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

NOV 2020 - FEB 2021

SEX & RELATIONSHIPS
The Highlights

For our fifth edition of Crowd Tracks we’re exploring sex, love and relationships. This topic is buzzing with complexity so, as usual, we’ve honed in on social conversation to grasp the most immediate happenings. After a year quite unlike any other, sex and relationships are in flux. By analysing social data from the past four months, we can begin to understand how these topics are shifting. We call this our Culture At Scale method and we use it to keep our finger on the pulse of change.

— Highlights from the report include celebrities coming out (or not) on TikTok, the sex tech brand that broke CES, why influencer endorsements can be problematic, vibrators that track orgasms, and why so many people are suddenly celebrating abstinence.

— Elsewhere, we take a look at how the way we talk about love has changed, including the rise in ‘twin flames’ and ‘love bombing’. Using image analytics software on 450,000 public Instagram posts, we’ve also explored the current visual cues that represent ‘love’ as we try to keep romance blossoming in a pandemic world.

— In the trends section, we unpick the science of love and how our obsession with data and tracking is reconfiguring our sex lives – from astrology to apps that ‘hack’ sexual wellness. With over half of young adults stating that they’d prefer to be single, the way we consider coupling is also shifting. Our second trend looks at this and how singledom is moving from a stance of empowerment to a form of self-care.

Culture moves fast when it comes to sex and relationships. 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 or to discuss Culture At Scale, please get in touch.
**The Top News Stories Shared On Social**

### Argentina

“Es ley” meaning “it’s law” was chanted in the streets as Argentina became the largest Latin American nation to legalise elective abortion. The law brings safety to women who experience violence after becoming pregnant, and the green worn by supporters continues to serve as a symbol of feminism across the country.

### US

Singer, dancer and TV personality, Jojo Siwa, recently came out as queer on TikTok via a video set to Lady Gaga’s Born This Way. Like Lil Nas X, the blase nature of Siwa’s ‘announcement’ helps normalise the experience for her younger fans. In fact, the message was so subtle that it led to significant confusion among viewers.

### UK

After immense popularity, I May Destroy You, a TV series about one woman’s sexual assault reckoning, was denied a nomination at the Golden Globes. Fans saw this as a blow; not only to the show’s creator, Michaela Coel, but to her story and what it represents for survivors.

### Poland

In an effort to improve narratives around women and sex, Poland’s leading porn mag, Twój Weekend, launched The Last Ever Issue. Instead of featuring its usual scantily clad images of women, this edition focussed on stories of Polish feminists and ways to spread awareness. It was met with mixed reviews online.

### France

After years of failed attempts, the French government began the motions to establish an age of sexual consent. In the global outpouring following #MeToo, light has been shed on France’s inability to hold sexual predators accountable. This movement, widely supported on social media, seeks to address that.

### Japan

The Japanese government is funding research into AI matchmaking – many think as a response to declining birth rates. The technology currently matches across age and income, but intends to take hobbies and values into consideration soon. There’s concern around its effectiveness as more and more people claim to be uninterested in dating.

### India

Shuddh Desi Gay is a new podcast exploring what it means to be gay in India. Hosted by a couple from Mumbai, the series is India’s first openly-gay podcast. It examines the queer experience in their country, as well as other controversial topics, including coming out and polyamory.

### US

Leaked Instagram DMs pointed to actor Armie Hammer’s BDSM tendencies, which appeared to include cannibalism. The internet went wild debating the difference between a kink and abuse, with some conversations pointing to how men in power often hide behind the guise of a ‘kink’ to harm women.
In a world paralysed by a pandemic, dating culture has been turned upside down. The language used to talk about dating has changed too, with certain phrases and terms going in or out of fashion as people express themselves differently online.

First, and perhaps no surprise, conversations about hooking up have dropped by a quarter in the last four months (-25%). Forced into a world of DMs and Zoom dates, there’s also been a rise in love bombing (+19%) – the showering of digital affection that generally turns out too good to be true. Finding the perfect match is back, albeit in the new form of twin flames (+51%); see definition to the right. Think of it as soulmates 2.0.

People are also more in love with love talk. Love language (+26%) and #lawofattraction (+7%) support the belief that there really is a perfect partner out there. Consequently, matchmaking (+10%) has also grown as people put trust in experts, perhaps to match their love energies (+5%). Read more about this trend on page 8.

TWIN FLAME (URBAN DICTIONARY):
‘Twin flames are our most perfect mirrors because they are us in another body. Our twin flames are the only ones who give us a true and honest reflection of who we are, and where we are in our lives at any given time’.

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**Sources:** Instagram, Reddit and Tumblr data, English speaking markets (global) Nov 2020, Feb 2021
Painting a picture of romance online, using image analytics software on 450,000 Instagram posts

Ocean and sea settings are the most popular backdrops for romantic shots, closely followed by marriage ceremonies, despite restrictions on weddings during the pandemic. It seems that even during lockdown, standard images of romance prevail. And, while many have put their plans on ice, others are powering through: Google searches for micro weddings have grown by 247 percent in the last year.

Traditionally romantic tropes such as horizons and twilight show a desire for escape and picture-perfect moments, which currently feel far away for many. This sense of #wanderlust is a common theme, seen through the prominence of vacations and beach holidays, too. Nature and forests add a wilder, less groomed depiction of escapism, as well as the nod to natural environments for adventure-seeking couple goals.

Finally, we see the seasonal impacts of winter, mountains and Christmas, as well as the personal touches of artistic collages. Interestingly, outer space also makes an appearance; suggesting an element of fate and spirituality as people look to the stars, perhaps hoping that their love lives improve.

Sources: Instagram data (collected Nov 2020-Feb 2021), exploding topics: micro weddings
After winning an esteemed robotics award last year, sex and wellness company Lora DiCarlo was stripped of the accolade when the Consumer Technology Association (who run CES) deemed the products "inappropriate". Following an ensuing media frenzy, the brand’s founder Lora Haddock DiCarlo, has been labelled as a feminist icon leading the charge in the repositioning of sex toys as sex tech. DiCarlo has since won two new, CES recognised awards.

The brand recently tapped up supermodel Cara Delevingne to join as co-owner and creative advisor on the quest for sexual empowerment for all. Lora DiCarlo attempts to educate people of any persuasion about sexual wellness. The website speaks in detail about ending shame associated with sex; it discusses topics around mental health; and wholeheartedly encourages sexual wellbeing for everyone and anyone.

But is Lora DiCarlo as inclusive as it claims? The blog aims to speak to everyone, but makes some pretty big assumptions. For example, a post about anal play compares it to vaginal sex, assuming all readers have vaginas or have sex with people who have vaginas. Plus, the brand’s overt attachment to its owners further pushes the white, cisgender female experience that is so commonplace across the industry.

So while brands employ celebrities to drive sexual empowerment, sex workers and educators continue to face an uphill battle. These individuals are often thwarted by social media (particularly those in the queer community) at the same time as celebrities are paid to promote similar messages to straight, cisgender women. The sex tech space still has work to do to truly include everyone.
Emerging Trends

1. Quantifying Chemistry
   Seeking evidence and data to place weight behind romantic compatibility, sexual pleasure and the ecosystem of love.

2. Self Care Singledom
   Opting to be purposely single with the intention to improve wellbeing. Celebrating freedom from dating burnout and relationship woes.
Love is no longer down to chance or stumbling across ‘the one’ on a dating app. People are seeking out data or guidance from a higher source to evidence romantic compatibility, love, and improve their own sexual pleasure.

Firstly, data and evidence are playing a larger role in the search for a companion. With so much uncertainty over the last year, people want reassurance of relationship success (even before one begins). In the past four months, mentions of astrology in regard to dating have increased 63 percent and mentions of attachment styles have increased 164 percent. Apps like Bumble now allow users to enter their star sign, attachment style and love language, and the app Struck provides matchmaking purely based on the ‘science of astrology’.

Similarly, on TV, data and tracking infiltrates romance like never before. Naked Attraction has contestants choose matches based on ‘scientific’ attraction to body parts alone, while Married At First Sight pairs couples based on extensive data analysis, including compatibility of facial features.

We’re also using data to improve our relationships with ourselves. Thanks to the omnipresence of wearables, we’ve become obsessed with tracking – from calories counted, to steps walked, to orgasms had. Ultimately, we seek to ‘hack’ our bodies, and now sex tech is helping quantify the formerly ‘elusive’ female orgasm, too. App-powered vibrators like Lioness give users feedback on their orgasms. Through data, such brands can help women achieve pleasure, but also educate themselves and their partners on their needs.

**NEXT STEPS**

As we emerge from a time of great uncertainty, consumers are looking to quantify the meaning in their lives. Brands should lean into this need for security and proof. When it comes to sex and relationships, data points and metrics can feel easier to control and grasp than swiping aimlessly or waiting for Cupid’s elusive bow.
Quantifying Chemistry

IN THE DATA

INCREASED EMPHASIS ON ATTACHMENT STYLES

As people become more clued up about romantic tendencies and preferences, attachment styles have become increasingly central to the conversation. Looking at the past five years, people are more conscious of how to use attachment styles to drive their romantic pursuits.

GOOGLE SEARCHES OF ATTACHMENT STYLES

DATA DRIVEN ORGASMS

Sex tech brand, Lioness, enables its users to track the orgasms they have when using a Lioness toy. Like a Fitbit for sex, the app provides data comparing different scenarios, striving to help its user understand their body.

KNOWLEDGE OF LOVE LANGUAGES SOARS

In the search for meaning behind compatibility, people are increasingly more familiar with love languages and what they mean for relationships. According to a GQ study analysing how people define love, it was found that almost half of Americans are aware of love languages. And interestingly, almost three quarters of Black Americans are familiar with them.
Quantifying Chemistry

WHAT ARE PEOPLE SAYING?

Communities are being built around the desire to tie our pursuits in love to something larger than us. From TikTok to Twitter, people are opening up, starting conversations and offering advice about the ways people can place weight and data behind love and relationships – a world that was once laced with mystery.

SO?
The more evidence-based information fills our everyday, the more it will infiltrate our romantic and sexual lives, too. It’s critical to consider this hunger for data and how it can influence the way consumers engage with brands. Prepare for a surge in interest around data-driven proof points as consumers yearn for the best possible experience from the products they use – and the people they meet.

**Review for Lioness toy**

JD on Jul 25, 2020

The Lioness is my reliable go to toy. Not to sound like Goldilocks, but truly this is “just right.” I have a few other “luxury” toys and have had issues with them being too much or just not reliably “working” for me... but I always, always am able to orgasm with Lioness. That I can track my orgasms has also helped me understand my body and my pleasure better. That you can personalize the vibration - I mean, come on. Why has no one else thought of that?? You will not regret this purchase.
Self Care Singledom

Broadly speaking, singledom has been a growing trend for decades. Once tainted by stigma, being ‘unpartnered’ has since become an empowering stance for people to take. But it’s no longer just about power – choosing to be single is now an overt and intentional act of self care.

We’re seeing more people sharing and shouting about the milestones and benefits of singledom compared to being in a relationship (not the other way round). People are recognising that being coupled up isn’t the pinnacle of existence. A whopping 62 percent said they prefer being single in a recent global survey, and they’re taking back time and space to work on themselves instead.

Key to this rise has been burnout caused by app-based dating. Constant swiping, endless self-curation and unfulfilling flings only serve to exacerbate negative feelings around relationships. Throw in a string of national lockdowns, Zoom-date hangovers and open discussions about #toxicrelationships, and suddenly singledom seems more attractive than ever.

People are more aware that choosing abstinence can be beneficial for mental health. The extra time saved from dating or swiping can be used productively, perhaps perfecting #selflove. It’s here that we see more celebratory conversations about single life, often suggesting that it’s happier and healthier than being in a relationship. And, thanks to advances in sex tech, singles looking for self care in the bedroom have never had so many options.

**NEXT STEPS**
Following the loss of stigma, people are celebrating singledom and practicing #selflove – and brands should seek to support this. Think about building products or comms that invert traditional couple experiences: single getaways, recipes for one, or content tailored to the unique benefits of being single will help inspire this growing pool of consumers.
Self Care Singledom
IN THE DATA

Looking at the Instagram data about single life, we can see that 41 percent of the total hashtags used are related to self care. #Selfcare and #selflove are the most popular, closely followed by #loveyourself and #happy. There is an overwhelming sense of positivity and intention behind these words; singledom is presented as a chance to put yourself first.

Other hashtags allow users to share tips on being #happyalone and ways to boost #positivity. As part of this, productivity is key. #motivation is the most used tag encouraging people to take control of their lives, while #travel, #poetry and #fitness provide opportunities to grow.

As a part of celebrating singledom, honesty and openness are encouraged in conversation around mental health. Many start with the process of #healing, eventually moving on to finding #innerpeace and developing a stronger #mindset. Finally, conversation around the burnout of #onlinedating provides adequate reassurance to stay single and focussed on self care.

Self Care Singledom

WHAT ARE PEOPLE SAYING?

Single life is being celebrated, shared and openly spoken about on social media in the same way people post about their relationship milestones or family life. The conversation is often contrasted with escaping toxic ties, or a comment on the invaluable learning experience that being single offers. Mindfulness and acts of self care are often discussed as a way to illustrate the freedom that comes with being detached from dating or coupledom.

SO?

People want to celebrate and be defined by their singleness in the same way that those in relationships might do. Brands should avoid falling into the trap of singleton stigma. Instead, they should seek to ditch relationship status stereotypes and focus on the complexities of human experience; communicating diverse narratives that build self confidence, or helping single people mark significant moments in their lives. Importantly, brands need to consider the distinction between simply telling single people to indulge and be their best selves, and genuinely encouraging self-betterment through self care and personal development.
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 focussed 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.