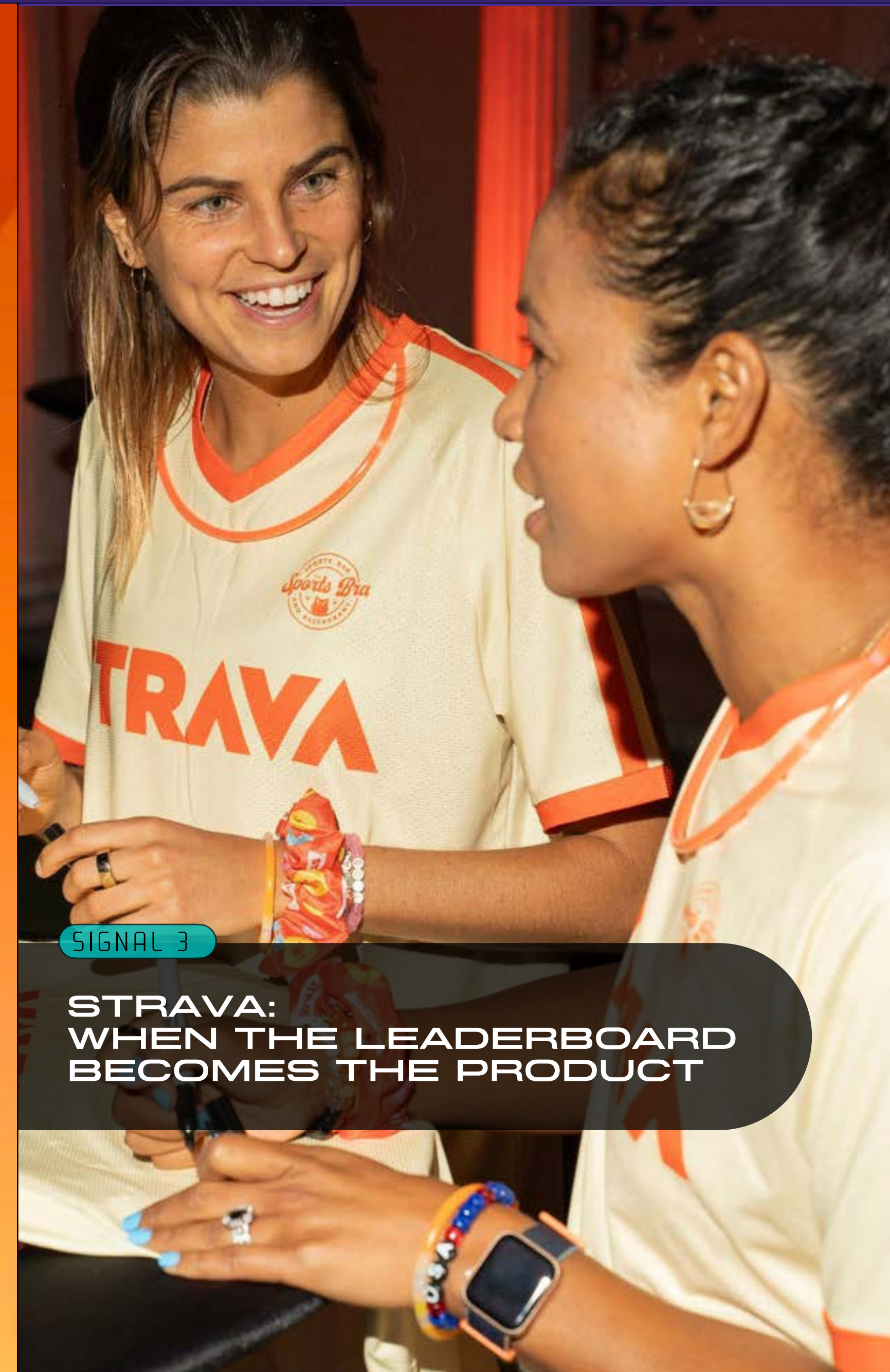
SIGNAL 1

**FORTNITE:
THE VENUE THAT
REPLACED THE VENUE**



SIGNAL 2

**DUOLINGO:
THE OWL AS PARA-SOCIAL
INFRASTRUCTURE**



SIGNAL 3

**STRAVA:
WHEN THE LEADERBOARD
BECOMES THE PRODUCT**

FANDOM COMPRESSED.
ALGORITHMS ASSIGNED IT.
MARKETS FINANCIALISED IT.

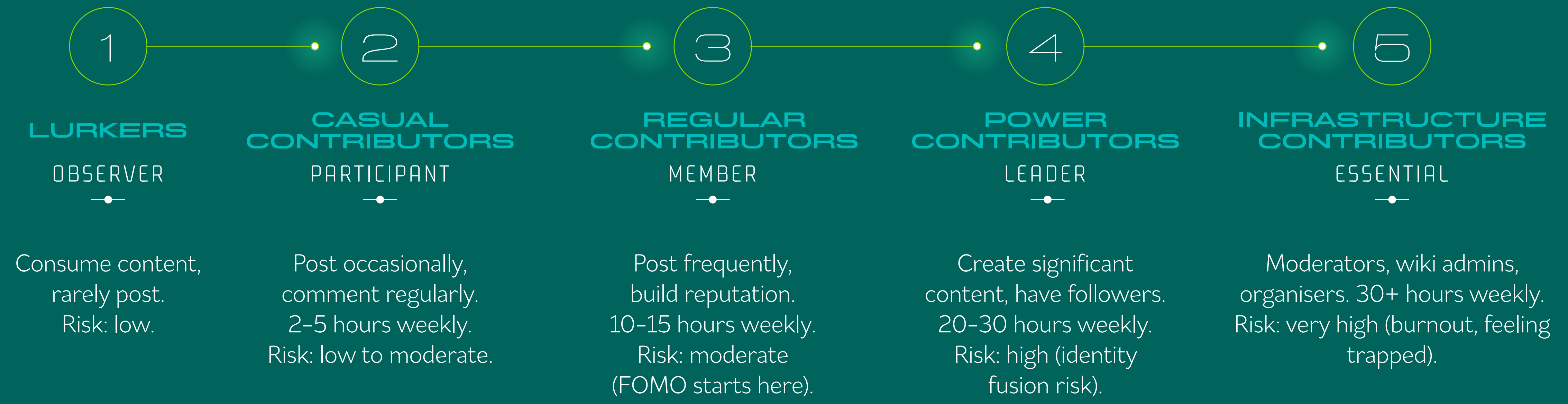
• **HOW DOES IT ACTUALLY WORK?**



HOW FANDOM ACTUALLY WORKS

THE STRUCTURAL MECHANICS OF
HOW COMMUNITIES ACTUALLY
FORM AND OPERATE

THE LADDER OF PARTICIPATION AND IDENTITY



The problem: identity formation accelerates faster than people realise.

You start as a lurker. **Within 12 months** of steady contribution, your entire self-concept has reorganised around the role.

THE BROADCAST MODEL IS DEAD

PURCHASE INTENT CORRELATION

ADVERTISING RESEARCH FOUNDATION, 2024 (200 CAMPAIGNS)

Impressions

R=0.07

Engagement

R=0.34

Participation Depth

R=0.71

Seeing your ad doesn't make me buy.
Participating in your brand's world does.

THE BRAND IMPLICATIONS: **PRESENCE, NOT CAMPAIGNS**

WHAT THIS MEANS FOR BRANDS:

You don't launch campaigns.
You build infrastructure for participation.
Stop thinking in campaign cycles.
Start thinking in community lifecycle stages.

THE ANATOMY OF A SELF-ANIMATING FIELD



“It's like being a city planner for a city you don't own. You keep the lights on. Sometimes the residents appreciate it. Often they don't.”

- A SENIOR MOD





WHEN NO FIELD FORMS AT ALL



YOU CAN'T CREATE A SELF-ANIMATING FIELD

SONY'S CONCORD:
\$100 MILLION FOR
697 PLAYERS (2024)

SHUT DOWN IN 14 DAYS.



YOU ARE WHAT YOU CONTRIBUTE

PROFILE 1:

Alex the Burned-Out Archivist



"I'M NOT OBSESSED WITH A TV SHOW. I'M OBSESSED WITH BEING USEFUL. THE SHOW IS JUST THE MECHANISM."



PROFILE 2:

Morgan the Ghost Who Can't Leave

"I'M 22 AND I'M TRAPPED IN AN IDENTITY I BUILT WHEN I WAS 19."

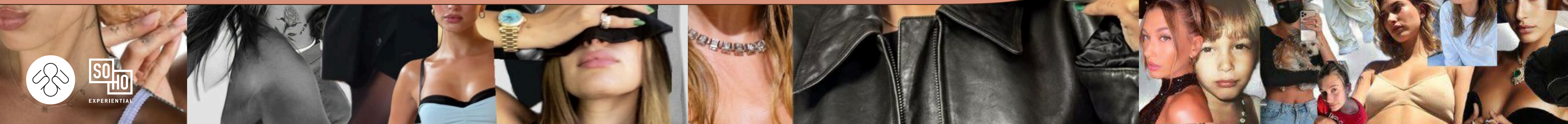
FORMER K-POP FAN ACCOUNT



FANDOM FOCUS THE ROAD TO RHODE

rhode

A CULTURAL ROADMAP OF FANDOM ARCHITECTURE



SOHO
EXPERIENTIAL

Six layers of audience, each from a different cultural domain, each contributing a different kind of trust. Rhode works because it's legible to all of them simultaneously.

LAYER 4

LIFESTYLE DOCUMENTATION (2018-2022)

YouTube channel, behind-the-scenes content, skincare routines. Habit viewing creates parasocial trust.

LAYER 2

PROFESSIONAL MODELLING (2014-2018)

IMG Models global signing. Runway for Topshop, Sonia Rykiel, Ralph Lauren. Editorial in every major fashion publication.

LAYER 1

HAILEY BIEBER

LEGACY PROXIMITY (1996-2013)

Before she launched a career, she had access to magazine profiles, industry events, and tabloid curiosity through family proximity.

LAYER 3

RELATIONSHIP CELEBRITY (2016-PRESENT)

Engagement and marriage to Justin Bieber created a new audience layer (Beliebers) and global tabloid interest.

LAYER 6

FOUNDER - OPERATOR (2022-PRESENT)

Rhode launches. Three products. Everything built over twelve years converges.

LAYER 5

BEAUTY AUTHORITY (2017-2022)

L'Oréal spokesperson, bareMinerals ambassador. "Glazed donut skin" aesthetic spreads via TikTok to millions.

SIGNAL 4

**ANTHROPIC:
MISSION AS FANDOM
ARCHITECTURE**



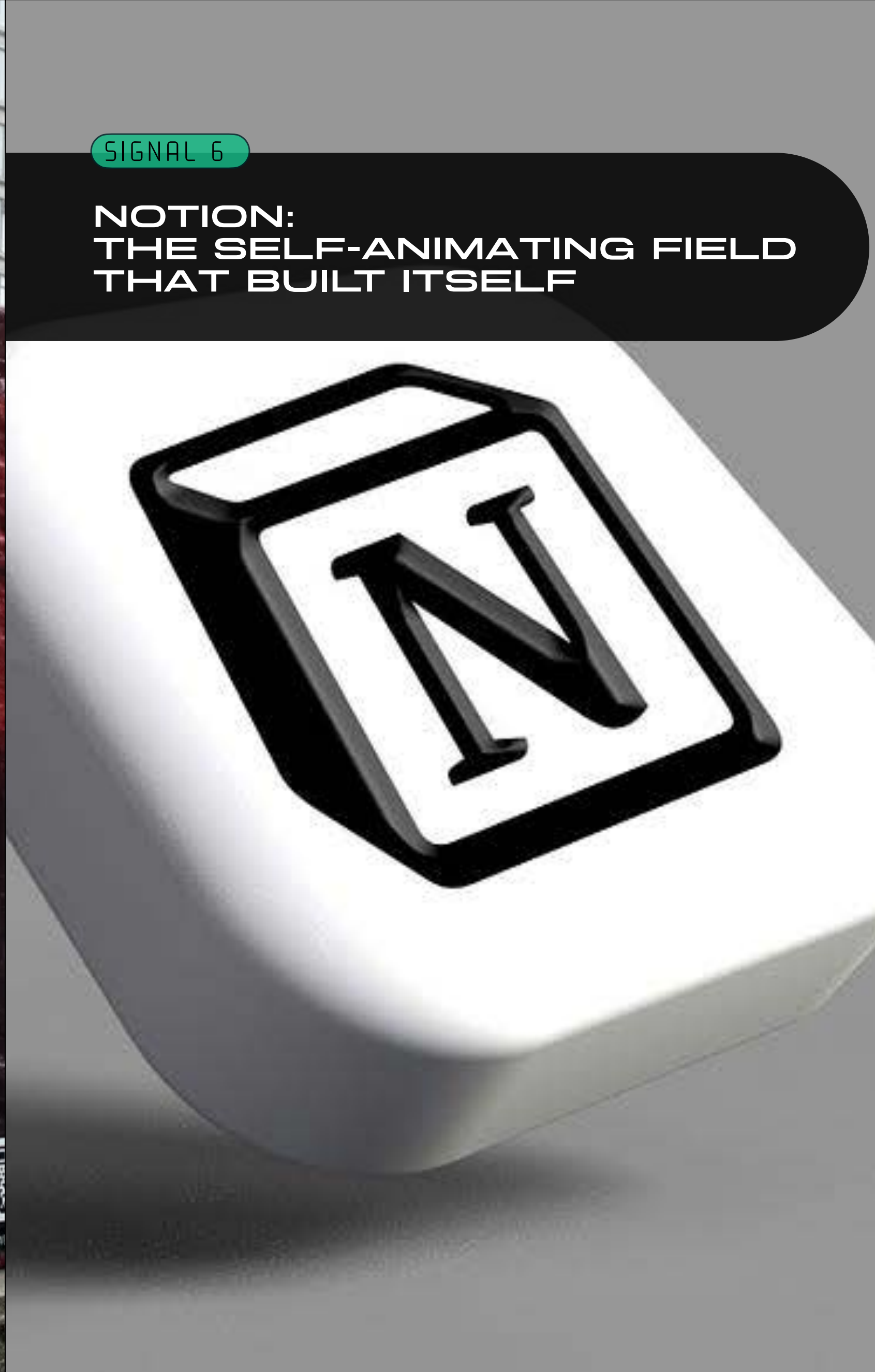
SIGNAL 5

**LULULEMON:
THE COMMUNITY SHOWING
STRESS FRACTURES**



SIGNAL 6

**NOTION:
THE SELF-ANIMATING FIELD
THAT BUILT ITSELF**



WE KNOW WHY FANDOM MATTERS.
WE KNOW HOW IT WORKS.

NOW:

• **HOW DO YOU BUILD IT
WITHOUT BREAKING PEOPLE?**



BUILDING CULTURE, NOT CULTS

A PRACTICAL FRAMEWORK FOR DETERMINING
WHETHER FANDOM IS THE RIGHT STRATEGIC
PURSUIT FOR YOUR ORGANISATION AT ALL



WHEN COMPANIES START ACTING LIKE FANDOMS

**MRBEAST ASKED FANS TO REARRANGE
STORE SHELVES.
THOUSANDS COMPLIED. FOR FREE.**

FEASTABLES HIT \$215M REVENUE IN 2024.

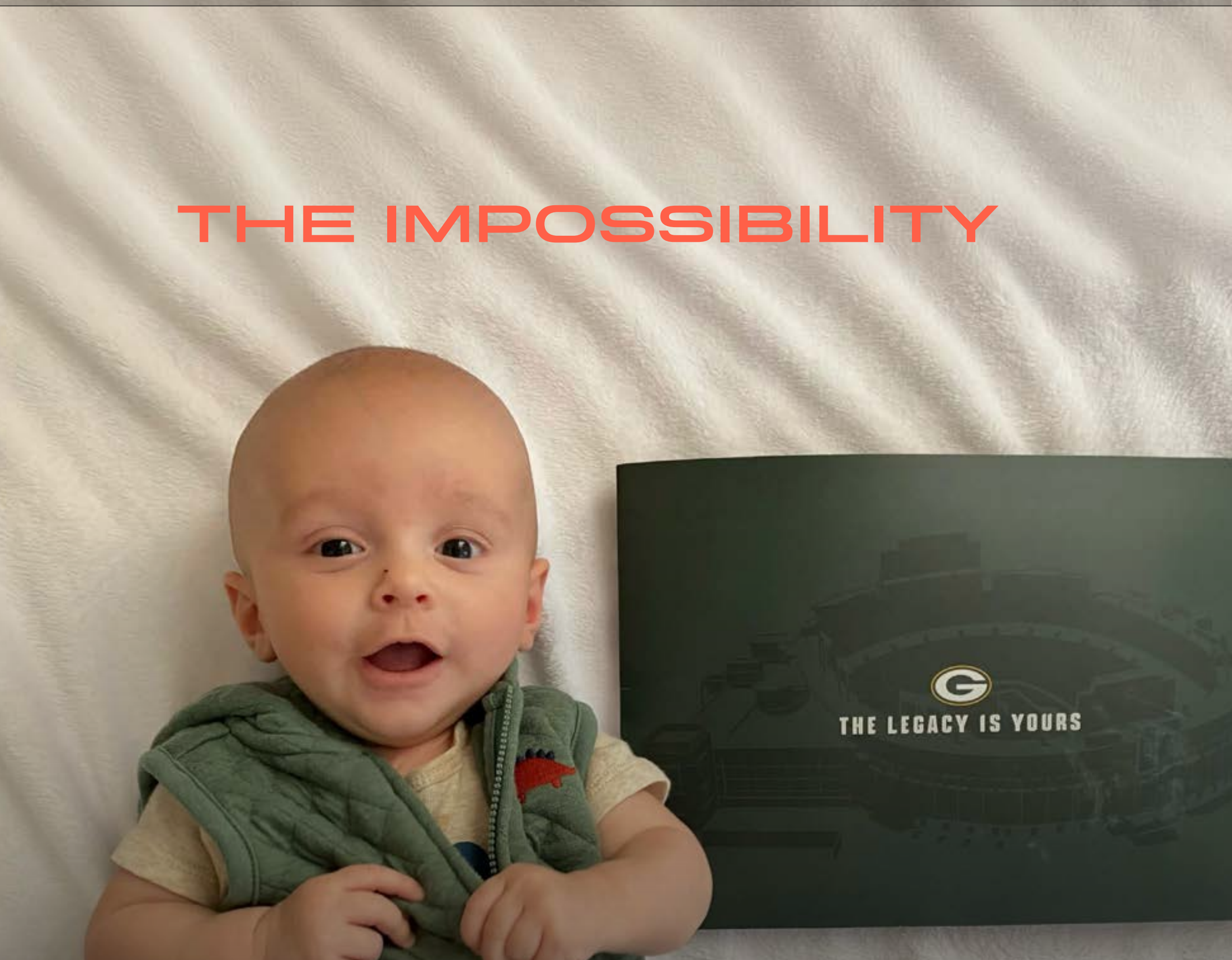


CULTURE OR CULT?



THE ANTIDOTE

VEJA:
EUR200M+ REVENUE.
\$0 ADVERTISING.



THE IMPOSSIBILITY

GREEN BAY PACKERS:
539,000 SHAREHOLDERS.
\$0 DIVIDENDS.

- **THE FRAMEWORK:**
CULTURE VS. CULT

- **CULTURE:**
TRANSPARENT. RECIPROCAL. EASY EXIT.
COMMUNITY OWNERSHIP.

- **CULT:**
HIDDEN. EXTRACTIVE. DIFFICULT EXIT.
ORGANISATIONAL OWNERSHIP.



THE PRIVACY PROBLEM: EMOTIONAL SENSING IS SURVEILLANCE

67%

OF SPORTS FANS
UNAWARE THEIR
EMOTIONAL RESPONSES
ARE TRACKED.

52%

WOULD OBJECT
IF THEY KNEW.



NEUROSPOT BARISTA

A live AI video analytics system for coffee shops

It overlays camera feeds to track barista output (e.g., "Deme 10 cups"), customer dwell times, wait queues, and movements in real time.





EXTRACTION BECAME HARVESTING, PARTICIPATION IS THE CORRECTION.



THE MODEL THAT'S ALREADY WINNING

LEGO IDEAS: **135 PRODUCTS.**
\$8M IN ROYALTIES TO FANS.
2.4M USERS.
10 YEARS RUNNING.

Competitors can copy LEGO bricks.
They cannot copy LEGO Ideas and its 10-year community.



Second 2025 LEGO® Ideas Review
Results coming in Spring 2026



**REST CYCLES ARE
FEATURES, NOT BUGS**



**REST CYCLES ARE
FEATURES, NOT BUGS.
"GLAD YOU'RE BACK"
BEATS "WE MISSED YOU."**

SPORT HAS FOUR ADVANTAGES MOST DIGITAL FANDOMS LACK:

SEASONAL RHYTHM

PHYSICAL RITUAL

GENERATIONAL
TRANSFER

THE CAPACITY TO
HOLD LOSS

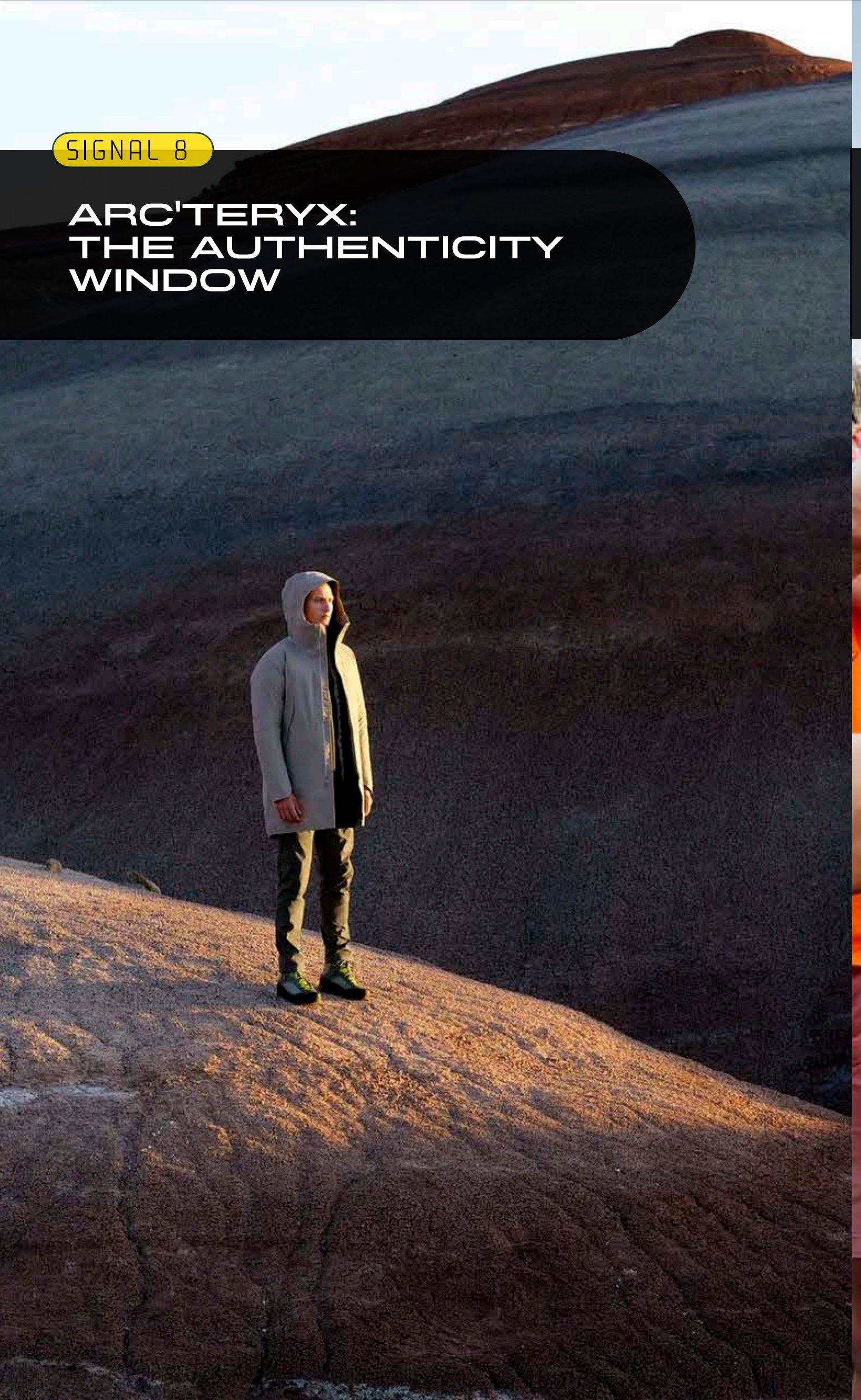
SIGNAL 7

LIQUID DEATH:
PARTICIPATION DISGUISED
AS A BEVERAGE



SIGNAL 8

ARC'TERYX:
THE AUTHENTICITY
WINDOW



SIGNAL 9

FORMULA 1:
TWO FANDOMS,
ONE SPORT



THE DIAGNOSTIC

BEFORE YOU BUILD FANDOM INFRASTRUCTURE,
ANSWER HONESTLY:

- 1. DOES YOUR PRODUCT WARRANT DEVOTION?**
- 2. CAN YOU COMMIT TO CONTINUITY (3-5 YEARS)?**
- 3. IS YOUR MODEL REGENERATIVE OR EXTRACTIVE?**
- 4. DOES LEADERSHIP UNDERSTAND THE TIMELINE?**
- 5. CAN YOU HANDLE PUBLIC, LOUD, UNFAIR CRITICISM?**

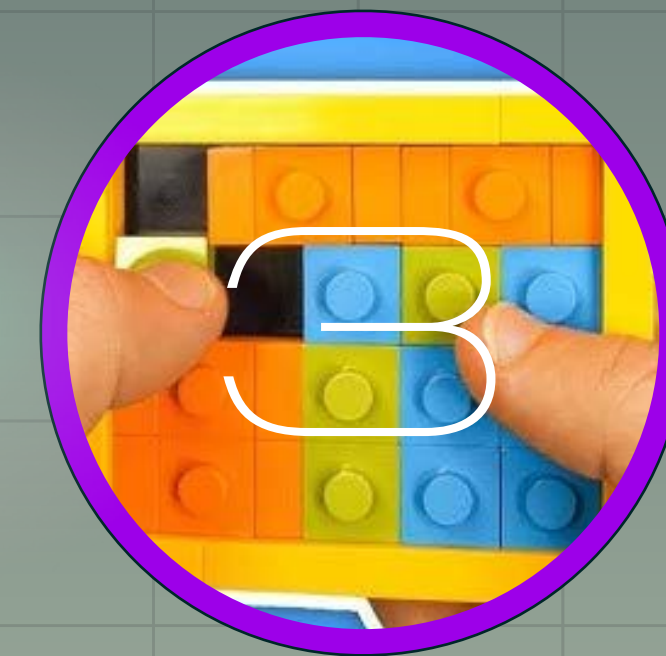
THREE SHIFTS THAT DEFINE WHAT IS NEXT



**FROM AUDIENCE
TO PARTICIPATION.**



**FROM
CONTENT
TO FIELDS.**



**FROM
CAMPAIGNS TO
CONTINUITY.**

THE ETHICAL LINE

IF PEOPLE WOULD
FEEL MANIPULATED
IF THEY UNDERSTOOD
HOW IT WORKS,

IT HAS CROSSED THE LINE.

THE FINAL QUESTION

**ARE YOU BUILDING SOMETHING
PEOPLE ARE TRAPPED IN?**

OR SOMETHING THEY
CHOOSE TO STAY?