

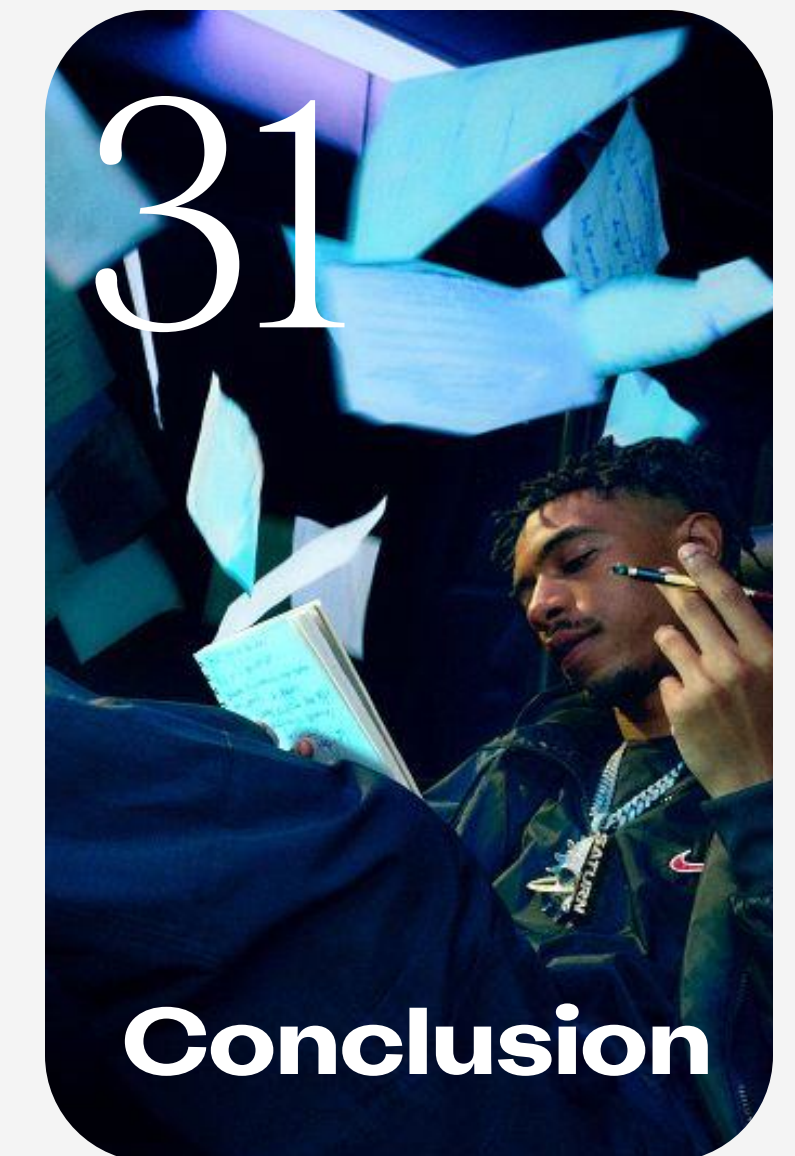
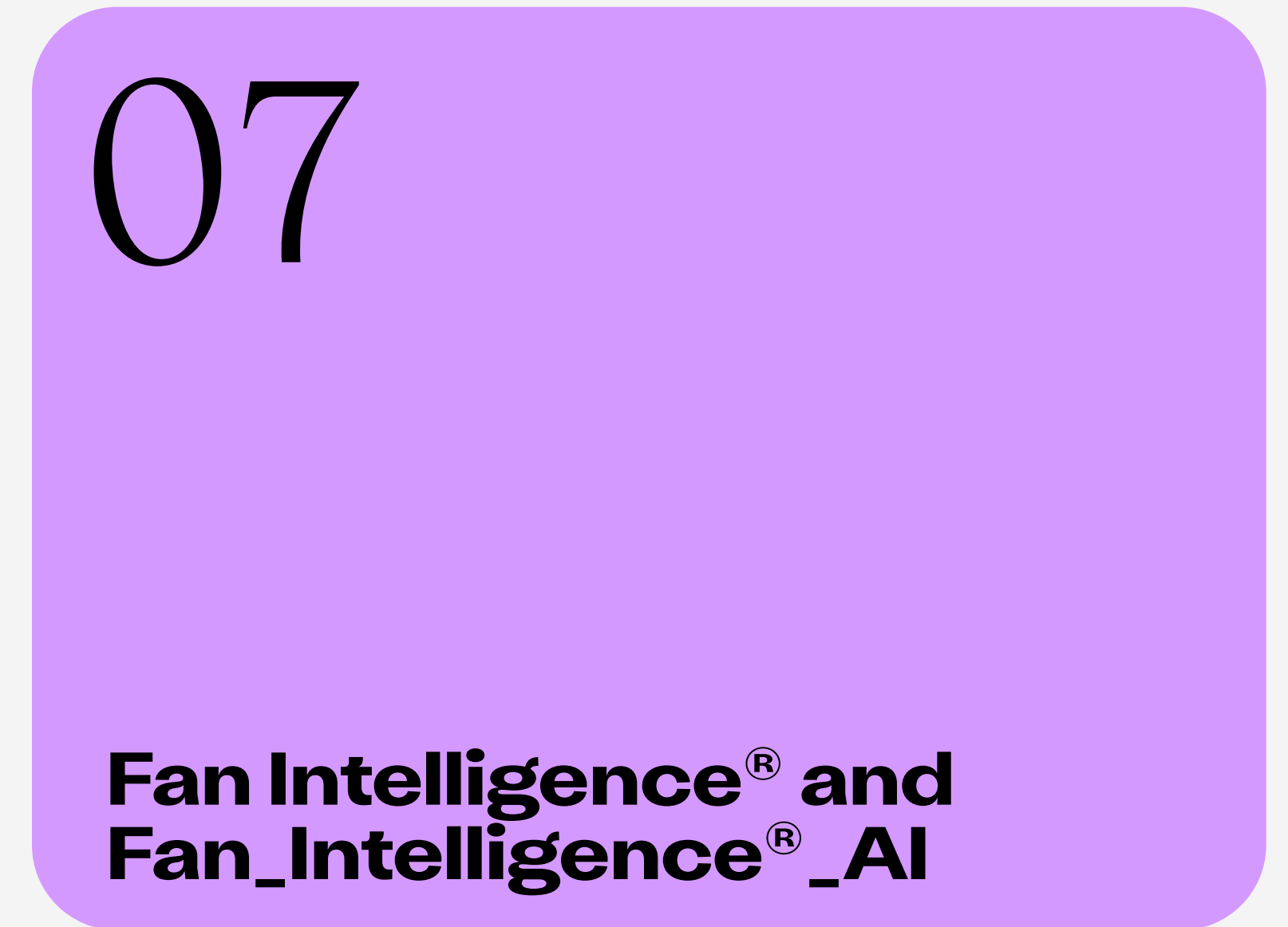
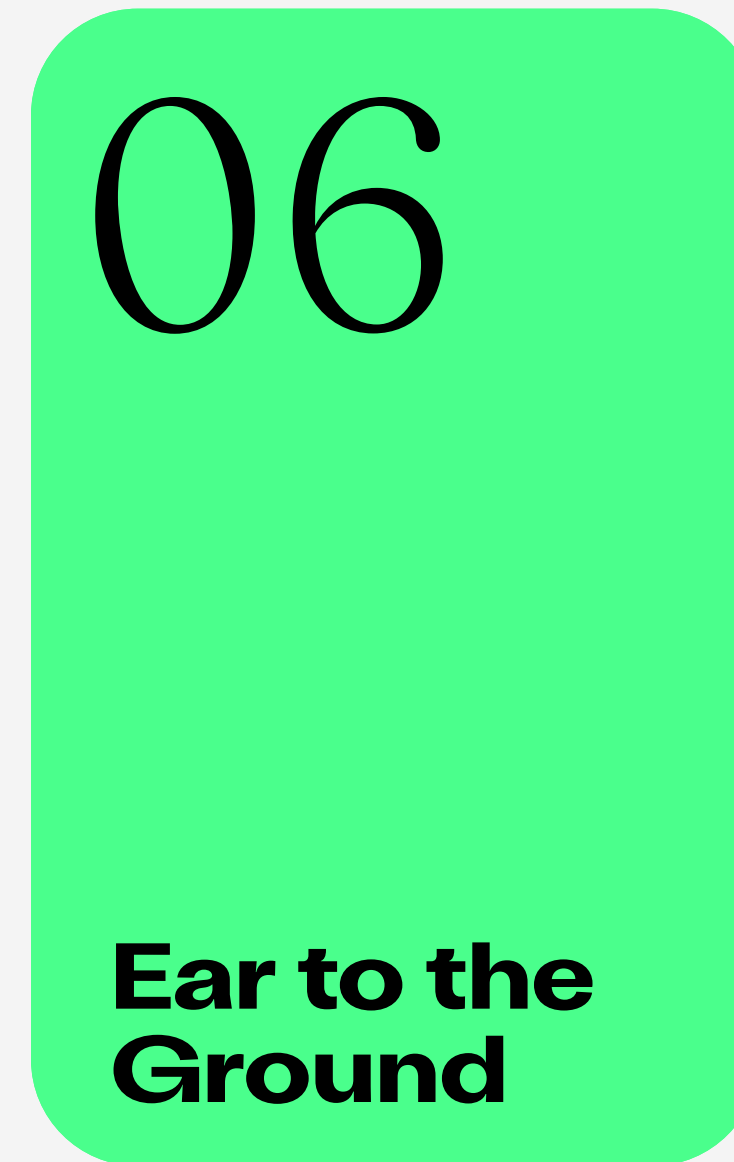
EAR TO THE GROUND

24/25

FAN_INTELLIGENCE[®]_INDEX

HYPERFOCUS

Ranking The World's Top 100
Brands By Fan Attraction



Contents

Introduction

Welcome to the **24/25 Fan Intelligence® Index**, Ear to the Ground's annual global ranking of the most culturally attractive brands.

You can learn a lot when you've got over 11,000 fans on speed dial.

Every year, we have in-depth conversations with our network of fans to rank the brands that are winning and losing the race for cultural relevance.

We all love a league table, but the ranking is only part of the story. New for 2024, our proprietary AI tool, Fan_Intelligence®_AI, analysed our conversations with fans and tastemakers to reveal our deepest insights yet, including shifts in language and attitudes as they've evolved year-on-year.

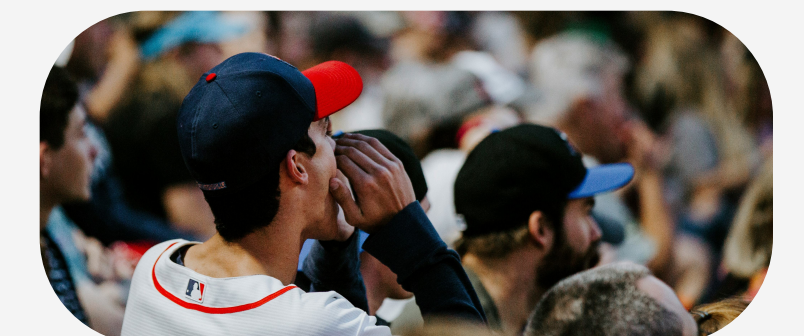
But, while change is constant and Fan Attraction remains in flux, there are clear and powerful lessons to be learnt for those who can listen best.

Thankfully, we've done all that listening for you.

Read on to discover which tech brand saw a 20-point drop; why one sportswear giant got 5x more unprompted mentions than their biggest rival; and how being unapologetically niche is powering the rise of a new wave of global brands.



You can learn a lot when you've got over **11,000** fans on speed dial.





Welcome to the age of

HYPERFOCUS

A Message from our CIO

This year's Index exposes a stark reality in sports and gaming: marketing only to the masses does not translate into Fan Attraction.

'Hyperfocus' is our headline finding. The future belongs to brands who combine fierce commitment to their core audience with broader mass marketing efforts.

That discipline - knowing who you are, and who you are not - is vital in an age where many overextend themselves.

Lifestyle, entertainment and tech brands are reaping the rewards of combining hyperfocus with mass awareness, while finance and drinks categories flounder.

The likes of YouTube and Nike remain dominant, but newcomers Gymshark and On are rising fast, cutting through the noise with unapologetic, fan-centric strategies.

Meanwhile, the likes of JD Sports, Puma and Prime slip as fans struggle to understand who they are for.

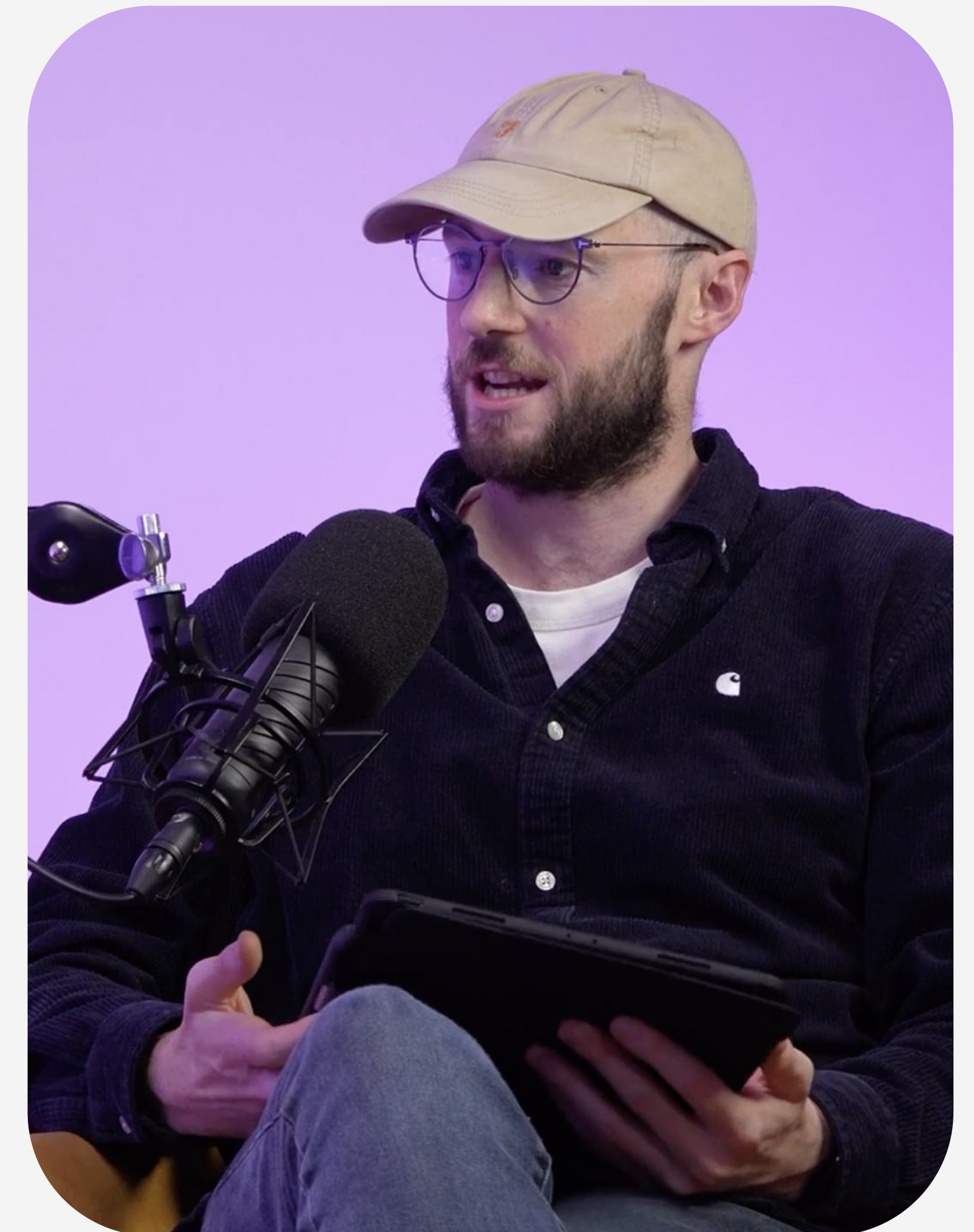
Producing the Fan Intelligence® Index is a highlight of my year. We get to talk to more fans, in greater depth, than at any other time.

This year I was doubly excited by our addition of Fan_Intelligence®_AI.

Now, we can bring another layer of linguistic and conversational analysis to understand the data.

We invested in AI because of how well it listens. It makes our work better, and it can do the same for yours too.

I hope you enjoy reading the Fan Intelligence® Index as much as we did creating it.



Owen Lavery
Chief Innovation Officer



Executive Summary

'Hyperfocus' is the trend that stood out as redefining fans' relationships with brands, and setting them up for mass audience success.

Given its key role in unlocking Fan Attraction, what are the golden rules for achieving hyperfocus?

First, brands need to consistently show up in the communities they want to reach. They need to commit to specific cultures and sub-cultures for the long-term, rather than for one-offs.

This consistent commitment is strengthened through intimate, specific and emotive storytelling, supported by a diverse roster of talent.

Finally, they must continually innovate within that space to stay front of mind, communicating in a language the audience understands. Fans rewarded brands who did all of the above. They were turned off by those who attempted to play in too many spaces or lacked commitment to the spaces they were already in.

EAR TO THE GROUND

We are a creative agency that turns fans into consumers.

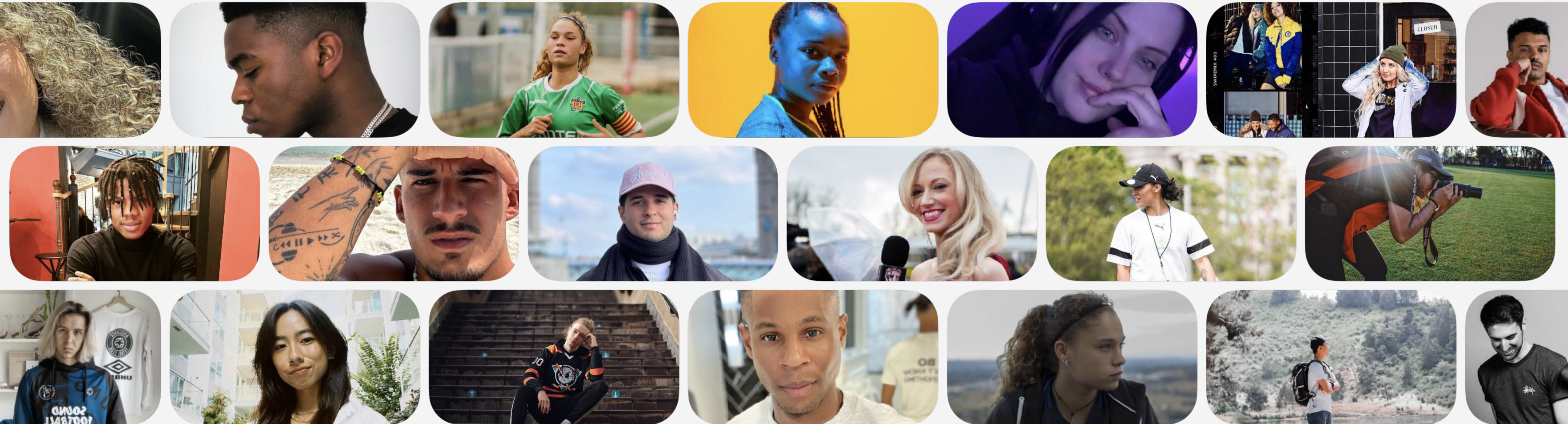
Our Fan Intelligence® approach allows us to access industry leading insights in minutes, not weeks. This means our creatives can co-create directly with cultural observers, at the heart of fan culture, to craft ideas that emotionally connect and drive impact.

FAN_INTELLIGENCE®

The Fan Intelligence® Network is a global community of over 11,000 of the most connected fans shaping culture today.

We collaborate with them in real time, at every stage of every client challenge. We then use Fan_Intelligence®_AI to uncover the macro trends and critical hidden signals that shape the leading brands of the future.

Fan Intelligence® enables us to understand the forces driving Fan Attraction better than any agency on the planet.



Introducing

FAN_INTELLIGENCE[®]_AI

Over the past 12 months, investment in our proprietary AI platform has paid off. Built on thousands of hours of conversations with fans, it keeps us plugged into culture, with key insights and tomorrow's trends on speed dial.

Fan_Intelligence[®]_AI brings a new layer of analysis and insight into shifting trends and fan behaviour.

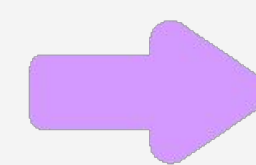
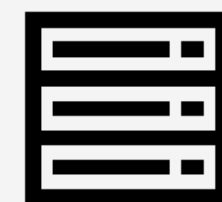
The tool is capable of identifying micro signals across language, tone and behaviour in our conversational data.

It then compares these trends with data down the years, using deep linguistic analysis to understand what's next.

These predictive capabilities allow us to anticipate future fan demands at pace, so our clients can stay ahead of the curve.




 Claude



 OpenAI



FAN_INTELLIGENCE[®]_AI



What are the most notable factors driving fan attraction in 2024 compared to 2023?

FAN_ATTRACTION_SCORE™

The metric at the heart of the Index is the Fan Attraction Score™ (FAS™).

We calculate this by asking our global network of fans to tell us how attracted they are to 100 of the world’s leading consumer brands.

After priming them to think about their passion for sports or gaming, we ask a simple but powerful question.

“How much do you like or dislike this brand?”

They rate it between -5 (strongly repelled) and +5 (strongly attracted).

We then subtract the percentage of individuals who are repelled (-5 to -3) from the percentage of those who are attracted (+3 to +5).

The result is converted into the final Fan Attraction Score™.

We explore these findings in deep qualitative interviews with fans across our network, allowing us to truly understand the stories behind the scores.

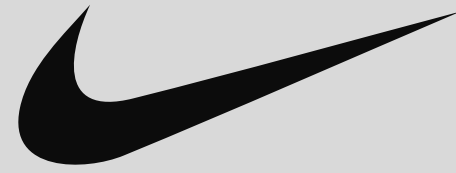




RANKINGS

The Top 10

1.



Champions of storytelling, backing athletes and innovating everywhere.

83.3

2.



Hub of creativity, a go-to for creators and audiences alike.

81.4

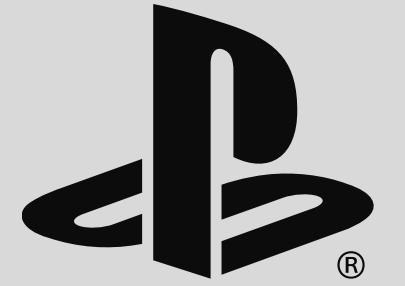
3.



Impressing fans through communities and creator collabs.

75.5

4.



Cinematic experiences and diverse talent turn gamers into fans.

75.5

5.



Making search, discovery and AI effortless for everyone.

73.5

6.



Innovating in audio, forging partnerships in sport and beyond.

71.6

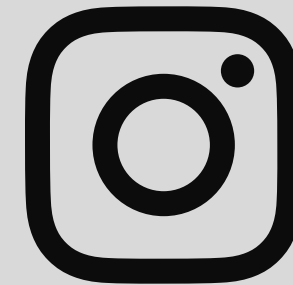
7.



A real franchise player, innovating to extend the universe.

71.6

8.



Discovery and access to wider culture empowers new fans and creators.

68.6

9.



Tech powerhouse, synonymous with innovation and IP.

67.6

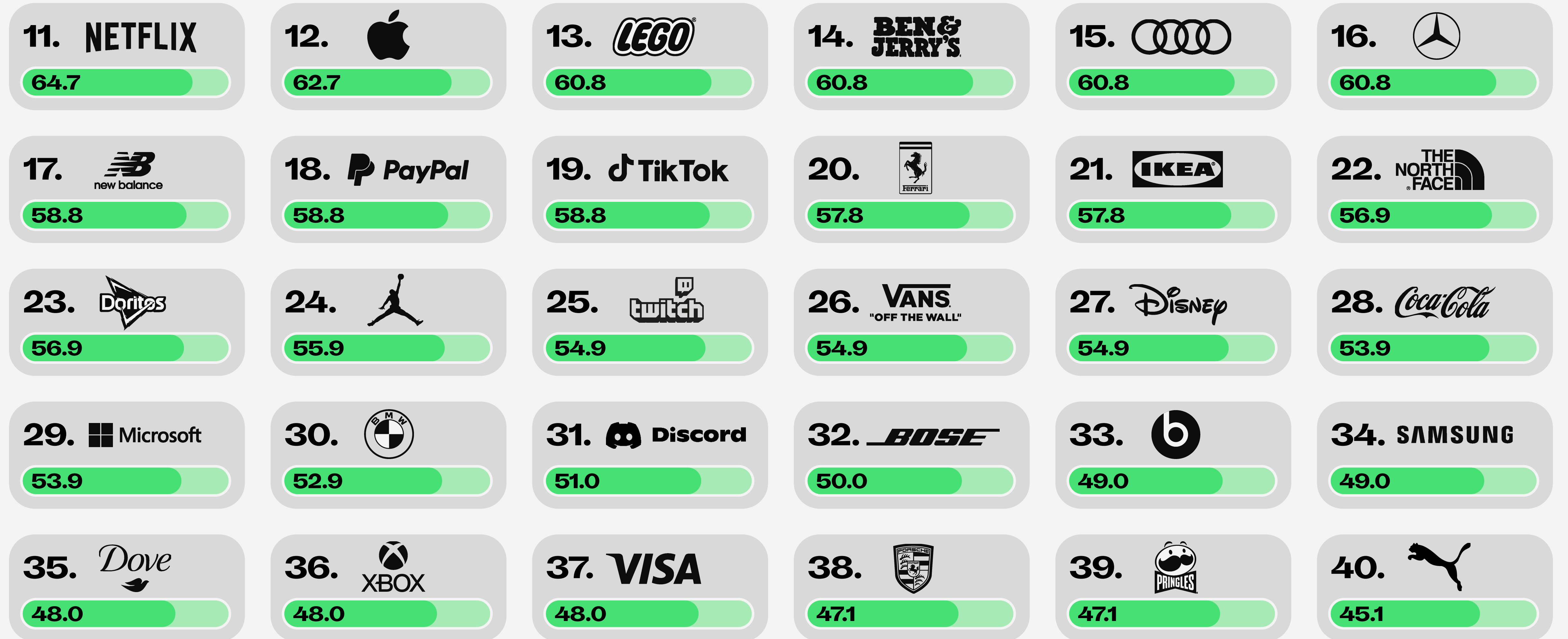
10.



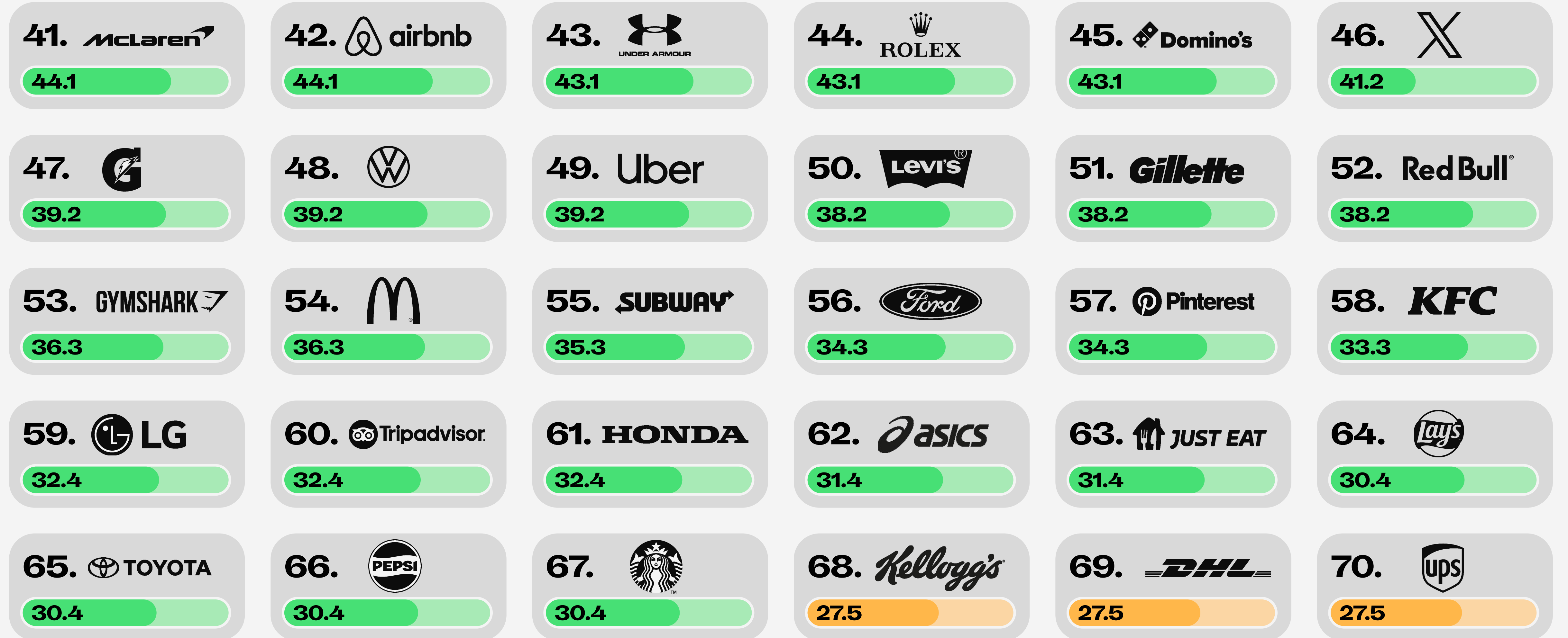
Entertainment and commerce go-to, seamless from shopping to streaming.

67.6

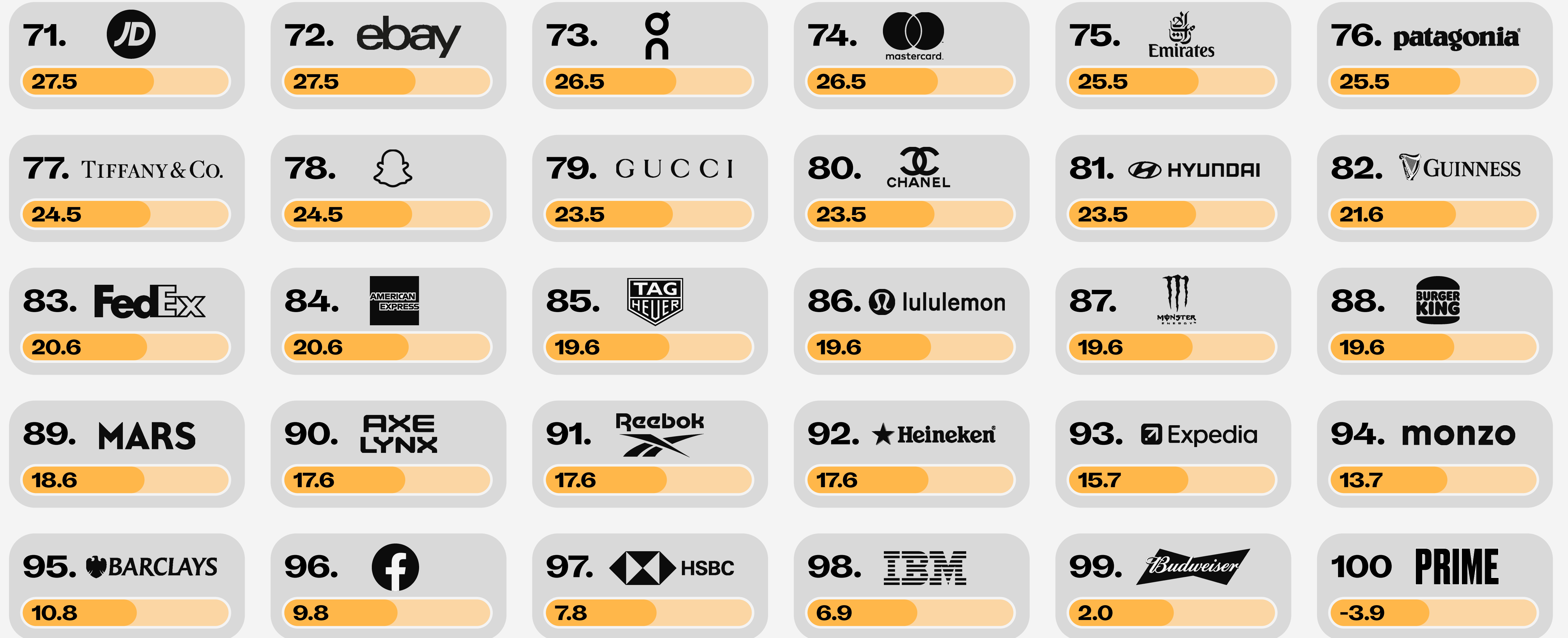
Full Rankings 11 - 40



Full Rankings 41 - 70



Full Rankings 71 - 100



On the Rise

These were the brands across sectors that took the biggest leaps over the last 12 months in Fan Attraction.

From Gymshark returning to its roots, Guinness doubling down on alcohol-free options, and Bose overtaking Beats as the cross-culture headphone brand of choice, these brands significantly improved their standing among young audiences this year with their Fan Attraction Score™.

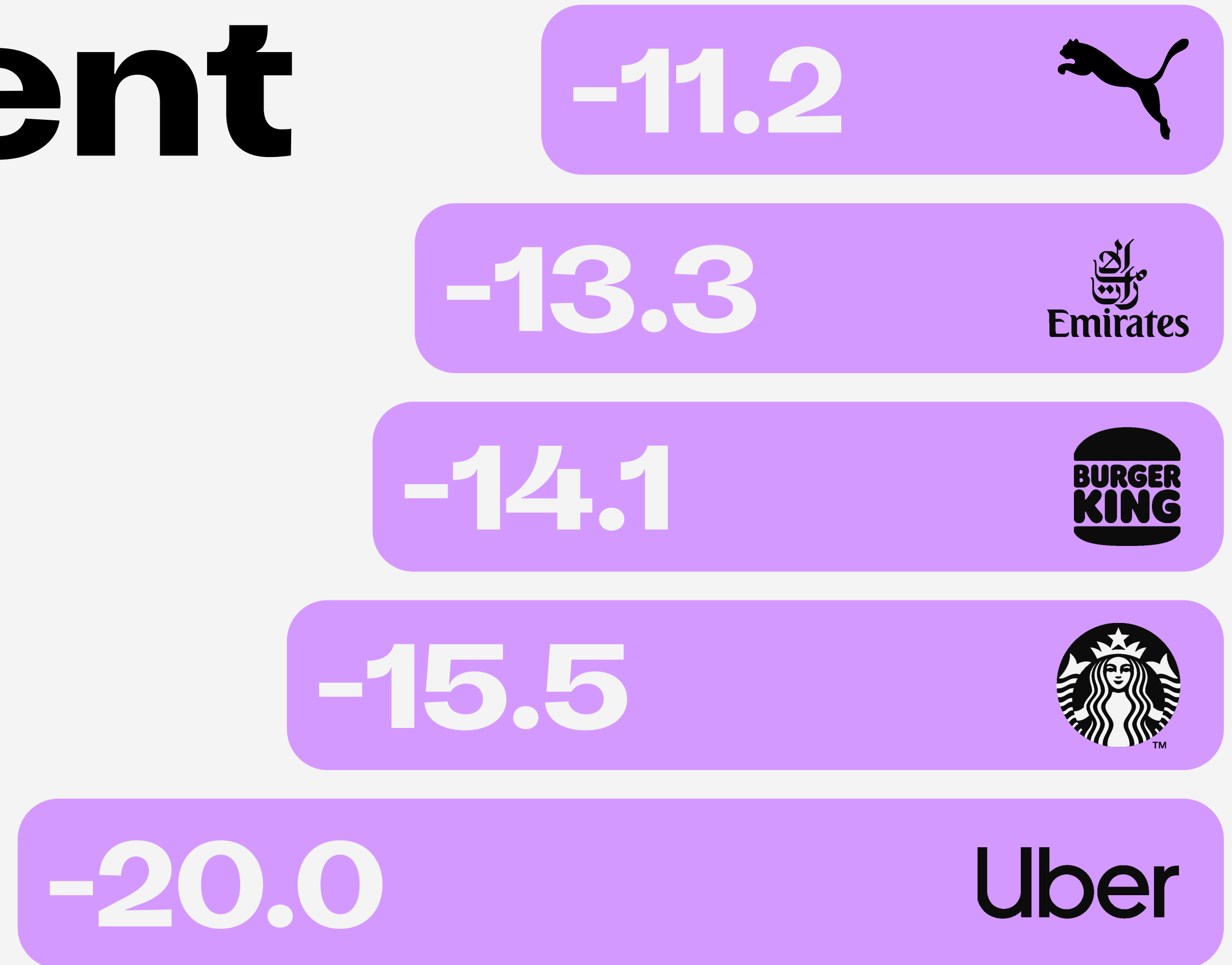


In Need of Improvement

Meanwhile, these brands have fallen the furthest, with notable winners from our 23/24 Fan Index such as Burger King and Emirates seeing the steepest decline.

Fans reported numerous reasons for decline, ranging from Starbucks' CSR struggles, to Puma slipping behind new lifestyle competitors. Ultimately, fans felt there was a lack of focus hurting all of these heavyweight brands.

"I noticed that while some of these brands get involved in sponsorships, they do not really get involved with the community. They are just there for visibility, not genuine engagement."



Driving Fan Attraction

Fan_Intelligence®_AI performed deep linguistic analyses of our conversations, producing five key principles for Fan Attraction in 24/25.

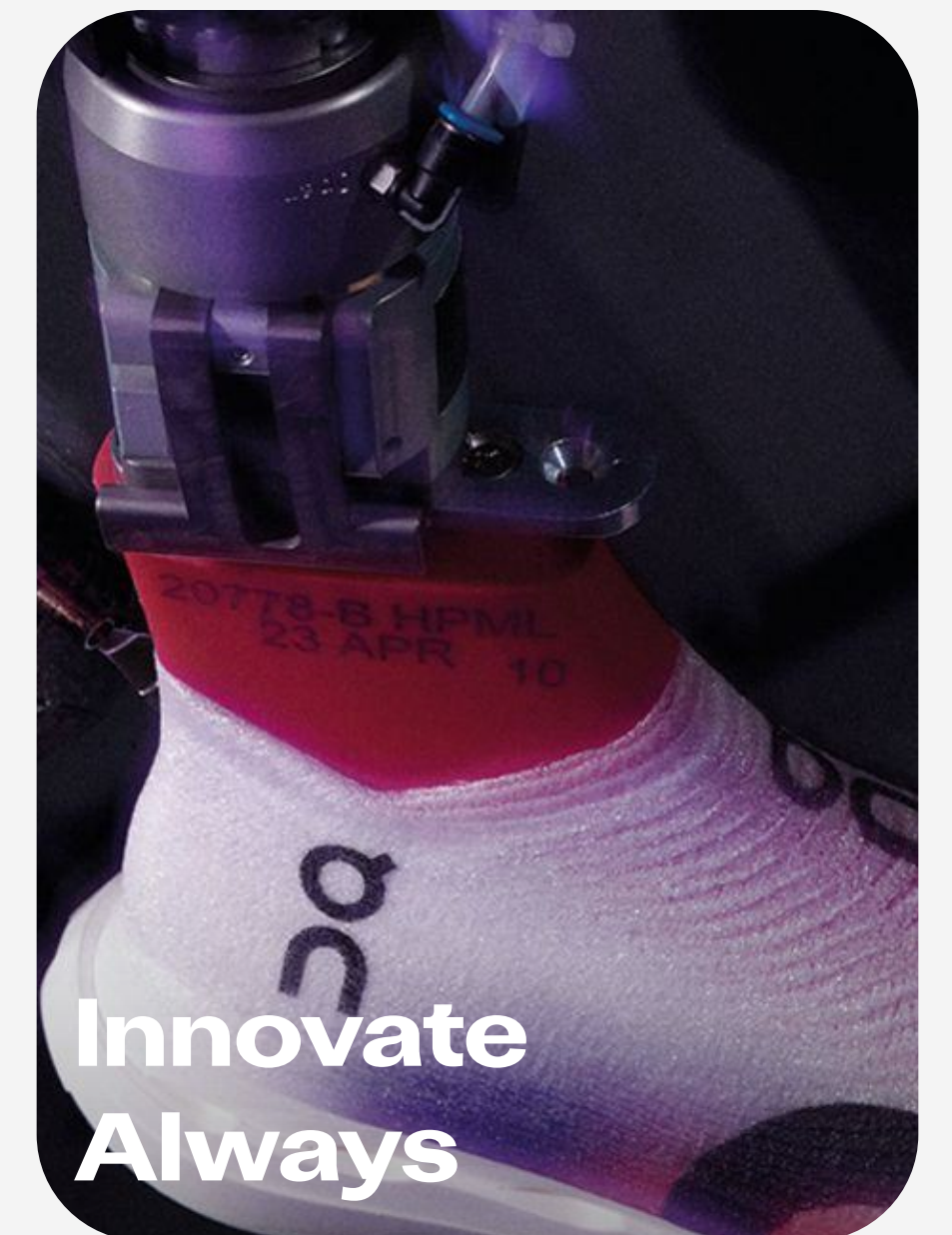
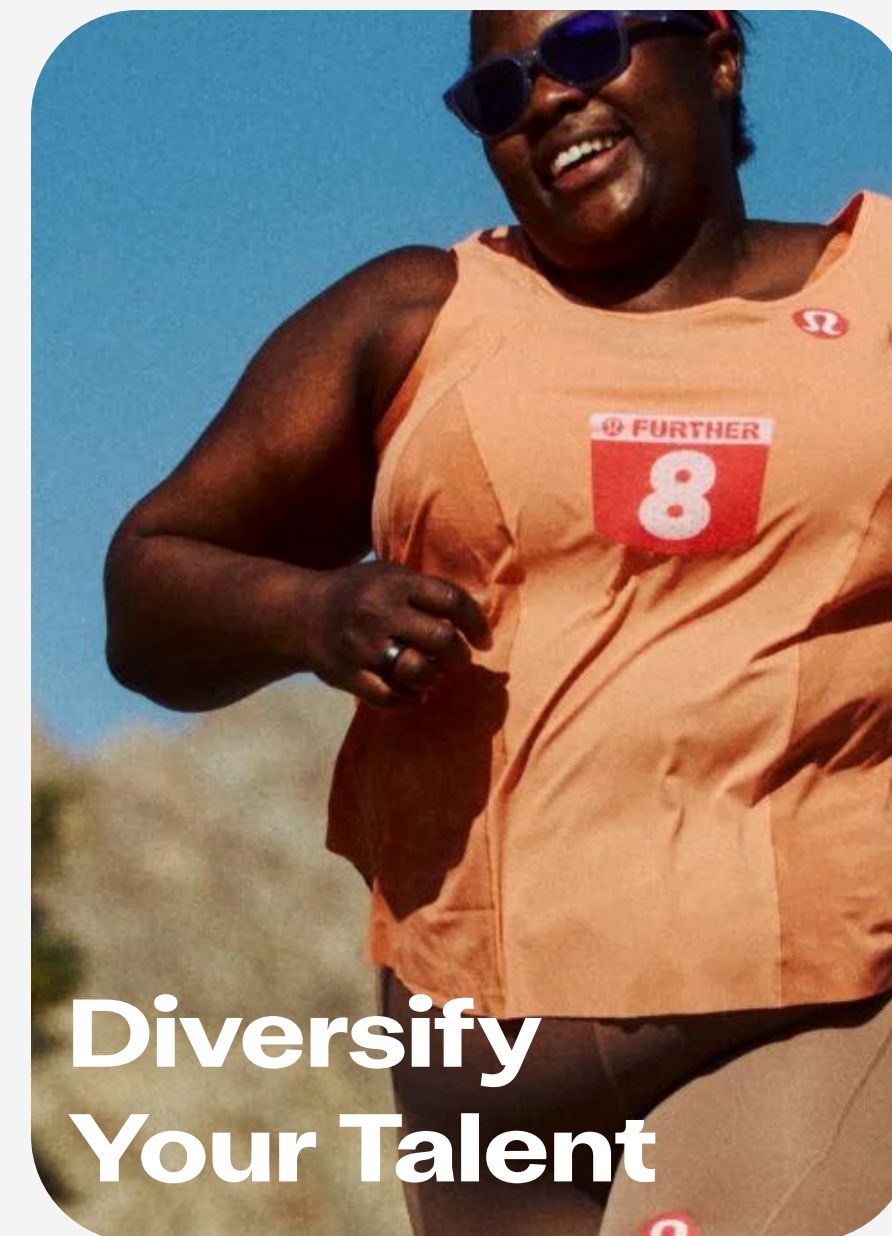
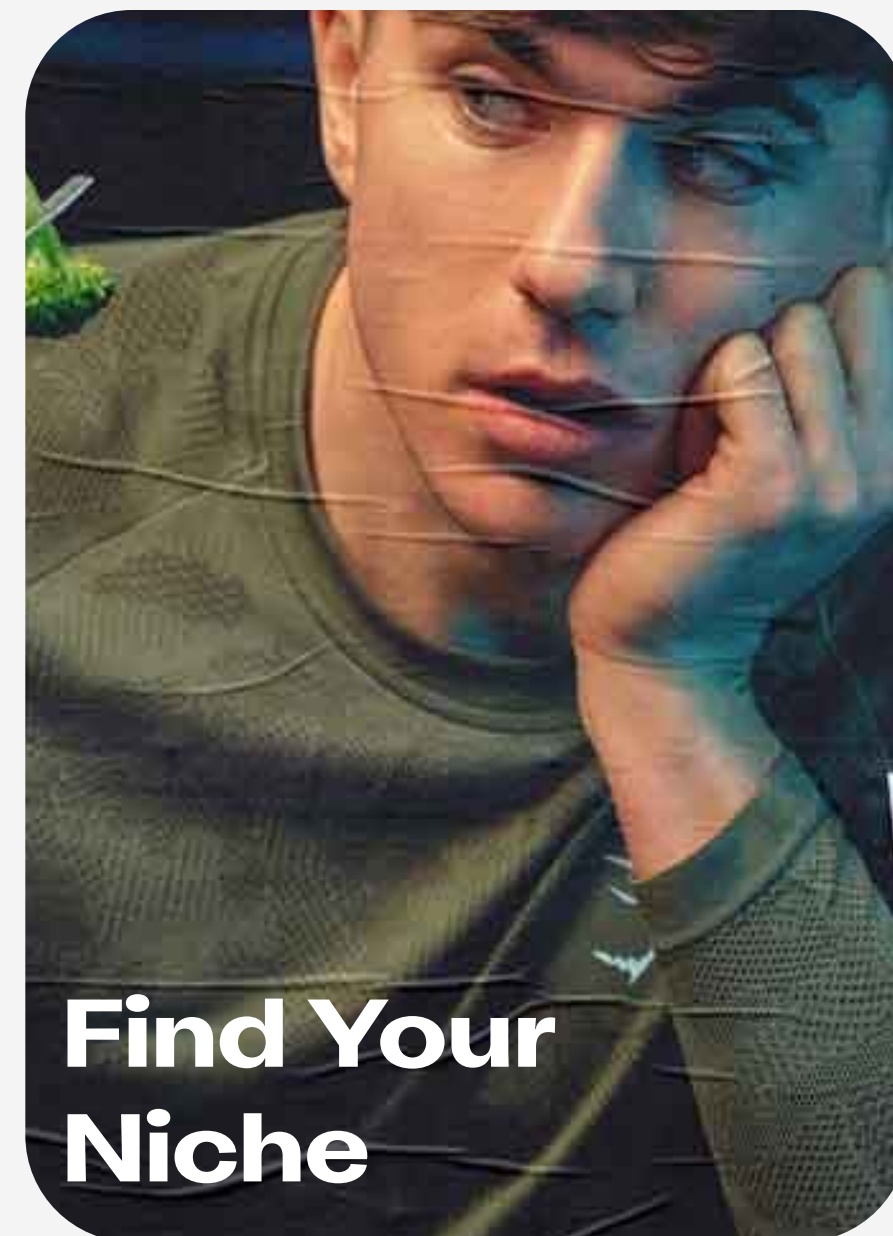
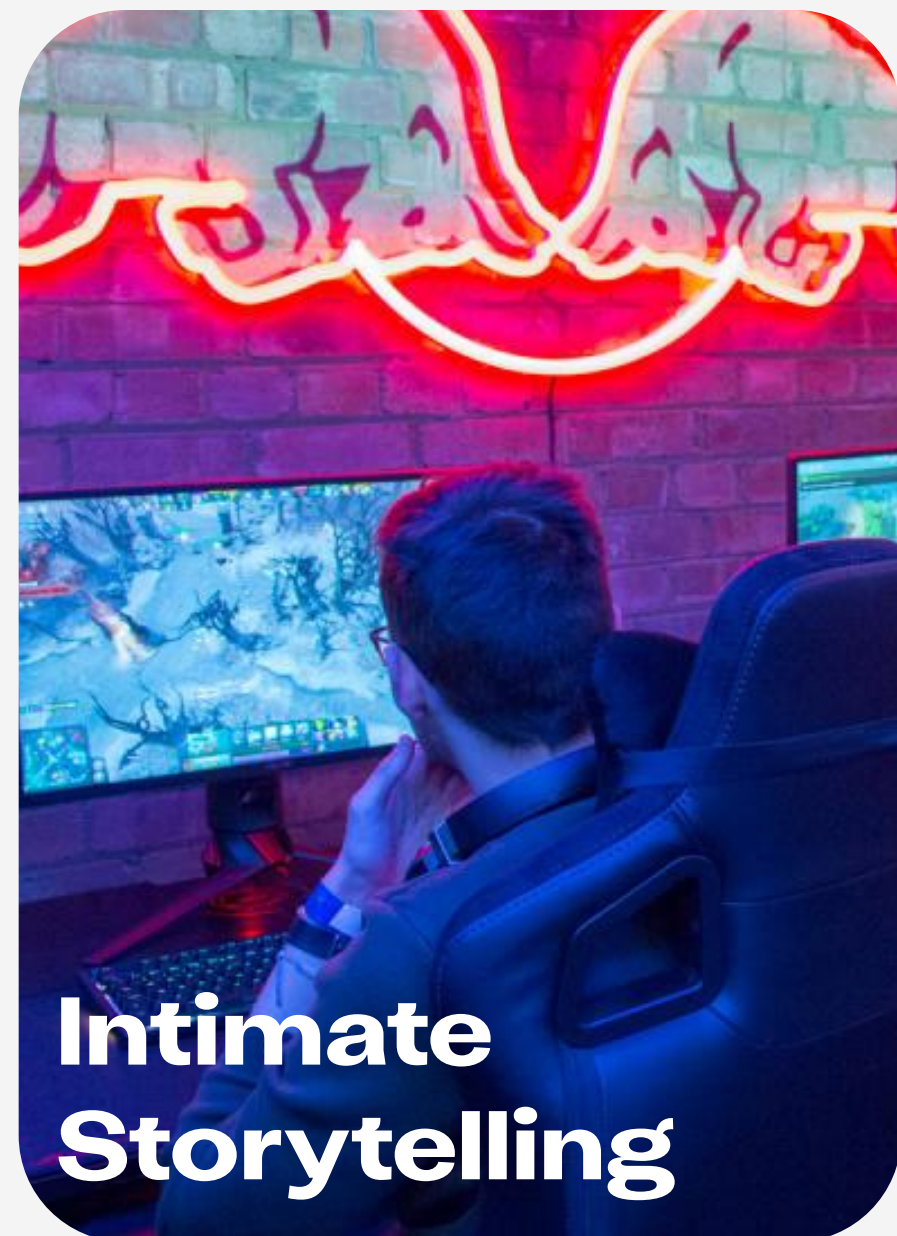
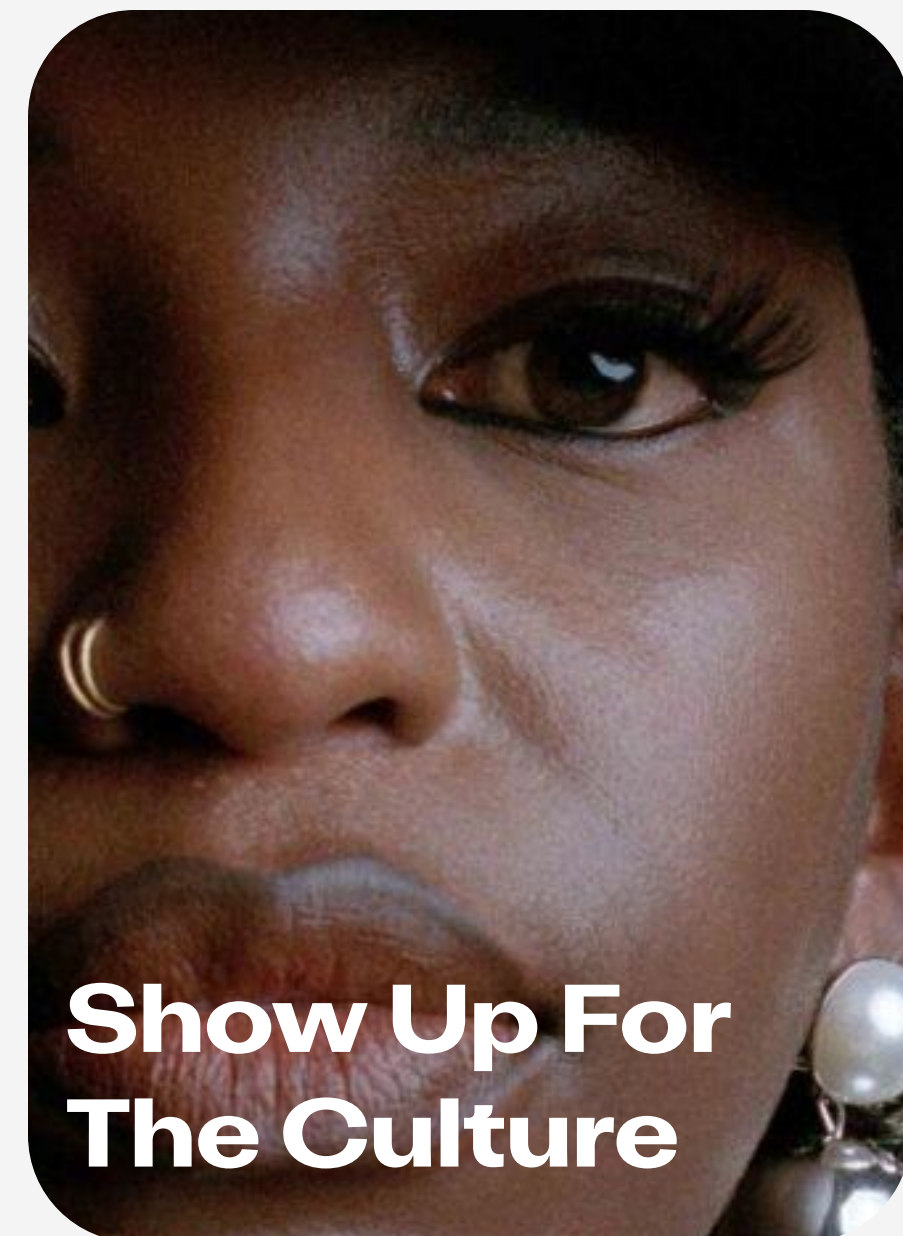
One

Two

Three

Four

Five



What's Changed?

In 2023, fans valued brands for their presence and impactful short-term activity, especially through elite sponsorships and compelling storytelling.

But there has been a shift in 2024.

Fans now prefer longer-term commitments and stories that feel culturally relevant, especially where they offer personal insights into athletes or gamers.

Diversity and inclusion remain vital for fans, while innovation is even more of an expectation for how brands connect and interact with specific communities.



The Need For Hyperfocus

The brands that had the most success this year were the ones that weren't afraid to double down on niches.

Brands like Nike, Gymshark, Guinness and Bose were all applauded by fans for their dedication to impacting fan groups that have disproportionate influence on sport and gaming communities.

Number 1 brand Nike had 5x more unprompted mentions from fans than adidas, showing that the biggest brand in sport and lifestyle still dominates the conversation.

The reason for success? A hyperfocused approach they take to the masses, supercharging their ability to win with young, influential audiences.

These brands haven't abandoned reaching mass audiences. Instead, they've combined huge reach with a focused commitment to highly influential fans to create cultural impact.



RULES OF FAN ATTRACTION

One

Show up For the Culture

Attracts:

Don't wait until a subculture makes the mainstream - focus on which audience you want to engage with, show up early and get involved often.

It feels risky for some but the rewards are plentiful. Fans love brands that make the effort and genuinely 'get it.'

"Adidas has really stepped up in terms of integrating cultural movements and technology into their brand. Their recent collaborations with grassroots organisations show they're not just about high-profile sponsorships anymore"

Repels:

Failing to show up can mean repeating activations that don't resonate or giving up on a previously valued community.

Once darlings of the scene, Burger King's Fan Attraction Score™ declined by failing to consistently show up in the gaming world.

"Burger King is one brand that's fallen off in gaming for me because it's the same thing with them over and over again. It's always Call of Duty without evolving. When they did it initially, it was cool, but the 10th time?"

ANALYSIS

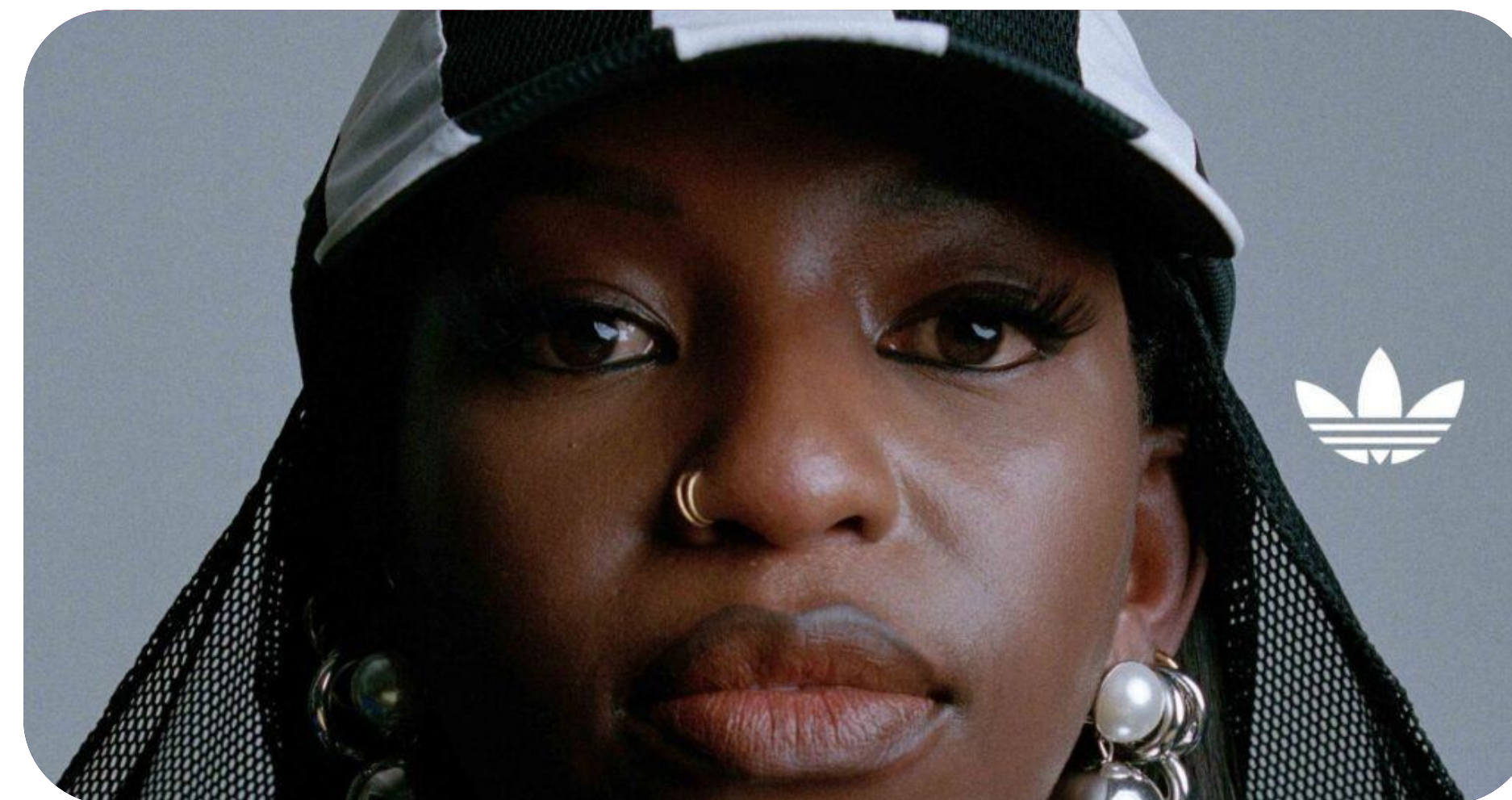
FAN_INTELLIGENCE®_AI

The Past:

Brands were recognised for their involvement in major events and for giving athletes and gamers high-profile platforms to shine.

The Future:

Fans care more about brands that are deeply engaged in local communities, showing up at all levels, not just big moments.



Two

Intimate Storytelling

Attracts:

Find your community, connect with the emotions fuelling fandom and tell the sort of stories that fans tell each other.

Getting intimate means gaining a deep understanding of what makes talent and fandoms tick, drawing out the details that fuel emotional storytelling that resonates with the masses as well as hardcore fans.

“I have a niche gaming hobby, which is in-game photography and Red Bull ran an event called ‘Capture Point’ that celebrated this, players submitted photos and the best photos were actually displayed in a gallery in NYC”

Repels:

Those who fear intimacy fail to connect with fans, who can spot a forced or inauthentic narrative a mile away.

Brands should never forget their privileged position to surprise audiences with powerful storytelling.

“Fans know when a brand is just throwing their name in for the sake of it. And they can see when they’re throwing it in because they believe in the product and understand the connection.”

ANALYSIS

FAN_INTELLIGENCE®_AI

The Past:

Storytelling was key to brand success, with many excelling in creating compelling narratives around their partnerships.

The Future:

A stronger emphasis on hyperfocused, culturally relevant stories that offer personal, behind the scenes insight into talent.



Three

Find Your Niche

Attracts:

Decide whose cup of tea you actually want to be, then go all in.

Audiences love brands that get specific about their audience - like Gymshark speaking to true gym-heads in a language they understand.

“Gymshark focuses on not only building a physically stronger community, but a mentally stronger one too. They know what values matter to the community because they are in the community themselves.”

Repels:

There’s a constant temptation to be all things to all people, but this is a recipe for mediocrity.

Axe fell in the rankings this year - a brand with strong heritage in both sport and gaming - because they haven’t consistently shown up.

“I gave Axe a low score because they haven't changed their narrative. It feels like they position themselves in sports because it's popular, but there's no real connection. It's like, 'Oh, we're a brand for athletes,' but they haven't done the work to really integrate into the community”.

ANALYSIS

FAN_INTELLIGENCE®_AI

The Past:

Brands were appreciated for providing platforms that allowed athletes and gamers to shine in front of the biggest audience possible.

The Future:

Fans value brands that are deeply focused on specific communities, where support is a sign of genuine commitment.



Four

Diversify Talent

Attracts:

Let diversity and creativity come through in your talent choices, while staying relentlessly focused on your message.

Diverse talent allowed the likes of Lululemon to express their mission in new and exciting ways, supercharging a return to form.

"Lululemon took a set of female athletes, had them try their product and do an endurance challenge to show off a side of female athletes that has rarely been documented. It was cool for them to focus on female achievement like that and show their product had the quality to withstand too."

Repels:

We've all seen how getting this wrong can backfire on brands in culture.

Fans don't just see through a lack of diverse talent, they will also call out brands that appear tokenistic.

"I've seen a lot of it because it's very popular these days to do that. Like all the ad campaigns have to have one person from each background represented in one ad, just because they have to. And I think that actually hurts their popularity because then it seems forced."

ANALYSIS

FAN_INTELLIGENCE[®]_AI

The Past:

Diversity from brands was appreciated but often viewed as a secondary benefit rather than a core reason for loyalty.

The Future:

Diversity has become central to fans' expectations who demand that brands authentically represent different genders, races, and abilities.



Five

Innovate Always

Attracts:

Fans are always looking for new products and ways to solve problems, big or small, especially ones that address their specific needs.

On's focus to innovation that benefits athletes is clear to see and has propelled them up the rankings, most recently with their hit shoe at the Paris Olympics.

"On were not on my radar last year, but now they seem to be on everyone's. I heard a lot of good things from other people but, for me, it was seeing the Cloud design, it was completely new. The story they created around it was like nothing I'd ever seen before."

Repels:

Innovation needs to be real and needs to sound real.

If you can't explain a new product or solution without heavy jargon, you haven't nailed it.

"If you are going to use tech talk you should know the key areas we look at because this tech is probably in those places. We want to know how the product actually helps us, all this tech is overselling the brand and not the product."

ANALYSIS

FAN_INTELLIGENCE[®]_AI

The Past:

Innovation was valued for its impact on product quality and technological advancements.

The Future:

Fans want to be surprised by innovations that provide focused, bespoke solutions to their problems, attuned to how brands adapt to specific needs in their cultures.



SPORTS VS GAMING

Passion Points

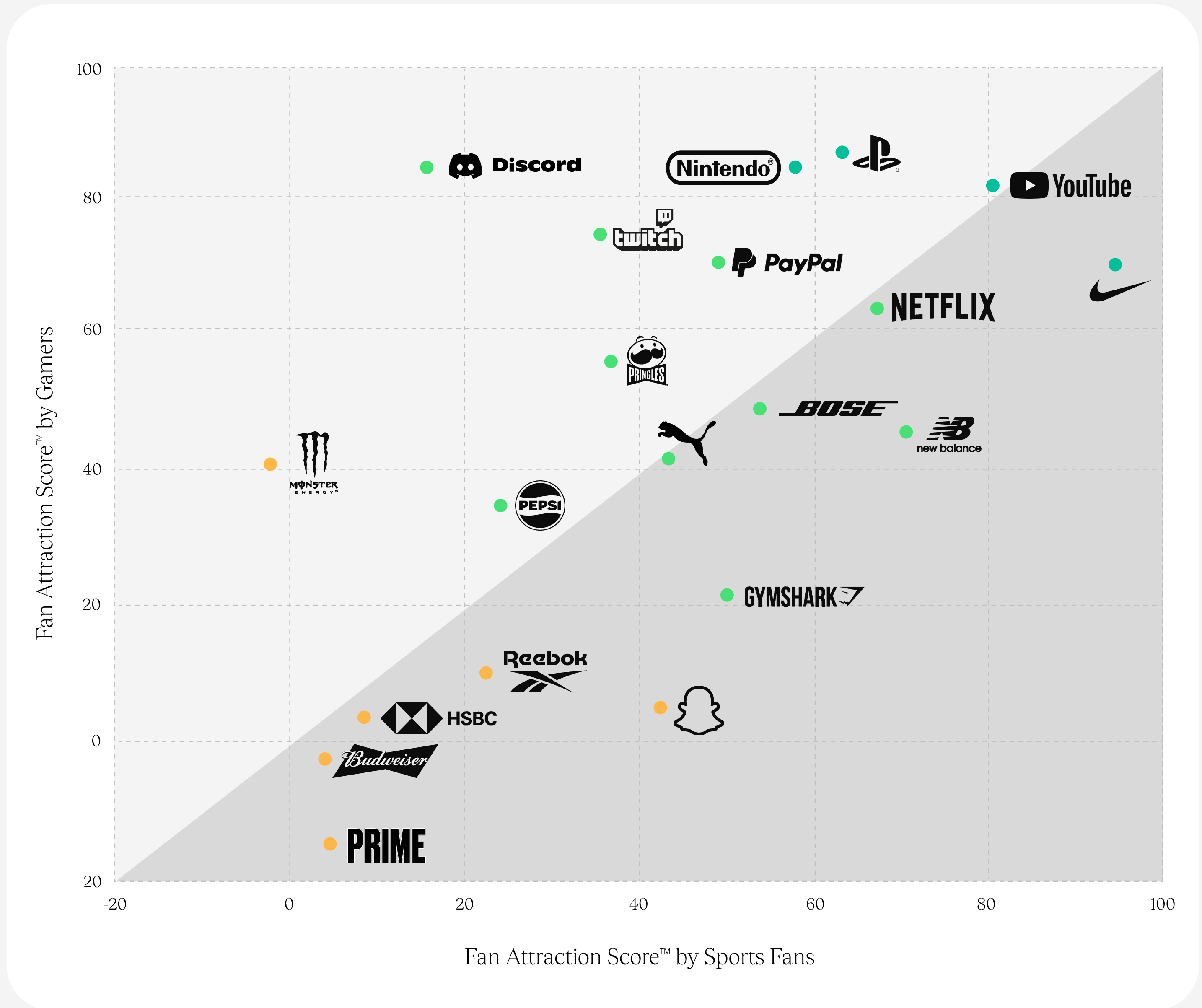
Choose them carefully.

Fans are not one-size-fits-all. If you think the same rules apply across all passion points, you're mistaken.

Nowhere is this contrast more evident than between sports and gaming fans.

Some brands resonate with both groups, others connect with just one, and many struggle to reach either.

To succeed, brands need a focused, tailored approach that recognises the unique needs of sports and gaming fans.



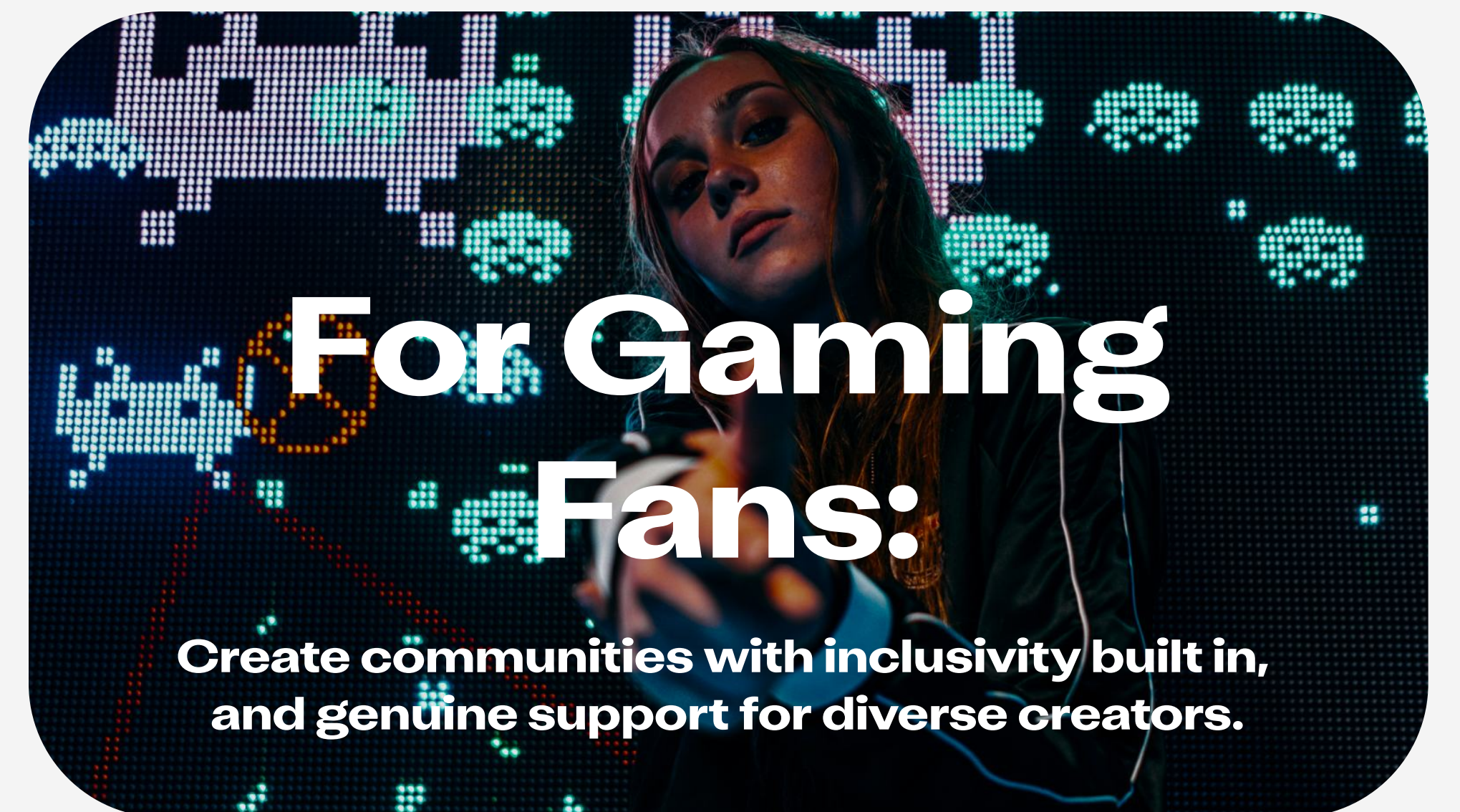
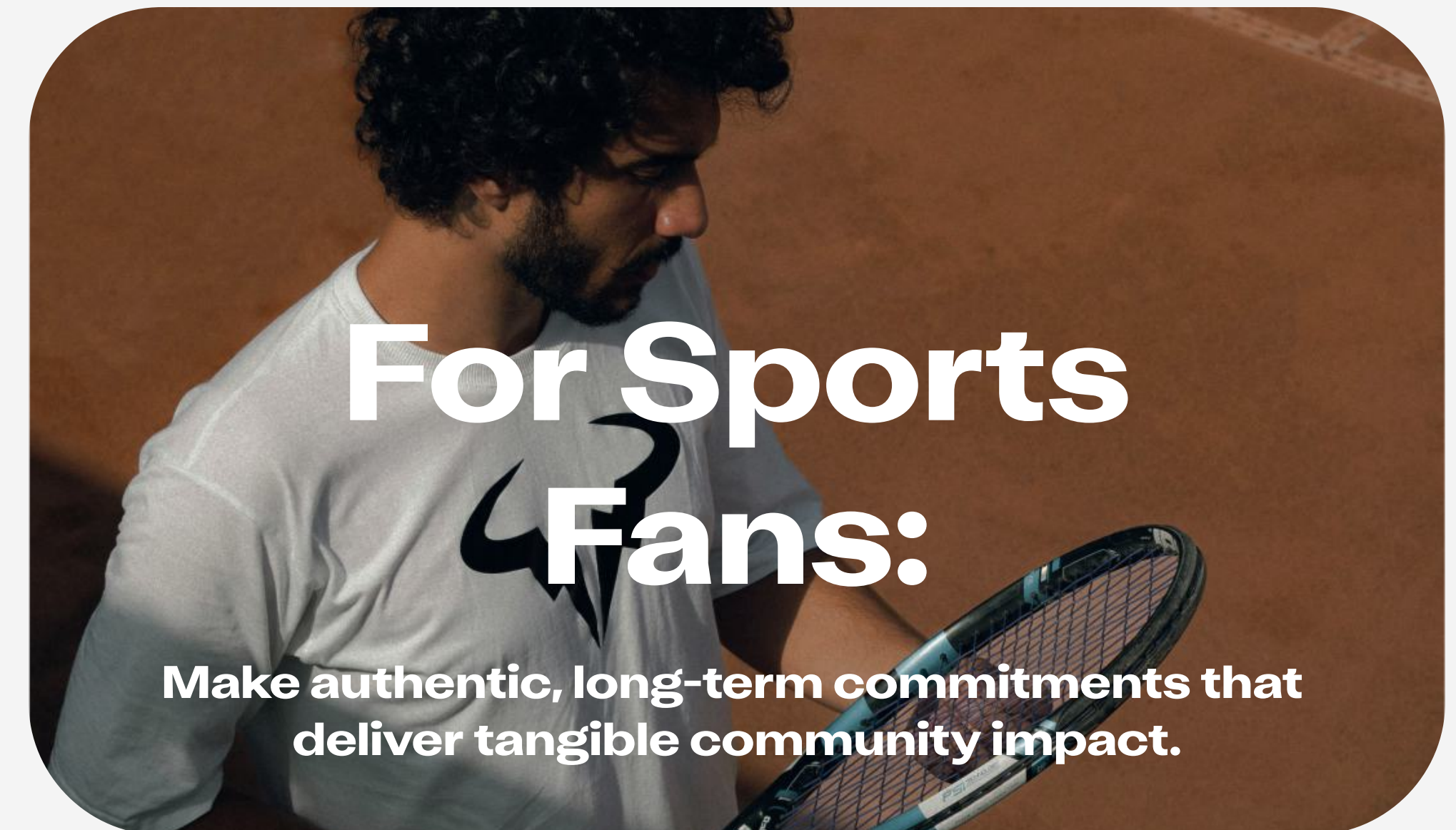
Fans are Seeking Community

Despite their differences, **Fan_Intelligence®_AI** has revealed an important shared truth with what both sports & gaming fans desire from brands; a heightened expectation for hyperfocus in their communities.

There are some nuances in how they want brands to show up.

Sports fans look for long-term engagement with the grassroots.

Gamers emphasise the importance of building inclusive and supportive communities within titles and on social.

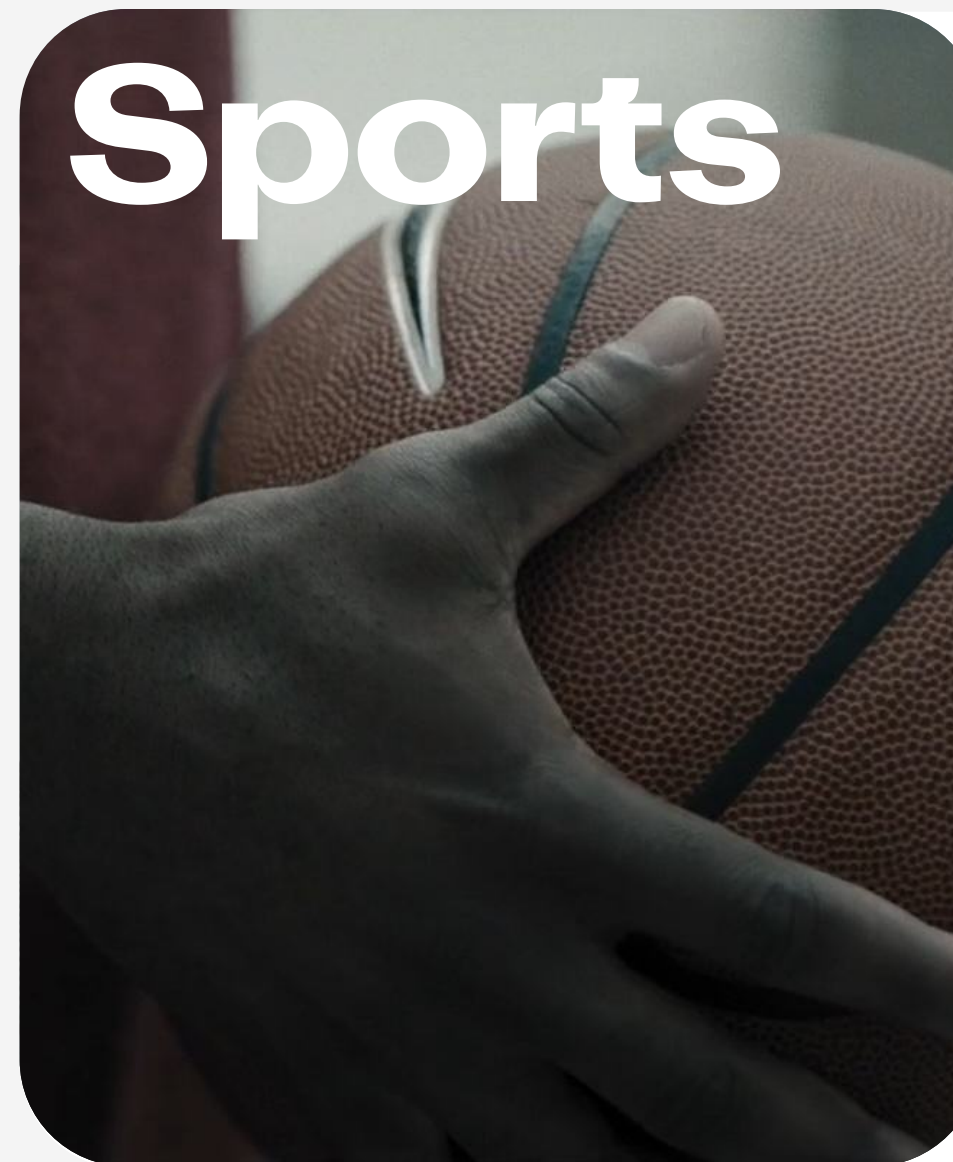


Future Priorities

Digging deeper into the nuances that drive sport and gaming fans, we've found important linguistic differences that provide clues for how brands need to show up for both audiences.

This year, we asked Fan_Intelligence®_AI to perform an advanced linguistic analysis on fan responses.

This allowed us to find nuances that human researchers can struggle to identify.



Long-Term Commitment:

Phrases include "ongoing sponsorship", "consistent presence", and "long-term connection".

Social and Environmental Responsibility:

Words such as "sustainability", "social impact", and "standing for causes" indicate elevated interest in brands that demonstrate responsibility.

IRL Engagement:

Fans emphasised "in-person", "community" and "face-to-face interaction" as critical for brand connections post-pandemic.

Diverse Representation:

Increasing use of terms like "diverse", "inclusive", and "representation" reflect a growing expectation for inclusivity.

Tackling Toxicity:

A push for "positive community", "anti-toxicity", and "safe spaces" shows concerns over gaming brands' roles in fostering ethical behaviour.

Storytelling:

Emphasis on "true narratives", "authentic representation", and "natural characters" in gaming IP.

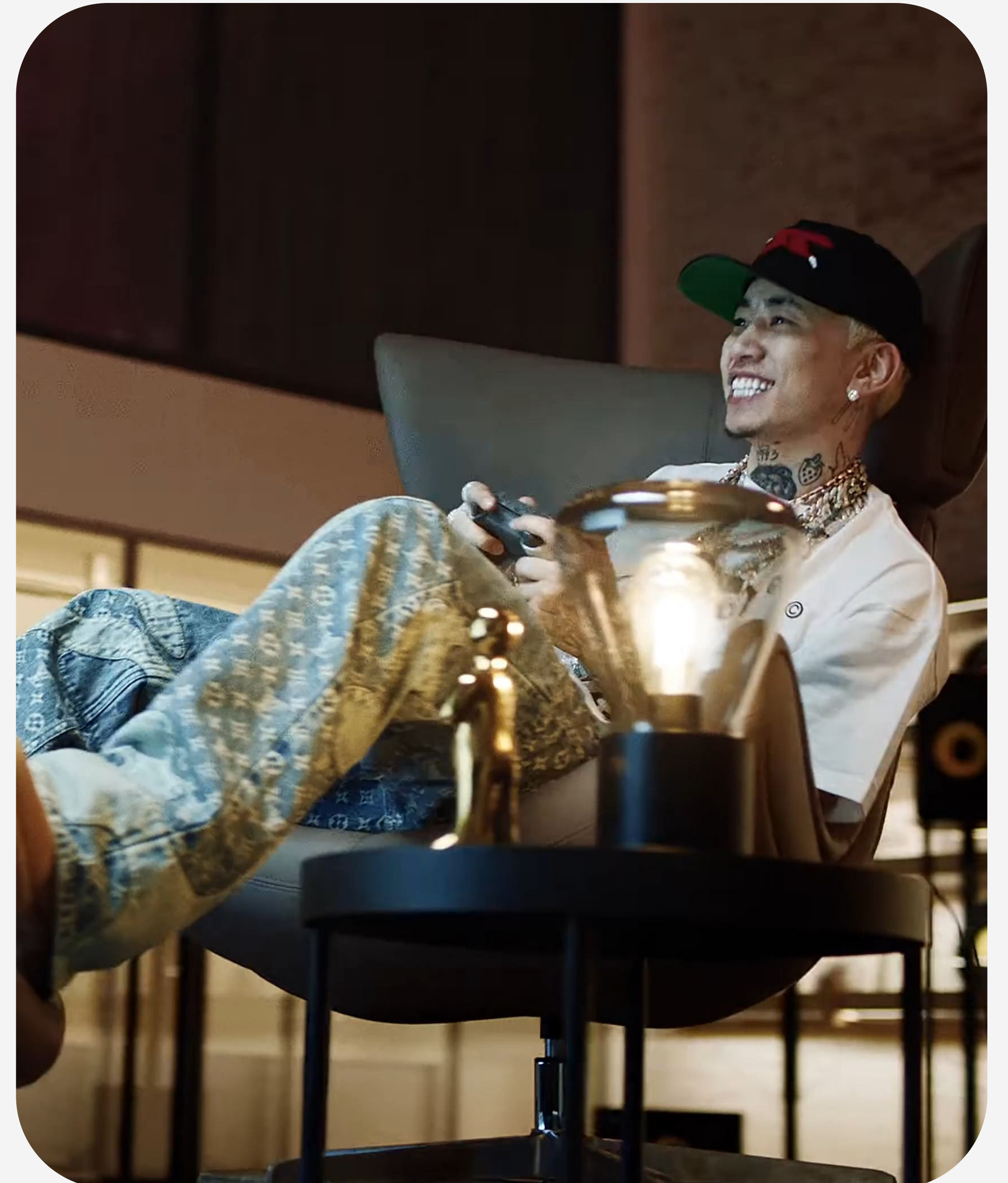


Adapt or Die

Brands must recognise the differences between sports and gaming fans; a one-size-fits-all approach will fail to resonate.

Both fan groups value community, but sports fans prioritise long-term community engagement, while gamers focus on inclusivity and support within spaces where their favourite titles and influencers show up.

Hyperfocused strategies with both fan groups should reflect these priorities - with sports fans valuing ongoing sponsorship and face-to-face interactions, while gamers seek authentic storytelling and efforts to tackle toxicity in their communities.



CONCLUSION

Conclusion

Fans are often seen as fickle, but the trends driving this year's Fan Intelligence® Index look to be deep-rooted and set to define the future of our industry.

Hyperfocus should be a rallying call to marketers to bring more discipline to their work.

It's time to double down on the audiences, niches and talent that make the difference, then take them to the world.

Too often we jump to what's shiny and new. Growth doesn't just come from adding new stuff, but from strengthening what's already there.

Hyperfocus sounds simple but it's far from easy.

For many brands, in a world of tightening budgets and growing sets of stakeholders, it's an argument that needs to be won internally.

But winning that argument is vital for the future of your brand and our industry.

The fans have spoken. It's time to focus.





Find Your

HYPERFOCUS

The Fan Intelligence® Index is just a taste of what can be learnt by speaking to fans at scale and in real time.

Our world-class strategists and creatives collaborate in real-time with our global network of 11,000 fans and cultural tastemakers.

Now bolstered by Fan_Intelligence®_AI, we can produce better, faster insights, leading to better work, and better results for brands like yours.

EAR TO THE GROUND

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