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# Music Fandom

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## OPENING ACT

**Nearly everyone has a connection to music.** For some of us, the connection runs deep – defining who we are, how we see the world, and soundtracking our lives along the way. For others, music is more of a passive presence, the elevator tunes we hear in the background and only selectively engage with. And for many of us, it's somewhere in between. But one thing is clear – music fandom is an inescapable force in culture that is evolving and intensifying as time goes on.

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***“Being a passionate music fan is a unique and rewarding experience. Music has the power to evoke emotions, transport us to different places and times in our lives, and connect us with other people on a deep level.” – 24, male***

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A mere twenty years ago, a music fan's relationship with their favorite artist or band was limited to CDs, videos or live performances. It was a one-way relationship. Fans listened or watched what the artist or band put out, and when that was done, there wasn't much more to engage with.

But the birth of “standom” or “stan culture,” around this time has proven to be prescient. Coined in the year 2000 from Eminem's song “Stan” featuring Dido, “stan culture” used to be perpetuated by images of overzealous or obsessed fans.

Now, over 20 years later, it is often seen as a badge of honor by music fans to show how committed they are to their favorite musician and how far they will go to support them. To be a stan of an artist has become a status unto itself.

# EVOLUTION OF MUSIC FANDOM ENGAGEMENT



While this intense level of fandom (or standom) has been around since the days of screaming Beatlemania fans and crying (or fainting) Elvis fans, the digital age of accessibility and oversaturation has swung music fandom into a new and interesting place.

Music fans are now willing and able to voice their opinions about their favorite artist and to advocate for things going on in their personal life. Swifties firmly believe Taylor Swift should take her fans into account when she decides who to date. Britney Spears fans stood outside the courthouse when her conservatorship ruling was being read. The digital age has rapidly shifted fans from passive consumers to active participants in the rise (or fall) of musicians at large.

**In the second installment of Starcom's Fandom Series**, we set out to explore Music Fandom and the role it plays in the lives of consumers. In today's culture, the community and camaraderie that is rooted in a shared interest around an artist or band has never been stronger. **And the stakes for brands who wish to tap into this fandom, has never been higher.**

## METHODOLOGY

This report is underpinned by primary research conducted by Starcom in the Spring and Summer of 2023, in which we surveyed ~5,000 Americans about their attitudes, behaviors, and beliefs regarding music fandom. In addition, we consulted industry leading sources, tech platforms, and social listening to analyze and unearth insight around the ever-changing rhythms of music fandom.

Fans have gone from **screaming at the stage** to **screaming at the screen.**



# MAIN TRACKS

## 01 The 'Brand' of Fandom in Music

### *Opportunities & risks of igniting an audience*

Devotion to an artist goes beyond just liking their music, it has become a sub-identity in itself. We have Swifties, the BeyHive, Beliebers and Little Monsters—oh my! While music fans have created personas of their own throughout history (think Deadheads, Parrotheads, etc.), digital connection to other devotees has led to the rise of fandom armies that wield influence of their own.

## 02 When Alchemy Became an Algorithm

### *Feed curation or revive surprise?*

Fandom used to be serendipitous. A song on the radio, a mixtape played at a party, a friend's MySpace song on their page. You'd come across the music by chance and if it sparked something, it would stick with you. Nowadays, artist discovery and the subsequential fandom that follows is more engineered. It's served up on a "New Music Friday" Spotify playlist or an automated suggestion such as: "You liked a song by Ice Spice, so you may also like...". If discovery has died at the hands of curation, is our fandom chosen for us?

## 03 From Live to a Lifetime

### *Experiences & artifacts that expand the fandom universe*

Live music is back, baby! And it's arguably the purest form of the music fandom experience. To hear and feel music IRL is intangible and often indescribable. Yet in today's culture, engagement with music doesn't stop at the stage - fans themselves have become an engine of experience, whether that be pre-concert rituals, self-made customized merch, customized choreography, fanfic about their favorite artist, album reviews, or ardent promotional posts, fans have extended their love to be always-on and inescapable.

## 04 The Day the Music Died...or was Revived?

### *New opportunities to take it up an octave*

Technology has not just connected music fans in a bigger way, it's opened the door for their own creations to gain traction. Whether that is through AI enabling fans to build their own songs, test drive what a mash-up of their favorite artists might sound like or imagine what tracks historic musicians might have recorded with today's bands, the possibilities are endless.

## HEADLINER

### 01 The 'Brand' of

### Fandom in Music

### Opportunities

### & risks of igniting

### an audience

**Nowhere in culture are fan communities more distinctly identified than in music.** It goes beyond interest or appreciation of an album, but into a full immersion of the aesthetic and lifestyle that an artist/band exudes. 'Branding' this fandom doesn't just signal a connection, it creates a sense of belonging and community. Communities that when focused on a goal, become vocal power brokers for action.

Swifties are one of the strongest examples of this at the moment. As Ad Age recently pointed out, Taylor Swift "dominates American cultural consciousness" in a way that few others have as of late, and recently named Swift one of their Top Brands in 2023 — for the fact that she "commands a loyalty program like no other." However, her fans have started to move beyond her music and into her personal life. While both approvals and disapprovals over her recent relationship with Matty Healy were evident, their breakup highlighted a new level of fan expectations. Starcom surveyed self-proclaimed "Swifties" hours after the news broke of Swift and Healy's split. When asked if Taylor Swift and other

celebrities/musicians should take fans into account when choosing who to date, a quarter of respondents "strongly agreed." One fan stated, "They owe their success to the fans and they must respect their decisions because they know who is best for them in a relationship."

#### On being a passionate music fan:

*"Passion for music is really strong, and we as fans live in that way. **Music influence[s] a lot of aspects in my life, including clothes, food, and lifestyle**" – 23, Male*

*"...being a passionate music fan looks and feels like an **intense connection** to and appreciation for a particular artist or genre of music. It can manifest as a love for attending concerts, collecting records, and **fostering relationships with other fans.**" – 27, Female*

*"You **feel the emotion of the artist** inside you as you listen to the music" – 54, Male*

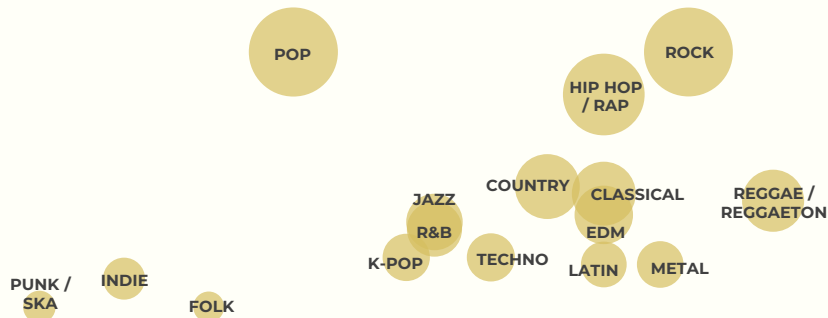
Source: Suzy

**"They owe their success to the fans and they must respect their decisions because they know who is best for them in a relationship."**





## MUSIC FANDOM



Source: Suzy

The intensity of fandom does tend to vary across genres. In our research we found that while nearly everyone loves Pop music, the degree of fan fervor is actually stronger in the Hip Hop / Rap space, or even in the Metal communities. But despite favoring different types of music, 68% of fans across the board agree that music is a core part of their identity, associating it with key memories in their lives, using it to help them express emotions, and finding inspiration and motivation in their chosen music. It showcases that while fan communities might be distinct in who and what they care about, there are common, underlying threads that all fans share.

68%

*of fans across the board agree that music is a core part of their identity*

Source: Suzy



## FOR MARKETERS

These avid, branded communities are seen across genres from Nicki Minaj's "Barbz" to Becky G's "Beasters" to Kenny Chesney's "No Shoes Nation." Their degree of involvement into the success and wellbeing of their favorite artists/bands means that **brands must authentically and strategically design a partnership that will resonate, not just ask for a plug and play integration.** When brands collaborate with artists, they bring a piece of themselves (and their appeal to the fans) into the partnership – but magic only happens for brands when it's a right match in the eyes of their fans. **Understanding the personality of different 'fandoms' is critical when deciding if your brand is in alignment to their values, passions, and needs.**

## THE VERSE

### 02 When Alchemy

### Became an Algorithm

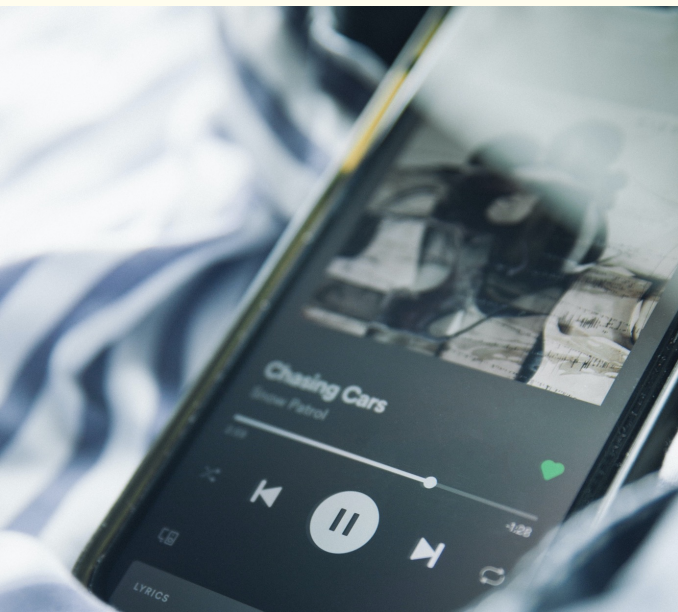
#### *Feed curation or revive surprise?*

Music has historically been an exercise in alchemy. We may remember a hit song, but **it's the packaging and persona of the artist mixed with the context in which we hear the song that makes it memorable and unique.** It's simple math, there are too many songs in the world competing for our ears. Even the best songs or new up and coming artists need some help getting into our consciousness, but this help has started to evolve into a default in recent years. We've slowly slipped away from pure happenstance discovery and into algorithmic efficiency. And while there are certainly benefits to this, it does beg the question: **Is our fandom also in turn becoming a product of mathematical process?**

Spotify serves up suggestions through their "New Music Friday" playlist. Or recommends musicians or songs based on the evidence such as "You liked this song by Chris Stapleton, so you may also like..." Hop over to another platform like TikTok, once you watch six seconds of a video from Tai Verdes, you will notice more and more of his content popping up on your "For You" page as a (calculated and engineered) recommendation.

Since so much music exploration is happening for us, it's no surprise that most music fans find it much easier to find new music now versus five years ago. **Just over 50% of our survey respondents claimed it's much easier or nearly much easier now.** (Suzy custom research)

The magic still happens, though, when music is picked up from another medium, such as TV, movies, or commercials. If someone is watching a show they like and they hear a song that peaks their interest (whether in the show or a commercial), they are more likely to pursue it. It's appearing in a positive environment and creating positive feelings – that leaves a powerful impression.



# 66%

***of fans said that that it's extremely likely or almost extremely likely that they'd research the song they love from TV or commercials.***

Source: Suzy

A classic, old-school example in our digitally-dominated lives of 'right place, right time'.

So what makes someone take a Spotify suggestion or jump on a fan bandwagon? Where does this music exploration and discovery happen in this calculated landscape and should brands be there as well?

When asked how they discover new music, our survey respondents ranked streaming services and social media as the top two forms of exploration—by far! When the same group was asked what platforms they use to discover new music and/or listen to emerging artists, the top two answers were YouTube and Spotify. This is where music fans are in an exploratory and suggestive mindset — and it’s where brands need to be.

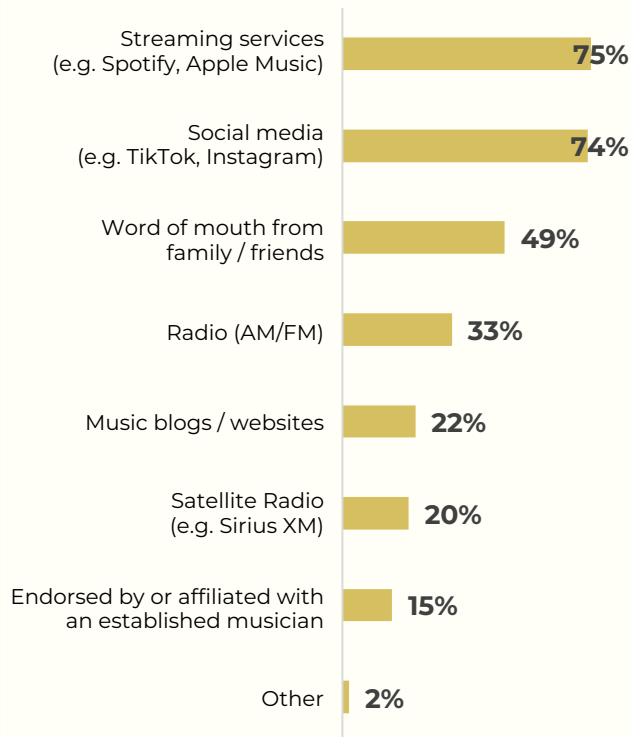
We also asked our music fan panel about emerging artists, with emerging being those considered “up and coming” or on the cusp of gaining popularity. When asked what factors influence their decision on whether or not to continue listening to a new or emerging artist, a majority of respondents ranked actual components of the music versus things like a social media presence or a recommendation from a friend. 75% of fans said the quality of the music makes them want to keep listening followed by the

unique style/sound (61%), catchiness of the music (60%) and lyrics (56%).



**When discovering new musicians, fans care most about the quality and how it makes them feel.**

### How do you usually discover new music?



Source: Suzy

## FOR MARKETERS

A recent study from New York University gave new meaning to the “five second rule.” The study proved that someone can tell within the first five seconds whether or not they like a song. Their opinion of a song didn’t change whether they heard five seconds or the entire track. Which means **brands have an extremely short window of time to make an impression to music fans when utilizing new, unheard songs.**

Outside of the miniscule window for earworms, **it’s also important for brands to design around the moments that come along with the music.** Music doesn’t exist in a vacuum. Music fans don’t need more content, they need more ways to discover, celebrate and explore the content – and brands can help them do that.



# THE CHORUS

## 03 From Live to a Lifetime

### Experiences & artifacts that expand the fandom universe

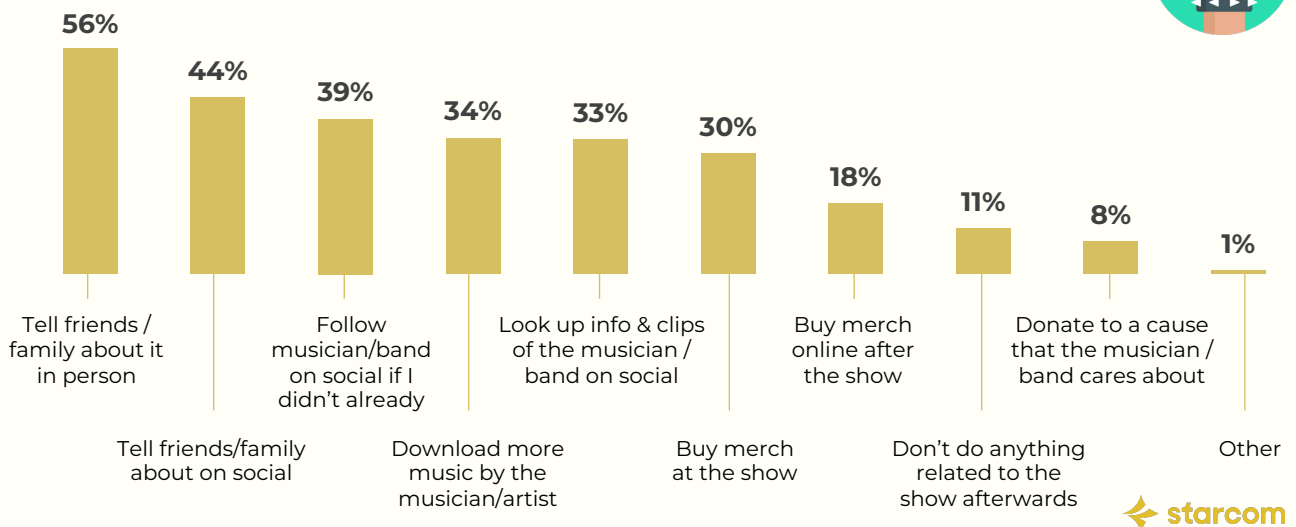
Live Music is Back, Baby! Music festivals are playgrounds for music fans. Not only do they attend to hear their favorite musician, but they also go to experience the aesthetic and atmosphere that music festivals bring. It's a place of community, camaraderie and belonging.

While these (often) transformative experiences to see an artist or band in the flesh are a one-time event, the effect this has on a fan and the longevity of that experience often lives well beyond that one day or night (or week if you're at Coachella ;)).

Some of the major music festivals have even influenced brands like Forever 21 and H&M to have designated sections within their stores for "Bonnaroo outfits" or "Coachella crowns." **Music festivals are built for the fans, yet the fans help create and grow the music festival's brand.**

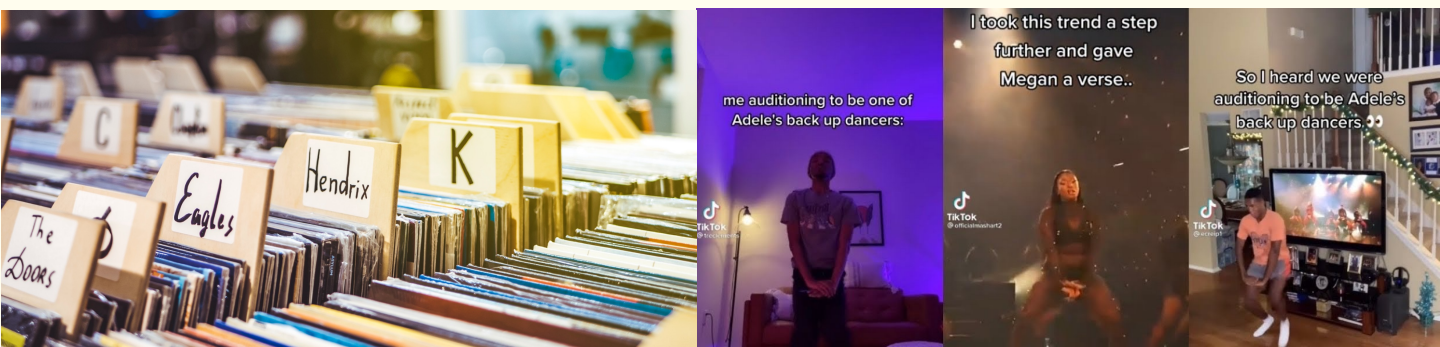
While many claim nothing can beat the experience of live music IRL, the digital world has served up new (and easy!) ways to gain more access to your favorite artist or festival experience. Between Youtube, the artist's social media channels and exclusive content channels, fans crave the opportunity to go behind the scenes of their favorite musician's tour or concert. For instance, the recent Disney+ documentary "Jack in the Box" follows BTS's j-hope giving fans front row seats to his Lollapalooza performance and behind the scenes footage of creative challenges he faced (USA Today) —none of which many BTS fans can see otherwise. Or Billie Eilish's 2021 documentary, "Billie Eilish: The World's a Little Blurry" and how it gave fans an in-depth look at her journey on the road and extraordinary rise in the music scene. For Billie Eilish fans, that is gold!

#### How do you usually continue the experience after attending a live music event?



While digital is making it easier for music fandom and experiences to live on, an old school way of listening to music is also resurfacing — vinyl. Vinyl has seen a surprising resurgence as of late with the vinyl business now being worth \$1.5B which is more than it has been worth in the past thirty years. **The kicker is that half of those purchasing vinyl don't even own a record player** (Trapital). One Reddit thread (r/Vinyl with 1.4M members) explained that many vinyl purchasers simply like to collect records just as many collect books they may not read or toys they may not open. They see vinyl as a “living time capsule” conveying feelings or memories tied to that specific musical artist. It's all about the brand. **Fandoms are brands and they have tokens to show for it.**

The flip side of this coin, is that content and creations are being produced by fans themselves as a way of extending their experience or connection to an artist/band. And the vast scale at which this is happening is staggering. Whether that's using a favorite song in their TikTok dance video (and giving Adele some viral back-up dance moves finally), or writing in-depth fanfic inspired by their favorite band (that yes...sometimes become a movie), or designing (and selling) their own merch (Etsy has thousands upon thousands of items...), **fans are now fueling an economy all their own.**



## FOR MARKETERS

There are endless opportunities for brands around experiences and artifacts of music fandom. **But it's critical to have a goal in mind before diving in.** Sponsorships get your brand in the door, and there's value to have massive crowds see your logo while they ride high on the adrenaline of live sound. But there's also opportunity to generate more unexpected and organic fan engagement that is worthwhile to explore. Creating new mechanisms for fans to participate in the culture of their favorite artist – such as what McDonald's did when they launched the Travis Scott meal, can yield outstanding results when done well. **What matters is a clear objective – is it about who you're seen with in music and borrowing some equity by association?** We all know rock stars are the perpetual 'cool kids' of culture. Or does your brand benefit more by enhancing an experience for fans in a way that taps into their passion and syncs with your product? Regardless, **knowing what you want from the fans first and foremost should always be your north star.**

## OUTRO

### 04 The Day the Music

#### Died...or was it

#### Revived?

### *New opportunities to take it up an octave*

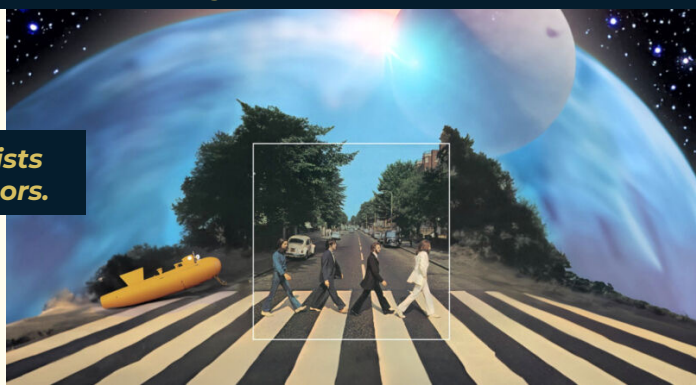
While AI has been around for some time, it has become a piping hot topic as of late. At first it came for utility, working behind the scenes to help everyday tasks become more efficient. But now, as was inevitable, it's finally started to come for creativity. Many people believe AI has the ability to transform the music industry for the better by changing the way music is created, distributed and consumed. **AI technologies can deliver personalized, original music in a way that it has never been available before.**

Through programs like Landr or Amper Music, **music fans can sit in the producer's seat** and create their own custom tracks quickly and easily without needing expensive studio equipment or professionals. They can create a dream mashup of two artists or bring a new song to life with an artist posthumously as Sir Paul McCartney is doing with John Lennon or expand album cover art with Photoshop's Generative Fill (yes, Katy Perry probably WAS sitting on a giant cat for Teenage Dreams).

In April of this year, the idea became reality when two major stars felt the wrath of AI after a mashup song "Heart on My Sleeve" (Drake + The Weeknd) went viral like wildfire. While Drake was noticeably unhappy by posting "This is the last straw, AI," (New York Times), fans clearly were curious to hear the track to the tune of millions of plays on Tik Tok, Spotify and Youtube. The track was eventually removed, but not before it hit many fans and revealed a cautionary tale of how creative copyright may work – or not work – against artificial intelligence. Other artists like Grimes, are leaning into this technology, and actively encouraging fans to utilize AI for new creations. "I'll split 50% royalties on any successful AI generated song that uses my voice," she tweeted alongside a link to NYT's "Heart On My Sleeve" story.



***AI-expanded images of album covers created using Adobe Generative Fill***



***We're seeing a more overt shift into where the artists become the inspiration and fans become the creators.***



# 30%

Believe AI will improve the quality of music

Source: Suzy

**Biggest benefits of AI music, according to fans:**

**Increased efficiency & speed of music creation**

**More diverse & unique music**

Despite the opportunities that this technology is creating, there are still some concerns about the future of AI on music. One of these concerns voiced by survey respondents is the fear of losing the human element that makes music so emotional and impactful. They see AI as having a “lack of emotional connection in the music” (63% response) and lack of creativity (38% response). Which is why 80% of our survey respondents believe either “AI music will become more common but human-created music will still be popular” or “Human musicians will continue to dominate the industry.”

**Bottom line:** there will always be something uniquely special about experiencing a melody that only someone who has lived a life has created.

## FOR MARKETERS

While AI is and will increasingly be a powerful tool, it can't (at the moment...) replace the magic of musical artistry.

**Music fans will still seek out the human element of songs, and the stories behind them. Because it's not code that sparks fandom, it's human creativity.**

However, the proliferation of AI technology is growing, and given the rising desire of music fans to create alongside or inspired by their favorite artists, it's expected that we will see more and more AI-driven music or music artifacts. Brands should approach this cautiously. They'll have stakeholders in the artists and the fans, for any AI-linked content or activation.

**Seek out opportunities that allow fans to play and explore music creation on their own or celebrate the fan-driven creativity that is emerging more and more. There might be unique avenues of impact by following the fans' lead.**

**But there are still skeptics...**

**“I do not think AI music will take over, there are some things AI cannot take over”**  
– 64, Female

**“I can see it being used for more business and commercials but not mainstream music since it's not creative and has not as much emotional connection.”** – 25, Female

**“It will not change the industry significantly, in my opinion music is feeling and AI lacks that”** – 36, Male

Source: Suzy



## ENCORE

**Music is fundamental to the human experience.** It's profoundly personal and uniquely unifying and there have never been more ways to enjoy it. At the same time, music fandom has taken on a persona of its own. The levels to which music fans emerge and evolve are almost unfathomable. The digital world we now live in not only creates room for more and more music content, it opens the door for fans to take a front row seat in music experiences that were never available to them before. They feel a sincere stake in their favorite artists' lives, they are discovering new music based on calculated and quantifiable recommendations, they are going to live music events but getting even more intimate with their favorite musicians online and they can now be a music creator themselves — rivaling professional producers from their basement couch.

Brands who want to make an emotional connection with consumers are wise to consider music, but as with anything else, we recommend starting by really understanding your brand, your audiences and ensuring that it truly aligns to the personality, environment, and motivations of the targeted music fandoms. Music is life to these communities, and they'll do whatever it takes to ensure it plays on.