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CULTURE & TRENDS REPORT

FANDOM

How fans have shifted from consumers to creators – and how they brought viewers along with them.

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THE NEW PROMISE OF FANDOM

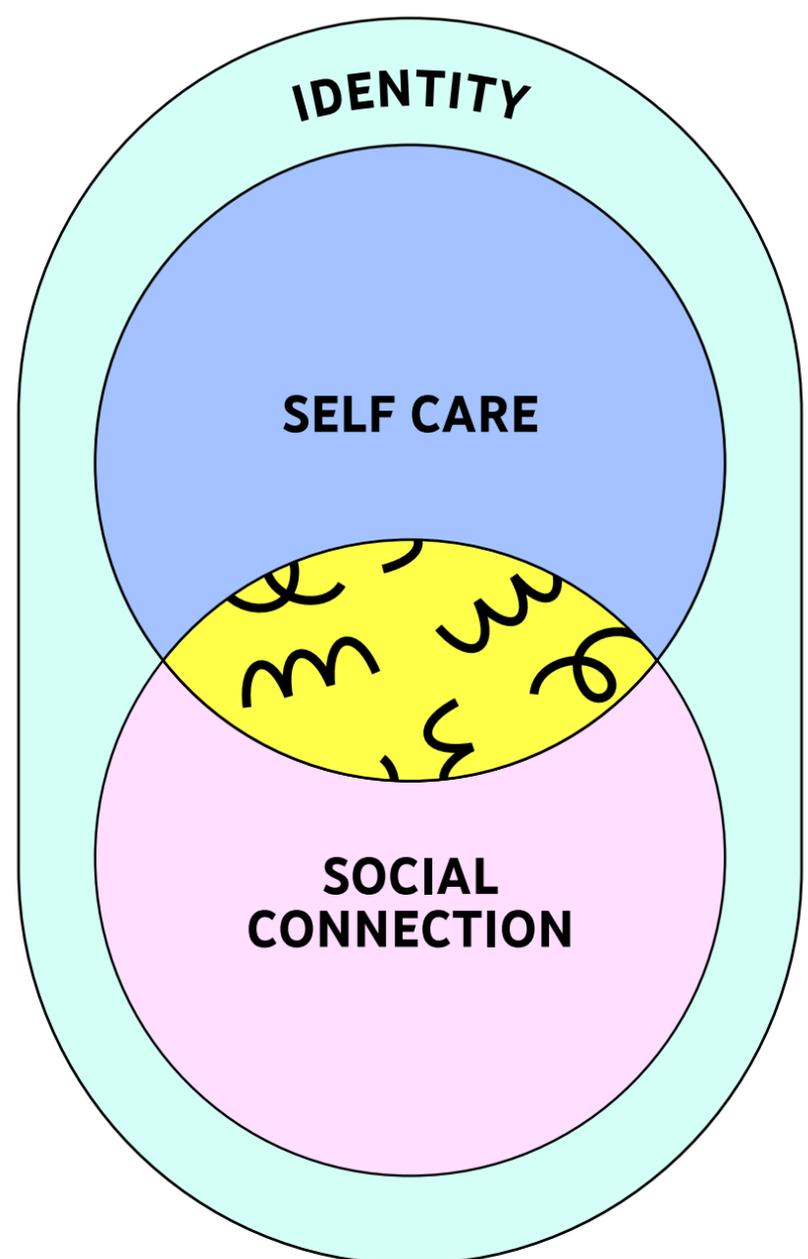
As any devoted fan will tell you, fandom isn't some frivolous pastime. It can be a deeply fulfilling and mood-elevating experience, helping people shape their identities and cultivate stronger connections to their community.

According to KR&I's Fandom Institute, fandom is a relationship between people and an object of their fandom; an object that is relatable, elevated, and inspires devotion and investment. As technology is evolving, so are fans' relationships with their favorite creators, artists, and other entertainment vehicles.

To learn more about how the nature of fandom has changed, the YouTube Culture & Trends team researched dozens of trends from the past year, consulted the Fandom Institute, and ran surveys with SmithGeiger, asking thousands of people about how they spend their time online as fans. Respondents were adults who are active online, age 14–44; and Gen Z who are active online, age 14–24.

KR&I'S HUMAN NEEDS MODEL: THREE OVERLAPPING PSYCHOSOCIAL NEEDS THAT SHAPE CONSUMER BEHAVIOR.

KR&I's Fandom Institute has identified these fundamental human needs that are satisfied through participation in fandom.



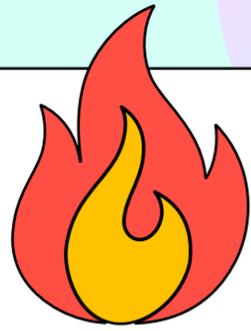
FANDOM'S VIRTUOUS CYCLE

Fans aren't just consuming their favorite content anymore – they're actively in conversation with it – creating their own videos to showcase their devotion to the source material and to strengthen bonds with other fans.

HOW?

How? Between trends, memes, fancams, explainers, reaction videos, fan art, and hour-long video essays, **fan content often extends well beyond its source material and attracts its own fans in the process.** Meanwhile, brands and traditional creators have learned to actively respond to their fans' content, forging a mutually beneficial creative relationship.

80%



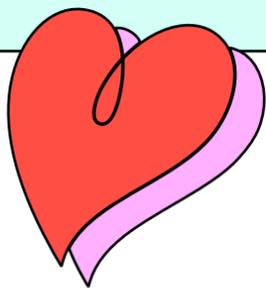
of fans (online 14-44 year-olds who identify as fans) use YouTube to consume content about the person or thing they're a fan of at least weekly.

Source: Google/SmithGeiger, YouTube Trends Survey, US May 2024, N=847 online fans age 14-44.



FROM FAN TO SUPER-FAN

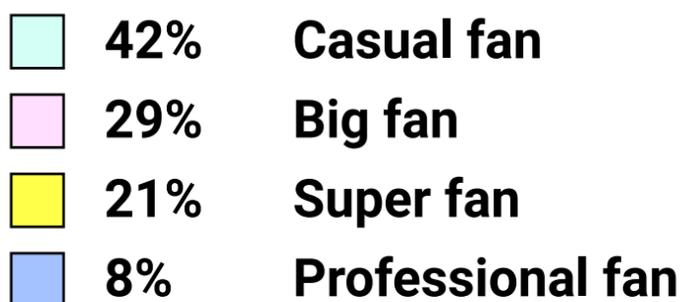
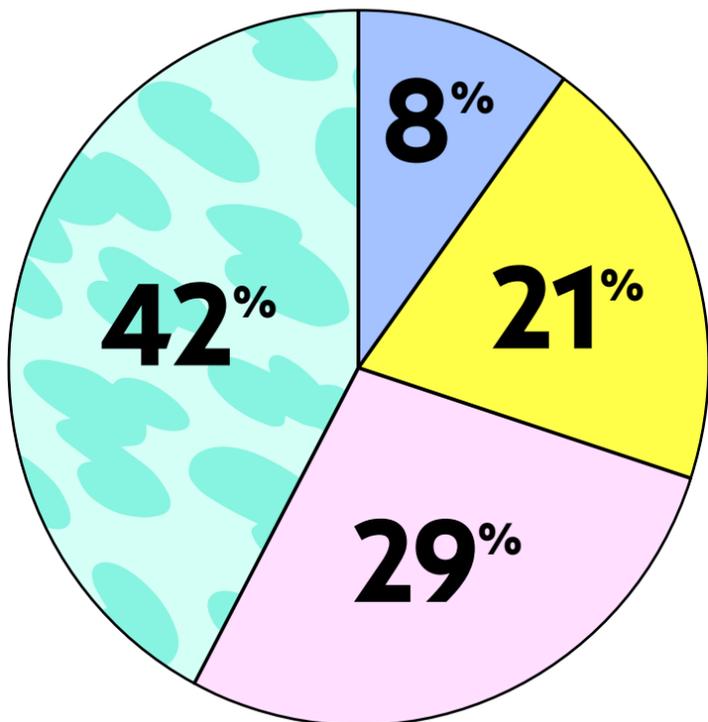
85%



of people online, age 14-44 describe themselves as a fan of someone or something.

Source: Google/SmithGeiger, YouTube Trends Survey, US May 2024, N=1000 online people surveyed age 14-44.

Gen-Z Fandom*



Source: SmithGeiger Study, US, May 2024.
Online 14-24-year-olds who identify as fans.

In recent years, technological shifts in short form video creation and generative AI have given fans more – and increasingly creative – ways to participate in their fandoms. That participation, with its varying degrees of commitment and engagement, has led to a stratification of fandom. **Casual fans may just consume media, but super fans routinely create media about the object of their fandom,** and often spend money on it. In short, the bigger the fan, the more content they are likely to consume and create.

Creators are often objects of fandom and fans at the same time. They are experts in how to foster fandom online because, as fans, they know what fans want, and as creators, they know how to use the technology and platforms available to them. As they build their own audiences and fandoms, they expand the reach of the things they're fans of.

*According to a SmithGeiger study, fans describes themselves as:

- A casual fan: someone who sometimes engages with the person or thing they're a fan of.
- A big fan: someone who engages in the important moments and regularly spends money on that fandom.
- A super fan: someone who engages regularly, participates in the fandom community, and goes out of their way to be a fan.
- A professional fan: someone who earns revenue from a fanship.

NICHES OF ALL SIZES

YouTube routinely serves as an on-ramp to massive, well-known fan communities as well as smaller, niche interests that few people even know exist. Consider Taylor Swift's Eras tour last year. While casual fans could still enjoy it, to fully appreciate the full three-hour concert, one needed to know Taylor's back catalog, her personal lore, and even her different marketing strategies.

The community of Swifties on YouTube made it possible for new fans to learn everything they needed to know.

Creators like **@AllySheehan** dedicate their channels to Taylor Swift lyrics and lore, video essays on her cultural impact, and even Swiftie friendship bracelet tutorials, making YouTube a one-stop shop for new fans to become super fans.



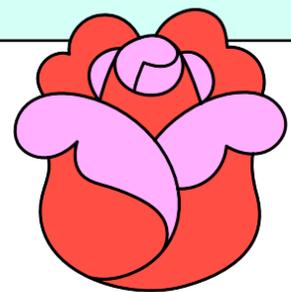
@ALLYSHEEHAN
189K SUBSCRIBERS



@11FOOT8PLUS8
312K SUBSCRIBERS

On the opposite end of the spectrum, **@11foot8plus8** is a channel focused on a single bridge in North Carolina and the 183 (as of May 2024) trucks that have scraped spectacularly under its low-hanging overpass. Its small community of 300k subscribers live nowhere near that bridge and likely have never met, but the **camaraderie of the channel's comment section allows them to come together.**

47%



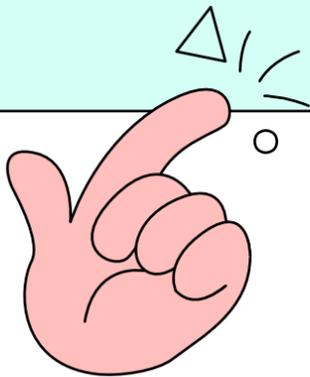
of Gen Z report belonging to a fandom that no one they know personally is a part of.

Source: Google/SmithGeiger, YouTube Trends Survey, US May 2024, N=312 online Gen Z respondents fans age 14-24.

SUPERSIZING CULTURAL MOMENTS

TRENDS CULTURE

66%

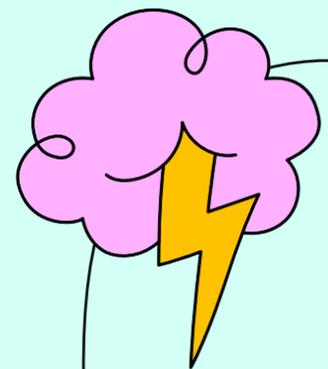


of Gen Z Americans agree that they often spend more time watching content that discusses or unpacks something than the thing itself.

The volume and variety of fan content being created today means unimaginably more entry points and opportunities for fans to spend time with the shows, celebs, movies, music and other things they're fans of, increasing and expanding the cultural relevance for those things.

Source: Google/SmithGeiger, YouTube Trends Survey, US May 2024, N=350 online Gen Z respondents age 14-24.

When **Rockstar Games** released the trailer to its long-awaited sequel, **Grand Theft Auto VI**, fans began watching immediately. **The trailer was viewed over 93 million times in 24 hours, setting a record for a 24-hour debut of a non-music video.*** But beyond that, fans also started creating reaction videos, trailer breakdowns and analytic deep dives with and about the trailer. And those videos accumulated over 192 million views in that same 24-hour period. That fan content expanded the cultural moment, allowing viewers to re-experience and re-interpret it through different lenses.

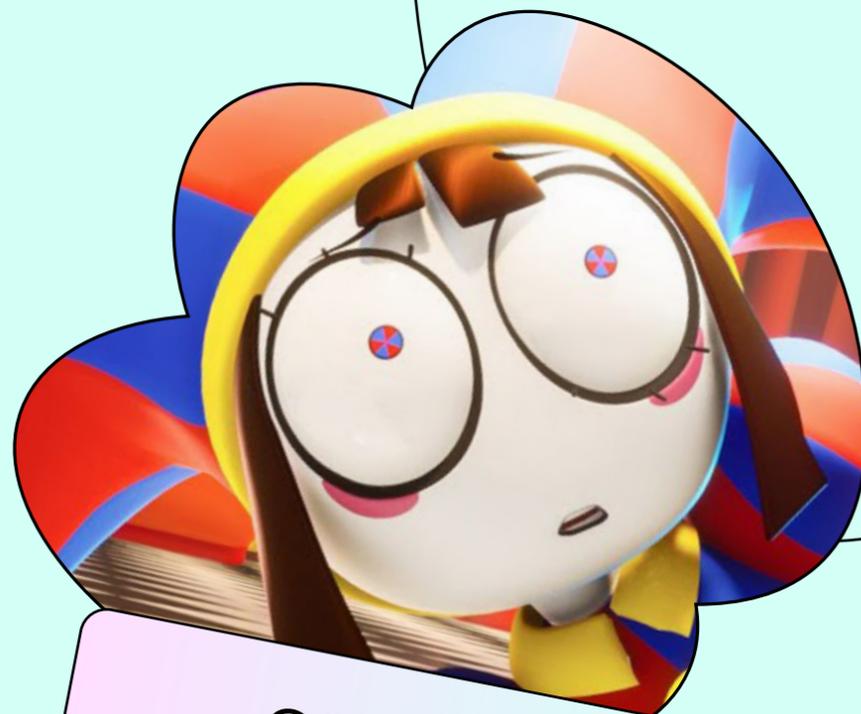


@TIMTHETATMANTWO
5.42M SUBSCRIBERS

*Source: YouTube data, Global, 4 Dec - 5 Dec 2023

CULTIVATING NEW FANDOMS

If creators are great at increasing and extending the cultural relevance of things people love in pop culture, it was probably only a matter of time before they began to apply it to their own projects to make new pop culture. With expertise in fan and platform dynamics, **creators are swiftly nurturing massive fandoms, propelling their projects into the public's consciousness at astonishing speed.**



@GLITCH
10.4M SUBSCRIBERS

22%



of Gen Z, 14-24 reported having already heard of The Amazing Digital Circus – a program with only 2 episodes.

Source: Google/SmithGeiger, YouTube Trends Survey, US May 2024, N=350 online Gen Z respondents age 14-24.

Take The Amazing Digital Circus.

Released last fall, the pilot of **GLITCH** and **Gooseworx's** animated dark comedy quickly racked up over 300 million views. But the show's fandom grew even faster. **During the six months between the first and second episodes, fan content related to TADC, from songs to memes, accrued over 25 billion views.***

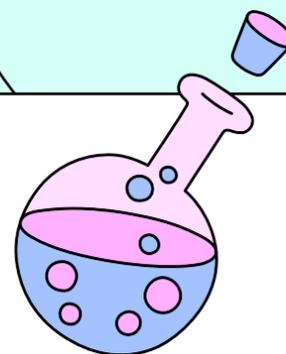
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**Source: YouTube data, Global, lifetime*

FANS AND BRANDS

As fandom increasingly shapes how content is created, content optimized to take advantage of these fan dynamics could have an advantage. Creators and brands are already benefiting from this phenomenon by plugging into the fandoms their audiences, consumers, and fans are into.

74%



Gen Z fans surveyed (online 14-24 year-olds who identify as fans) agree they like seeing brands engage with things they're a fan of.

Source: Google/SmithGeiger, YouTube Trends Survey, US May 2024, N=312 online Gen Z respondents fans age 14-24.

McDonald's tapped into anime fandom by launching a campaign based on the way McDonald's is often represented in anime as "**WcDonalds**". They even created their own version of an AMV, an abbreviation for anime music video, a fan-created music video featuring anime clips. This came after **McDonald's nabbed the #2 trending topic of 2023 in the US with Grimace Shake by allowing fans to generate shorts trends and other content**, earning billions of views for videos related to the purple beverage.

So, to reap the benefits of fan culture, creators and producers will have to be responsive to it. And those who will benefit the most are those who remove rather than impose obstacles to fan creativity.



@MCDONALDS
700K SUBSCRIBERS

FAN DRIVEN POP CULTURE

The modern entertainment experience is increasingly informed by the products of fan culture.

Technological advances have made expressions of fandom easier than ever, increasing participation and creating additional value for fans and the objects of their fandom. As a result, the people and things that inspire fandom are becoming as diverse as humanity itself, and less connected to mass media.

As fans become creators, their creativity elevates mass media, while also spawning entirely new breakthrough phenomena. Creation tools like Gen AI make fan creativity even more accessible, and fans expect their media to be malleable and to be **empowered** to remix it.

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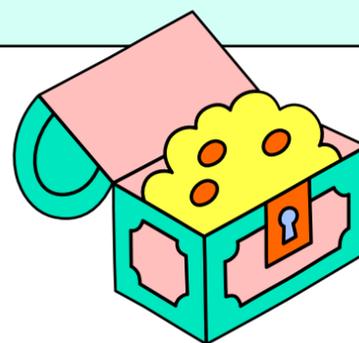
65%



of Gen Z respondents consider themselves to be “creators”.

Source: Google/SmithGeiger, YouTube Trends Survey, US May 2024, N=350 online Gen Z respondents age 14-24.

8%



of Gen Z would describe themselves as professional fans who earn money from their creation.

Source: Google/SmithGeiger, YouTube Trends Survey, US May 2024, N=312 online Gen Z respondents fans age 14-24.

Today's fans understand the value their participation creates for the things they're fans of. And the people and things they are fans of have become increasingly responsive to their participation, from conceptualization to distribution. As a result, **fan culture has become the central driver of emerging popular culture.**

WHAT THIS MEANS FOR YOU



01

Your success isn't just about your content anymore. Because the popularity of fan content often eclipses that of the original work, the volume and success of that content can be even more impactful. **Closely follow what your fans are creating** to get a better idea of what your audience is and isn't responding to in your own content.

02

Maximizing your cultural relevance requires loosening the grip you have on your creations, letting your fans remix and remake your creations in their own image. **Your fans are going to play with your content anyway; you may as well use it as an opportunity** to strengthen your connection to your audience.

03

Be responsive to what your fans are passionate about and highlight the things you're passionate about, even when it isn't directly related to your own content. This can help you build stronger, more authentic connections with your audience.

04

With YouTube, fans of anything, no matter how niche, can easily create content and connect with other fans, 24/7. So **don't be afraid to lean into new and unfamiliar phenomena** that people are becoming fans of. Today's niche can be tomorrow's mainstream.

