

# SUPERFANS & ENTHUSIASTS – US – 2024

Superfans offer brands the opportunity to create connections with new or existing consumer subsets who bring with them established category enthusiasm and loyalty.



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# Superfans & Enthusiasts – US – 2024

## This report looks at the following areas:

- Demographics of self-identified Superfans and comparisons across fandom categories (ie movies/TV, music, sports, video gaming, books/comics/graphic novels)
- Superfans' motivations behind their enthusiasm and passion for their fandom
- The social media platforms Superfans across categories rely on and communicate through
- Superfans' fandom-related spending and purchasing over the past year
- The ways in which Superfans dedicate their time to their fandom
- Opportunities for brands to engage with and form connections with Superfans across categories
- A look at brands that have successfully appealed to fandoms through advertising and/or marketing activations



Superfans offer brands the opportunity to create connections with new or existing consumer subsets who bring with them established category enthusiasm and loyalty.

## Overview

Fandoms and fan culture have been a **consistent pillar of pop culture for decades**. The advent of the **internet and social media, however, brought new visibility and scalability to fan culture**, eventually giving shape to a new tier of fandom: the Superfan\*.

Online platforms not only brought new ways for fans to find one another and connect, but also offer fans more ways to immerse themselves in their fandom. Today, Superfans represent the

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most enthusiastic and devoted fans, who ultimately view their **fandom as a deep-seated facet of their identity**.

Compared to Mintel's 2021 data, consumers today are more likely to identify as a Fan, and nearly half of the population considers themselves a Superfan. Not only are **Fan and Superfan subcultures growing**, they are also becoming more lucrative segments for brands and companies to engage with. Video game and book/comics/graphic novel Superfans demonstrate that the more niche a fandom, the more dedicated and invested Superfans are likely to be.

For brands today, finding genuine and organic ways to appeal to Superfans offers the **opportunity to create connections** with new or existing consumer subsets who bring with them **established category enthusiasm and loyalty**.

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# Report Content

## EXECUTIVE SUMMARY

### Key issues covered in this Report

- Overview
- What you need to know
- Key consumer trends
- What consumers want & why

## MARKET DYNAMICS

### Market context

### Target audience

- The vast majority of consumers consider themselves to be fans of at least one entertainment category
  - Graph 1: self-described fans, by category, 2024
- The share of self-identified fans has grown since 2021
  - Graph 2: self-described fans, by category, 2021 and 2024
- Video games/gaming fans are most likely to identify as Superfans
  - Graph 3: self-ranking fan dedication, by category, 2024
- Nearly half of the population self-identifies as Superfans

### Superfans by categories

- Movie/TV Superfans are most likely to be multicultural, Millennials and Gen X parents
- Music Superfans overindex as urban-dwelling and Hispanic Gen Zs and Millennials
- Sports Superfans are most likely to be Black and Hispanic men who are parents and work full-time
- Video games/Gaming Superfans are most likely to be young, multicultural and single urbanites
- Book/Comics/Graphic novel Superfans skew female and/or LGBTQ+, and are most likely to be Hispanic Millennials

## CONSUMER INSIGHTS

### Consumer fast facts

### Consumer fast facts (cont.)

### Outlook on fandom

- Nearly two thirds of Superfans consider their fandom to be a big part of who they are as a person
- Sports, Gaming and Book/Comic/Graphic Novel Superfans are most likely to identify by their fandom

## Superfans & Enthusiasts – US – 2024

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- Graph 4: agreement – "My fandom is a big part of my identity," by gender and generation, 2024
- Graph 5: agreement – "My fandom is a big part of my identity" – among Superfans, by category, 2024
- Fans' passion extends beyond just their fandoms
  - Graph 6: agreement – "I tend to go "all-in" on the things that I love and am passionate about," by Fans and Superfans, 2024
  - Graph 7: agreement – "I tend to go "all-in" on the things that I love and am passionate about," among Superfans, by category, 2024
- Fans in their own words: demonstrating their passions
- There's the opportunity to direct fans' passion and enthusiasm toward brands
- Parenthood increases fan dedication and passion
  - Graph 8: agreement – "I tend to go "all-in" on the things that I love and am passionate about," by generation and by parental status, 2024

### Motivations behind fandoms

- Both Fans and Superfans view their fandom as a source of enjoyment, but Superfans have more drivers behind their fandom
  - Graph 9: motivations behind fandoms, by Fans and Superfans, 2024
- Both Fans and Superfans view their fandom as a source of enjoyment, but Superfans have more drivers behind their fandom
  - Graph 10: motivations behind fandoms, by Fans and Superfans, 2024
- Superfans cite additional drivers behind their passion and interests
- Superfans' motivations vary across fandom categories, offering brands different ways to engage different fan audiences
  - Graph 11: motivations behind fandoms – among Superfans, by categories, 2024
- Comfort, community and connection are key drivers behind Gen Z and Millennials' fandom
  - Graph 12: motivations behind fandoms, by generation and parental status, 2024
- Being seen as a subject expert can add a sense of pride for the majority Superfans
  - Graph 13: agreement – "I like being seen as an expert or having insider knowledge when it comes to my interests and passions," by Fans, Superfans, and by categories, 2024
- Brands should explore exclusivity, but avoid being exclusionary

### Superfans and social media

- Brands need to utilize social media to connect with Superfans
  - Graph 14: social media platforms used to keep up with fandoms, by fans and Superfans, 2024
- YouTube is a primary resource for Music and Gaming Superfans, while Book/Comic/Graphic Novel Superfans turn to Instagram and TikTok
  - Graph 15: social media platforms used to keep up with fandoms – among Superfans, by categories, 2024
- Reddit partnering with Sports leagues
- Fans in their own words: fandom discovery and role of social media

## Fandom spending & purchasing

- Costs are less of a concern for Gaming and Book/Comics Superfans
  - Graph 16: agreement – "Money/cost is not a big consideration for me when it comes to supporting/demonstrating my fandom," by Fans, Superfans, by categories, 2024
- Brands should turn their attention to Millennials and parents, who are most willing to spend money to support their fandom
  - Graph 17: agreement – "Money/cost is not a big consideration for me when it comes to supporting/demonstrating my fandom" – among Fans – by generation, parental status and LGBTQ+ identity, 2024
- Nearly half of Superfans have spent money on official fandom events or merchandise in the past year
  - Graph 18: purchasing behaviors in the past year, by Fans and Superfans, 2024
- Brand + Fandom collaborations and partnered releases are most successful among niche Super-fandoms
  - Graph 19: purchasing behaviors in the past year – among Superfans, by categories, 2024
- Though there's fan interest in unofficial merchandise, brands must tread lightly
- Book/Comics Superfans, followed by Gaming Superfans, invest the most in their fandoms
  - Graph 20: count of purchases in the past year, by Fans and Superfans, by categories, 2024
- Appeal to Fans and Superfans because where this is passion, there is potential

## Superfan engagement & behaviors

- Following official social media accounts and listening to fandom podcasts are the most common way Fans and Superfans invest time on their fandom
  - Graph 21: time dedication in the past year, by Fans and Superfans, 2024
- Book/Comic/Graphic Novel and Gaming Superfans are, once again, the sub-groups dedicating the most time to their fandoms
  - Graph 22: count of time dedication in the past year, by Fans and Superfans, by categories, 2024
- Gaming and Book/Comics Superfans are more likely to create their own fandom content
  - Graph 23: fans' time dedication in the past year – among Superfans, by categories, 2024
- Crafting and DIY-ing offers brands an adjacent avenue to engage fandoms and Superfans

## Brand opportunities

- Brands can offer Superfans one-of-a-kind experiences to further immerse themselves into their fandoms
  - Graph 24: agreement – "I'm always looking for new ways to further immerse/involve myself in the world of my fandom," by Fans and Superfans, 2024
  - Graph 25: agreement – "I don't like when brand partnerships try to appeal or pander to my fandom without really understanding it," by Fan and Superfans, 2024
- Hype marketing, experiential marketing and other immersive fan experiences can help foster fandom community and individual fan expression
  - Graph 26: brand involvement – any agreement – among Fans, by select demographics, 2024
  - Graph 27: brand involvement – any agreement – among Superfans, by categories, 2024
- Offer immersive fandom experiences – but be prepared to demonstrate knowledge of the fandom ins and outs
- Fandom-themed home/accommodation rentals offer unique and immersive vacations for Superfans

- But even the most ardent Superfans have a limit
- Superfans are eager to demonstrate their fandom to others
  - Graph 28: agreement – "I use my clothes/appearance to demonstrate my fandom to others," by Fans and Superfans, 2024
  - Graph 29: agreement – "I use my clothes/appearance to demonstrate my fandom to others" – among Superfans, by categories, 2024
- Representing your fandom is all about finding kindred spirits and feeling part of the community
  - Graph 30: agreement – "I use my clothes/appearance to demonstrate my fandom to others," by race/Hispanic origin and parent status, 2024
- Many Superfans and cosplayers of color reimagine their favorite characters to feel represented
- Offer Superfans exclusive content and in-the-know Easter eggs to demonstrate a brand's fandom knowledge
  - Graph 31: agreement – "I like being among the first fans who access new content/offerings in my fandom," by Fans and Superfans, 2024
  - Graph 32: agreement – "I love when brands offer hidden messages/inside jokes (ie Easter eggs) for my fandom," by Fans and Superfans, 2024
- Across fan categories Superfans are eager for exclusive content and insider knowledge
  - Graph 33: brand engagement – any agreement – among Superfans, by categories, 2024
- Axe partners with Fortnite content creator to lean into unintentional in-game cameo

## INNOVATION AND MARKETING TRENDS

### Launch activity and innovation

- McDonald's takes its marketing beyond the mainstream, tapping into the subcultures of fandoms
- Sports leagues are finding creative ways to make inroads with Gen Z gamers and esports enthusiasts

### Marketing and advertising

- Roku City has become an integrated advertising hotspot to reach fans
- Peacock + Walmart partner to bring shoppable ads to reality TV Superfans

## APPENDIX

- Market definition
- Consumer research questions
- Consumer research methodology
- Consumer qualitative research methodology
- Generations
- Abbreviations and terms

### Disclaimer

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