

HOPEFUL
MONSTERS.

1,000 TINY PIECES.

*Cultural fragmentation in an always-on world
and the impact on modern brand building.*

CON TENT IS

01 THE SILENT GROWTH CRISIS

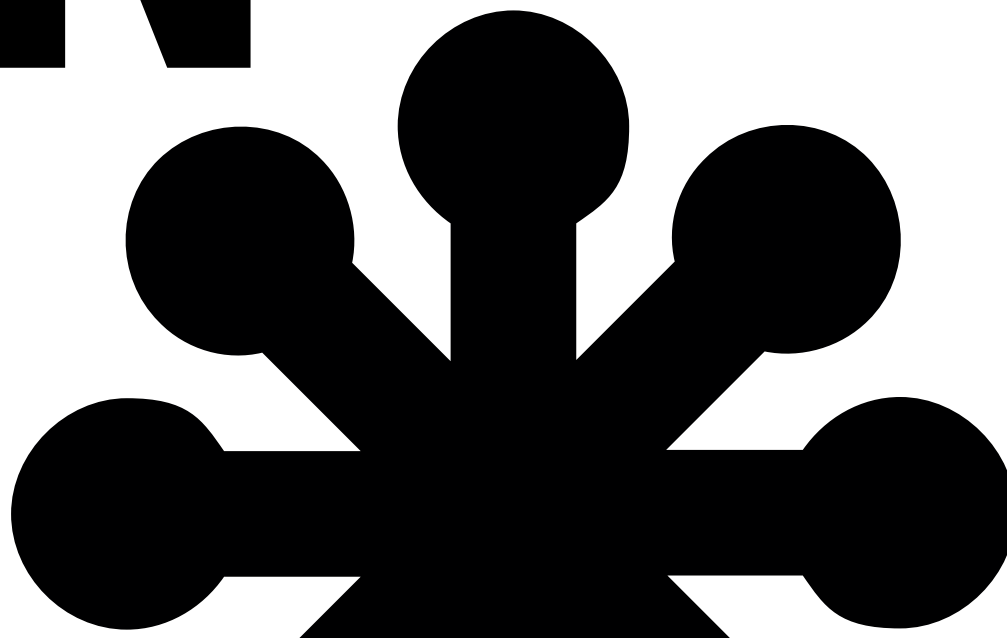
02 CULTURAL FRAGMENTATION

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CULTURES EVOLVE.

They've multiplied.
And fragmented.
From one big mainstream conversation
into *1,000 tiny pieces.*

THE SILENT GROWTH CRISIS.

When you think about top-quality mass media, what springs to mind? Advertising during the Grand Final, perhaps the evening news? Undoubtedly, these media entities still have a role to play, but can you really call 'mass media' mass anymore?

During the 2000 Sydney Olympics, the highest-rated news program reached 21% of the population. Fast forward to now, and it's barely reaching 7%.

The AFL Grand Final did reach a bumper 6 million people in 2024, but it's expensive and infrequent. And given the rapid growth of the population, it arguably isn't keeping pace. For comparison, 33% of Internet users over the age of 16 in Australia use Reddit monthly. That's nearly a million more than the AFL Grand Final.

So, despite the cost of CPMs rising over the last 25 years, mass isn't really reaching a mass audience.

This doesn't matter, of course, because targeting people is more sophisticated than that. Got a video? Let the algorithmic media machine serve it across platforms.

There is no escape. However, when 70% of media investment is with just Meta and Google, that arguably isn't even happening, and 75% of all digital advertising isn't even seen for long enough to cross the memory threshold.

But if you do believe that brands have cracked the media fragmentation code with a potent mix of science, data and technology, it's perhaps worth taking a quick look at the state of things. If marketing is essentially about growth, how well are brands growing?

According to the excellent Henry Innis, CEO and Founder of Mutinex, a world-class marketing mix modelling operating system for growth:

"Major companies today are facing a silent growth crisis. Despite hefty marketing budgets and sophisticated ad tech, many big brands find their growth stalled."

"Between 1960 and 2010, the combined FMCG sales of P&G, Unilever, Nestle, and Colgate-Palmolive grew at a compound annual growth rate of approximately 8%," says Michael Farmer in Madison Avenue Media Madness.

But since then, with the advent of digital and social advertising, and massive increases in spend, these brands have grown collectively at less than 1% per year, about half the growth rate of the US economy (2.1% per year).

In the largest longitudinal study into consumer decision-making and effectiveness, it highlights that over ten years, a 1% increase in advertising share now works 50% less than before.

They are not the only major advertisers who have grown below GDP rates. At least 20 of the 50 largest advertisers in the US have grown below 2% per year for the past 15 years."

That said, stock markets and Kantar's BrandZ Annual Report tell the story of stratospheric growth. According to Kantar, the top 100 most valuable brands grew by 29% surpassing a record \$10 trillion. However, we're seeing a significant concentration of that growth, primarily within big technology, utilities and finance. These top 100 brands are now worth nearly 10% of total Global GDP.

So, unless you are in that lucky position, where does that leave everyone else?

The good news is, 'Not all reach is equal'. Recent research led by Professor Felipe Thomaz of Said Business School, University of Oxford, challenges the old rules of brand growth.

The reason? Marketing plans look the same. There's a nullifying effect as brands copy the same tactics and principles. However, according to Thomaz, every brand is different. Every situation is different. People are different, and the media impacts them differently. Smart brands that adapt their approach grow.

Over 75 years ago, legendary copywriter Howard Gossage wrote, "People don't read advertising, they read what interests them and sometimes that's an ad".

The difference now is that what interests people is more diverse, easier to connect around and often happens away from what we perceive to be the big, mainstream. This report provides an alternative and complimentary way to think about growing a brand and what needs to be done to get adopted by cultures, over and above just getting them to see ads in different places.

FOREWORD

UNLESS YOU'RE ONE OF THE LUCKY FEW, OUTSIDE OF TECHNOLOGY, UTILITIES AND FINANCE, GROWTH IS STUBBORNLY STAGNANT. COMPOUNDED BY MEDIA FRAGMENTATION, ADVERTISING TO EVERYONE, EVERYWHERE, ALL AT ONCE IS LESS VIABLE.

BUT PERHAPS, IT'S IN THE SPLINTERING OF CULTURES WHERE NEW MEMORY STRUCTURES AND BRANDS CAN BE BUILT.

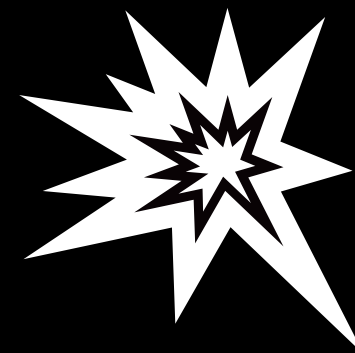
For all its influence, mass mainstream media created a false sense of security. It was easy to treat different groups of people as one captive, 'addressable audience', a mono culture if you will.

Of course, this isn't new news, but there is no such thing as 'a culture'; there are thousands of cultures that make up a population, and they rarely move as one. And brands grow, not through marketing science and data, but by being adopted by those cultures.

So, while a fragmented media landscape is a well-documented phenomenon, it has also become an expensive game of whack-a-mole for brands. However, it's important to remember that when the nature of media changes, it also changes the nature of the people using it.

From simply staying informed and being entertained, the mainstream has splintered into thousands of seemingly connected communities where people follow passions and gather around shared interests and identities.

Mega moments still exist, but they're rare. Outside of Labubu, Barbenheimer, or a "once-in-a-4-year" Olympics, the momentum of a population now swings across a mosaic of shared cultures...each with its own values, attitudes, behaviours, rituals and influence nodes. An AFL fan is no longer just an AFL fan. They also love UFC, NFL, NBA and EPL.





CULTURAL

FRAGMENTEN -TATION.

When culture splinters, it's in the fragments where identity, meaning, and new memories are built.

There was a time when we all watched the same thing. At 7:30pm, the nation would tune in and by Monday, the whole office was talking about who got voted off, who made headlines, and what no one saw coming. Shows like Friends, Big Brother and Game of Thrones weren't just entertainment, they were shared moments.

And it wasn't just TV. We queued for the same movies, blasted the same albums, played the same games. A Beyoncé drop or a Star Wars premiere could light up the world. Barbenheimer gave us a glimpse of that again; a moment big enough to bring us together.

That was the era of cultural convergence. Shared references that shaped how we interacted and connected.

However, today, such convergence is rare. We don't consume en masse, we consume alone, fed by algorithms that reflect our interests.

Enter Fandom, splintered micro-communities, each with their own language, rituals and platforms. Still passionate. But less visible, and certainly less accessible to outsiders...most of all brands.

So, what's driving this change?

Culture has shifted from the mainstream to the many.



DRIVERS:



“HUMANS ARE
INHERENTLY
FRAGMENTED”

- J. Krishnamurti 1971

***IDENTITY**
***BELONGING**

***ALGORITHMIC**
ESCAPE

“...Culture looks like a Spotify playlist.”

1. The evolution of

Monoculture: From the Seattle sound of the late 90's to Seinfeld...there was once a shared cultural canon; mass-market entertainment, limited channels, and common touchpoints. That world has evolved, those moments still exist, but are rarer, replaced by endless choice, where no single moment or medium dominates for long. What was once centralised and unified is now dispersed and hyper-personalised.

TL:DR

The Seattle sound of the late 90's, Seinfeld, Star Wars.

2. The Contradictory Self: At

the heart of cultural fragmentation is the fragmented individual. People are full of contradictions, and modern culture reflects that. Our digital lives allow us to embody multiple, often conflicting identities like peace-seekers who consume chaos and wellness warriors who live online. This internal dissonance spills outward, shaping a culture that is plural, paradoxical, and hard to pin down.

TL:DR

The wellness junkie who's also deep into black metal, the accountant who roleplays on Discord, the sneakerhead who swaps into vintage Pokémon forums by night.

“...The idea of easily identifiable tribes are breaking down, revealing multi-layered individuals, each person's outlook is shaped by a unique mix of identity, environment, and aspiration”.

Source: Warc & Channel 4, UK, 2025

3. “Two-speed” culture:

Fragmentation accelerates cycles (TikTok trends, meme-ification, micro-fads), but alongside those bursts the slow-burn, structural cultural shifts that rewire meaning over decades have also become more prevalent (e.g. the rise of women's sport, gender identity conversations, politics, climate consciousness). They stay top of mind, over longer periods, and chip away at building new narratives over time. Both of these reshape how ideas spread; how quickly they can be forgotten, but also the impact they can leave.

TL:DR

Culture moves fast and slow and is having longer term impact on bigger cultural narratives.

4. Decentralised Cultural

Influence: Culture is no longer dictated from the top down by gatekeepers or mass media. It's formed in group chats, shared links, underground drops and hidden forums. What matters isn't exclusively mainstream visibility, but subcultural relevance; micro-communities shaping their own realities, often invisible to outsiders.

TL:DR

Influence is formed from the “bottom-up” of culture.

HOW FRAGMENTATION AND INTER- CONNECTEDNESS ARE REWRITING BRAND IDENTITY:

Fragmentation isn't new. Human culture has always splintered into tribes, scenes, and subcultures. What's new, and radically so, in the digital age is the connective tissue between those fragments.

Algorithms, group chats, hashtags, and feeds have stitched together once-isolated niches into vast constellations of overlapping identity. We don't just belong to one world anymore; we navigate many at once, switching codes as easily as tabs on a browser.

This interconnectedness has transformed identity itself. Online, people can experiment with selves they may never have dared to in their immediate offline circles.

Identity is no longer fixed or singular, and brands that surface more than once in that exploratory journey popping up in a subreddit, then again in a group chat meme, then at a pop-up event become woven into the act of self-assembly.

The scraps that Bullmore is referring to today are the posts, memes, drops, hashtags, collabs, IRL encounters, the tiny fragments scattered across digital and cultural space.

For brands, the implication is clear: cultural salience isn't achieved by dominating a single channel or chasing monocultural fame. It comes from being present in the right fragments, again and again, in ways that feel native to the codes of each space.

Fragmentation doesn't diminish identity; it multiplies it. And when brands respect that complexity when they provide the "scraps and straws" that people can gather and make their own, they stop being outsiders and start becoming part of the nest.

"People build brands as birds build nests, from scraps and straws we chance upon."

Jeremy Bullmore, 1982.

CULTURE COMPOUNDS WHEN FRAGMENTS RECOMBINE:

Media and creative have splintered, and people went with them.

Importantly, in the fragments, proximity exploded: fans DM artists, Discords replace forums, and tiny scenes build their own rituals, codes and stewards. Algorithms then corral the like-minded, intensifying participation and turning niche signals (saves, stitches, raids, drop queues) into distribution.

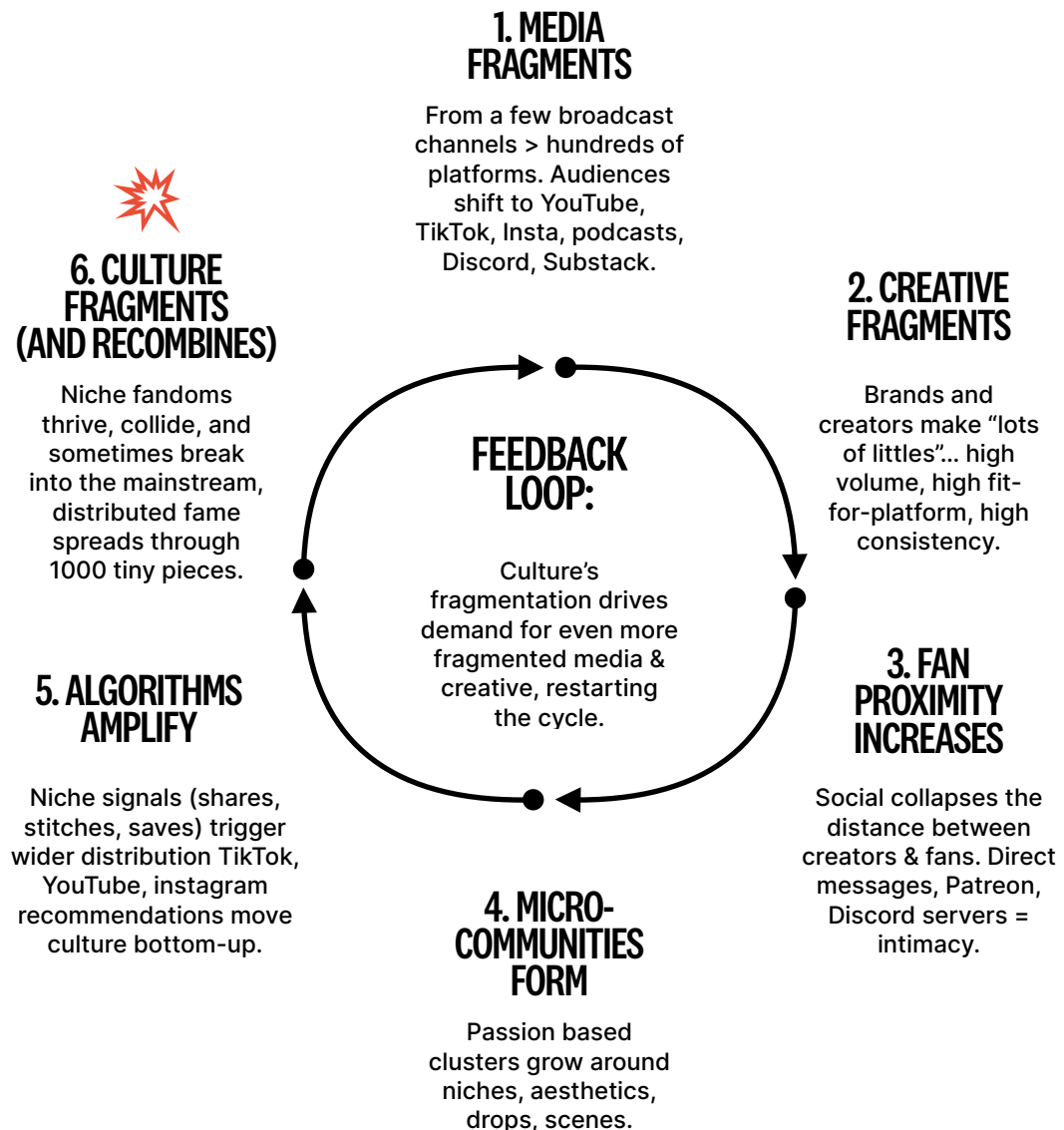
What looks “small” on the surface is dense underneath: high-frequency interaction, shared language, and repeatable moments that help build new memory.

For brands that become part of multiple cultural fragments, we see a compounding effect emerge. Adjacencies bridge (hardcore → skate → streetwear; women’s football → grassroots clubs → family fandom), carrying symbols and stories sideways.

Each new node that adopts the signal reduces cultural friction for the next, creating a network effect of meaning: more people know why it matters, not just that it exists.

Brands that respect the order of operations earn their way in. First, show up where meaning is made (infrastructure, access, credible collabs). Then defend the community’s codes (credit originators, match cadence, contribute more than you extract). Do it right and the community carries you outwards: from a tight cluster to adjacent scenes to the mainstream bottom-up, not top-down.

The path to mental availability in this case is: memory built through culture, then amplified at scale.



CASE STUDY: HEAPS NORMAL

Heaps Normal shows this shift perfectly. Rather than relying on traditional mass marketing, the brand built its reputation on the non-alcoholic drinks space, through independent venues and grassroots relationships.

Early adopters were drawn into a shared culture that wasn't dictated by broad campaigns but by authentic community connections.

Algorithms then helped amplify this engagement to further expand the brand's reach and lock newcomers into vibrant, highly engaged circles where passion and advocacy flourished.

How they did it:

Culture, not campaigns. From launch, Heaps Normal framed itself as "redefining the way we play," with a manifesto ("Too Good To Be Wasted") that centres moments, scenes, and people over sobriety rhetoric.

Showed up where meaning is made (music). They've treated music as a primary canvas: editorial ("Normal Stories"), ongoing scene support, and now Heaps Normal Records, an in-house label that releases vinyl/merch and backs touring with indie distribution partners. That's cultural infrastructure, not just media.

Scaled intimacy through participation. Content like the festivals essay ("Why Music Festivals Are Too Good To Be Wasted?") positions the brand inside community conversations, validating labor behind the scenes earning trust before asking for attention.

Practiced inclusive identity, not purity politics. Their brand voice makes space for "taking a night off" as much as going sober, reducing stigma and letting more tribes see themselves in the product (athletes, creatives, parents, performers).

Invested in venues and ecosystem health. Programs like "Karma Cases" (buy a case, they gift one to your local) reinforce the backstage economy that keeps scenes alive again, infrastructure over ad spend.

Depth × spread = permission to go mainstream. Years of bottom-up credibility across music and hospitality created the social proof to land a culturally resonant Robbie Williams partnership - announced as a creative collaborator and investor, coinciding with the brand's UK push. That's a recombination moment: a niche-built code carried into mass culture by a mainstream node.

Value alignment, not celebrity rent. The Williams' collab feels authored by the culture, not bolted on; the brand's role is to platform a way of living, with a household name expanding reach.

Proof of a network strategy. Australia → UK soft launch, plus music-led IP and partner distribution, shows deliberate spread across geographies and subcultures before mass reach turning micro-community equity into mainstream salience.

FRAGMENTATION, CULTURE, AND A NEW ERA OF EFFECTIVENESS:

As an industry we've been talking about 'Fragmentation' for decades; mostly through the lens of media and creative, but very little on its impact on cultures. Grace Kite, arguably one of the world's leading voices of effectiveness, progresses the narrative:

"In brand building, it's the little things that count now... and great acts of brand building will have to be like plans sketched out on a million Post-its on the meeting room wall. They'll have to be made up of a lot of little things."

Tom Roach also weighs in, and whilst still talking strictly about "advertising", starts to hint at a wider narrative... "Advertising is now a thousand kinds of smaller things, not just one of a few big things. If we don't embrace this truth, our industry will fail to benefit from the massive shifts we've seen in the wider creative and creator economy".

These are important perspectives, particularly when we look beyond just paid advertising, where brands also become mentally available.

In a mic drop moment at this year's IPA effectiveness awards, Cathryn Kehoe (Chair of IPA's effectiveness) peers into a wider, less traditional world, which is less about "air power" driven by enormous targeting and machine learning and more about "hand-to hand" marketing replacing fire and forget".

It's a powerful statement that acknowledges a new era for the big end of town, and reinforces what a lot of us have known for a while: the disproportionate effectiveness of brands that are building from the depths of culture, bottom up.

"We have entered a new era of marketing effectiveness, but still much of our thinking has been honed from the age of 'air power', that saw carpet bombing and surgical strikes managed from a central command post, powered by enormous targeting and machine learning in media buying. But this is going in reverse now. The growing weakness of TV as a mass reach and mass event medium is well documented. Whilst data privacy laws mean the huge machine learning data opportunities now sit in walled gardens controlled by Google, Meta and others. And so, we are increasingly entering in a world of brands being built on the ground, by armies of influencers, by brand partnerships and collaborations, and by in-feed and in-game activations. Hand-to-hand marketing is replacing fire-and-forget. And that means we are all learning new lessons every day in so many ways."

Cathryn Kehoe (Chair of IPA's Effectiveness Awards)



Memory attention:

CULTURAL SALIENCE

Mental availability earned through cultural embedding.

CULTURAL SALIENCE DEFINED:

Cultural salience shifts the focus from just being known to being relevant in culture... it's memory building in the wild.

From a memory building perspective, cultural salience is the degree to which your brand's codes, stories and rituals are easy to recall because they are embedded in the shared meanings of a culture. It's as much about the codes, as it is about the frictionless way they can be shared across nodes of culture.

Two bodies of work ground the importance of cultural salience:

Kevin Lane Kellers' original work in his 1993 academic paper "Conceptualizing, Measuring and Managing Customer-Based Brand Equity" references 'Associative network theory' – That brand knowledge is a network of linked nodes (meaning, cues) that make retrieval fast and fluent.

Ehrenburg bass' memory-structure models (brands grow by being easy to remember at buying moments) operationalises the same memory logic at scale: build mental

availability by encoding and repeating distinctive assets, and by linking your brand to many category entry points (CEPs).

The end game for brands is that their distinctive assets and meanings travel across nodes without losing recognisability. It's not just about attention, but that the brand is also easy to recall at category entry points. Not an easy task, especially given the nuanced context of operating authentically when it's time for the brand to show up in culture.

Practically that means choosing the meanings and situations you want to "live in," encode them into a small, repeated set of assets, and reinforce them across the micro-communities where those meanings are made and traded. That's how cultural presence becomes memory (not just momentary attention).

Principle:
Memory > Attention



Pathway:
Cultural Salience



Outcome:
Mental availability

THE OUTSIZED IMPACT OF CULTURAL SALIENCE ON BRAND AND BUSINESS GROWTH

Not all Earned is equal:

We've just defined cultural salience as the mechanism that turns attention into memory; WARC's Beyond the Buzz shows why that matters commercially.

When activity is culturally salient, i.e. it earns coverage, conversation, and sticks around in culture, it delivers a higher incidence of very large business effects than non-culturally salient work.

Across the outcomes that actually move the P&L, profit growth, sales growth, market share, customer loyalty, and new-customer acquisition, the culturally salient cohort outperforms.

Cultural salience isn't a soft brand metric; it's a growth accelerator.

Referencing the work of Ehrenberg-Bass; salience expands mental availability by multiplying retrieval cues at many Category Entry Points

(CEPs). WARC's pattern of stronger sales and market-share effects is what you'd expect when more buyers can recall you, in more situations, more often.

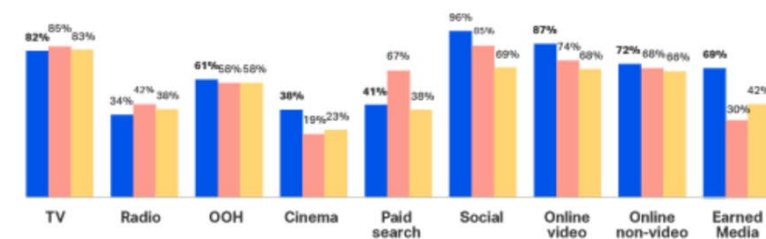
Because culturally salient ideas are built from recognisable distinctive assets and enacted inside live communities, they travel further and live longer: more word-of-mouth, more creator pick-up, more social proof.

That earned distribution is effectively "free frequency" that compounds memory without paid inflation hence the superior profit effects WARC observes.

Beyond the Buzz: Examining the effectiveness of Earned Media

Media used

■ Culturally salient ■ Non-culturally salient ■ Other



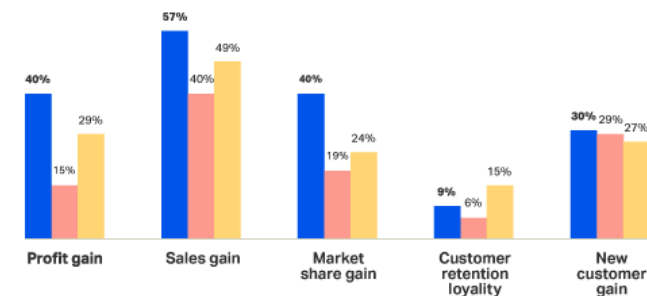
* Cultural salience = Earning coverage, conversation and longevity (9+MOS)

* Based on sales data shared with IPA along with the size of effect

Source: The earned effect study: TWSC study with IPA to understand impact of cultural salience on brands and companies

% cases reporting very large business effects*

■ Culturally salient ■ Non-culturally salient ■ Other



* Cultural salience = Earning coverage, conversation and longevity (9+MOS)

* Based on sales data shared with IPA along with the size of effect

* Very large as defined by the IPA

Source: The earned effect study: TWSC study with IPA to understand impact of cultural salience on brands and companies

FAME VS CULTURAL SALIENCE

In classic marketing science, fame is a component of mental availability: being widely known and easily recalled in buying situations.

Traditionally, brands achieved this through mass media dominance... big ads in big channels, engineered to reach as many people as possible at once.

In this light, 'Fame' is mostly a broadcast phenomenon, powered by scale and spend, with cultural impact often a by-product of media weight.

Cultural salience, by contrast, reframes the challenge for a fragmented, networked era.

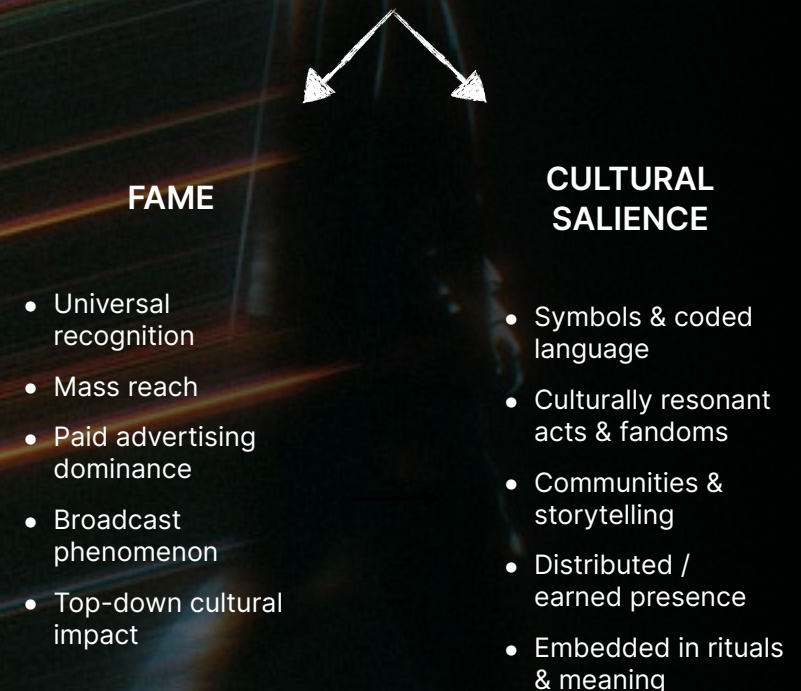
Rather than asking whether a brand is broadly famous, it asks whether it is meaningfully present in the cultural codes, rituals, and shared meanings of the communities that now drive attention and identity.

Salience is built not just by reach, but by embedding in culturally resonant symbols, stories, and practices that make a brand easy to recall and easy to talk about.

It is memory plus meaning: **mental shortcuts charged with cultural voltage.**

MENTAL AVAILABILITY

RECALL AT CATEGORY ENTRY POINT



**BUILDING SALIENCE THROUGH CULTURE, NOT SPEND,
A ROUTE TO MENTAL AVAILABILITY FOR BRANDS WHO
CAN'T BUY THEIR WAY INTO MEMORY**

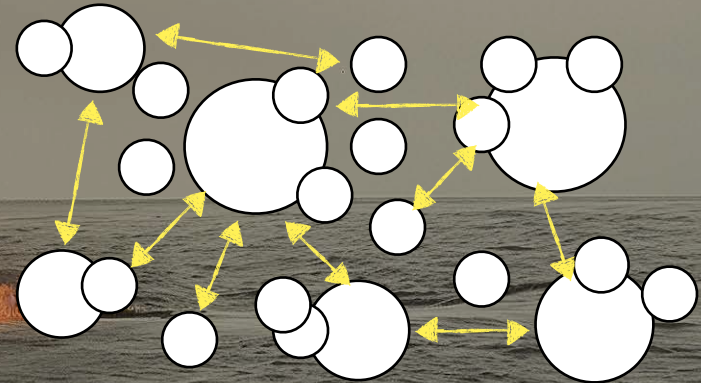
(Source: Ehrenberg-Bass)

FAME



MASS FAME MODEL SUSTAINED
BY BROAD REACH

CULTURAL SALIENCE



DISTINCTIVENESS AND MEANING
WITHOUT LOSING RECOGNISABILITY

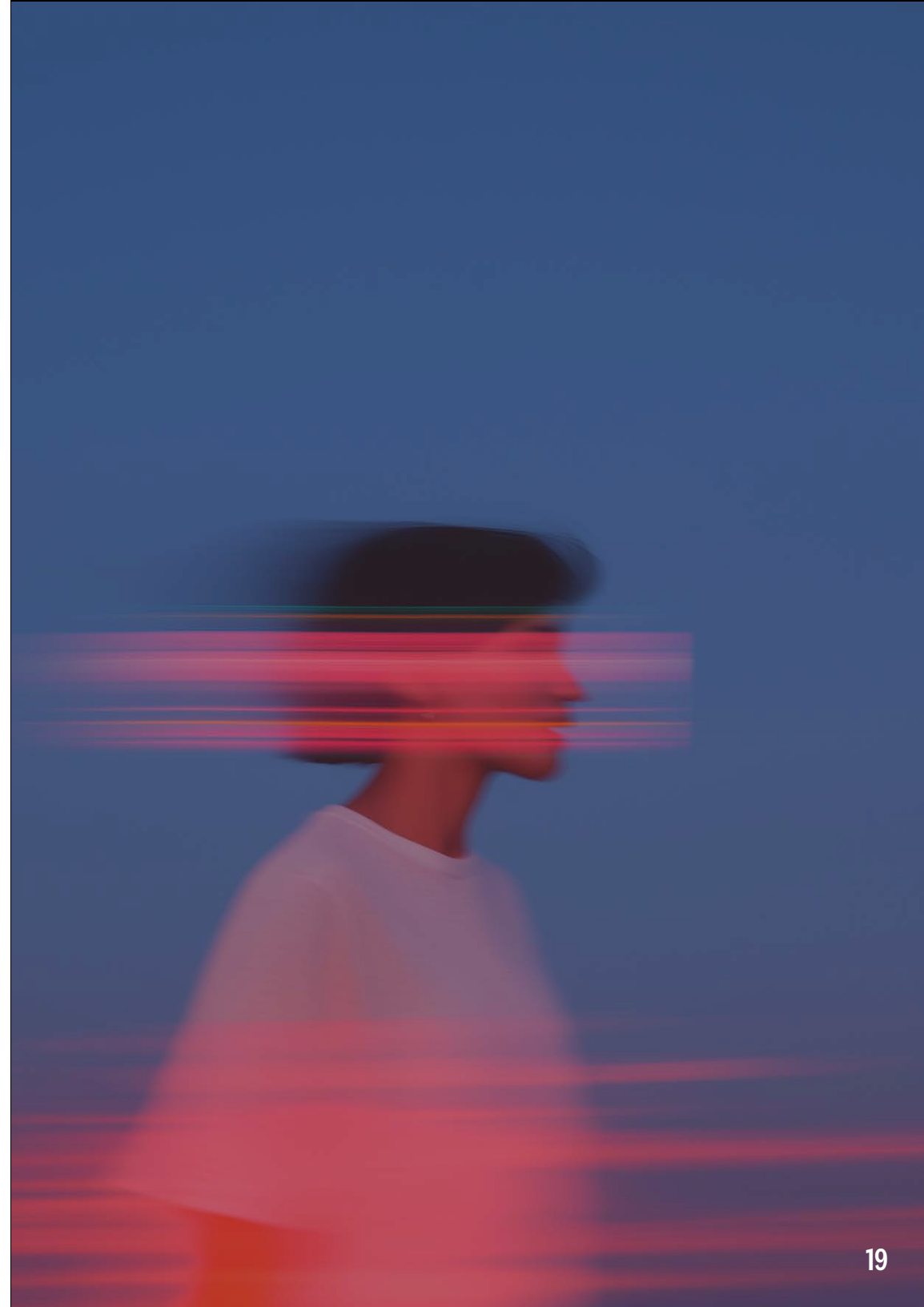
BIG & SMALL: BOTH ARE TRUE

Effectiveness still rules. Binet & Field demonstrate that fame (often culture-powered) and E.S.O.V (Excess share of voice) drive long-term market share, so a cultural and a commercial lens are complementary, not competing. Whilst fame is part of the end game, it's the necessity to drive **cultural salience**, the connectivity between sub-cultures, that is an emerging frontier.

To achieve this, an evolved mindset is needed along with an appetite from brand leaders to build across '1000 Tiny Pieces' each creating "sparks" that over time, build an interconnected narrative, compounding into wider recognition and ultimately, contribute to long and short term brand growth.

Evidenced in the growth of Hopeful Monsters so far, earned and culture-driven ideas are not indulgences or fringe media inclusions, but necessities, and present a parallel path for modern, effective brand building.

HOPEFUL MONSTERS



1. From broadcast to embedded: “Fame” particularly for brands, has traditionally been built “top down”, deploying a mix of media to achieve an excess share of voice in any given category. Today, even whilst fragmented, fame can spread equally through lo-fi, decentralised channels where cultural salience is earned, not engineered.

2. Cultural presence can lead to mass awareness: It’s not just being known by everyone, it’s about being powerfully relevant within the right circles. Influence is measured by intimacy and scale.

3. Discovery is the new battleground: As traditional engines of awareness become increasingly expensive and out of reach, particularly for early stage companies, the challenge isn’t just creating content - it’s helping people find and feel it. Without discovery, emotional connection and cultural resonance fall apart.

4. Memory > attention: Brands can no longer solely depend on broad reach or borrowed interest, but equally they must earn attention that results in memory building, not just attention for attention sake.

5. Fragmentation is both a challenge and an opportunity: While reaching everyone simultaneously is harder, brands can cultivate deep lasting relevance within niche communities, allowing fame to spread organically and authentically from the ground up.

6. Embedding in a culture is essential: Brands build cultural salience by integrating into everyday life through rituals, language, symbols and memes, creating emotional connections that go beyond simple recognition.

TL:DR



FANDOMS:

A PRODUCT OF A FRAGMENTED WORLD

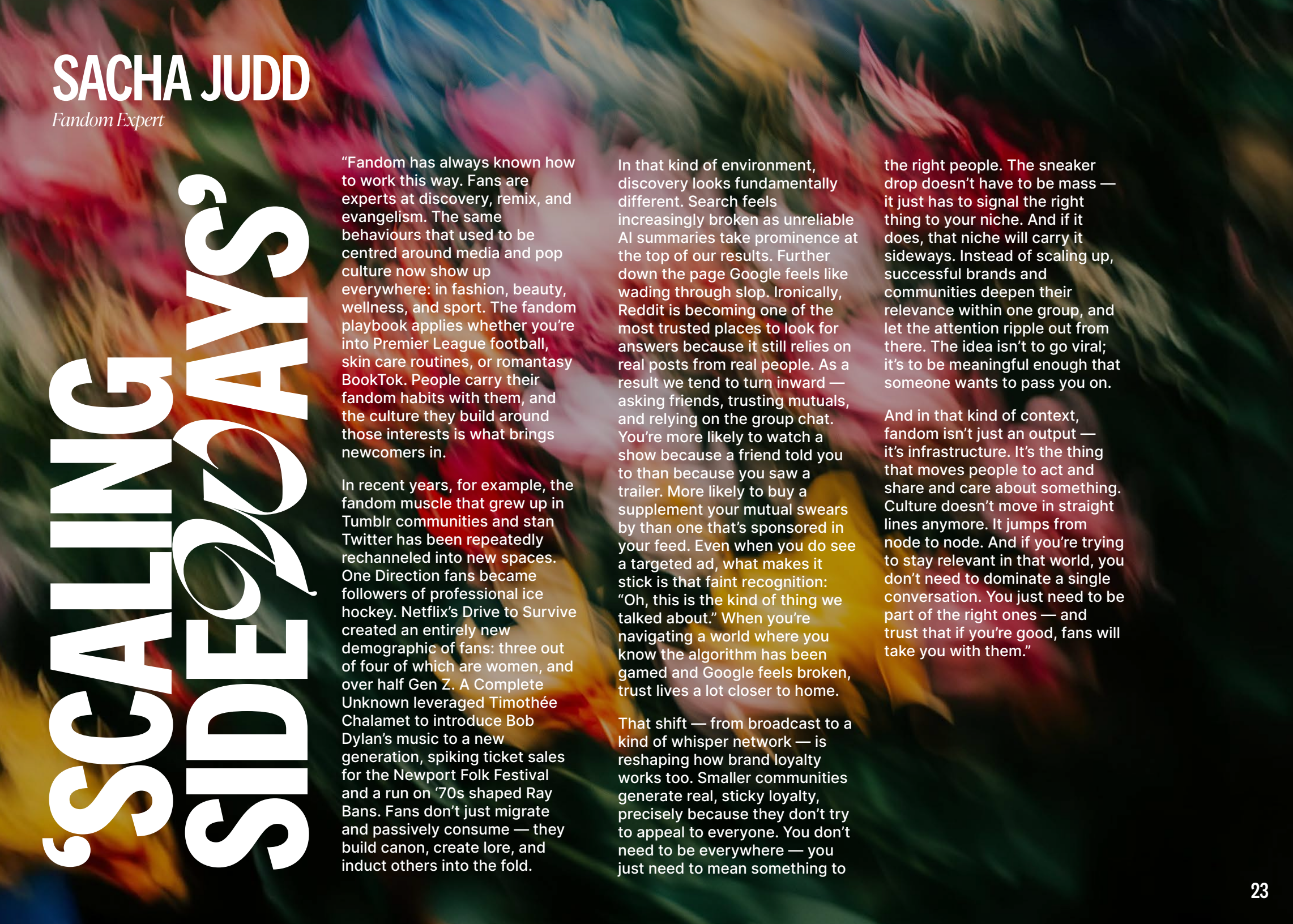
"Fan loyalty and emotional attachment to their favourite characters or celebrities result from a complex interplay of psychological and social factors, driven by emotional connections, identification, and the desire for community and belonging."

Nancy Sokarno

WHAT THIS MEANS FOR BRANDS...

FANDOMS ARE NOT A CUSTOMER BASE. THEY'RE A CULTURAL MOVEMENT.

- **Tapping into raw, unfiltered fandom loyalty isn't about transactional deals, it's about:** emotional investment, shared identity, and cultural capital.
- **Build a world people want to live in.** Give them stories to tell, symbols to wear, language to share.
- **Don't ask for loyalty, earn it.** Because fandoms aren't built in a marketing cycle. They're built in culture.
- **Fans don't just stick around.** They bring their friends. That's how fandom becomes a powerful engine for sustained engagement, especially as more people now rally around brands and products with the same passion once reserved for sports teams, celebrities, and culture icons.
- **Stop trying to sell to fans, and start showing up with them.** Speak their language. Share their values. Be part of the world they're building, not an outsider trying to cash in.



SACHA JUDD

Fandom Expert

'SCALING SIDEWAYS'

"Fandom has always known how to work this way. Fans are experts at discovery, remix, and evangelism. The same behaviours that used to be centred around media and pop culture now show up everywhere: in fashion, beauty, wellness, and sport. The fandom playbook applies whether you're into Premier League football, skin care routines, or romantasy BookTok. People carry their fandom habits with them, and the culture they build around those interests is what brings newcomers in.

In recent years, for example, the fandom muscle that grew up in Tumblr communities and stan Twitter has been repeatedly rechanneled into new spaces. One Direction fans became followers of professional ice hockey. Netflix's *Drive to Survive* created an entirely new demographic of fans: three out of four of which are women, and over half Gen Z. A Complete Unknown leveraged Timothée Chalamet to introduce Bob Dylan's music to a new generation, spiking ticket sales for the Newport Folk Festival and a run on '70s shaped Ray Bans. Fans don't just migrate and passively consume — they build canon, create lore, and induct others into the fold.

In that kind of environment, discovery looks fundamentally different. Search feels increasingly broken as unreliable AI summaries take prominence at the top of our results. Further down the page Google feels like wading through slop. Ironically, Reddit is becoming one of the most trusted places to look for answers because it still relies on real posts from real people. As a result we tend to turn inward — asking friends, trusting mutuals, and relying on the group chat. You're more likely to watch a show because a friend told you to than because you saw a trailer. More likely to buy a supplement your mutual swears by than one that's sponsored in your feed. Even when you do see a targeted ad, what makes it stick is that faint recognition: "Oh, this is the kind of thing we talked about." When you're navigating a world where you know the algorithm has been gamed and Google feels broken, trust lives a lot closer to home.

That shift — from broadcast to a kind of whisper network — is reshaping how brand loyalty works too. Smaller communities generate real, sticky loyalty, precisely because they don't try to appeal to everyone. You don't need to be everywhere — you just need to mean something to

the right people. The sneaker drop doesn't have to be mass — it just has to signal the right thing to your niche. And if it does, that niche will carry it sideways. Instead of scaling up, successful brands and communities deepen their relevance within one group, and let the attention ripple out from there. The idea isn't to go viral; it's to be meaningful enough that someone wants to pass you on.

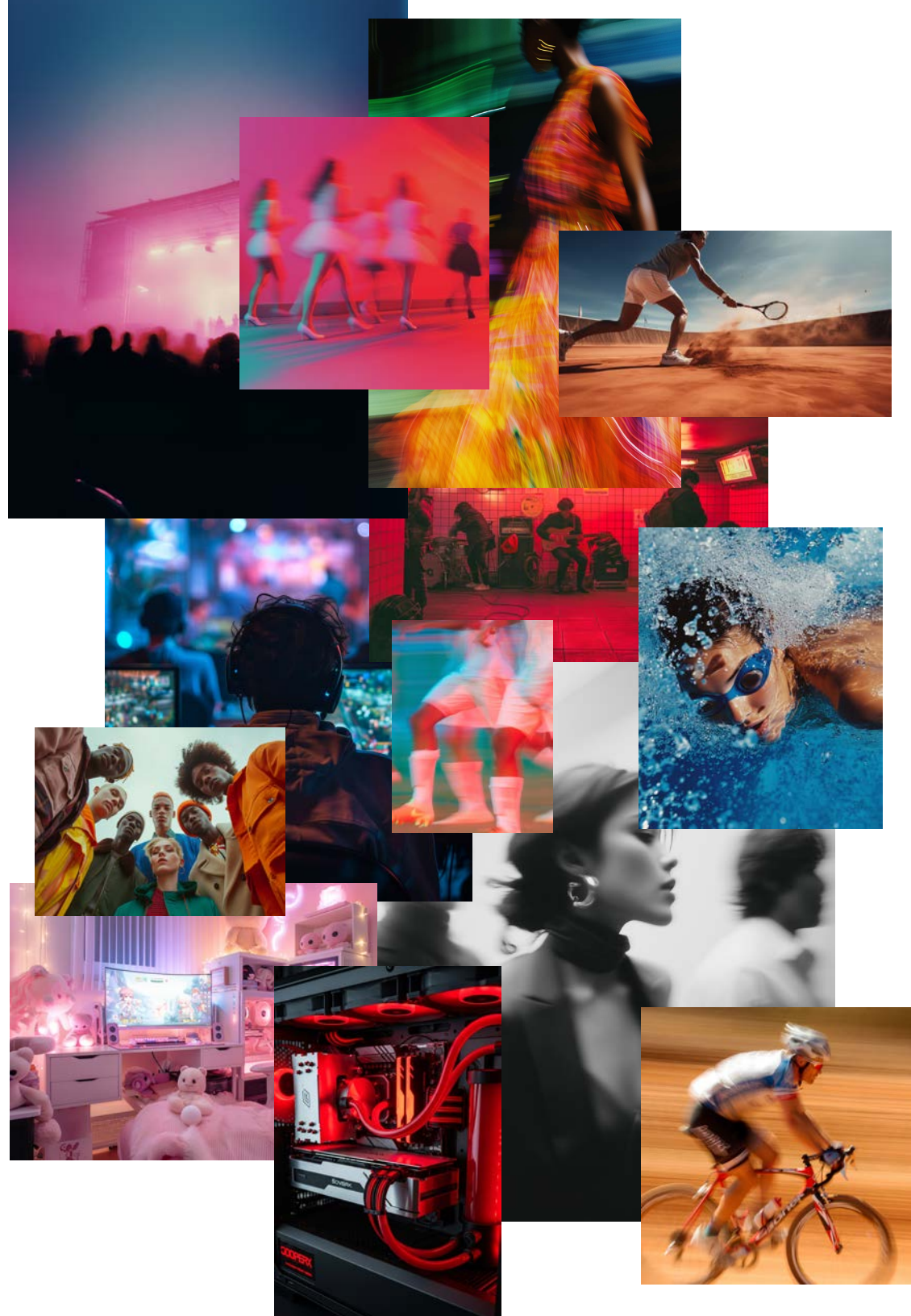
And in that kind of context, fandom isn't just an output — it's infrastructure. It's the thing that moves people to act and share and care about something. Culture doesn't move in straight lines anymore. It jumps from node to node. And if you're trying to stay relevant in that world, you don't need to dominate a single conversation. You just need to be part of the right ones — and trust that if you're good, fans will take you with them."

01 FASHION

02 MUSIC

03 SPORT

04 GAMING





Fashion and beauty makes up 35% of fandoms across Australia.

25

Cultural salience in fashion is rarely manufactured, but granted.

Carhartt WIP

Built through ties to subcultures like skateboarding, graffiti and underground music scenes, rather than relying on traditional advertising or paid influencers.



Trojan Records x Carhartt WIP



Carhartt WIP's Relevant Parties Podcast



Tupac in Carhartt



Still from La Haine, 1995



POP Trading Company x Carhartt WIP

Brands earn it when communities adopt, adapt and reframe their meaning in ways that transform their original intent.

Take these two brands below for example. Carhartt, once built for the factory floor is now shorthand for creative credibility through Carhartt WIP. Salomon, designed for alpine performance, has crossed over into fashion and streetwear, worn as much in Paris and Tokyo as on mountain trails.

Both illustrate how cultural relevance moves laterally across nodes of culture. From utility to identity, niche communities to global visibility. Their success lies not in chasing culture but in allowing culture to co-opt them, and then leaning into that energy with authenticity, partnerships and presence.

In doing so, they show how functional origins can become the foundation for deep cultural connection.

Salomon

Engineered for outdoors, adopted by the rave scene and high fashion streetwear enthusiasts who turned technical performance into a style statement.



Rihanna at the 2023 Super Bowl



Hype DC Manukau x Salomon



Dekmantel x Salomon



Dev Hynes in Salomon

STREETWEAR: MORE THAN JUST A LOGO

"Buying from a brand and wearing it connects people to a community." (Sandy Kaura, Her Story In Sneakers podcast)

Supreme, Off-White and other legacy streetwear brands once defined cool. Their logos were cultural currency, drops created queues around the block, and collaborations with luxury houses seemed unstoppable. But over the last few years, some of these giants have felt the strain: mass-market exposure, corporate ownership and formulaic hype cycles have eroded the authenticity that once made them untouchable.

Meanwhile, emerging streetwear brands like Corteiz and Awake NY are thriving in micro-communities. These labels are prioritising cultural storytelling, community connection and limited drops that feel earned, not marketed.

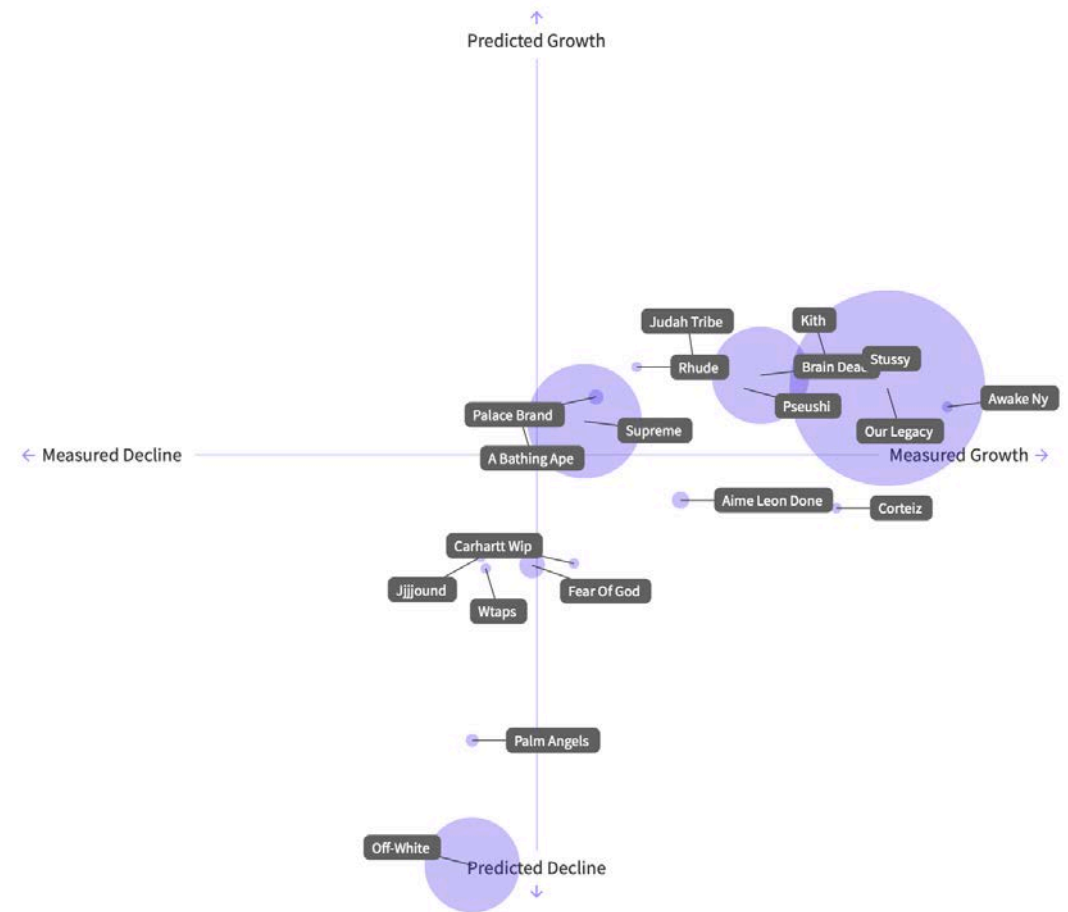
The lesson is clear: the era of streetwear giants ruling through scale and logos is waning. Today, power flows to the nimble, culturally attuned brands that understand their communities and embrace the nuance of niche. Emerging streetwear brands are rewriting the rules and the legacy brands who follow suit by keeping their connections with micro-communities, such as Stussy and Carhartt WIP, continue to be adopted by culture.



THE NEW RULE(᳚)S OF STREET- WEAR

Using AI-powered technology, we put streetwear brands head-to-head to predict their growth.

Emerging brands (Pseushi, Awake NY, Our Legacy) and the legacy brands who are adopting their community-first approach (Stussy, Kith) are predicted to see growth over the legacy brands who are relying on logos alone (Off-White, Supreme, Palm Angels, Fear Of God).



This model extends beyond major cities. Brands like Melbourne's **JUDAH.** started with sticker drops in 2018 and grew into one of Australia's most distinct underground labels.

Known for authenticity and grassroots energy, it's less about hype and more about community as it acts as a symbol of self-made ambition and cultural pride.

We spoke to JUDAH.'s anonymous founder, whose following is built on suburban identity and underdog grit. Fans connect not just to the clothes but to a story that empowers overlooked youth to forge their own path.

In a culture full of performative authenticity, JUDAH. stands out as a true reflection of the community's values, pride, and resilience.

'We grew up there. That's how it was born and will probably always stay... For the streets, by the streets. That's where we live.'



(Source: JUDAH.)

WHAT WE LEARNED...

1. LOOK FROM BROAD TRIBES TO MICRO-COMMUNITIES

Fashion has long expressed identity beyond words. Today, it's more personal and fragmented, moving from broad tribes to varied micro-communities with distinct codes. It serves as both mirror and signal - shaping how we see ourselves, connect, and recognise belonging.

"You might be seeing someone walk down the street that has the same fashion sense as you. So automatically you're like 'this person obviously lives in a very similar world to me.'"

2. IN A WORLD OF SAMENESS, BREAK UNIFORMITY

Greater acceptance of individuality has unleashed radical freedom in dress, making fashion fluid and moment-driven. Digital platforms accelerate this, but algorithms often reduce personal style to "brain rot" performative uniformity on TikTok and Instagram.

"I think we're in a time period where you could just wear whatever you wanted and it's justifiable. You could be wearing a phone box as an outfit and walk down the city... people will think it's normal."

3. SET YOUR TARGETS TIGHTLY (THEN GO EVEN TIGHTER)

Rather than dilute itself to reach the widest possible audience, Judah leans into specificity, the kind that attracts not just attention, but allegiance. Even amidst the shift, JUDAH. sees fashion as inherently social - a means of alignment and recognition.

"We grew up there. That's how it was born and will probably always stay there. For the streets, by the streets. That's where we live."

4. MOVE BEYOND DIGITAL HYPE TO THE REAL-WORLD

Judah sees today's digitised, clout-driven, brand-heavy fashion fandom as a phase, not the end. Like all cultural waves it will reverse, shifting from screens to streets and from likes to real-life connections.

"The jitterbug space gets so lost in the sauce and boring that the only way to kind of showcase your fashion and your taste and your style is with the community and go back to basics."



JUDAH'S KEY ADVICE FOR BRANDS

LOOK TO NEW FACES AND VOICES

Credibility isn't bought, it must be earned by amplifying underrepresented voices, creating genuine opportunities, and avoiding tokenism. Impact comes from loyalty, which is built through consistent, selfless investment in people.

"You don't always have to use the biggest influencer in the world. Find out the key players, not the big ones that already have a microphone but the people that don't have the opportunity... and put them on."

Build Infrastructure Over Hype

Infrastructure over hype means building culture that people can walk into, touch, and be part of. Fund warehouses or creative hubs, events or showcase nights surfacing up-and-comers, materials and tools that help creators create.

Fashion brands can bridge style and stance by connecting personal identity with cultural relevance to design systems that move with culture, not just mirror it.

Top ways people engage.

28%

In-person

26%

Peers

16%

Social

Elevating lesser-known voices boosts credibility for **37%** overall — strongest among younger, affluent audiences



51% of 18-34s support collaborations with emerging creators vs celebrities

Only **15%** would support a brand with great design but no cultural stance.

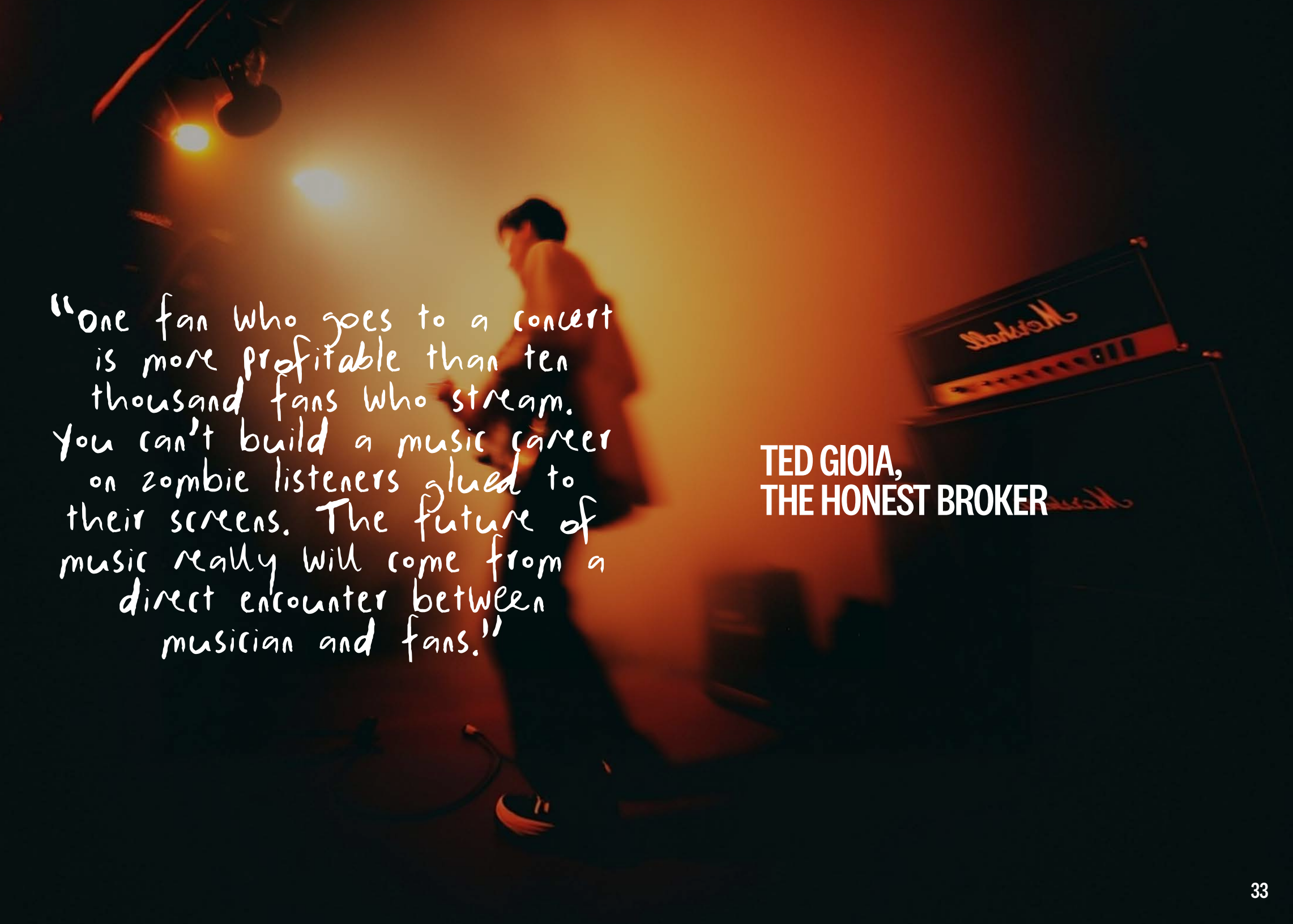
02 MUSIC

Music was once the engine room of mass culture. It didn't just reflect the zeitgeist but created it. From Beatlemania to MTV, music culture has always set the tone for fashion, politics, slang and social movements (Rockabilia, 2024). But over the past decade, as media fragmented and platforms atomised attention, music's cultural authority dispersed into the niches.

No single artist or genre defines the moment anymore (The New Yorker, 2021). Instead, subcultures simmer in parallel, each with their own codes and styles.

But music hasn't lost its power, it still shapes culture but not all at once. Influence now bubbles up from the fringes, carried by tightly knit fanbases who aren't chasing mainstream relevance but building their own cultural worlds from the ground up.



A blurred photograph of a musician playing a guitar on a stage. The scene is lit with warm, orange-toned stage lights, creating a hazy atmosphere. In the background, a Marshall amplifier is visible. The text is overlaid on the left side of the image.

"One fan who goes to a concert
is more profitable than ten
thousand fans who stream.
You can't build a music career
on zombie listeners glued to
their screens. The future of
music really will come from a
direct encounter between
musician and fans."

**TED GIOIA,
THE HONEST BROKER**

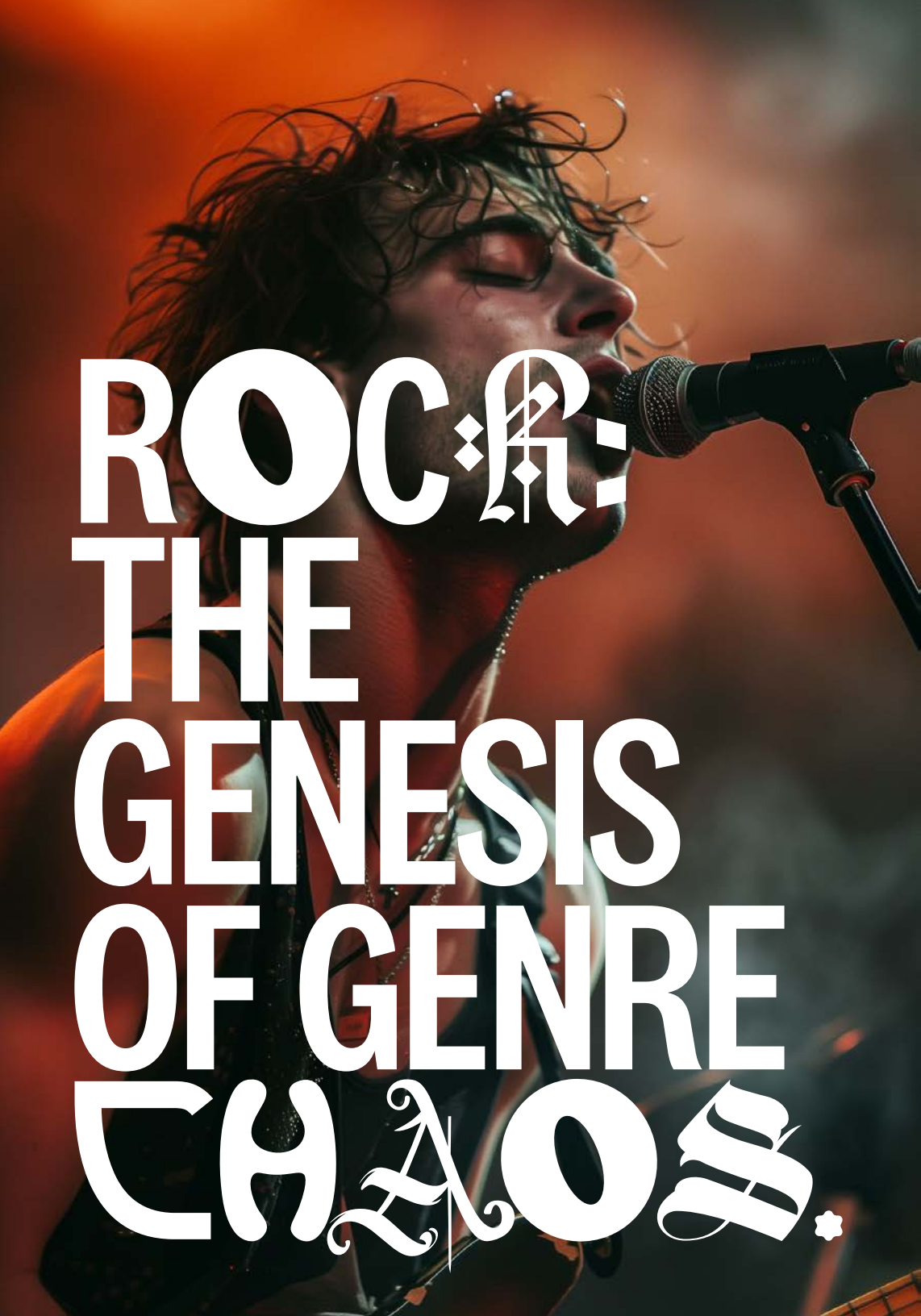
CULTURE IS FINDING VALUE IN THE EDGES:

Despite the creeping homogeneity of A.I made music, alongside the "lo-rent" modus operandi that global streaming platforms persist on protecting, music today continues to evolve its role in culture as it splinters into genres, equally colliding and reframing what cultural influence even looks like. If fragmentation means sub-genres splintering off (hardcore, shoegaze, doom, etc.), it also means artists, fandoms, and even entire categories bending the rules of who belongs where and why.

- **Turnstile's Baltimore free show:** Even in the 'distraction economy', embodied collective moments can cut through, bring online communities into IRL spaces and create generation-defining moments for fans.
- **Bieber x Mk Gee / Dijon:** Big stars chasing credibility from smaller, culturally influential acts. Not a new thing, but being pushed to the extreme in this instance and a reversal of the fame ladder that shows cultural capital > celebrity capital.

- **Fontaines / Idles / Kneecap:** Discordant, anti-polish, political... stealing the spotlight at Glastonbury show how imperfection is a cultural asset when mediated through community authenticity.
- **Metallica at Tomorrowland:** Culture colliding at its weirdest, a legacy rock band flexing to help an EDM festival? Shows how even icons chase community access points outside their core.
- **Sault:** Radical mystery and minimal exposure as a strategy...an act doubling down on community intimacy over mainstream visibility, and proving that exceptional product plus scarcity fuels deep fandom.

Together, these examples show that fragmentation is not just about genres multiplying, it's about rules dissolving. Fame is upside down, categories are porous, and culture is finding value in the edges: the unpolished, the colliding, the mysterious.



ROCK: THE GENESIS OF GENRE CHAOS.

Once a dominant force in popular culture, rock music pioneered the fragmentation of genres, breaking away from a unified sound into countless niche micro-genres. What was once simply “alternative” has exploded into a complex ecosystem of hyper-specific styles: hardcore, emo, deathcore, shoegaze, crust punk, black metal, sludge, math rock, nü-metal revival, post-rock...

This early genre splitting set the stage for today’s wider cultural breakdown. From blending musical styles (like blues, country and R&B)

to challenging conventions and embracing counter culture, rock’s rebellious spirit fostered a culture of experimentation and a willingness to breakaway from established musical conventions (Guitarmetrics, 2025). Naturally, the genre laid the groundwork for the diverse and fragmented musical landscape we see today. Where fans once rallied around a few shared moments, the rock scene now thrives as isolated, tight-knit communities, each with its own distinct identity.

‘From the outside [rock] looks like one homogeneous group but there’s half a dozen subcultures within this subculture.’

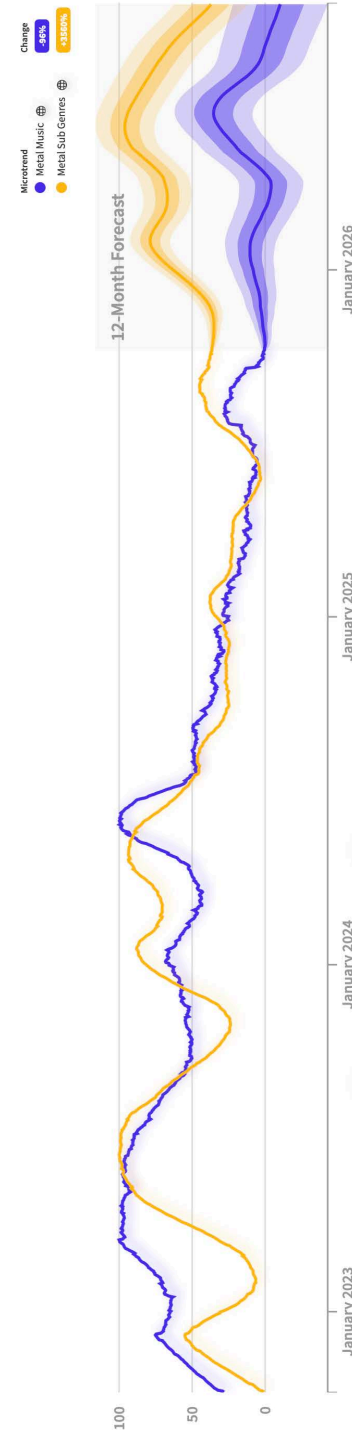
Lochlan Watt

A COMPARATIVE & FORECAST STUDY ON CONSUMER INTEREST: METAL VS METAL SUB-GENRES

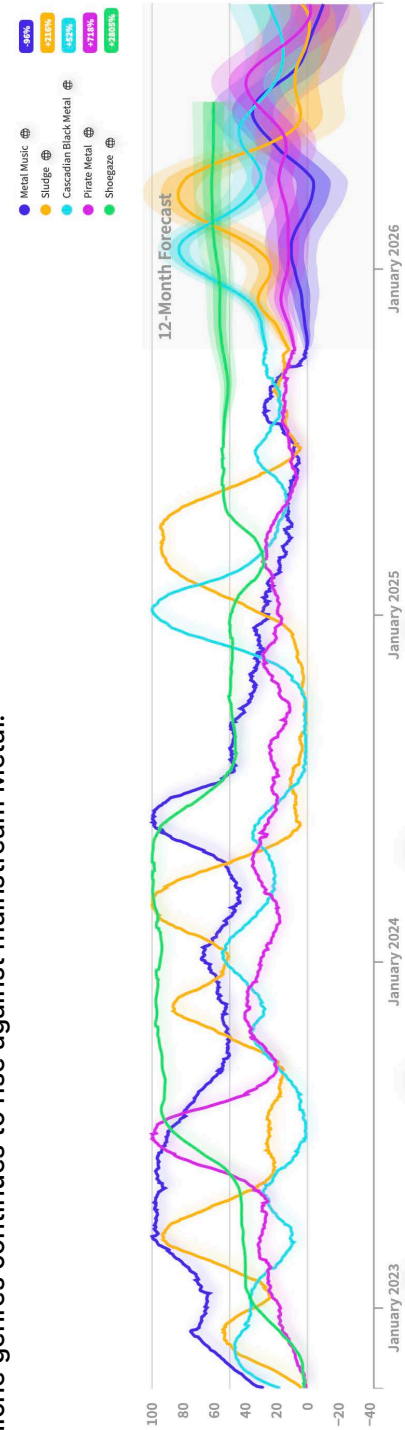
Over the past three years, mainstream Metal has seen a significant decline in interest and growth, with a 96% decrease, expecting to continue declining over the next year.

(Source: NWO/Neha)

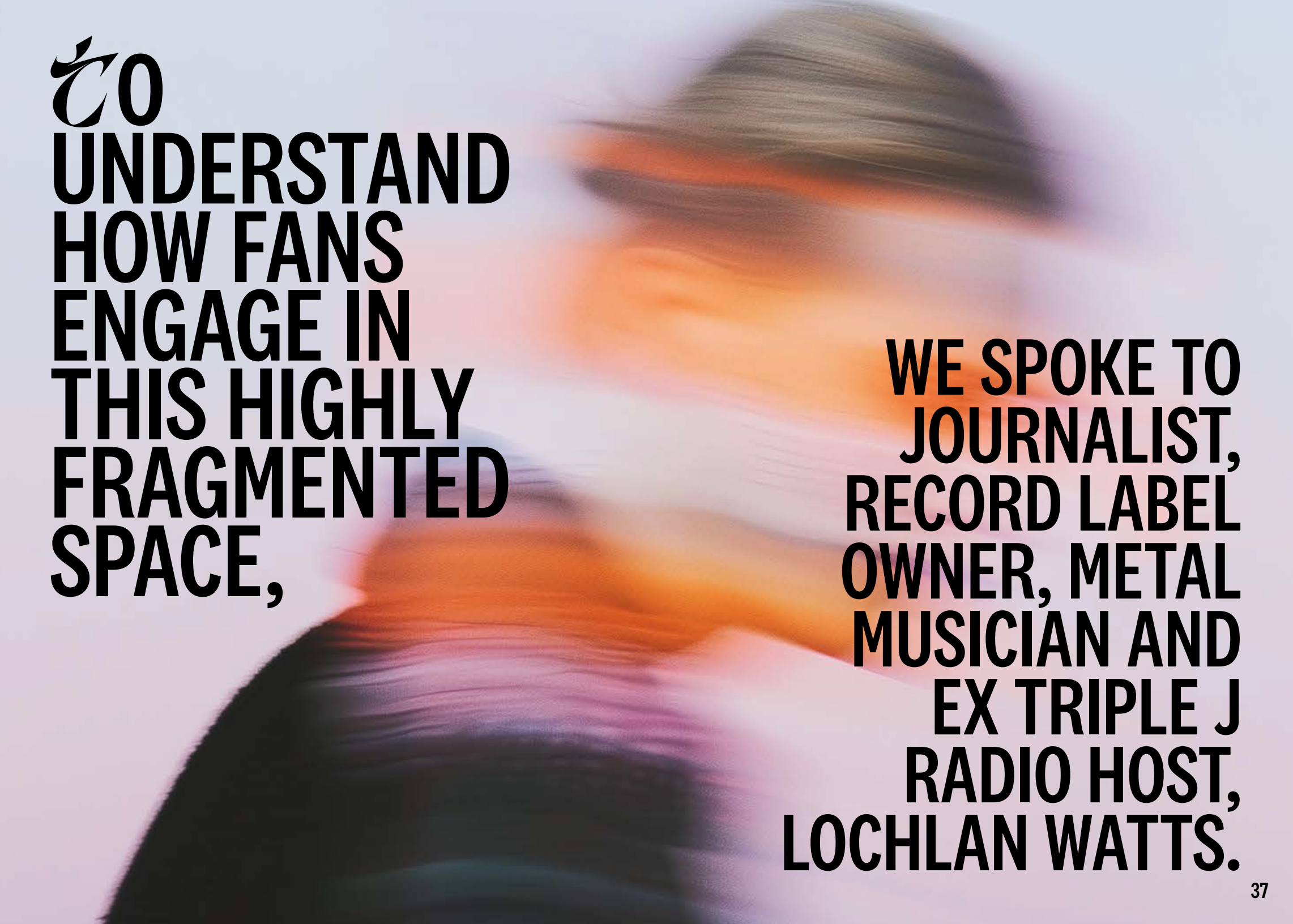
In contrast, Metal Sub-Genres have exhibited substantial growth, with a remarkable 3,560% increase over the past three years, and a 23.50% growth over the past year. Although the forecast for the next year suggests a stationary trend, the growth momentum in recent times indicates a robust interest in these niche categories.



As we zoom in further on specific Metal Sub-Genres, the narrative remains the same as growth within these niche genres continues to rise against mainstream Metal.



(Source: NWO.ai)



**CO
UNDERSTAND
HOW FANS
ENGAGE IN
THIS HIGHLY
FRAGMENTED
SPACE,**

**WE SPOKE TO
JOURNALIST,
RECORD LABEL
OWNER, METAL
MUSICIAN AND
EX TRIPLE J
RADIO HOST,
LOCHLAN WATTS.**

WHAT WE LEARNED...

1. LEVERAGE FRAGMENTATION AS A STRENGTH

The fragmentation that makes these communities smaller also makes them stronger. These aren't fair-weather fans, they're lifers. And while mainstream music festivals increasingly face declining ticket sales and fading cultural relevance, heavy music events, from grassroots hardcore gigs to massive metal festivals, are thriving.

"Involvement in metal or hardcore isn't a casual pastime but a lifelong commitment."

2. CELEBRATE DIFFERENCE OVER MASS APPEAL

These scenes thrive because they were never built on mass popularity. They aren't for everyone. Their strength lies in their specificity, in the sense of being an insider to something bigger than yourself. These are homes for misfits. Intentional, curated communities where difference is not just tolerated but essential. Subcultural value is directly tied to exclusivity.

"It would kind of suck if everyone else was into it. You wouldn't want the whole world to be into this. Because then it would sort of take away what made it so appealing in the first place. It's not for everyone and I think that's a good thing."

3. FOSTER THE UNSPOKEN BONDS

One of the most profound, and often overlooked, aspects of these fragmented fandoms is how emotionally legible they are, even among total strangers. In a world of algorithmic distance, niche music scenes offer something rare: immediate connection. There's no need for small talk when your shared taste speaks louder than words. It's an unspoken language of mutual recognition. A nod in the pit. A compliment on a shirt. A shared scream in the front row.

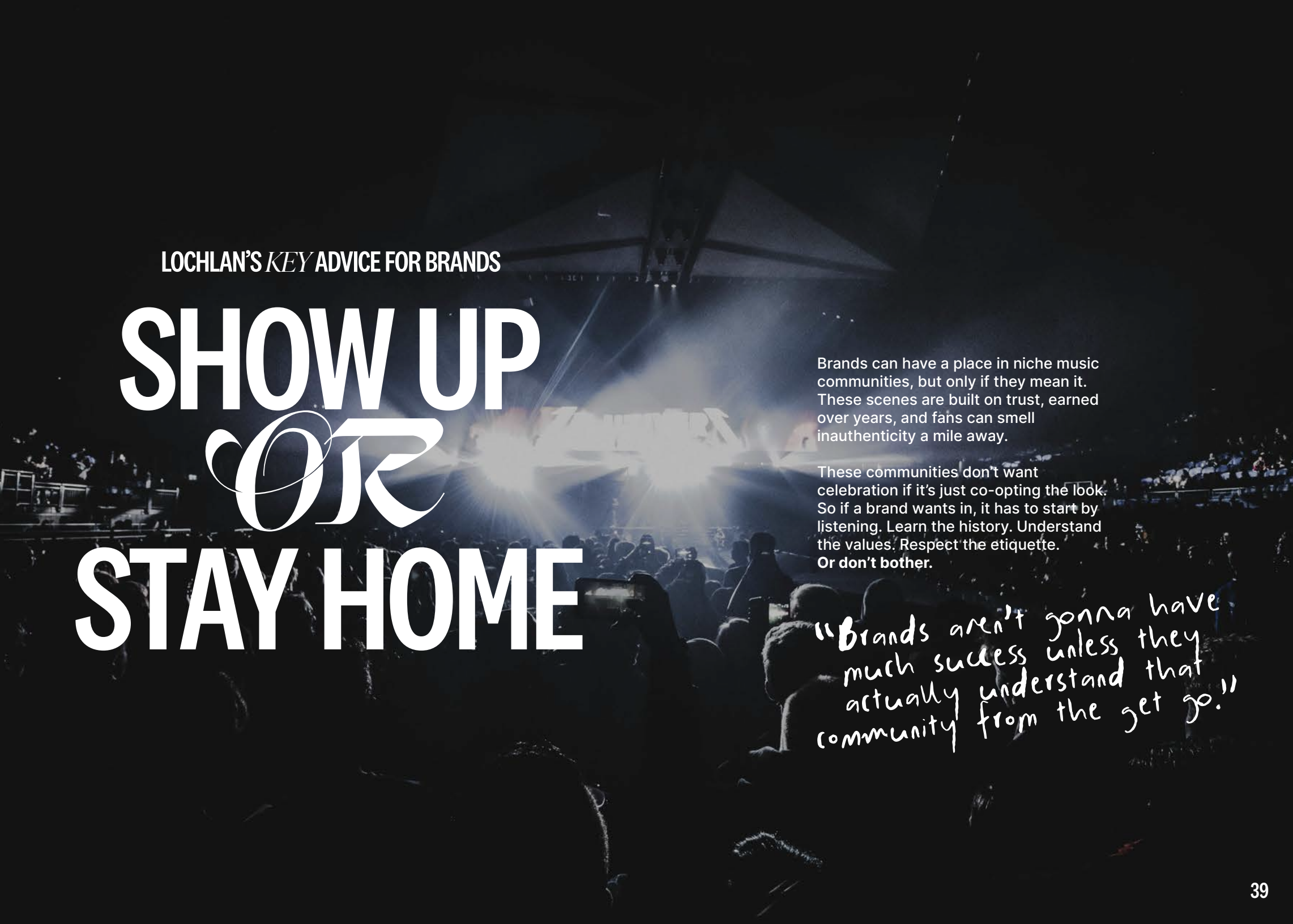
"You see someone wearing the shirt of a band you like and just strike up a conversation about it, and next thing you know, you got a friend for life."

4. LOOK TO FLUIDITY OVER FIXATION

After two decades of cultural fragmentation, the pendulum may be swinging but not back to monoculture. Boundaries are blurring, creating a new unity built on fluidity. Young fans no longer commit to a single genre or scene as one night they're in the hardcore pit, the next they're moved by Ethel Cain. No one keeps score anymore and this mirrors a broader shift toward a more flexible, remixable sense of identity among younger fans.

"Genre is less of a rulebook and more of a vibe."





LOCHLAN'S *KEY* ADVICE FOR BRANDS

SHOW UP *OR* STAY HOME

Brands can have a place in niche music communities, but only if they mean it. These scenes are built on trust, earned over years, and fans can smell inauthenticity a mile away.

These communities don't want celebration if it's just co-opting the look. So if a brand wants in, it has to start by listening. Learn the history. Understand the values. Respect the etiquette. Or don't bother.

"Brands aren't gonna have much success unless they actually understand that community from the get go."

Cultural Capital > Fame

Cultural capital grows where authenticity meets participation. The strongest scenes are built by people who contribute, not just consume.



Smaller scenes feel stronger for authenticity (40%) and creativity (36%), not star power.



Showing up at gigs (37%) and buying merch (35%) seen as critical to belonging.



Genres have become fluid. 42% treat them as a vibe, 38% ignore them altogether.



03 SPORT

Being a sports fan used to be simple: turn on the TV, cheer on your team with your mates, and feel like you're part of something bigger. But today, it's a costly, fragmented hustle. With streaming rights split across Kayo, Prime, Stan Sport and more, the average Aussie is shelling out up to \$2,000 a year just to keep up (The Guardian, 2025).

While AFL and NRL still throw fans a free-to-air lifeline, global sports lovers (such as NFL fans) are stuck behind paywalls.

The pub roar, the office banter, the group chat blow-up...the connection we once knew has changed shape. Over 70% of fans now say community is the main reason they engage with their teams (The Growth Distillery, 2024).

And yet, in this fractured landscape, new models of fandom are thriving. Few stories capture this better than the rise of Wrexham AFC under Ryan Reynolds and Rob

McElhenney.

What began as a struggling Welsh club in the fifth tier has transformed into a global movement fuelled not by broadcast deals but by storytelling, social media intimacy, and the cult appeal of its unlikely Hollywood owners. Wrexham's Netflix docuseries didn't just pull in viewers; it created participants. Fans across the world bought kits, joined forums, flew in for games, and treated the club's underdog story as their own.

This is what fandom looks like in 2025: not passive spectatorship, but active, emotionally-invested community. In an era of fragmented platforms and hyper-personalised experiences, fans are finding new ways to feel part of the game not just by watching, but by belonging.

First, how much do Aussies really care about sport?



8% would skip the birth of their own child or grandchild.

12% would miss a wedding or funeral.

25% would blow off a close friend or family member's birthday to catch their team in the finals.

17% would miss an anniversary dinner or event.

1.3 million have called in sick just to watch a big match.

3.8 million have scheduled holidays around live games.

WOMENS FOOTBALL:



THE MATILDAS EFFECT

Make no mistake, Women's football is big, mainstream, and a mass cultural triumph. The Matildas 2023 World Cup run united 11 million Aussies, the largest TV audience ever recorded in the country.

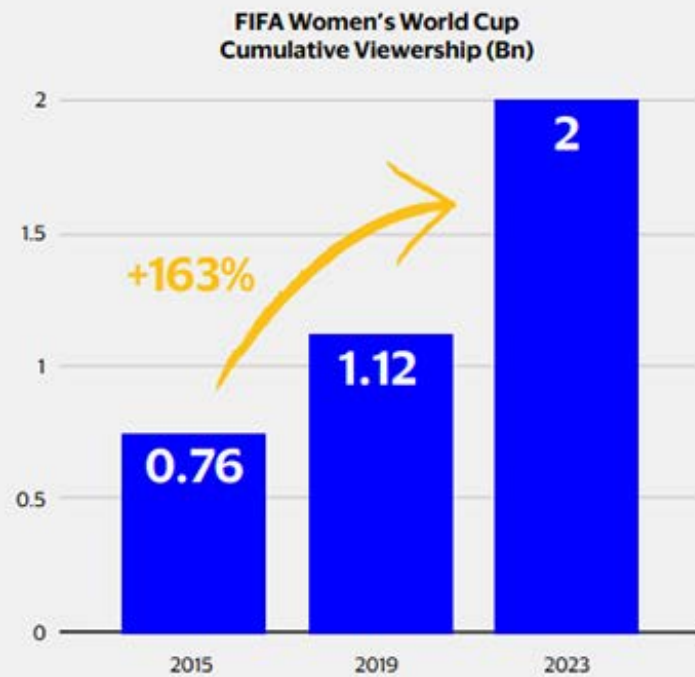
In a fragmented cultural landscape, they created a rare shared moment that crossed generations and interests. This moment was a catalyst for growth in women's football fandom, raising visibility and energising both national and international fan communities.

Their journey reshaped women's football fandom as a whole, making it more inclusive and community-driven. New fans who hadn't followed the sport before found connection and pride amongst others, sparking diverse communities and a surge in grassroots participation.

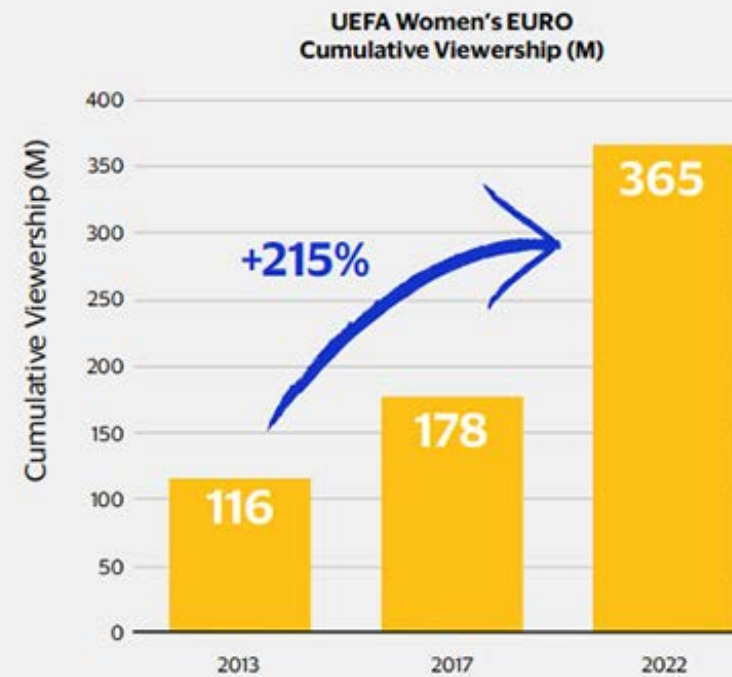
The ripple effect of the Matildas has contributed to a broader global narrative around rising competitiveness and the entertainment value of women's football.

Amid splintered attention, the Matildas showed that sport still has the power to bring people together and ignite lasting passion.

Global Cumulative Viewership - Women's Major Tournaments



Source: UEFA (2022), FIFA (2023)





“RANDOM IS NOT JUST ABOUT LIKING SOMETHING; IT’S ABOUT IDENTITY, COMMUNITY, AND EMOTIONAL FULFILMENT.”

(Calvin Innes, GM and Creative Director, JuM NERD London)



To understand the rapid surge in women's football fan communities, we spoke to representatives from Matildas Active Support (MAS) and Sydney FC Fan communities.

WHAT WE LEARNED...

1. BACK THE GAME, NOT JUST THE MOMENT

Early supporters are quick to spot brands jumping in after mainstream success as there's a strong sense of ownership. To them, late-stage brand involvement can feel performative rather than purposeful especially when it doesn't actively contribute to the culture or the community.

“There's a certain level of cynicism amongst people like myself who knew both periods of pre and post Matildas hype – who was there from the beginning and who jumped on the bandwagon.”

(Rachel Choi, MAS Member)

2. MAKE SPACE FOR EVERY KIND OF FAN

Fragmentation is showing up within sport fandoms, as sub-groups bring clashing expectations into shared spaces. Active support areas are becoming contested, with newer fans unfamiliar with the more traditional football culture. This divide (sport vs spectacle) has eroded intimacy. There's an opportunity to bridge these gaps by creating inclusive experiences that speak to both legacy and emerging fans.

“There's kind of a divide between the fans who are there to be more interested in the sport and in the team and the fans who are there maybe for an individual player or to get, you know, merchandise or selfies. It's become a bit performative and diluted but the culture's not lost.”

(Gabi Boyd, Founder of MAS)

3. SET THE TONE

Building a vibrant stadium atmosphere is still a challenge in a country where football hasn't yet built a strong stadium culture. Active support struggles to take hold, making fan engagement during games increasingly difficult. This opens the door to help shape new matchday rituals and fan experiences from the ground up.

"Australia is not really a prime culture for that traditional football stadium support. It really is an uphill battle to try to get crowds involved."

(Gabi Boyd, Founder of MAS)

4. REFRAME REPUTATION

A lingering 'hooligan' stigma still clouds football fandom, especially in media and institutions, holding the sport back. Fans - particularly of women's football - want to be seen as passionate, not problematic, and as a welcoming, values-driven alternative to the aggressive machismo of traditional football culture.

"I don't want that stigma of football hooligans, like we ruin things. We're not the worst game. We're one of the best."

(Michelle Prasad, Sydney FC Fan Member)

"We get a lot of men supporting the Matildas, but you don't really get as many women in the active support spaces for men's football because they're just not made to feel welcome."

(Gabi Boyd, Founder of MAS)





THEIR KEY ADVICE FOR BRANDS

EMBRACE (AND INVEST IN) GRASSROOTS

Impact doesn't happen through flashy campaigns but the infrastructure support brands can provide at a grassroots level. Facilities for girls' football are sorely under-resourced. Support like funding change rooms, training fields or kits builds real goodwill and will forever put your brand top of mind for those impacted.

"Any kind of sponsorship they could put towards grassroots football would be hugely appreciated, by the community and build a lot of goodwill."

(GABI'S ADVICE)

INTEGRATE, INTEGRATE, INTEGRATE

The most authentic brand engagement happens when fans are doing what they love, and the brand enhances the experience, not just sponsors it.

"When you have that actual participation of the audience member in something that they're already doing and they're already interested in, that makes for a much more genuine connection."

(RACHEL'S ADVICE)

CELEBRATE RADICAL BELONGING

True fan culture doesn't ask for your resume. It asks you to show up, sing loud and be yourself. No matter your past or background. Fan culture, at its best, is radically accepting and this may be football's most overlooked strength but brands aren't tapping into this enough.

"We don't ask questions. We don't want to know who you are or why you're here, we just want you to join and become our family."

(MICHELLE'S ADVICE)

Back the game, not just the moment.

Sport's legacy depends on belonging, not just broadcasting. Show up well before the "big game" or the spotlight is on a sport. Co-create, invest, and treat fandom like a team sport.

The data shows where participation meets belonging, showing brands how to build connections that outlasts the scoreboard.

47% believe lasting brand connection comes from both grassroots investment + big moments.

Engagement:



Watching

71%

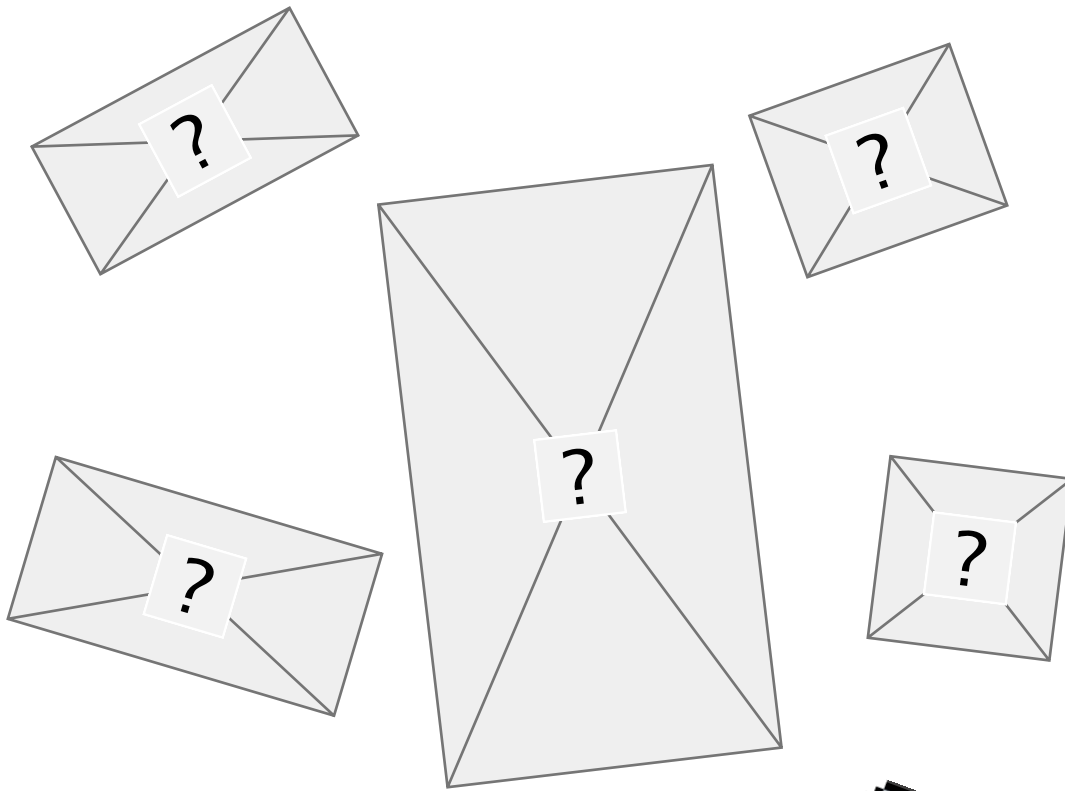


Talking

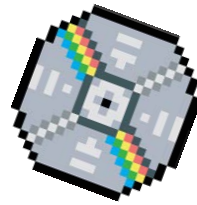
47%

Engagement: watching (71%), talking with friends/family (47%)

63% feel accepted in fandom.



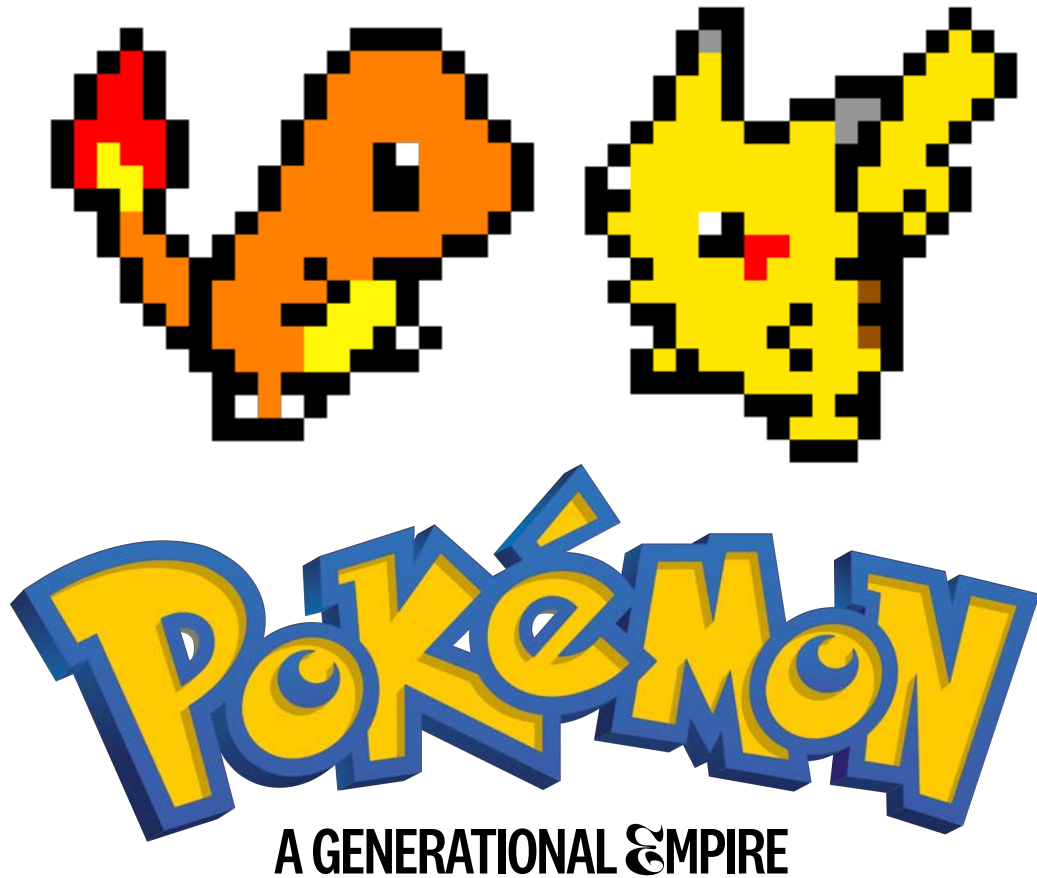
04 GAMING



Gaming's journey from the shared rituals of arcade halls and living rooms in the '80s and '90s has transformed into a fragmented ecosystem. Today, over 3 billion gamers worldwide engage across diverse platforms, from mobile and PC to console and VR (Statista, 2024).

Fandom is no longer unified by a single title or platform but splintered into micro-communities shaped by streaming, e-sports, and niche genres (NPD Group, 2023). Players seek personalised experiences and meaningful connection within their tribes (ESA, 2023), reflecting broader cultural shifts toward fragmented, interest-based fandoms.



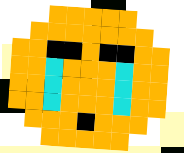
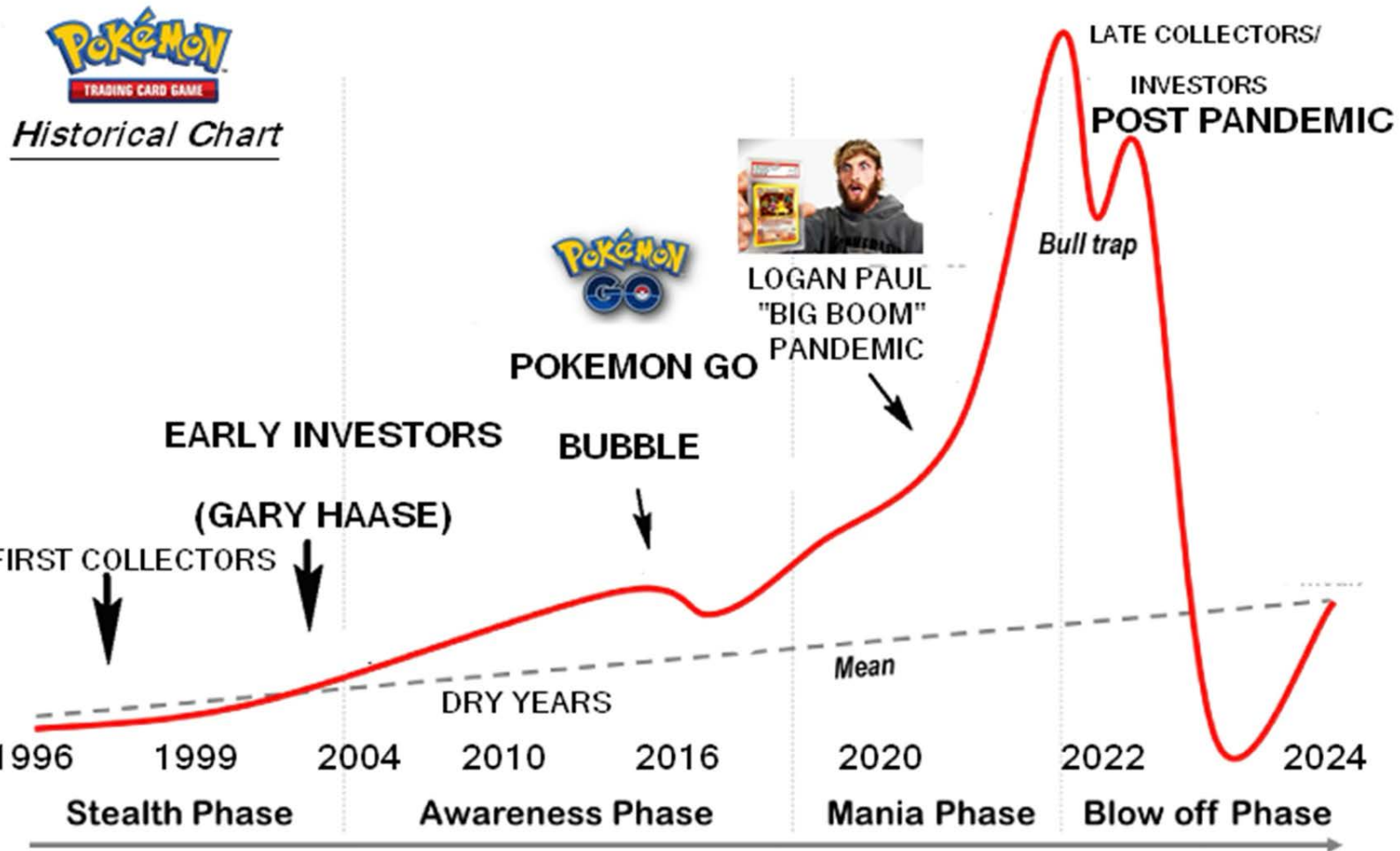
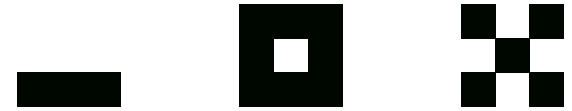
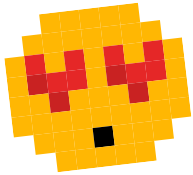


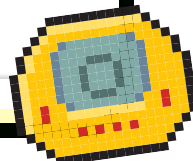
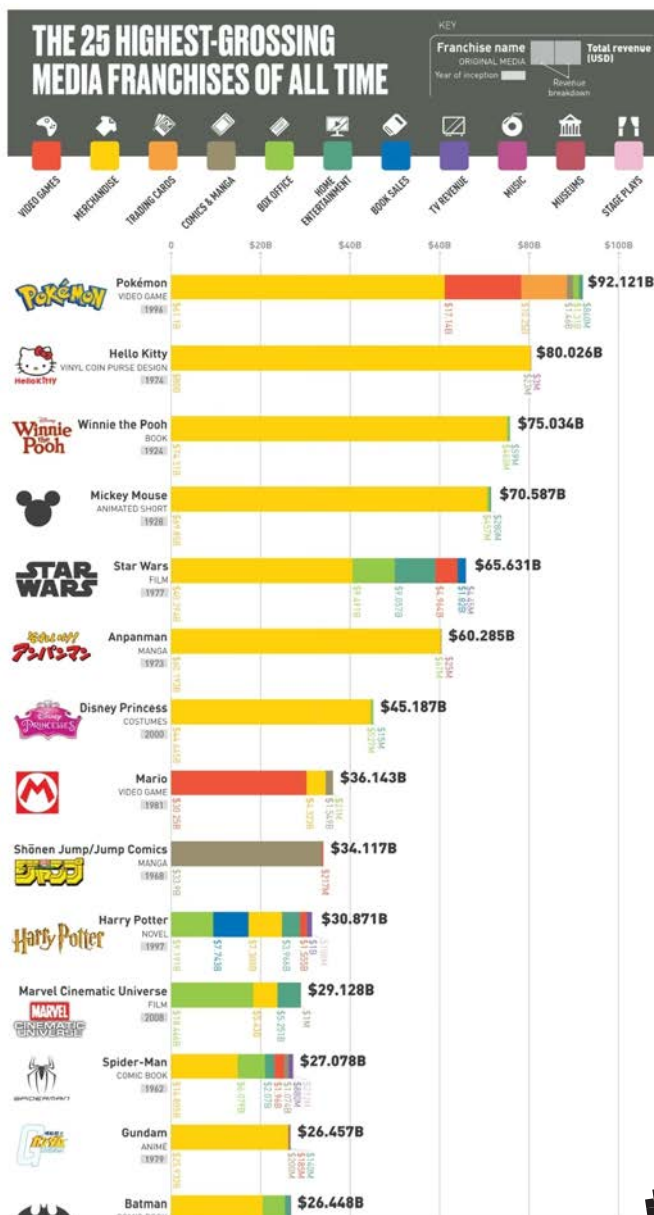
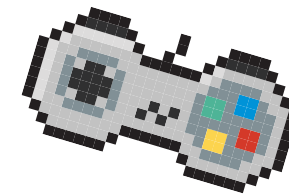
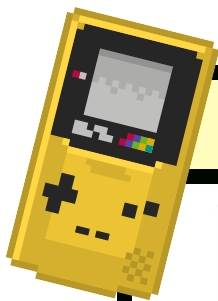
Since its debut in the late '90s, Pokémon has grown from a simple game and TV show into a sprawling cultural empire. As culture fragmented, Pokémon evolved too, more notably with Pokémon Go. By blending digital play with real world exploration, it brought together fans across generations: 38% of players in 2023 were between 13-17 years old, while 30% were aged 30-49 and reconnecting with childhood nostalgia (Vintage is the New Old, 2023; Medium, 2023).

In a splintered world, Pokémon Go created a rare shared experience with over 20 million weekly active players in 2024 and millions gathering in local communities for events and raids around the globe (PocketGamer.biz, 2024). It proved that legacy franchises can thrive by connecting fragmented fandoms in fresh, meaningful ways.



We chatted with UNSW's Pokemon Society, a growing community of over 3,000 university students and alumni who have created a space for fans of the franchise through a range of events, including fortnightly Showdown tournaments, lively Pokemon themed game nights, Pokemon Go adventures, Switch game nights and more.

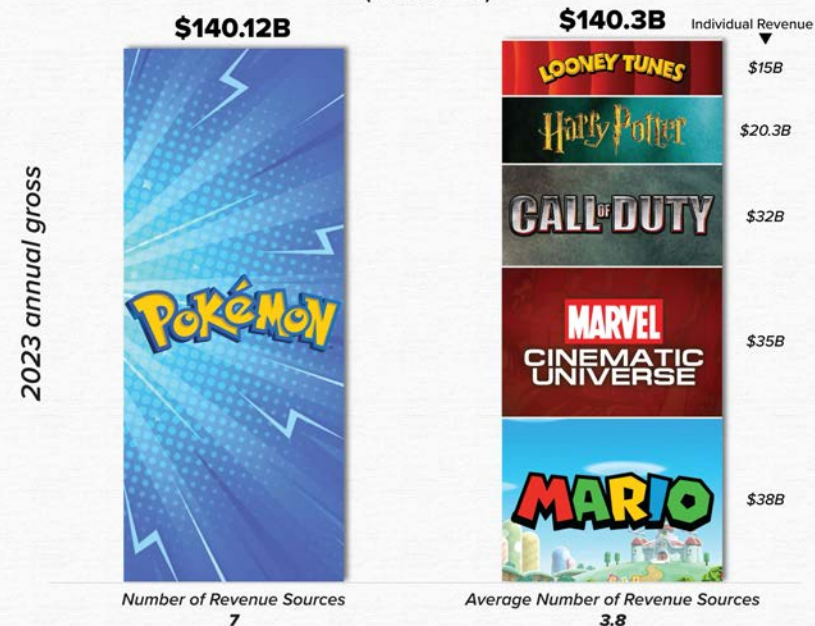




(Source: Reddit)

Pokemon Franchise Vs. Top Media Franchises

(as of 2023)



Source: ultimatepopculture.fandom.com



(Source: Reddit)



(Source: UNSW Pokemon Society)

WHAT WE LEARNED...

1. RENEW FANDOMS ACROSS GENERATIONS TO ACHIEVE LONGEVITY

Pokemon's strength lies in its generational familiarity and cyclical resurgences, allowing the fandom to continuously renew itself across age groups and formats. The franchise's cultural presence is so widespread that it serves as a shared language across generations. Pokemon is also seen as safe, wholesome and familiar, making it easy for parents to pass it down to their kids like an inherited fandom.

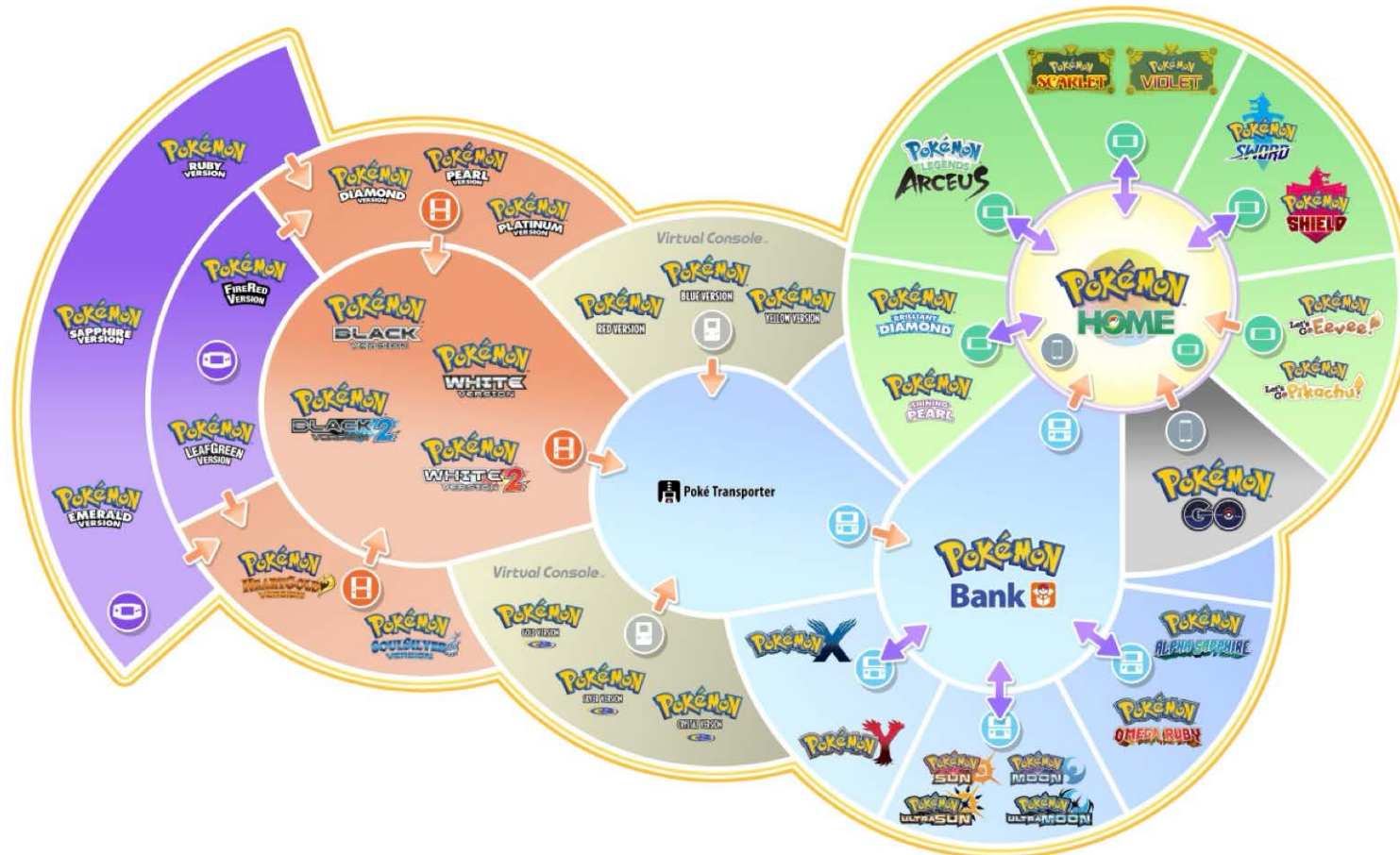
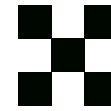
"Everybody knows Pokémon, so when there's a small fad or like a resurgence in like the game or the card game everybody starts flooding back in because they're all familiar with it."

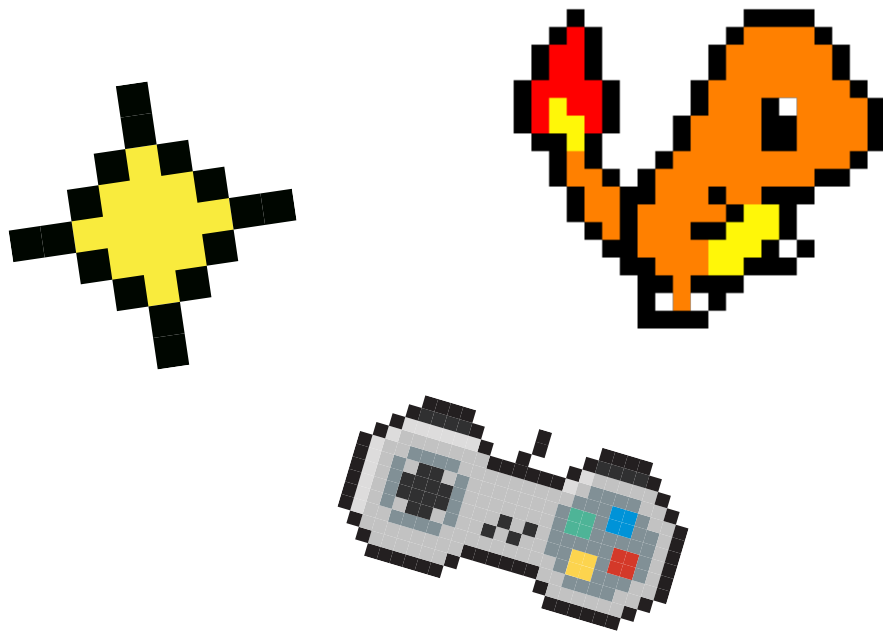
2. EMBRACE FRAGMENTATION THROUGH TIERED ENTRY POINTS

The franchise maintains cohesion by offering different levels of engagement, from plush toys to competitive games. This allows fans to find their own space without needing full commitment. This layered approach mirrors the fragmentation of fandoms more broadly. These vast content ecosystems allow different sub-fandoms to bloom over time which helps sustain interest as popularity cycles.

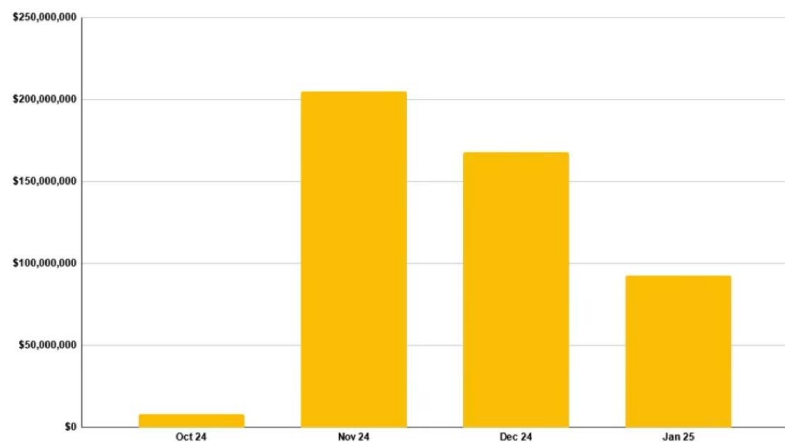
"Pokémon's marketing strategy is to have an outer ring of accessibility... plushies, cards, things you can walk in and engage with and then within that, your more core fans who engage with the video game, the card game, actually playing it."

GENERATION TRANSFER DIAGRAM FOR ALL GENERATIONS IN NINTENDO STYLE





POKEMON TCG POCKET'S MONTHLY PLAYER SPENDING



(Source: Pocket Gamer)



3. FOSTER COLLECTION OVER COMPETITION

Pokemon TCG, unlike Magic or Digimon, is driven largely by collectors. This makes emotional attachment more central, further driving the longevity of the fandom. However, collecting is not just transnational. It's a source of pride, joy and a bonding tool with other fans. This gives depth to the Pokemon fandom as they are balanced by strong and casual collecting communities.

"It feels like an accomplishment to collect them all and show it to people. It's a good way to bond with people."



4. BE MINDFUL OF ALIENATING SUB-GROUPS

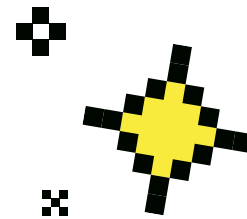
Cultural fragmentation risks drowning out niche sub-groups as dominant fandom streams take over. Fans engage with varied aspects (Pokémon Go, TCG, anime, plush collecting), making cohesion harder. Fan leaders must prevent silos, since smaller groups often feel marginalised when hype focuses on just one area (like TCG).

"The main challenge is to not fragment the community so much that the groups can't interact with each other. If this happens then the more niche and smaller groups can get swallowed up by the more dominant groups."

5. CROSS-POLLINATE WITHIN FANDOMS, ONLY WHEN IT'S CULTURALLY RELEVANT

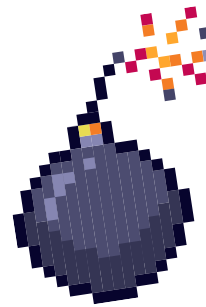
Cross-fandom mashups resonate, especially when they create unexpected but culturally relevant overlap. Collabs that merge these fandoms (e.g. Pokemon x Hatsune Miku, Charmander + Hamilton) create new excitement and engagement, particularly when they reflect overlapping audience passions.

"Combining two big things with overlapping fandoms, people get extra excited for it."



UNSW POKEMON SOCIETY'S KEY ADVICE FOR BRANDS

FACILITATE, DON'T DOMINATE



The gaming community is intentionally non-commercial so brand involvement is only welcome when it supports community accessibility and benefits fans (e.g. discounts, access), not when it benefits profit or corporate branding.

This means facilitating participation, not dominating the space. Brands should play an enabling role in amplifying fan experiences, like supporting card shows or local events, rather than inserting themselves for visibility.

"We're just trying to foster a community not to make money so the only way we'd accept brands in this space is if it makes things more accessible for people."

Cultural entry points.

Gaming is both a category and culture.

Winning brands connect the two, understanding not just how people play, but why they play, share, and belong.

Brands need to see both sides of the screen by mapping what drives play, and decoding the cultural signals that keep players coming back.

Top Motivations

Escapism

42%

Challenge
/ Mastery

30%

33%

still play
childhood
franchises

25%

share them with
younger family

Positive
On Fandom
Crossovers

30%

Rising
Among
18-34's

+47%



IN A *Fragmented* WORLD,
BRANDS DON'T BUILD COMMUNITY,
THEY EARN PERMISSION TO JOIN IT.

STRATEGIC IMPLICATIONS

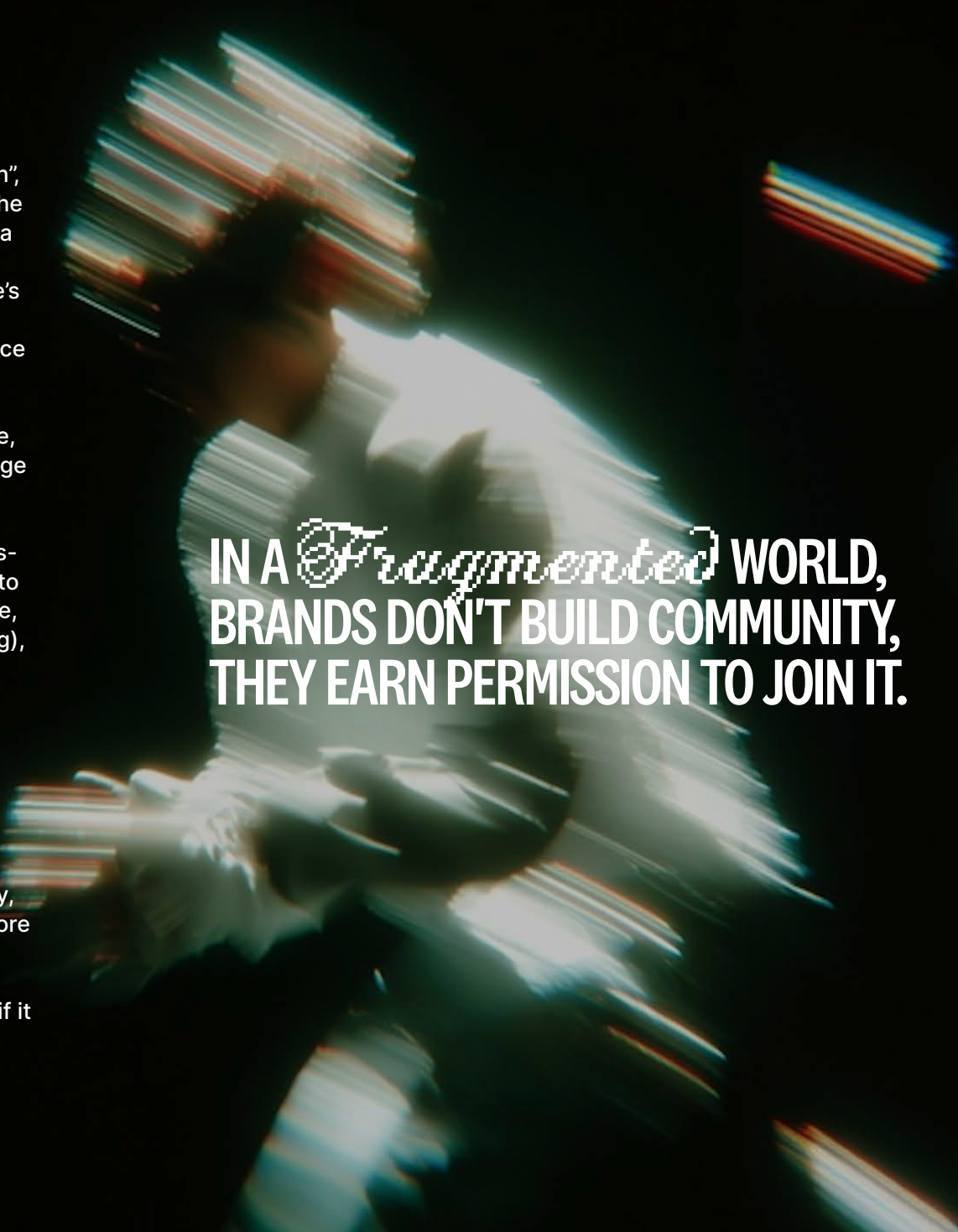
Ad-land has been great at selling the idea that brands “create culture”. The reality is that “culture”, and all its unpredictable tentacles existed long before a brand decides to show up and weave in its commercial agenda. Brands can absolutely play a meaningful role (e.g. Red Bull Music Academy), build platforms, and energise communities in a way that breeds more cultural output... but it’s the creativity of the people that ultimately decide.

Culture happens anyway, the opportunity for brands is to deepen, improve, or accelerate it.

To that end, understanding human behaviour is our starting point to building (hopefully) some helpful frameworks that might apply if your intention is to show up gracefully in the slipstream of a deeply fragmented cultural context. What is it about people that needs understanding and attention for this to be effective? What are the dynamics of the existing community and how can we play a role? What metrics matter in these moments? All necessary questions to unpack.

The ever-brilliant Zoe Scaman talks about the “space in between”, the changing dynamic between the fan and the celebrity or group as a starting point for understanding where and how to play a role. Zoe’s point is that fandom isn’t a trait inside a person; it lives in the space between fans and the worlds/ creators they love, a relationship dynamic with its own temperature, distance, rituals, rhythms, language and unwritten rules. She maps a spectrum from closeness/ reciprocity (open channels, works-in-progress, fans as co-authors) to distance/mystique (curated space, coded drops, devotional decoding), and most cultures sit somewhere in between.

Crucially, these dynamics, not demographics, shape the rituals, behaviours and business models around a fandom, and decide whether people feel invited in or kept outside the gates. Practically, that means reading the room before you act: if a scene prizes reciprocity, earn your way in through participation and credit; if it prizes mystique, protect the distance, and contribute to the canon rather than collapsing it.



**IN A *Fragmented* WORLD,
BRANDS DON'T BUILD COMMUNITY,
THEY EARN PERMISSION TO JOIN IT.**



THE 'LADDER OF CULTURAL PERMISSION'

How brands can enter and stay in fan spaces: Another “way in” is approaching culture in stages, applying a “Ladder of Cultural Permission” to earn your place in a community or fandom. Each rung has evidence you must show before you move from.

The ladder reframes entry as **permission, not entitlement**: progression is paced by *proof-of-care*, respect for taboos and rituals, and a willingness to accept vetoes from community leaders. Practically, it's a planning and governance tool that sets what you're allowed to do (and not do) at each stage.

Why it matters: Treating permission as a constraint **raises effectiveness** (higher response, lower backlash) and **improves efficiency** (less wasted frequency, more earned advocacy). Benefits include truer cultural fit, stronger word-of-mouth from gatekeepers, sturdier brand equity, and better ROI as media / ideas are amplified by community participation.

Trade-offs: It's slower, requires sustained resourcing, and can be messy. Over-relying on a few stewards may entrench gatekeeping or miss quieter voices, and skipping rungs invites reputational blowback.

Premise:

Cultural communities grant access in stages moving from outsider → observer → participant → contributor → co-owner.

Five Rungs:

1. **Outsider**: Brand is irrelevant or invisible to the community
2. **Observer**: Brand shows curiosity but hasn't engaged
3. **Participant**: Brand references or collaborates lightly (e.g., meme usage)
4. **Contributor**: Brand funds, builds or amplifies without taking over
5. **Co-Owner**: Brand is woven into community rituals (e.g., Red Bull in esports)

Brand Implication:

Audit your current role in each fandom. Never skip a rung and be wary of "jumping to contributor" without time in the trenches.

Special thanks to our contributors and collaborators:

Ideally team (Henry Cole, Greg Synnott, Lucy Travaglia), Tom Roach, Sacha Judd, Grace Kite, Lochlan Mills, Phat JUDAH., UNSW Pokemon Society, Matildas Active Support, Sydney FC Fan Community, NWO.ai team

SHAPE AND LEAD CULTURE WITH US.

Hopeful Monsters was born out of the belief that the most effective brands have an innate understanding of the culture that drives their brand and the role they play in shaping that.

Culture gets thrown around a lot, and we believe very few take it seriously.

For us, **Culture is Serious Business.**

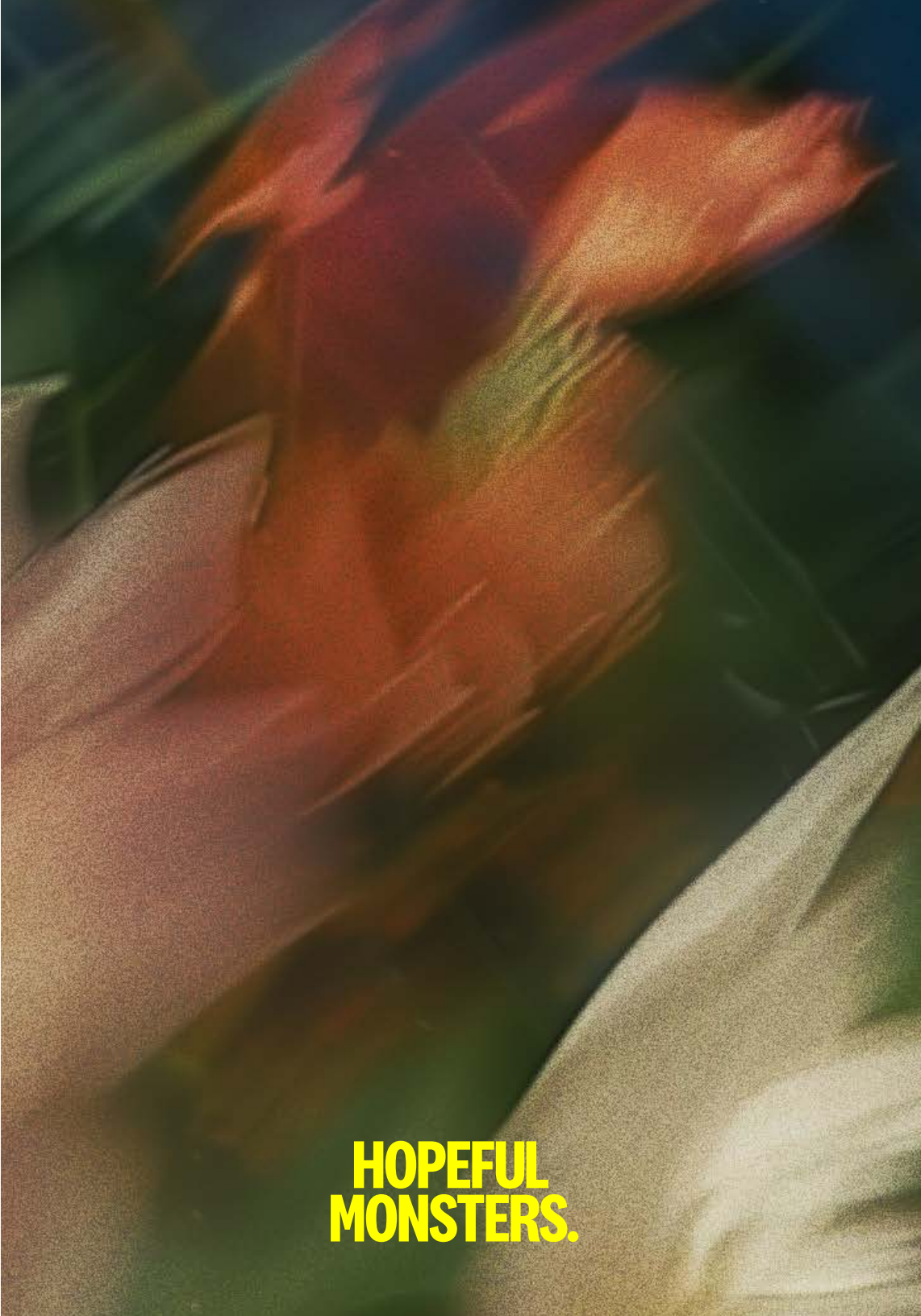
It's not about broadcasting a message or jumping on the newest online trend. It's the values, attitudes and behaviours of a group of people.

Brands are in a position where, if they understand the role they can play in shaping the culture of a category, marketing effectiveness and growth awaits.

Let's solve interesting problems together.

For more information contact:

hello@hopefulmonsters.com.au



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MONSTERS.**