Using social data to chart the trends and category shifts that matter most

JUN - NOV 2020
Welcome to the fourth edition of Crowd Tracks – our social data series highlighting trends at the intersection of brands and culture. This time, we’re looking at gaming: analysing conversation in what’s been a bumper year for gamers and the industry alike. By using social data from the last six months, we can track consumer sentiment, explore conversations at scale and uncover learnings for brands playing in this space. We call this our Culture At Scale method. Highlights from the report include:

— BTS’ recent venture into Fortnite; why a Tony Hawk’s Underground Skater trick was renamed, and how an Indian developer is educating players about the country’s colonial past.

— We use Instagram data to break down some of the biggest conversations of 2020. Looking at the most mentioned games, we unpack the mega-success of Animal Crossing as well as the continued reign of battle royale multiplayers, Fortnite and PUBG.

— Under the trends section we explore the rise of games as cultural ecosystems, with their new found routes to housing entertainment and brands beyond gameplay. We also chart the recent steps being made toward greater representation in the industry – but, as we’ll show, diversity in gaming still has a long way to go.

Culture moves fast in the world of games. By turning to social data, we can spot the next big thing via patterns in online consumer behaviour. If you have any questions about this report, please get in touch.
Viral Stories
THE TOP NEWS STORIES SHARED ON SOCIAL

**US**
Contrary to popular belief, a recent survey by WePC found that 37% of gamers felt that playing games has a positive impact on their mental health, with just 8% saying the opposite. 46% also report gaming to be a useful distraction from the pressures of everyday life.

**UK**
The UK government has launched an inquiry into loot boxes in mobile games (randomised items paid for during gameplay). They've asked the public for evidence following concerns that the games are exploiting children through addictive mechanisms.

**SOUTH AMERICA**
Online video gaming is seeing the fastest growth in popularity in South America - specifically Mexico, Argentina and Brazil. Games such as League Of Legends and World Of Warcraft are becoming hugely popular in the region, where the market is expected to grow 12% this year.

**CHINA**
Chinese mobile sensation, Game For Peace, recently hosted one of the world’s biggest virtual music festivals, gaining over three million views on Weibo. The brand also ran offline events at nightclubs, further expanding the franchise into the real world.

**SOUTH KOREA**
Following the likes of Steve Aoki and Travis Scott, BTS are the next pop sensation to launch new content via Fortnite. The video for their new track Dynamite was released during a virtual performance and viewed 101 million times in the first 24 hours.

**FRANCE**
Despite shares growing by 32% this year, Activision Blizzard Inc (of World Of Warcraft fame) decided to shut their original HQ just outside Paris, causing outrage and protests from the 400 workers who were employed there.

**INDIA**
In an effort to educate younger generations, a new game developed in Gujarat takes players on a journey through the country’s colonial past. The Indifferent World Of Edible Places brings real historical stories to a new audience through surrealist gameplay.

**US**
Following the remastering of the original Tony Hawk’s Pro Skater game two decades on, Hawk has renamed one of the classic tricks the ‘mute air’ to the ‘Weddle grab’, after the deaf skater Chris Weddle requested it be changed.
The brands that drove the most conversation & why

1. **ANIMAL CROSSING**
   - 67m mentions | 13m authors

2. **FORTNITE**
   - 20m mentions | 9m authors

3. **MINECRAFT**
   - 16m mentions | 6m authors

4. **PUBG**
   - 13m mentions | 6m authors

5. **FINAL FANTASY**
   - 5m mentions | 2m authors

**ANIMAL CROSSING**

The standout game of the year, and by far the most spoken about online, is the social simulation series, Animal Crossing. During the uncertainty of 2020, the game’s simple mechanics and charming predictability have helped position it as the perfect distraction for players of all ages. The game also facilitates social interaction during times of restriction, making it a popular and ongoing resource.

**SO?**

More so than ever, gaming is being presented and accepted as a tool for self care. This is a narrative shift from gaming as a disrupter, to an enabler, of mental wellbeing. It also positions games as positive, mainstream spaces for partnerships and activations.

**FORTNITE**

The juggernaut that is Fortnite has continued to drive conversation this year as it becomes further embedded within mainstream culture. Social media is inundated with Fortnite inspired memes, replay clips, gaming art and TikTok choreography. The game is also becoming a fully-fledged entertainment venue in itself, regularly featuring music premieres and film trailers as part of its growing ecosystem (see page 8 for more detail).

**SO?**

Games such as Fortnite are establishing themselves as cultural hotspots that all internet users (not just gamers) will want to interact with. Listening in and learning the lingo can provide tactical inspiration for communicating with new, potential audiences.

**MINECRAFT**

Like Fortnite, Minecraft continues to remain relevant through constant innovation and new in-game features. The recent Minecraft Live 2020 event hosted millions of players and offered a sneak peak into the future of the game and its spin-off, Minecraft Dungeons. It also acted as a platform to reveal ‘Glowsquid’, the most popular new character, as voted for by fans.

**SO?**

Online games are constantly reinventing themselves to stay relevant to their players. MMOG’s (massive, multiplayer online games) are masters at retaining engagement through their freemium models, which are more like subscription services than standalone products. Brands with a similar service model can learn a lot from them.
Gaming: Behind The Hashtags

INSTAGRAM IS FULL OF GAMING CHATTER — BUT WHAT DOES IT ALL MEAN?

TITLE TALK
Game chat revolves around titles. Despite fierce competition, Fortnite is still dominant and occupies 11 percent of the total posts here, continuing to represent strong cultural currency among players. This ranges from content through #fortnitegameplay, to #fortniteclansrecruiting where people seek others to play with.

GAMING GAFFS
Humour is essential in gaming culture. Each game has its own idiosyncrasies and inside jokes that tap into the lighthearted side of gaming. Looking at mentions of #pubgfunny, for example, there are memes that mock lad culture, getting in trouble at school and other real life situations outside gaming.

COMMUNITY BUILDING
Many players use social media to publicise themselves or their clans. By promoting themselves with #streamer or #esport, professional players can raise their profile and find like minded others. This speaks to the increasingly commercialised nature of gaming as big brands begin to muscle in and players become more savvy.

CREATIVITY & MERCH
It’s not just by playing that people can make money from gaming. #art, #anime and #photography also provide potential income streams. Twitch streamers and gaming personalities are also branching out into fashion, with examples including the FaZe Clan member SWAGG launching his ‘Nuke Squad’ collection, and Ninja’s recent collaboration with adidas.
Tell Me Why
THE BRAND THAT GOT US TALKING

Game developer Dontnod has followed their much revered Life Is Strange series with another progressive and story-led game, Tell Me Why. The choose-your-own-adventure follows siblings Allison and Tyler (the first trans lead in a major game), as they reunite in small town Alaska and are forced to sift through their past in order to sell the family home.

Dontnod have never shied away from confronting challenging issues, such as police injustice, immigration and environmental degradation. Tell Me Why is no exception. With Tyler voiced by trans actor August Aiden Black, the game confidently addresses queer representation in gaming, without it being the sum of his character’s personality.

The characterisation and plotlines of Tell Me Why take players on a compelling and mature journey rarely seen in other games. Visually stunning and cinematic in tone, the game’s three chapters were released weekly, with subsequent choices made by players impacting the narrative each time. Comparisons to Netflix’s hit series Bandersnatch have seen Tell Me Why eclipse other choose-your-own-adventure titles when it comes to storyline choice, emotional depth and player investment.

The game also explicitly tackles mental health issues, marking another point of difference within the world of gaming. The player controls the protagonist as he struggles with memory loss, grief and dark emotions while attempting to piece his past together. In summary, Tell Me Why confronts what most games shy away from by blending escapism with meaningful storylines and honest, well-considered identity representation.
Emerging Trends

1. Crossover Culture

The pressure is on for games to expand into surrounding culture. Big hitters are already fast becoming 360 degree entertainment hubs; running concerts, launching brand activations and hosting film premieres in their growing gaming ecosystems.

2. Reality Strikes

Developers are beginning to reflect greater diversity in their games. Whether it’s leading with minority groups, representing the gender spectrum, or equipping characters with a wider range of powers, players are starting to expect more from the games they choose.
Crossover Culture

Gaming has come a long way from its nerdy roots. In a time of massive online multiplayers and eSport celebrities, games are playing an increasingly influential role in wider culture. Platforms like Twitch and Discord are mobilising players (and viewers) like never before, providing a lucrative new avenue for brands to reach global audiences.

Savvy musicians and labels were some of the first to be experimenting on these platforms. Travis Scott created a giant 3D avatar of himself in Fortnite, Soccer Mommy performed in Club Penguin, while American Football used Minecraft and Discord to host a gig and chat with fans. These routes provide an exciting alternative for gamers, as well as a new way for artists to cash in, often via add-ons of virtual merch sales.

Fashion brands are getting in on the act now, too. Gucci recently partnered with content creators Harrie and Grimcookies to launch a fashion line in Sims 4, while Louis Vuitton branded a lethal weapon with its signature pattern in League Of Legends. Even politicians are getting involved. In the 2020 US election, Joe Biden’s team created their own island in Animal Crossing for people to learn about his campaign and put placards outside their virtual homes.

NEXT STEPS
Having started pre-pandemic, gaming is now firmly on the way to providing brands with an entirely new arena to communicate with people, not just players. There is no blueprint on how to do it yet, but brands should start by taking a bespoke approach to each title in order to add value in a way that’s truly native to the game.
Crossover Culture

IN THE DATA

MOST MENTIONED FORTNITE CONCERTS
(JAN 2019 - OCT 2020), GLOBAL (ENGLISH), TWITTER, YOUTUBE, REDDIT, TUMBLR

MOST MENTIONED CELEBRITIES ON ANIMAL CROSSING
(MAR - NOV 2020), TWITTER, REDDIT, BLOGS, FORUMS, INSTAGRAM

Mentions of music and film launches in gaming have increased by 474% in the last 6 months across the globe.

Conversation about fashion launches in games has increased by 170% in the last 12 months globally.

Music & Film in Gaming

Fashion in Gaming

Gaming and Crossover Media

Total Posts (Jan 2019 - Oct 2020), Global (English), Twitter, YouTube, Reddit, Tumblr

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MARC JACOBS & VALENTINO ANIMAL CROSSING LAUNCH
MOSCHINO X SIMS
STAR WARS: THE RISE OF SKYWALKER FORTNITE TRAILER LAUNCH

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Crossover Culture

WHAT ARE PEOPLE SAYING?

Many players proudly promote and advocate for parties and virtual events in video games. Specific community codes apply to each game and clan. For example, in Minecraft, BYOG means 'bring your own gold' as a means to create excitement and exclusivity around the events. Players also feel comfortable letting their hair down in virtual spaces, borrowing from pop culture through slang (“lets get lit” or “quarantine queens!”), or sporting branded outfits and merch.

SO?

Gatherings in video games offer players new ways to engage with their friends and favourite brands, artists and characters, with an ease of access. There’s also much more freedom involved in navigating virtual worlds. Meeting new people without the usual social pressures and experiencing something deeply immersive together is an instantly bonding experience. Brands should think about ways they could foster this sense of community and positivity in games; adding value to the experiences or curating new events, all while staying true to game culture.
If you’re old enough to have played video games in the 90s, you’ll probably remember taking the reigns of action-hero Lara Croft. As the protagonist of cult classic, Tomb Raider, Lara was a hyper-sexualised image of a woman in gaming. Her eventual evolution into a more realistic and complex character provides insight into how gaming has shifted. But why has it taken so long?

Surrounding culture – from the media and beauty industry, to films and TV – have come on leaps and bounds when it comes to reflecting diversity, but the gaming world has lagged behind. This is largely due to the toxic male energy among certain gamer groups, which in turn causes developers to resist positive change. Cyber bullies and anonymous movements like #GamerGate have had too much freedom to spam hate on chat forums, casting a dark cloud on the gaming world.

That’s why big budget title The Last Of Us caused such a stir this year by featuring a muscular, female lead (a lesbian character who also gets her own sub-game where she comes to terms with her sexuality). Predictably, this enraged certain fan groups, but stood as a courageous step for the gaming industry. In another positive move, Tell Me Why also spotlighted a trans lead with mental health issues (see page 6). Importantly, these weren’t just tokenistic inclusions, but enriched characters with stories reaching far beyond their sexuality. Thanks to gaming’s growing popularity, greater connectivity and exposure to wider audiences, developers are starting to take these risks because consumers genuinely want to see them.

**NEXT STEPS**

Despite these advances, diversity in gaming still has a long way to go. Jay-Ann Lopez, creator of Black Girl Gamers, argues that white, male characters are by far the best portrayed while their minority counterparts often fall prey to stereotypical tropes. Movements like #RaiseTheGame and non-binary eSports players like SonicFox are of vital importance, shedding light on this issue and helping to demand change.
In the UK & US, conversations around diversity, representation and negative stereotyping in gaming has been steadily rising for the last three years. Twitter, Tumblr and Reddit are extremely popular among gaming communities, where discussions of diversity are always a contentious topic.

**TOP TWEETS:**

1. @Fautanagrotesque questioning wider homophobic attitudes in the predominantly male, heterosexual gaming world.
2. @Gyrolliverpool promotes trans activism through the medium of gaming, helping to spread positivity and awareness on social media.
3. A viral tweet from @Wordglass discusses the figure of Abby, the muscular female protagonist of The Last Of Us 2, in response to negative stereotypical comments online.
Reality Strikes

WHAT ARE PEOPLE SAYING?

Diversity in games brings about mixed responses on social media. Many people are celebrating the range of experiences and characters available to play; for example Animal Crossing was lauded for the ability to play an Asian woman equipped with saris and bindis. On the other hand, some players feel like their groups are poorly represented in games, either for reinforcing stereotypes or for actively discriminating.

SO?

More and more, people expect to see real life stories in the media they consume, and while they have lagged behind, games are no exception. Brands should think about providing real representations of minority experiences through in-game activations and partnerships, while confidently calling out trolls and prejudice.
How We Worked It Out

**METHODOLOGY**

Our Culture At Scale method uses unstructured data taken from forums, search, social, review sites, client sales and behavioural sets to uncover cultural insights. Merging data sources and using AI and machine learning for speed of analysis, we reach provocative outcomes to evidence trends and support innovation.

While each Crowd Tracks report covers a four-six month period, we often go back further to add more historical context to data points and cultural developments.

Each social platform has different data privacy and sharing conditions, which means the datasets we have access to are incredibly varied. Twitter, for example, allows full access to conversation data, while Instagram and Facebook are more private with heavy restrictions. Additionally, by nature of Twitter’s popularity in the US and other Western markets, the data is likely skewed towards brands and campaigns present in these markets. In the creation of each report, we always endeavour to take these nuances into consideration and provide as truthful a reflection of the conversations as possible.

Culture At Scale fits within our Crowd Signs specialism – our team focused on unlocking future potential, and where we also house semiotics, trends expertise and our KIN network (see right). These interlinking methods help give us a head start on what the interesting category developments are and how they relate to broader cultural shifts.
Thanks for reading

Part of our Crowd Signs specialism, Culture At Scale allows us to deliver audience, category and brand insights to meet a variety of research objectives.

Harnessing large sets of publically available data allows us to add richness to our range of other research and strategy tools spanning qual, quant and semiotics.

As a methodology, it can be used as an agile and efficient way of responding to challenges, able to add value at any stage of the project, or as a detailed method alone combining qualitative and quantitative understanding. It can also be powerfully combined with a range of different datasets, including Google Analytics, search data and behavioural data sets, allowing us to cross compare a variety of influencing factors.

If you’d like to discuss how our Culture At Scale offering could help your business, please get in touch for more information.