## UNPRECEDENIED

How is Covid-19 changing the way we stay **entertained**?



#### Who's on screen



**Mobbie Nazir** Global Chief Strategy Officer

Lore Oxford Global Head of Cultural Insights

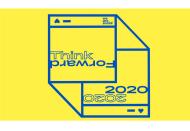




UNPRECEDENTED? Introduction

#### Our thought leadership

Unprecedented? is the latest addition to our public facing research and thought leadership.















#### Who we work with

The most pioneering global brands in the world.







**BURBERRY** 



















MARY KAY

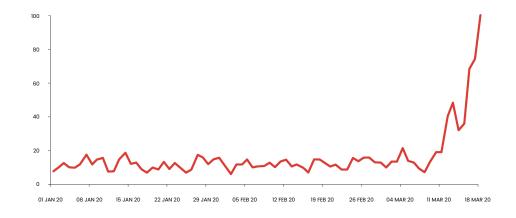






### Introducing Unprecedented?

A series in which we explore how much Covid-19 has really changed the way we behave online – not just now, but in the long-term. This year, there's been unprecedented use of the word 'unprecedented'





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How is Covid-19 changing the way we **connect**?



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How is Covid-19 changing the way we **connect**?



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# Introducing Unprecedented?

A series in which we explore how much Covid-19 has really changed the way we behave online – not just now, but in the long-term.



How is Covid-19 changing the way we **connect**?

02

How is Covid-19 changing the way we stay **entertained**?

03

How is Covid-19 changing the way we get **informed**?

How is Covid-19 changing the way we stay **entertained**?



### Who contributed

We Are Social boasts a team of 800+ social experts spread across 15 offices globally, our global cultural knowledge is unmatched by most creative agencies.

Our **Social Spotting Network** is a core group of collaborators whose collective brain ensures we're keeping track of cultural shifts on a global scale.





# Who contributed



**Dr. Tunisha Singleton**Media Psychologist &
Brand Consultant



Matteo Bellini Integrated Media Manager at IKEA Italia

**Harvey Cossell** Group Head of Strategy, UK



**Werner lucksch** Strategy Director, Singapore



**Bruno Tecci** Head of Strategy, Italy







Less time outside, more time online



- Less time outside, more time online
- More anxiety, more escapism



- Less time outside, more time online
- More anxiety, more escapism
- Less routine, more experimentation





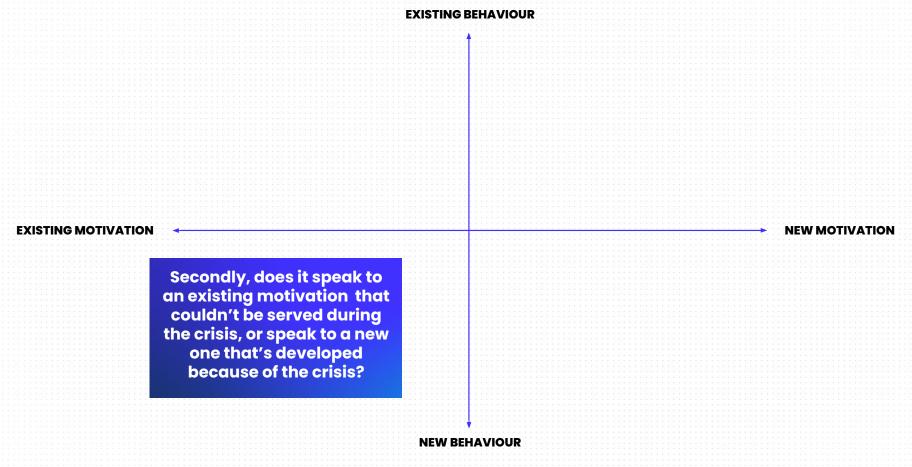
In this environment, swathes of **new behaviours** have emerged.

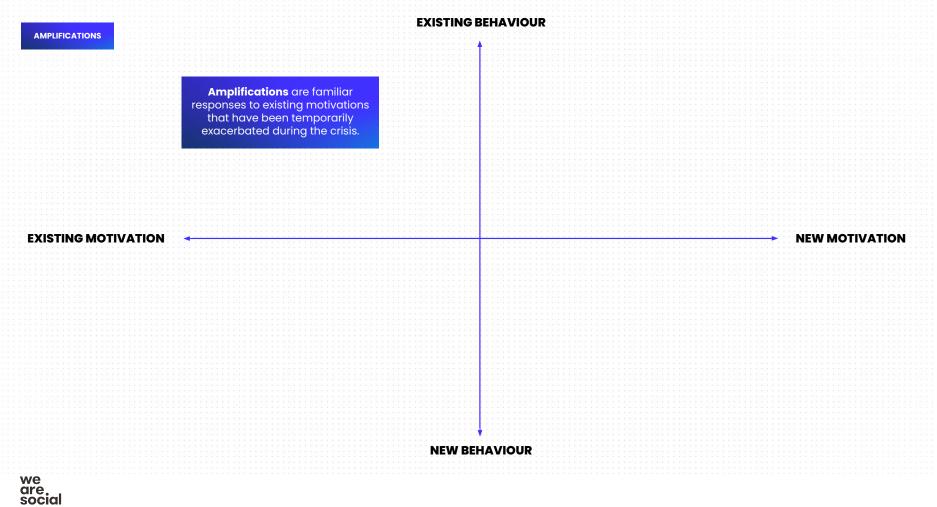
We designed a framework to interrogate which behaviours are more likely to be for the **longer term**...

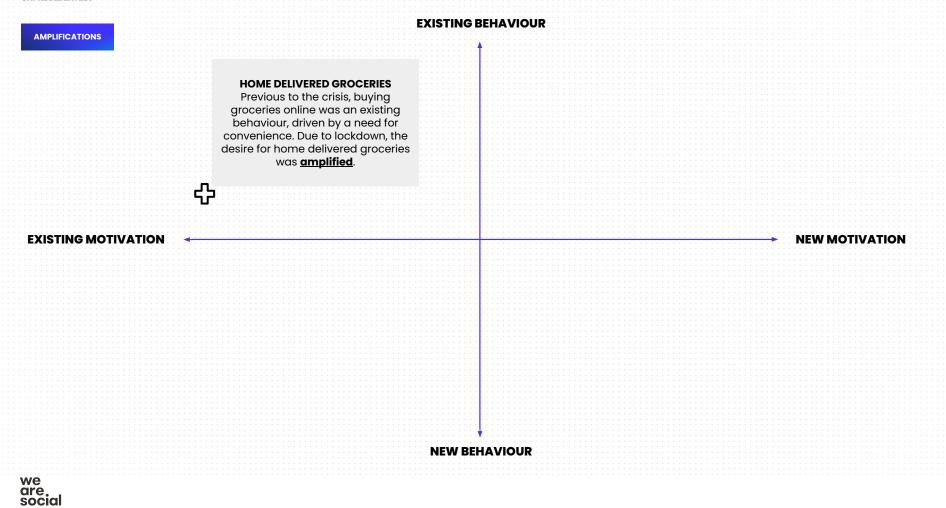
#### **EXISTING BEHAVIOUR**

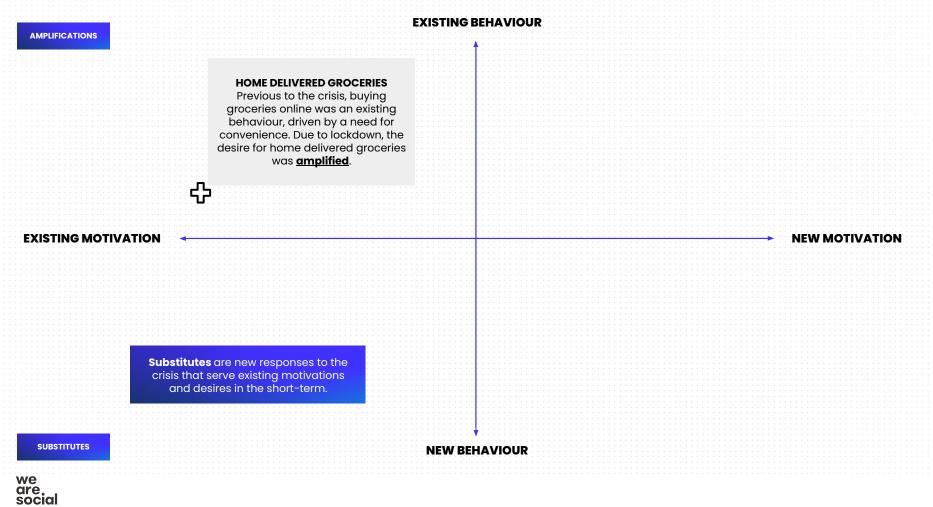
Firstly, is it truly new, or is it part of an existing behaviour?

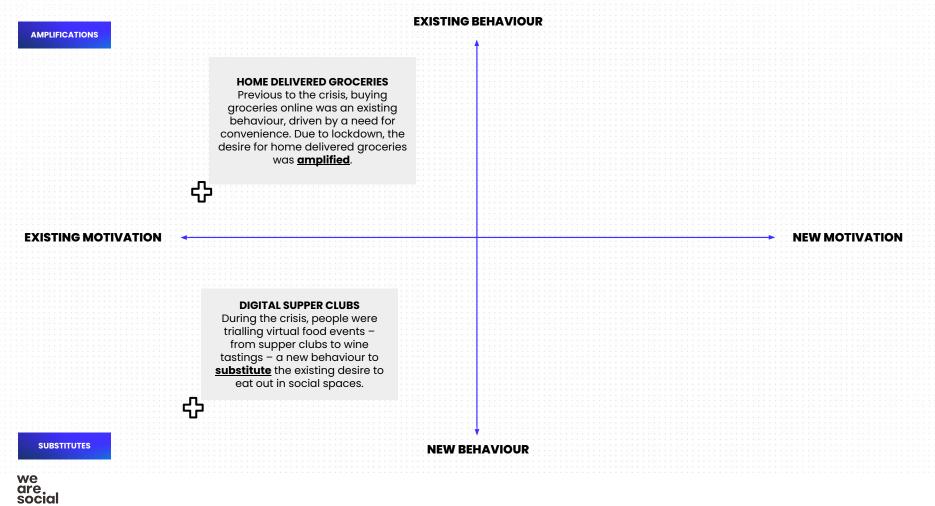
**NEW BEHAVIOUR** 

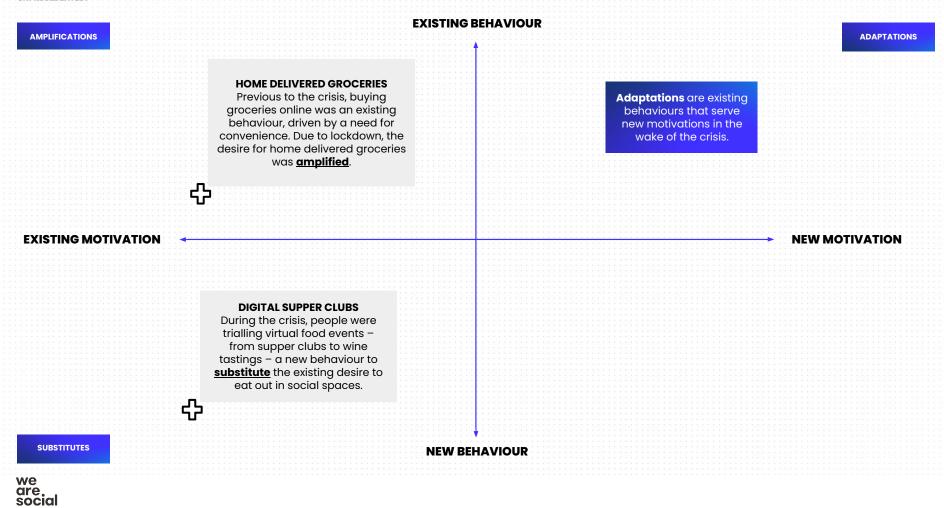


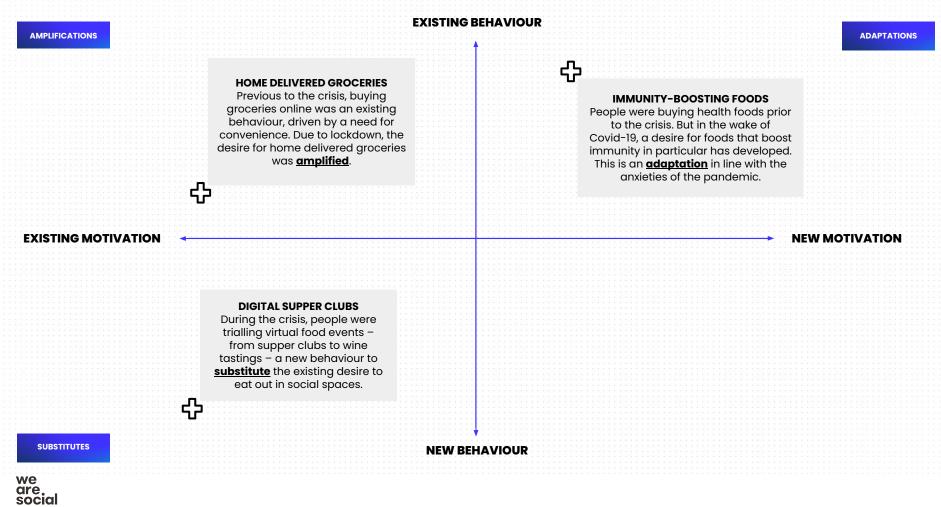


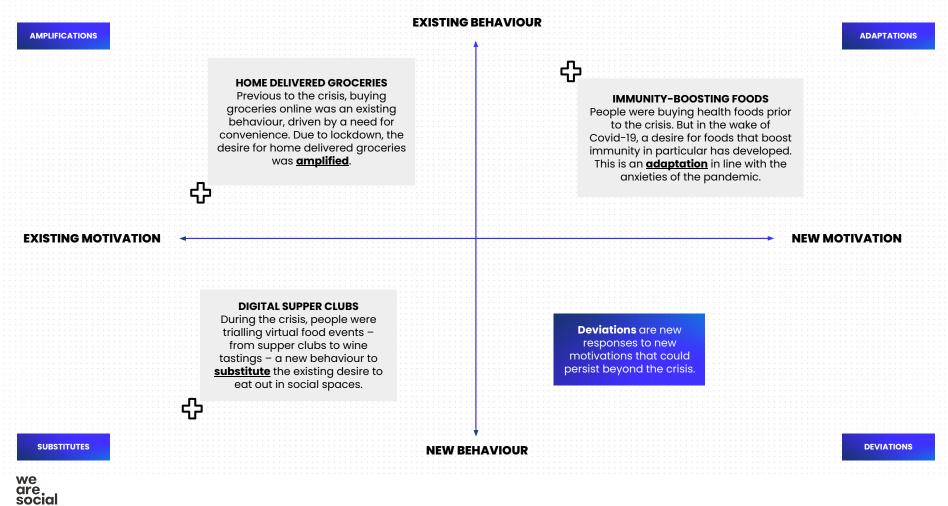


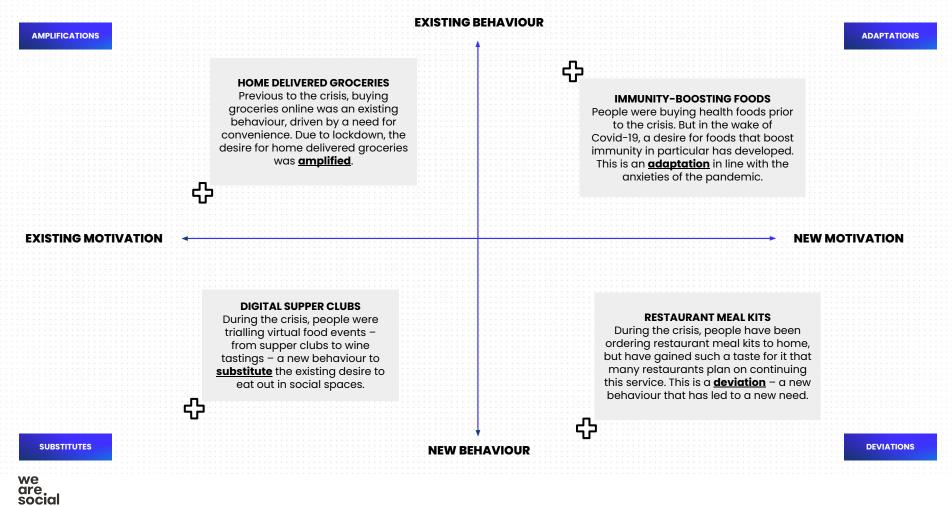


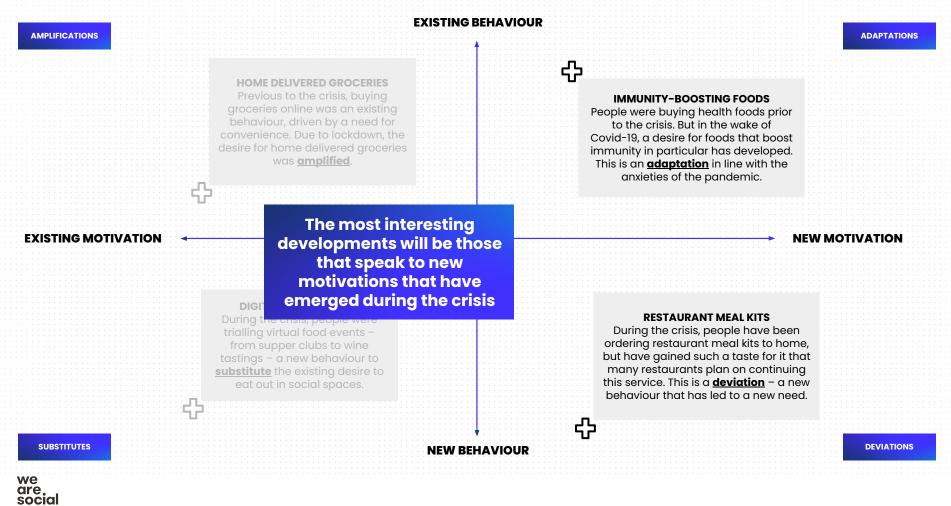














So let's explore the key behaviours defining the ways we stay entertained during Covid-19...

### 01

### Comfort Blankets

People want entertainment that provides comfort amid anxiety



# **01**Comfort Blankets

People want entertainment that provides comfort amid anxiety

#### **Before Covid-19**

The rise of binge watching and ongoing global popularity of sitcoms like Friends and The Office have taught us that home entertainment is extremely good at helping us protect ourselves from the outside world.

#### **During Covid-19**

Between daily death tolls and a digitised civil rights movement, entertainment that makes us feel warm and safe has taken on fresh purpose during this time, with our screens doubling as comforters.

### Where we've seen it?



Talking Pictures TV is a family-run TV channel airing black and white movies based out of a Hertfordshire garden that blew up during lockdown

UK



John Krasinski's Some Good News gained over 71 million views and 2.57 million subscribers between March and May

US / Global



A community of South Korean vloggers have gained a global following for soothing 'silent vlogs' that document soothing everyday routines

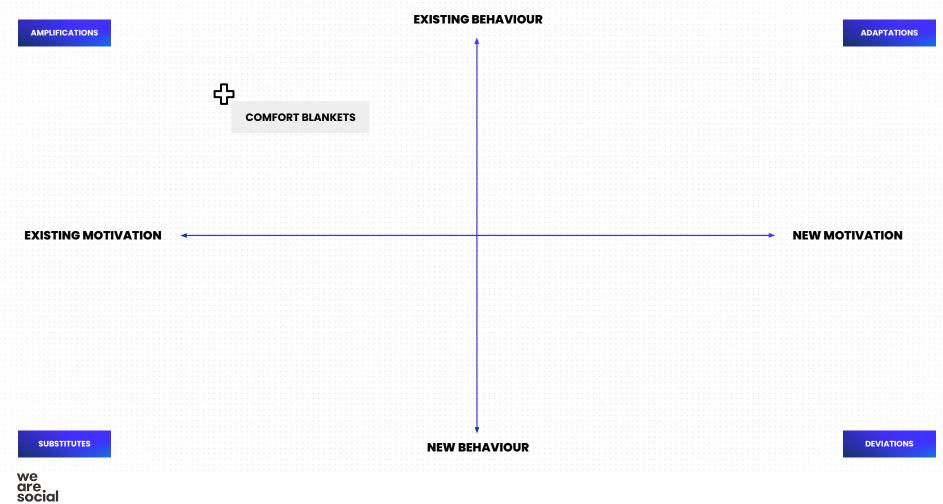
Global / South Korea

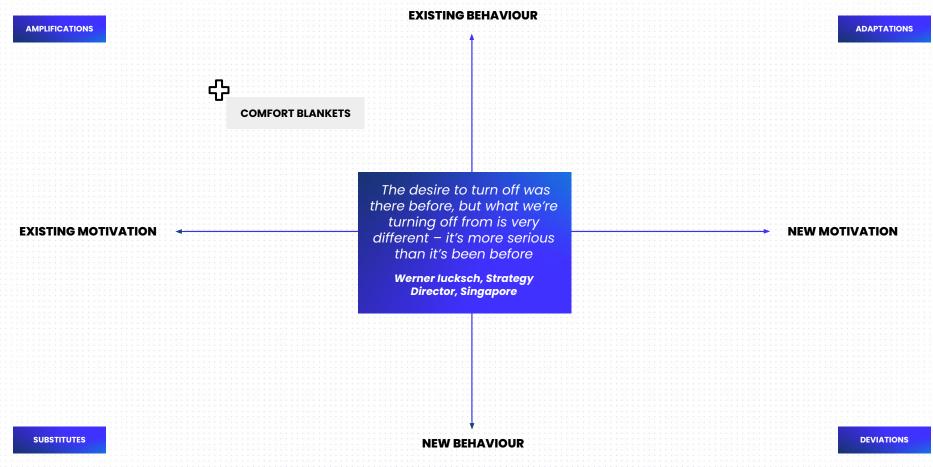


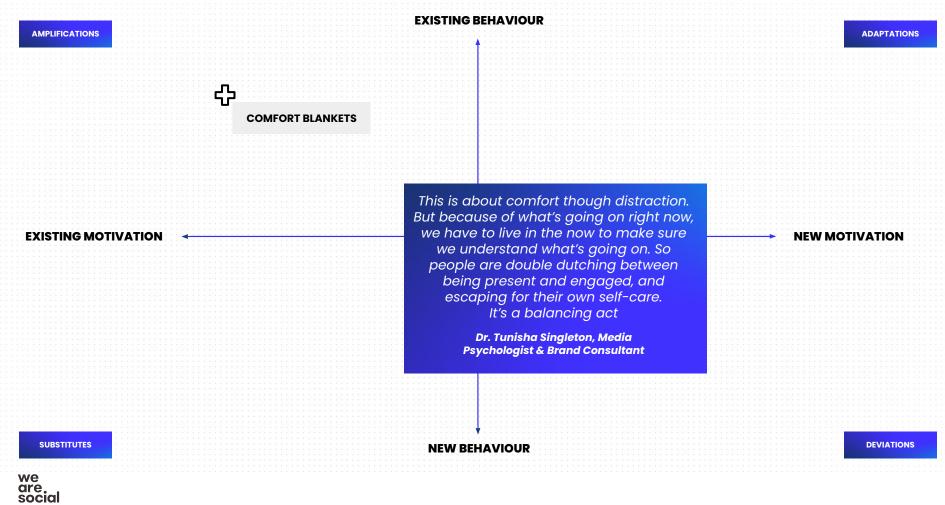
A World of Calm is a collaboration between HBO Max and mental health app Calm, in which celebrities will read soothing 30-minute stories in a TV miniseries

Global









### What it means for brands

#### In Q3 and Q4...

There's an opportunity for brands to offer people a moment of escape at a time when their feeds are filled with anxiety around the pandemic and wider political unrest.

This is about leaning into entertainment. It's an opportunity for brands to show their more whimsical and playful sides.

#### In the new normal...

In the longer term anxiety levels will decrease as people get used to living with the virus, and even more so once there's a vaccine.

That's not to say the need for escape won't still exist – the struggles of the everyday will still see people look to entertainment as a means of escape – as they have done previously – but it's unlikely to be maintained at this scale.

## 02

#### Living Live

Live streamed entertainment has gone mainstream



# 02 Living

Live streamed entertainment has gone mainstream

#### **Before Covid-19**

Despite ongoing buzz around live platforms like Periscope and Twitch, prior to the crisis, live digital content was largely reserved for the fringes of digital culture.

#### **During Covid-19**

During the first wave, creators and viewers alike were confronted with an unusual amount of time on their hands, giving them the opportunity to experiment with live digital content, and removing inertia in the process.

#### Where we've seen it?



Twitch channel Just Chatting – known for content that transcends gaming – saw 134 million hours streamed during April alone

Global



BTS hosted a concert during lockdown – one of many – which drew over 750,000 viewers, raking in ground \$25 million

Global / China



GCN Race Pass allows people to watch live cycling races from all over the world through its app

Global



The Galaxy Unpacked 2020 is a live virtual event to launch the next Samsung Galaxy handset

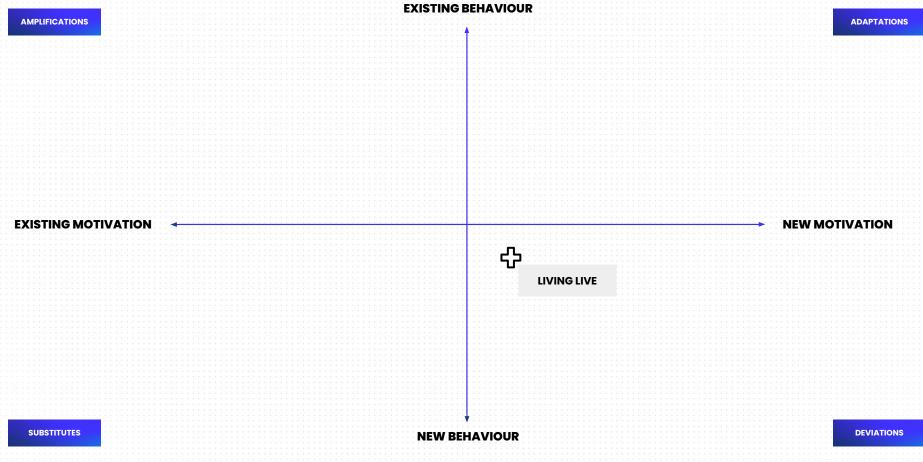
Global

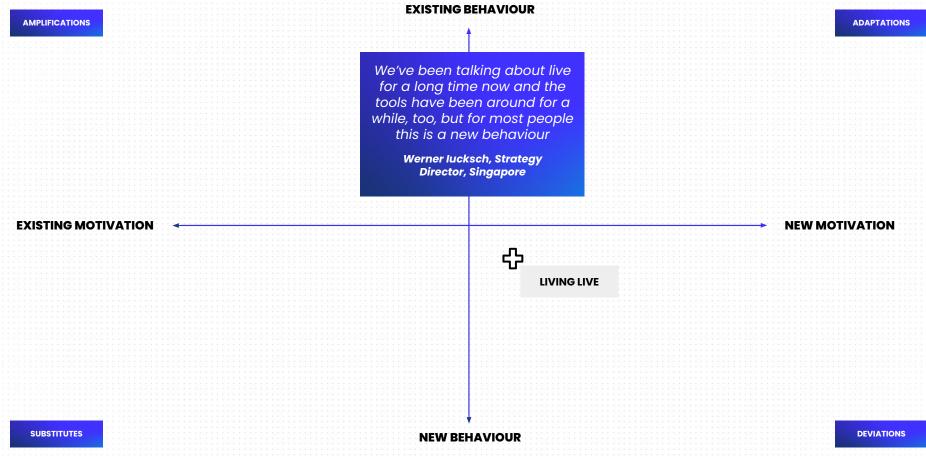


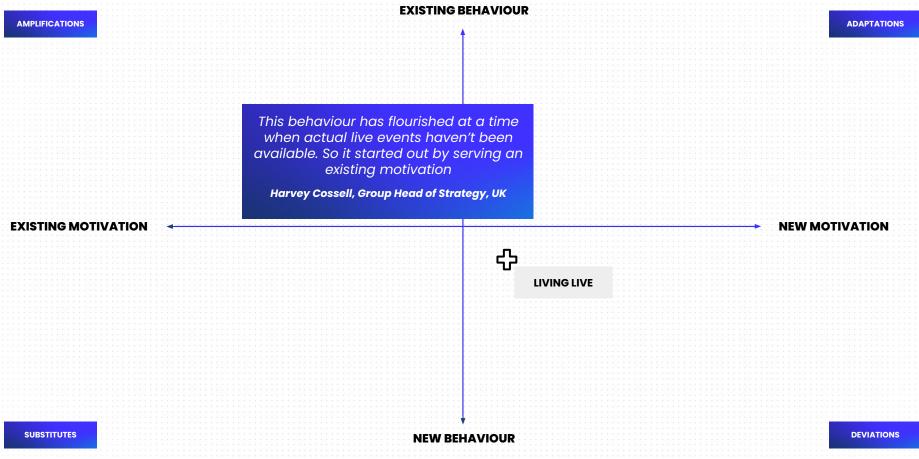
We've been [broadcasting live content] using people from IKEA, shooting live streams directly from their homes, and developing a real bond with our followers. Real people talking to real people about their needs, from their homes. That really worked for us. Because it wasn't just about the brand anymore

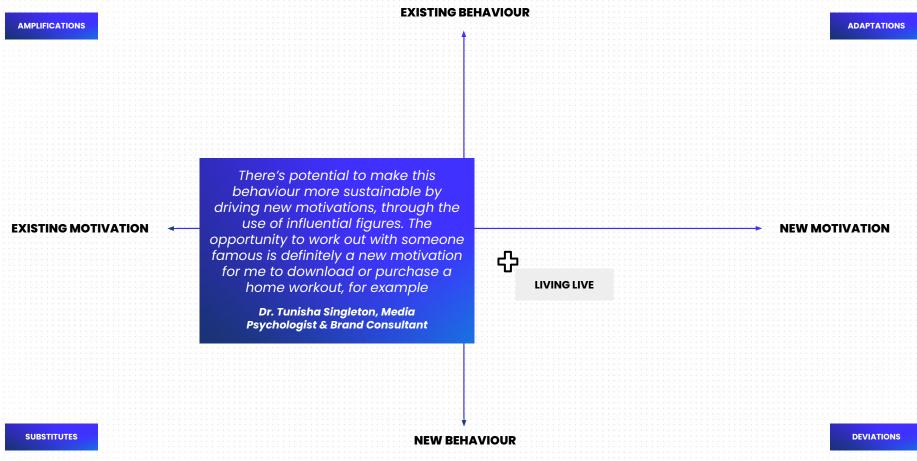
Matteo Bellini, Integrated Media Manager at IKEA Italia











# What it means for brands

#### In Q3 and Q4...

The desire for live digital entertainment will be heightened until we have a vaccine, bolstered by the fact that large-scale live events are still off the cards for the foreseeable future.

During this time, there's an opportunity for brands to use this type of content to show more authentic, and less curated sides of themselves

#### In the new normal...

After the crisis has passed, we could see brands use live digital content to complement live physical events, adding an additional layer of exclusive access via digital channels.

Live content has a lot of staying power. This is especially true when it comes to working with influencers and talent. Brands across categories have the opportunity to bring people closer to their heroes and facilitate more intimate experiences as a result.



### 03

## Thirsty Fandoms

Fan communities have been living for surprise lockdown drops



# O3 Thirsty

## Thirsty Fandoms

Fan communities have been living for surprise lockdown drops

#### **Before Covid-19**

Fan communities have always rallied around shared cultural moments, with emotions like anticipation and surprise often central to their experience.

#### **During Covid-19**

During lockdown, many of the moments these communities had been waiting for were pushed back or cancelled. In light of this, surprise drops and early releases at this time have been treated like lifelines, heightening the experience of being a fan.



#### Where we've seen it?



Fans campaigned for the early release of The Last Dance, leading to it becoming the most watched ESPN documentary of all time

Global



HBO's Euphoria fans have redirected their excitement to Malcolm & Marie – a film made in lockdown by the show's lead Zendaya and director Sam Levinson

Global



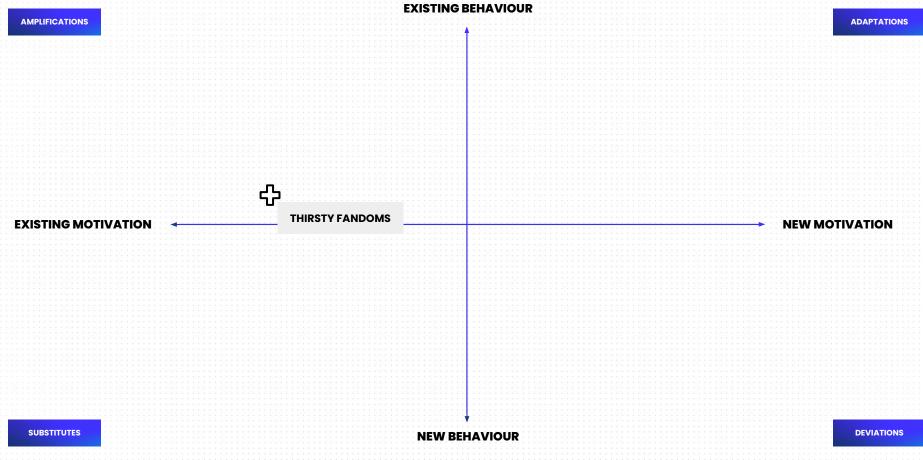
Writer and director
Miranda July is inviting her
fans into the launch of her
next film, by releasing the
trailer to her IG Followers
early, and asking them to
screen it on IGTV
unanimously

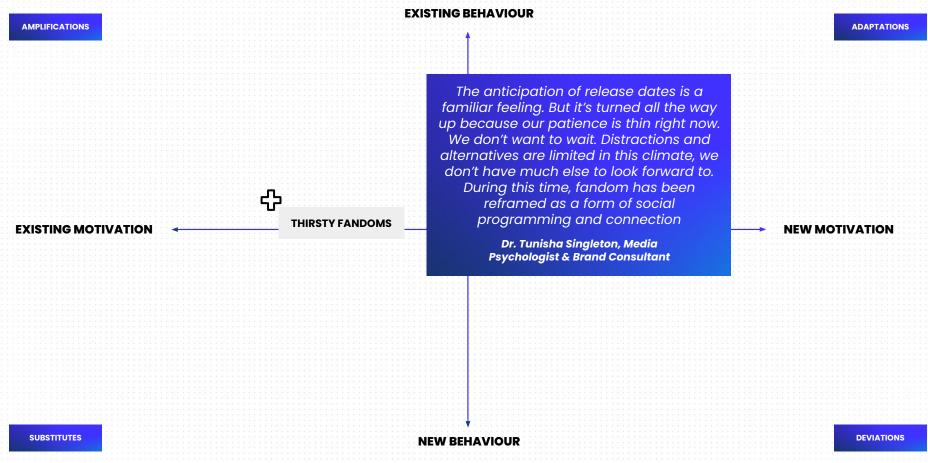


Direct to VOD releases like Frozen 2 and Trolls: World Tour are international successes

Global







# What it means for brands

#### In Q3 and Q4...

The physicality of fandom has been removed during this time, and so there's a desire to generate heightened emotions to replicate those feelings. There's an opportunity for brands to help people feel connected at a time when shared IRL moments are off the table.

It ties into a broader opportunity for brands to be providing emotional lifts to audiences during a time period rife with anxiety.

#### In the new normal...

In the long-term, we could see people's expectations of brands shift. If they do, these kinds of random acts of kindness and serendipitous events will need to be baked into brand calendars, rather than occurring on an ad hoc basis.

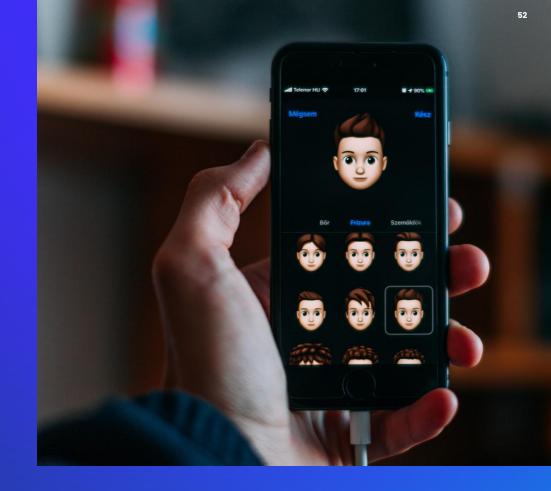
We could also see people grow more impatient with traditional media cycles. Against that backdrop, innovations like straight to VOD released could hail in new norms.



## 04

#### Virtual Selves

People have been spending more of their time online as avatars



# **04**Virtual Selves

People have been spending more of their time online as avatars

#### **Before Covid-19**

Once exclusive to gamer communities, avatars have become increasingly commonplace internet-wide in recent years.

#### **During Covid-19**

Stripped of the luxury of venturing into the outside world, avatars have become more popular than ever, with people using their virtual selves to immerse themselves in shared digital entertainment experiences.

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#### Where we've seen it?



Global Pride partnered with We Are Social Singapore to host a Pride march in Animal Crossing

Global



People are creating quarantine blogs in The Sims 4 Quarantine Challenge

Global



For those who weren't satisfied just watching the livestream of One World: Together at Home, Roblox opened an in-game venue so that people could attend with their avatars

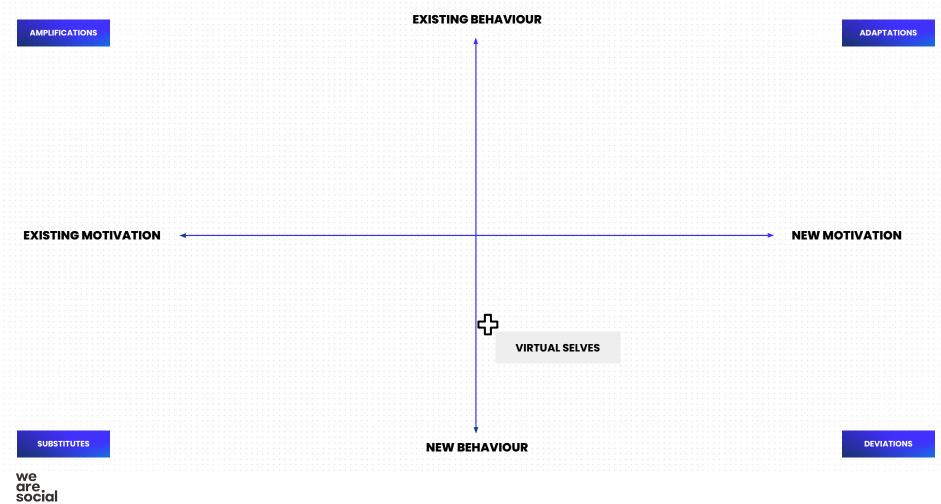
Global

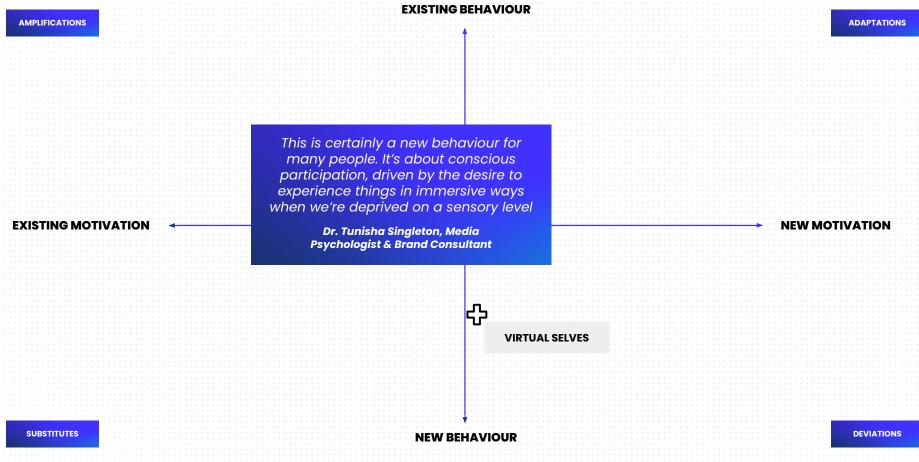


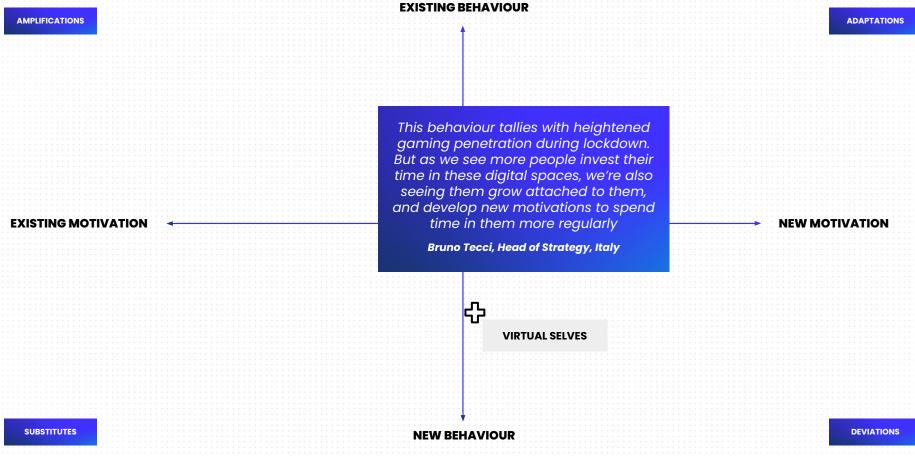
Avatar app Taobao Life 淘宝人生 has been blowing up during lockdown, with Valentine's Day seeing many brands use the platform to connect couples during lockdown

China









Digital spaces like online games are also social networks – places where people spend time and community can be fostered. These spaces become more credible when you reframe them in this way

Werner lucksch, Strategy Director, Singapore



# What it means for brands

#### In Q3 and Q4...

In the short-term, any brand that facilitates offline self-expression should enable people to do the same via their avatars.

There's also an opportunity for brands to create immersive digital experiences for people to attend with their avatars – from Travis Scott's Fortnite show to graduations held in Minecraft, anxiety about the outside world will lead to people seeking out moments like these online.

#### In the new normal...

With platforms like Facebook and Snapchat investing heavily in avatars to use in-platform, this is part of a shift away from anonymity and towards more fully formed digital citizenship, giving these avatars new meaning and weight.

We could also start to see brands humanise themselves in digital spaces, whether using avatars to put an actual face on customer service, or anthropomorphising themselves in spaces like Animal Crossing or Roblox.



## **05**

#### Home Playgrounds

People are using digital channels to make the most of their downtime from home



## 05

## Home Playgrounds

People are using digital channels to make the most of their downtime from home

#### **Before Covid-19**

The rise of JOMO and the broader 'cocooning' trend have seen more people spending their downtime at home in recent years, enabled by digital services.

#### **During Covid-19**

During lockdown, downtime from home wasn't optional, so people have been getting creative with home entertainment. Even as economies reopen, the 'homebody economy' continues to be bolstered by anxiety around leaving the house.

Covid-19 has been a crucial moment for us to understand the importance of our homes. They're not only a shelter, but an environment within which we can enjoy our lives

Matteo Bellini, Integrated Media Manager at IKEA Italia



#### Where we've seen it?



People have been investing in bigger screens, with the beginning of lockdown in the UK saw a 39% rise in TV sales, compared to the previous year

UK



People have been investing in at-home workouts as home exercise soars, with Lululemon buying fitness hardware start-up Mirror

Global



The rise of TikTok has been driven by people looking to entertain themselves from home, with challenges like 'Category Is... Social Distancing' seeing people craft elaborate costumes in the name of potential fame

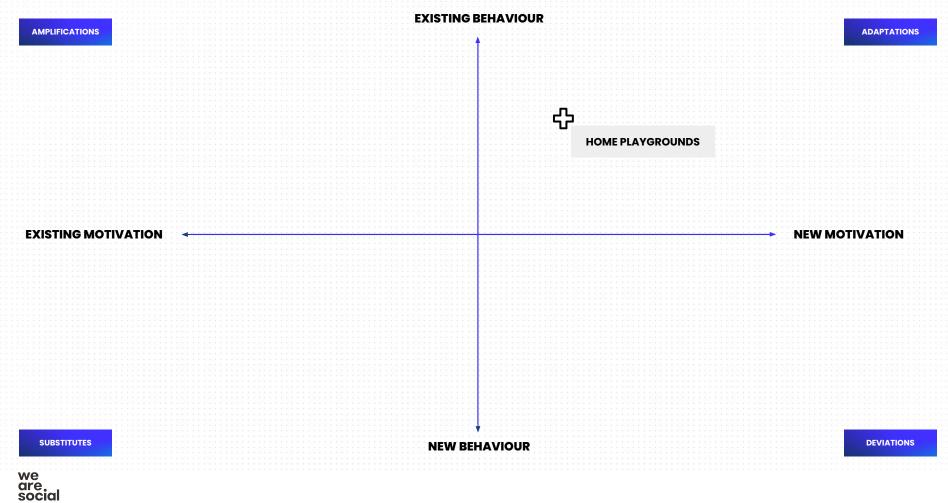
Global

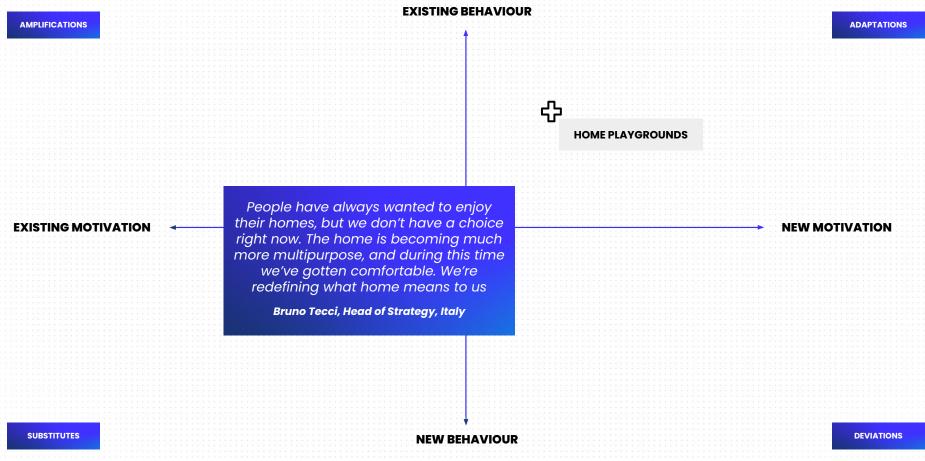


Spotify advertises playlists that can change the mood of your space

Global







# What it means for brands

#### In Q3 and Q4...

This behaviour will continue to be relevant in the short term, and as a result, there are opportunities for brands across industries to maximise the potential of leisure from home for all family members.

In particular, home brands will have a huge opportunity to help people change the feeling and purpose of people's space.

#### In the new normal...

For brands that successfully help people enjoy their space during this time, there's an opportunity to become a mainstay in people's habits, routines and daily lives in the long-term.

This is about brands understanding that the context of their products is changing on a fundamental level. This could also impact product development long after Covid-19.



### То recap





**Comfort Blankets** People want entertainment that provides comfort





**Living Live**Live streamed entertainment has gone mainstream



Thirsty Fandoms
Fan communities have been living for surprise lockdown drops



amid anxiety

**Virtual Selves** 

People have been spending more of their time online as avatars





#### Home Playgrounds

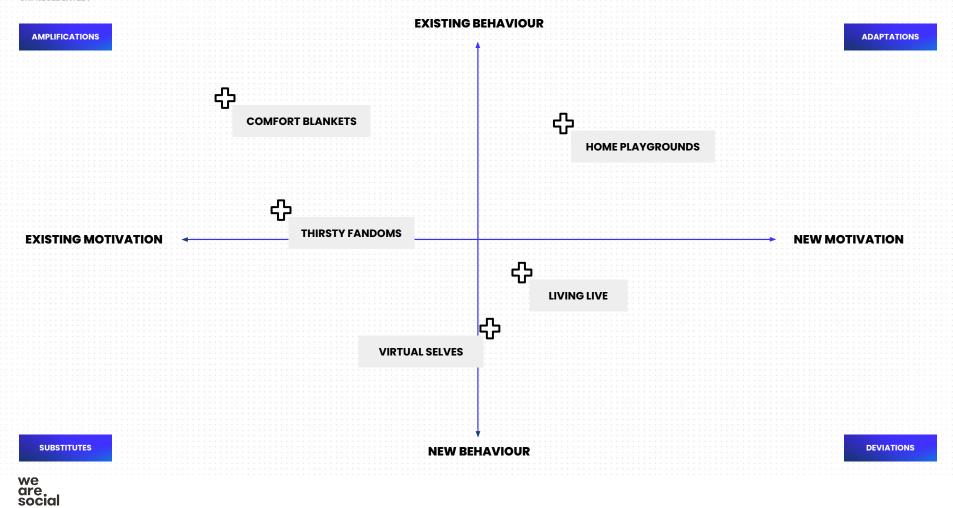
People are using digital channels to make the most of their downtime from home

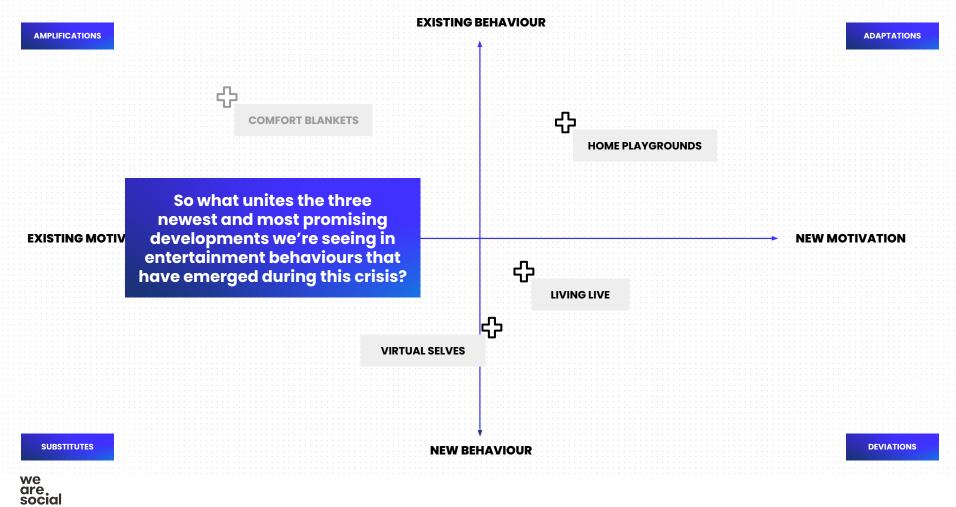






UNPRECEDENTED? 68





Immersive entertainment is moving from the fringes into the mainstream.



## Previously, these behaviours were largely reserved for the fringes of digital culture...

**Living Live** sees livestreaming expand beyond gaming, enabling people to connect in real-time across genres.



Home Playgrounds has seen people use emerging tech to keep themselves entertained from home.



**Virtual Selves** sees a breadth of people immerse themselves in virtual worlds for a range of new interest-led reasons.

Nintendo Co Ltd Nintendo's 'Animal Crossing' leads lockdown boom in video gaming Whimsical island fantasy beats 'Call of Duty' in March sales as game spending jumps by a third  **Remai Crossing New Hartons: is Intende's linest release for its Switch console their coultins or Nintendo	≡ FINANCIAL TIMES
Nintendo's 'Animal Crossing' leads lockdown boom in video gaming Whimsical island fantasy beats 'Call of Duty' in March sales as game spending jumps by a third	SIGN IN
lockdown boom in video gaming  Whimskal island fantasy beats 'Call of Duty' in March sales as game spending jumps by a third  Americansy New Hotocos, in Namendo Justi rules for its Jesus counter the country of the co	Nintendo Co Ltd
as game spending jumps by a third  Animal Crossing Non-Harcross; in National's littler thase for its Switch consider  where playing plant (Money, Carlot butterfield) in the consideration of the cons	
where players plant flowers, catch butterflies, decorate their homes and customise	
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The restrictions of lockdown have led to experimentation.

While some behaviours will pass with the crisis, we're overcoming inertia to others, and it's driving innovation.





## Already, we're seeing brands and platforms adapt to this changing landscape...

Fortnite has launched party mode, in which weapons and building have no place, but virtual hangs and holographic visuals do.

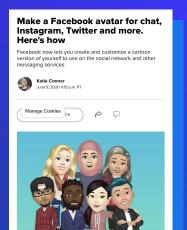
Fortnite's new experimental mode is about partying, not fighting

Party royale

By Andrew Webster on April 29, 2020 1:48 pm

1 1

**Facebook** has launched Avatars, enabling people to create and customise in-platform versions of themselves.



**TikTok** and its success during lockdown is hailing in a new form of social entertainment, in which second screens are not an option.





# ANY we are social