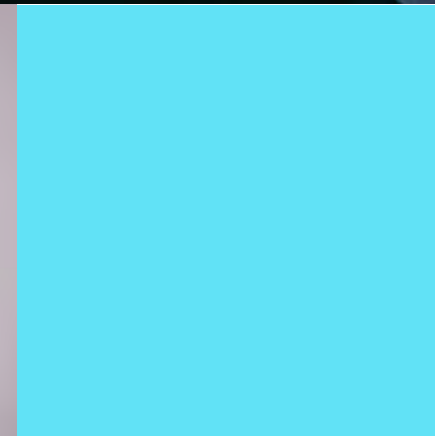
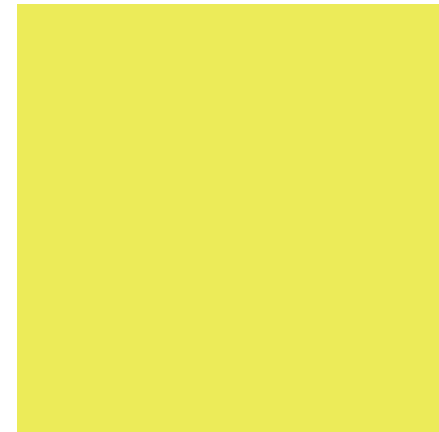
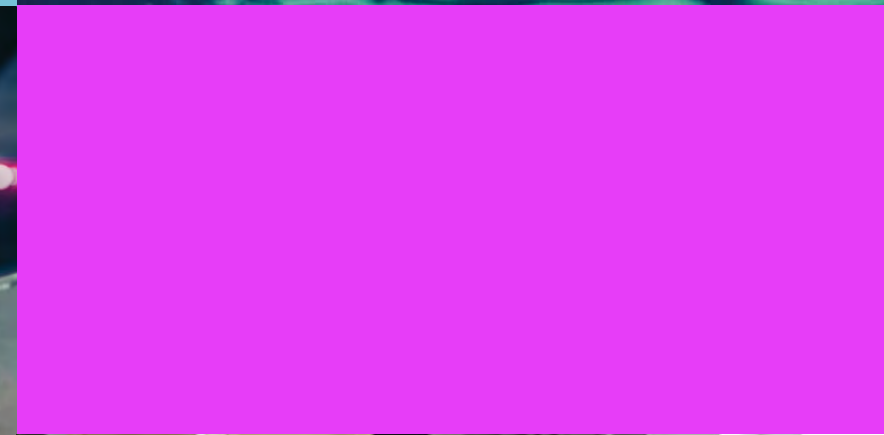
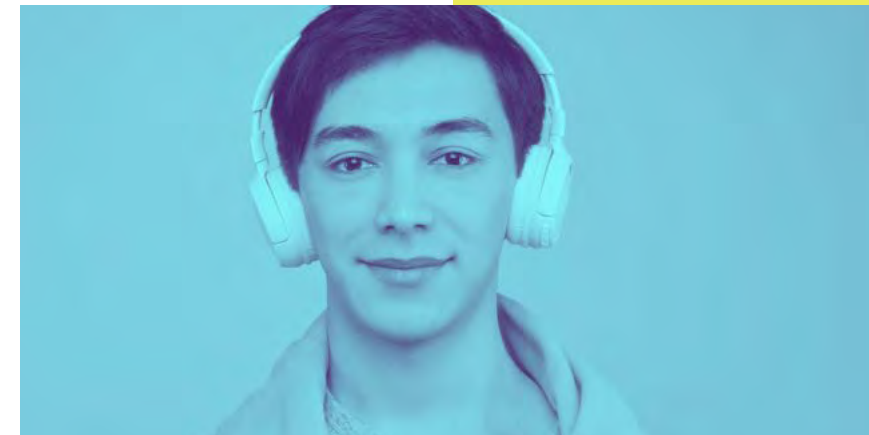


# Meet Consumers Where They Are

TREND REPORT:  
Unexpected Opportunity in a Virtual World

**whynomics**

November 2020



While **gaming** is the context...

**This Impacts  
Everything.**

**EXPECTATION**

This is not a  
report for the  
gaming industry.

This is a story about how  
gaming is transforming  
our culture and why it  
presents a huge opportunity  
for **all brand categories**.



## SITUATION

# Goodbye, world. Hello, gaming.

2020 marks the year when the floodgates exploded open, ushering new audiences into the category.

By **2023** the industry will grow to **3 billion gamers** and a market size over **\$200B** globally, based on a year-on-year growth of **+9.3%**. (NewZoo)







## INSIGHT

**The gamer is no longer a teenage boy in his parents' dungeon-like basement.**

Drop the stigma.



# The gamer has changed.

46/54

% Female to Male

Statista

65%

of American adults play video games.

Entertainment Software Association

Values	Gamers	Non-Gamers
Consider family a top priority	82%	68%
Place high importance on friends	57%	35%
Feel positive about their aspirations	67%	42%
Describe themselves as natural leaders	61%	35%

Entertainment Software Association

48%

have graduated college.

11% attended grad school.

Entertainment Software Association

Average Age:

35

They own a home and have a family.

Game Sparks





## INSIGHT

**As the industry expands and evolves, it will be ripe with opportunity to become something more for more diverse audiences.**



## CULTURAL IMPACT

The gaming industry is changing categories beyond its own.

Pioneers of this world have begun to establish new partnerships and uncover unique brand opportunities by **seizing the growth of gaming.**



INSIGHT

## In-Game Versus Real Life

Gamers today desire an increased correlation to the aspirations they have in their everyday lives – giving them an outlet to **explore the life they yearn for, rather than escape.**





TREND

# Activism in Gaming

Although gaming is typically a form of entertainment, these platforms are also seen as a place for online activism and **living out a more ideal life**, especially for Gen Z.

## The Sims 4



Tiny Living and Eco Life Expansion Packs allow for virtual experimentation with downsizing and environmentally-friendly living

### Eco Life Key Features

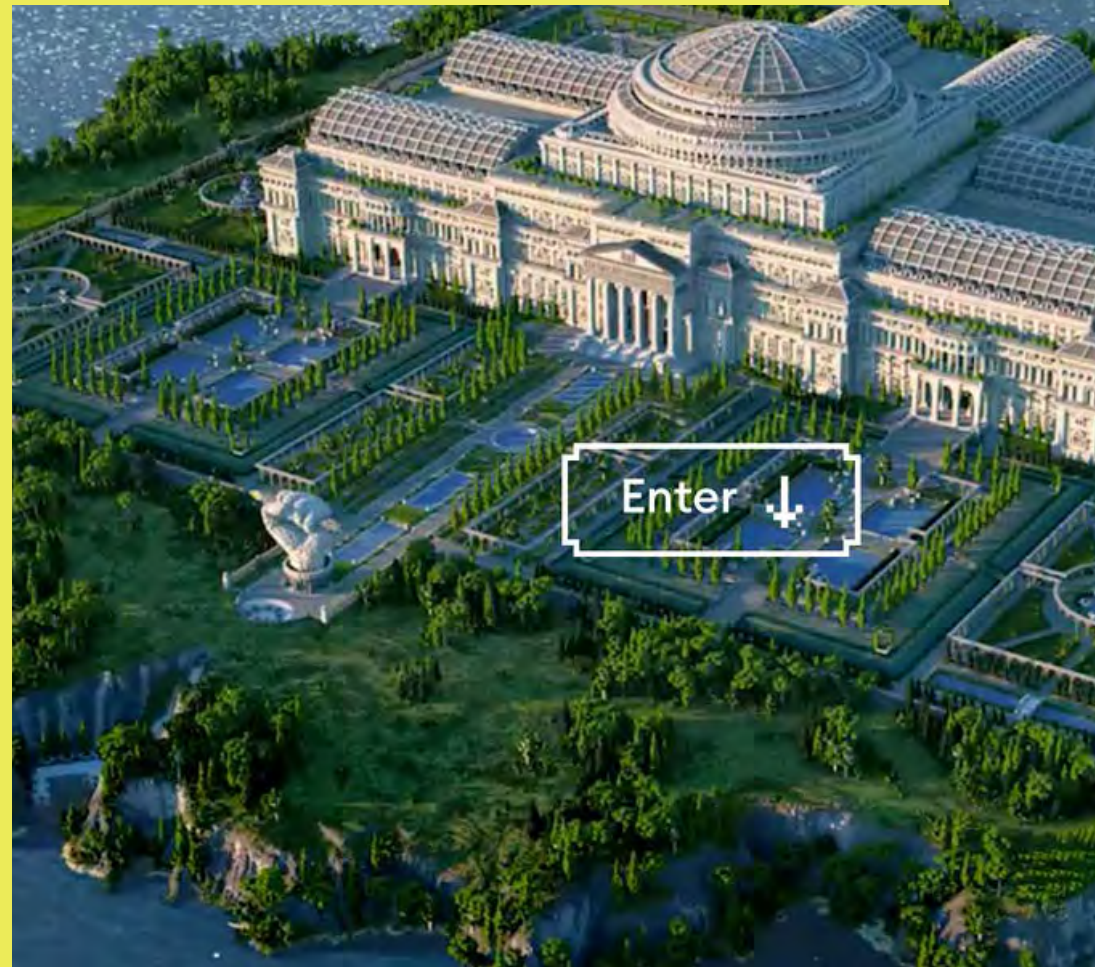
- Sustainable Living
- Collaborative Community
- World-Changing Decision Implications
- Upcycled Decor

### Tiny Key Features

- Downsized Dwellings
- Combo Spaces
- Purposeful Furniture
- Low Key Lifestyle Items



## Minecraft & Reporters Without Borders



"On March 12, the 'World Day Against Cyber Censorship', The Uncensored Library opened its doors. **Providing access to independent information** to young people around the world through a medium they can playfully interact with. Journalists from five different countries now have a place to make their **voices heard again**, despite having been banned, jailed, exiled and even killed."

- Uncensored Library.

## Campaigning in Gaming



Harnessing the power of online communities, the Biden-Harris Campaign entered a new **digital partnership with Animal Crossing**. From yard signs to merchandise, gamers are can now take a political stance in real and virtual worlds.

Alexandria Ocasio-Cortez also debuted on Twitch with live viewers peaking at 435k, one of the **biggest debut streams in the site's history** just days before the 2020 election.



# Saving Lives Not Taking Them



A category of games are emerging that **aim to strip back the violence** often associated with gaming, and instead promote heroism.

The International Committee of Red Cross and Fortnite teamed up to create a game called **Liferun** which gives players points for saving lives and offers missions - for instance, rebuilding schools or rescuing others.

# Raising Good Gamers



"We see online games, their technologies, and communities of gamers as important and powerful tools for achieving broader goals of social justice."  
- Katie Salen Tekinbaş, co-founder, RGG

"Working with game developers, advocacy groups, philanthropists and educators, Raising Good Gamers explores the ways that **gaming environments can address online toxicity**. Inspired by the policies and infrastructures already in place to keep children safe in the real world, and the **contrasting lack of support online**, the initiative considers how gaming can cultivate empathy and civically engaged children," reports LS:N Global.



TREND

# Virtual Fashion

At the intersection of real and virtual worlds, in-game fashion is on the rise as brands and designers find **new occasions for consumer self-expression**, be it on oneself or on their avatar.



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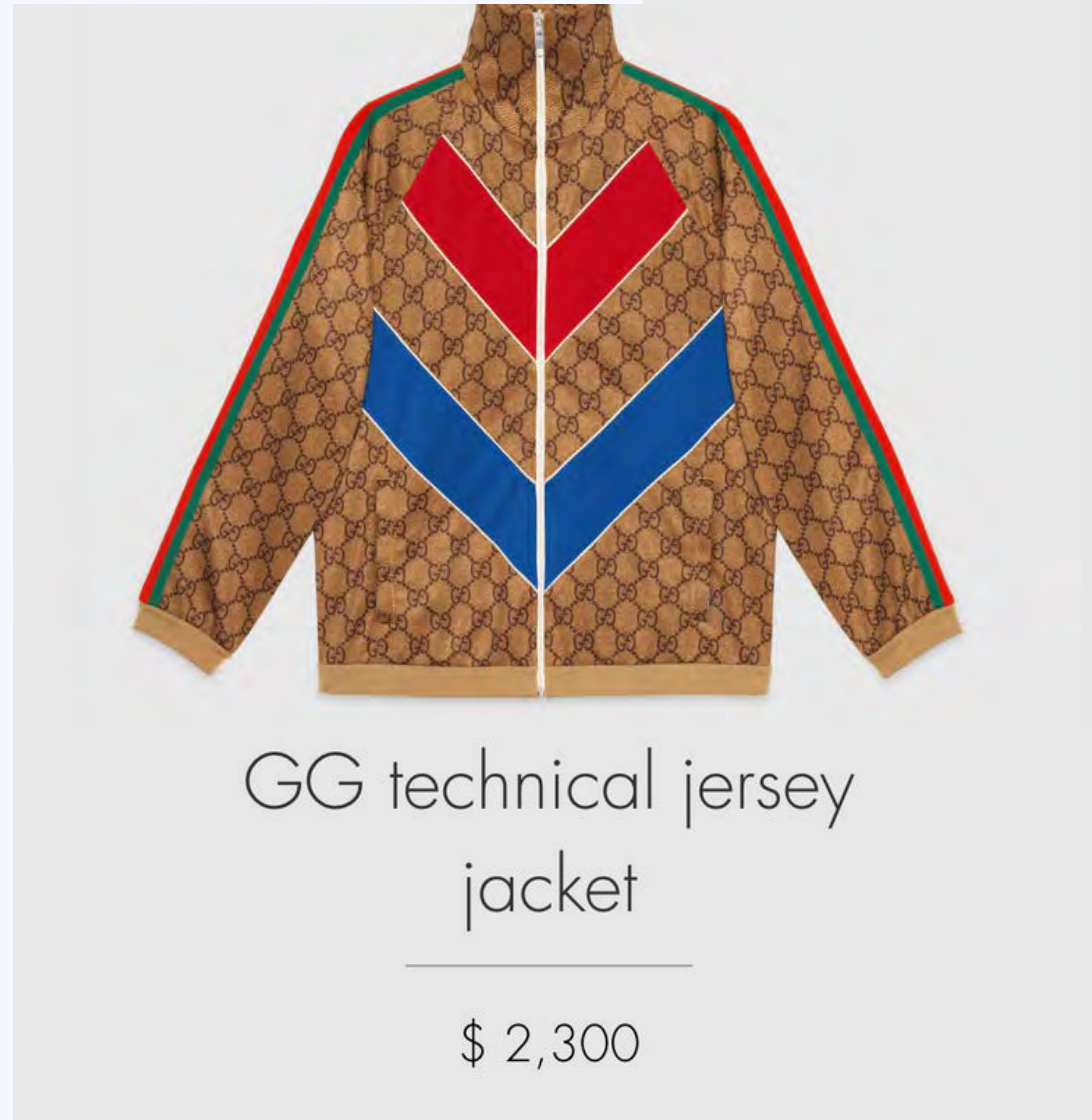


**"[The gamer audience] is a mainstream community that brands, luxury or otherwise, need to **learn how to interact with.**"**

**Rachel Waller**  
VP of Digital Marketing, Burberry



## Luxury Gaming



According to Gucci, "Tennis Clash players will be able to discover exclusive Gucci looks and be able to participate in a special Gucci tournament. Tennis Clash fans will also be able to **buy outfits that mirror those on screen for themselves** from the Gucci website, which brings the virtual and real worlds together."

Building on this success, Gucci announced the debut of a **Sims 4 Fashion Line** in October 2020.

"In the world of Animal Crossing, fashion and interior design are important elements for players to **express their individuality.**"

**Aya Kyogoku**  
Game Director, Animal Crossing



A young woman with long brown hair and round glasses is smiling while looking at her smartphone. She is wearing a white collared shirt and a gold watch. The background is a blurred outdoor setting.

**WOMEN MOBILE GAMERS ARE**

**79%**

**MORE LIKELY TO MAKE AN  
IN-APP PURCHASE.**

NewZoo

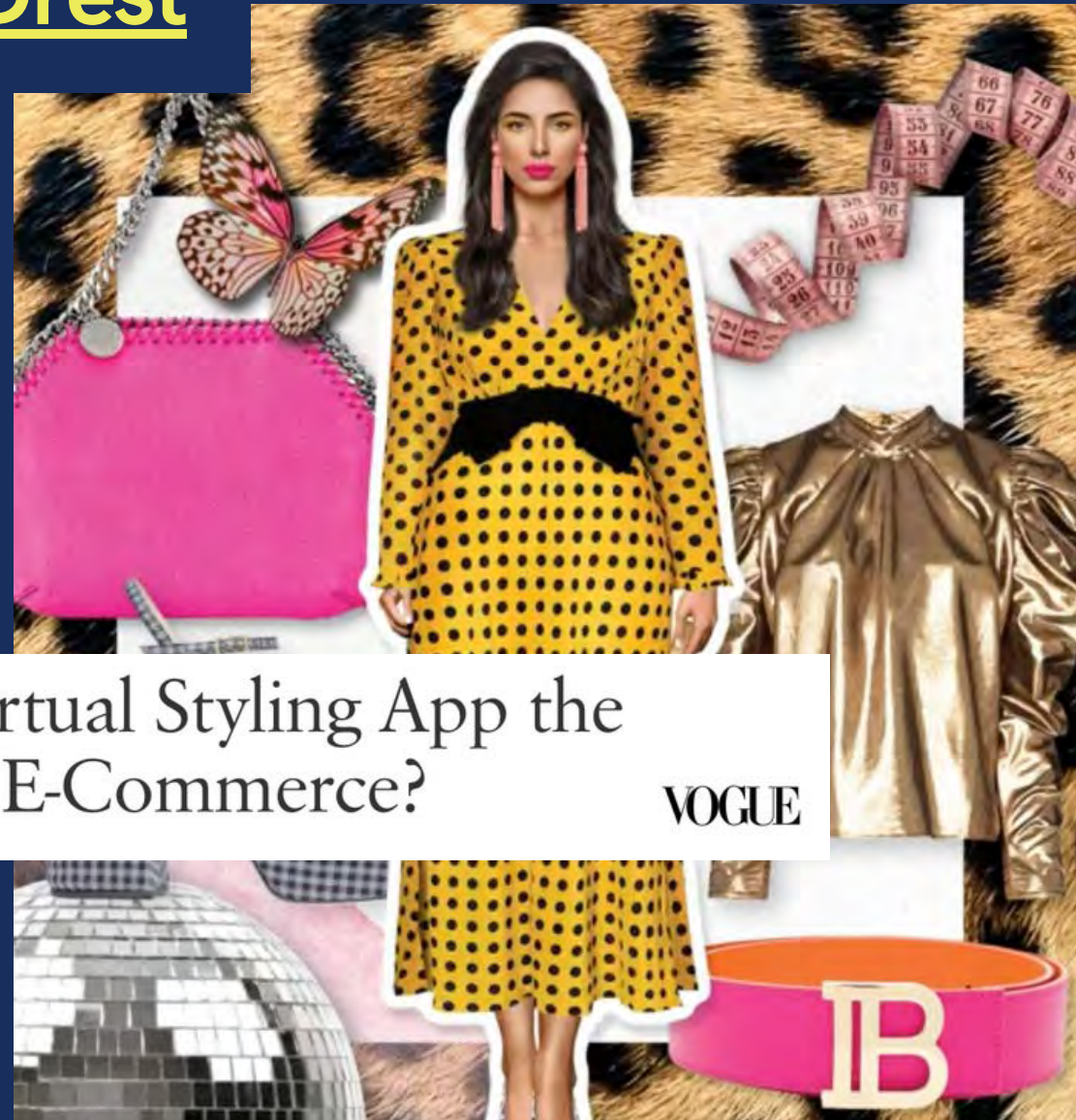
## IMPLICATION

# Merge Behaviors & Create New Habits

Build on the established behavior to spend in-game by incorporating items they are already shopping for elsewhere – merging behaviors and experiences.



## Drest



Is This Virtual Styling App the Future of E-Commerce?

VOGUE

The idea started 10 years ago, but Lucy Yeomans (previously Editor-in-Chief of Harper's Bazaar, UK) recently launched Drest, a game dedicated to styling like a fashion editor.

She said, "I saw people I respected playing this game [FarmVille] where they had to grow strawberry patches and herd chicks and cows, and I thought, This is crazy. And then I thought, What if you were doing that with something you cared about—like shoes and bags and fashion?"

## Nike React



In most examples of this trend, brands are moving to the virtual world; however with ReactLand, Nike **brought gaming into the physical brand experience** at retail locations. Consumers were asked to try on shoes, then try out the shoes in a game where your moves are the players moves.

**48% of people who tried the game bought the shoes.**





TREND

# Mental Game

Over the last few years, as a society, we've made tremendous strides in talking about mental health and its importance. We have normalized the once unspoken, or even taboo topic, finally allowing people to get the help they need and deserve.

**Just as the prominence of mental health has risen in daily conversation, it has within gaming as well.**



## Prescription Gaming



Authorized by the FDA, EndeavourRX is the first game to be **approved as a medical prescription**. Having proved its effectiveness through years of clinical studies with children ages 8-12 with ADHD, the game has shown to improve cognitive function.

## Gamer Therapy



Together, Rise Above the Disorder (mental health organization) and Skillshot (Esports company) created Gamer Therapy, a platform where gamers and mental health professionals can sign on to **play real games and have real therapy conversations at the same time**.





"Creating a  
modern space  
for people to  
open up."

[Gamer Therapy: Promo Video](#)

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TREND

# New Form of Entertainment

While the gaming category has historically been a unique segment of the entertainment industry, gaming is now being **incorporated across entertainment segments to enhance the experience.**



## Travis Scott Concert



Marshmellow held a live Fortnite concert in 2019 with 10M viewers, setting a precedent for large-scale concerts in a virtual setting. Taking things to the next level, Travis Scott brought nearly 30M unique players in-game to attend his live Fortnite concert months later.

## Fortnite Movie Nite



Movie theaters, especially hurt during Covid, are now up against game developers. This summer, Fortnite aired three Christopher Nolan films and premiered a trailer for his new movie, Tenet - all within the game.



## Sony Music's Immersive Media Team



"Sony Music Is Hiring Some Serious Game Designers: A spate of new job listings suggests one of the world's biggest recorded music companies is **investing new energy into video-game opportunities**," reports [Rolling Stone](#).

This proves Sony is dedicated to build on Epic's early success of in-game entertainment.

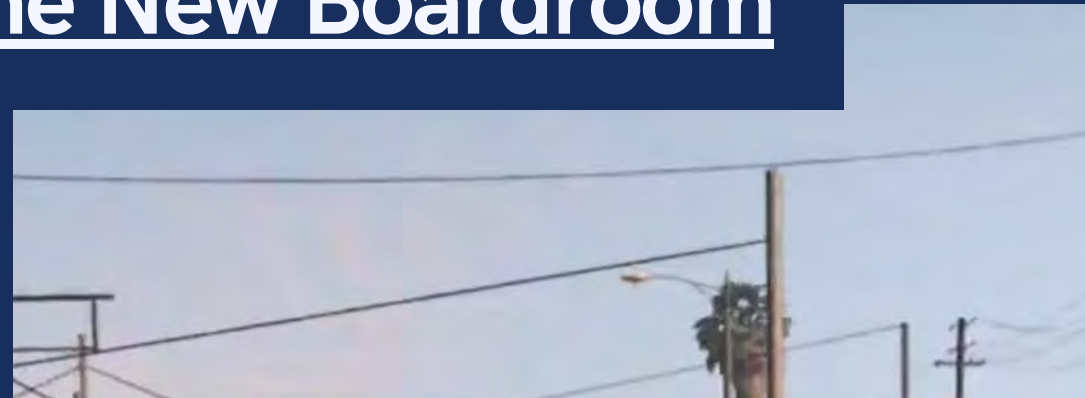
## Animal Talking: A Show



The **first live, late night talk show within a game**, Animal Talking, has begun to land big-name celebrity guests (Sting, T-Pain and Selena Gomez, to name a few), beginning a break the break of late night television away from cable norm.



# The New Boardroom



*'Hey, You Free on Friday for a Meeting and a Bank Heist?'*

The New York Times



With Zoom fatigue setting in, **business meetings are taking place in-game** which offers the same capabilities of virtual meeting tech with added appeal, connection points with colleagues and clients, and a **break from the monotony** of traditional meetings.

Virtual gaming outings  
"are a chance to **form memories** with people he has not met, a crucial part of developing business relationships."

The New York Times



## SYNOPSIS

**Gaming is making a significant evolution from an **activity** to a **vehicle** for how we engage with brands, consume information and experience life.**

How is your brand using culture shifts like these to grow and connect with your consumers in new ways?



# Let's Connect.

If you found this report valuable, just imagine what we can uncover for your business.

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Consumer Insights Manager

Connect with us

