Hasbro State of Play

Hasbro × BIG SPACESHIP

January 2019

About this book

We know that keeping our fingers on the pulse of what's happening is important.

After tracking and cataloguing hundreds of cultural observations over the course of 2018, we decided to step back and look at the big picture. What was a momentary blip and what might signal a fundamental shift?

While new trends and behaviors will continue to emerge, we hope these themes can inspire us in 2019 and beyond!

BIG SPACESHIP ✕ Hasbro™
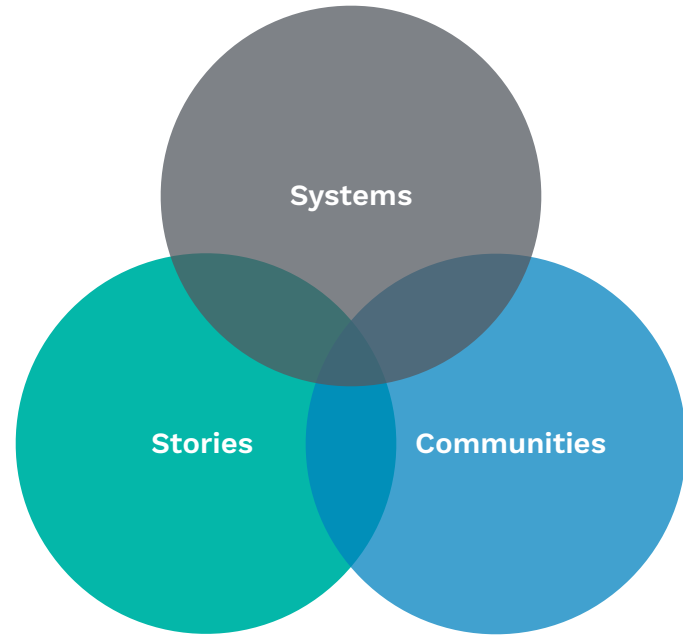
A **modern partner** to ambitious brands.

We believe a modern brand is a combination of stories, systems and communities and we approach our work aiming at the overlaps between.

That is where modern brands will thrive.

Creating positive human connections for Hasbro, powered by Cultural & Behavioral Intelligence

Breadth

Giving people chances to play and explore in new and unexpected ways

Depth

Connecting with people at different depths along the fandom spectrum

Agility

Ensuring we adapt to the new ways to find and share joy in an ever-changing world

Breadth

Giving people chances to play and
explore in new and unexpected ways

From finding ways to seamlessly infuse technology into epic Nerf battles
and dungeon dives, to unlocking imaginative play with literal keys or the
sound of your voice, we're constantly on the hunt for the new ways to play.
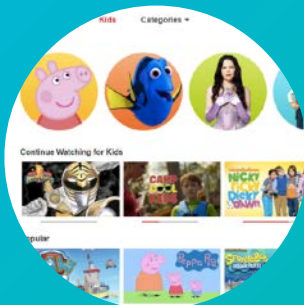
Depth

Connecting with people at different depths along the fandom spectrum

From the artists of Tumblr and Easy to the cosplayers and mana-tappers to the entertainment junkies and comic nerds, we're constantly looking for passionate audiences to connect with in new, authentic ways.
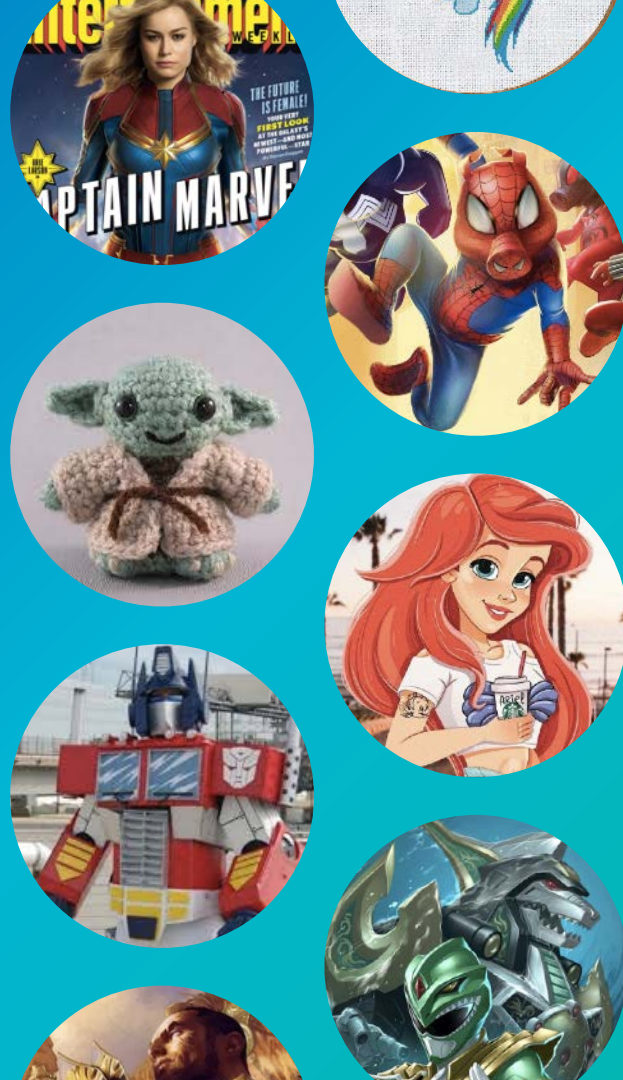
Agility

Ensuring we adapt to the new ways to find
and share joy in an ever-changing world

From the impact of technology on how people find joy, to shifts in the retail
landscape and the increasing buying-power of formerly niche audiences, to shifts in
the types of experiences that are valued, we have to be ready when the playing field
evolves.

BIG SPACESHIP®

9 Themes for 2019

64 observations

Internet Culture

Design

Entertainment & Fandom

Product

- Distrust of Platforms
- Community Confusion
- Everything is Fake
- Chunky Sneakers
- Logomania
- Oversized
- Universe Expansion
- Refreshing Revamps
- Critics v Spectators
- Unboxing Scents
- Tactile Unboxing

- Dark Social
- Ephemeral Content
- All-in-one Platforms
- Colorful & Magical Hair
- Enamel Pins
- Mini Sunglasses
- Gaming Driving Culture
- Customized Game Play
- Augmented Reality
- Drones and Robots

- TikTok Challenges
- Dance Challenges
- Parties for every occasion
- Clear Accessories
- Plastic Recycling in Fashion
- Even Faster Fashion
- Gaming for All
- Gaming Industry Growing Pains
- Voice Activated Play
- Multilayer Unboxing
- Unusual Unboxing

- Identity Memes
- Costume Breakdown
- Meme Marketing
- Pet Cosplay
- Beyond Plastics
- Simplicity
- Hyper Personal
- The Queen: Ariana Grande
- K-pop Kings BTS
- Sequin Plushies
- Wearable Collectibles

- Con Artists
- Absurd Fame
- Big Animals
- Mimics
- SAY IT LOUD
- Doodles
- The Drake System
- The Podcast Boom
- Modern Audio Dramas
- Gross is Fun
- Internetty Card Games

- Cringe Brands
- Cringey UGC
- 80s & 90s Nostalgia
- Witches
- Renaissance
- #MoreThan AnAthlete
- NBA Style
- Pro Fans
- Coding Games
- DIY Video Games

Output

9 for 2019

Nine key themes aligned with three major shifts

In order to keep up with the ever-increasing pace of change, it's vital to have our fingers on the pulse of what's changing in culture & behavior. While individual trends are important to note, we've distilled our observations into nine broader themes that align with three major shifts.
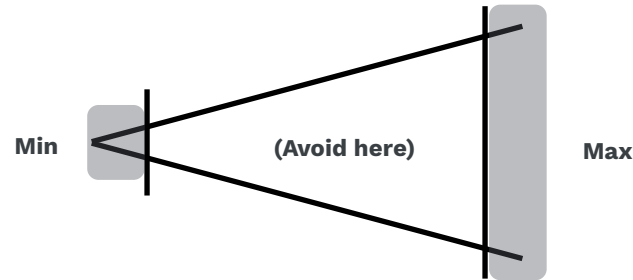
SHIFT 1:
No Middle Ground

SHIFT 2:
Shareability Redefined

SHIFT 3:
Empathy & Understanding

SHIFT 1: No Middle Ground

THEN: There used to be wisdom in playing to the middle, safety found in numbers

NOW: Success and breakthrough are found in the extremes

Min   (Avoid here)   Max

**Aesthetic
Extremes**

**Maximalist & Minimalist
Experiences**

**Postmodern
Storytelling**

SHIFT 1:
No Middle Ground

Aesthetic Extremes

MAXIMALISM: Things are getting louder, brighter, bolder

From chunky sneakers to oversized coats to bright hair and Ariana Grande

Chunky Sneakers   Oversized   Colorful & Magical Hair   Ariana Grande
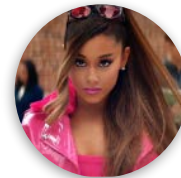
MINIMALISM: At the same time, we're returning to basics

From limited palettes, to leaving room for a small personalized touch, to clear/see-through materials, to hand-drawn doodles

Simplicity   Hyper Personal   Clear & Transparent   Doodles

Maximalist & Minimalist Experiences

MAXIMALISM: People are looking for visceral, over-the-top experiences

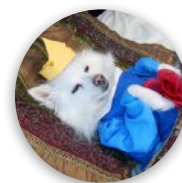From scents, to tactile, to gross, they're even turning their pets to 11

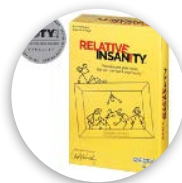**Unboxing Scents**   **Tactile Unboxing**   **Gross is Fun**   **Pet Cosplay**

MINIMALISM: At the same time, there's a yearning for simplicity

From 80s/90s nostalgia, to simple card games, brands are responding with simplified branding, revamped classics, and boy bands

80s & 90s Nostalgia   **Internetty Card Games**   **Witches**   **BTS**

SHIFT 1:
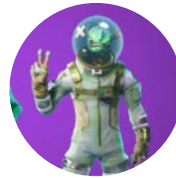**No Middle Ground**

Postmodern Storytelling

MAXIMALISM: Audiences have begun to crave depth and multi-dimensionality in the stories they follow

From ever-expanding universes, to customized play in video games, to exploring augmented reality, to deep-dive podcasts

Universe Expansion

Gaming Driving Culture

Augmented Reality

Podcast Boom

MINIMALISM: On the other hand, there's still plenty of desire for the shallow and absurd

From ridiculous internet celebrities, to silly parties, to big animals, to the latest dance challenge
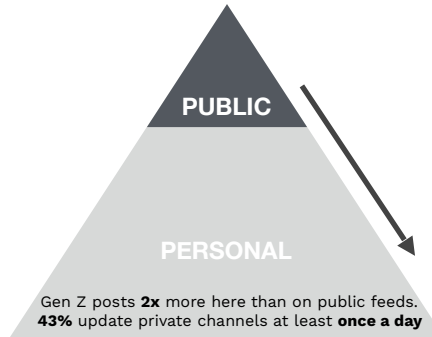
Absurd Fame

Parties for Every Occasion

Big Animals

Dance Challenges

SHIFT 2: Shareability Redefined

THEN: People lose trust in brands and start sharing with each other
NOW: People are losing trust in platforms and how their data is being shared

PUBLIC

PERSONAL

Gen Z posts **2x** more here than on public feeds.
43% update private channels at least **once a day**

Source: Jaywing, "How do I understand dark social?", 3/2018

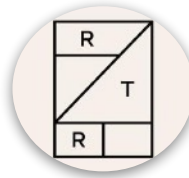**Curated Personas**   **Ephemeral & Private**   **Algorithmic Influences**

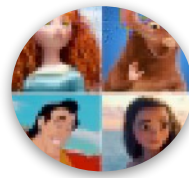**SHIFT 2:**
Shareability Redefined

Curated Personas

This "tip of the iceberg" approach to curating your social persona has accelerated the cycle of fashion and beauty trends and also shaped the types of social content shared
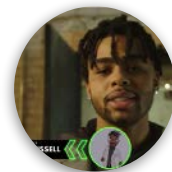

Even Faster Fashion

Identity Memes

NBA Style

Colorful and
Magical Hair

Professional Fans

SHIFT 2:
Shareability Redefined

Ephemeral
& Private

As consumers (particularly younger ones) become more aware of the permanence of what they post, we're seeing a steady rise in private and ephemeral sharing

Platforms that understand the needs of this new generation are thriving, while others have stumbled
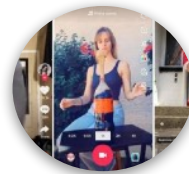
Dark Social

Ephemeral Content

Not Understanding Communities

The New "Challenge" Platform

The All in One Platform

**Algorithmic
Influences**

Shareable-by-design is not new. Products, brands and artists have been embedding shareability into their work for some time now

What has accelerated is the regularity and savviness with which things are designed, even optimized, to work best for the specific algorithms of specific platforms and audiences

The Drake System

K-Pop Kings: BTS

Unusual Unboxing

Customized Game Play

Gross is Fun

Parties for Every
Occasion

SHIFT 3: Empathy & Understanding

THEN: The promise of big data to help us understand the connections between everything & everyone

NOW: The pendulum swings back towards understanding specific audiences intimately & emotionally

Underserved Audiences

Authenticity as Social Capital

Race to be the Most Woke

SHIFT 3:
Empathy & Understanding

Underserved Audiences

Made for someone, even
if that's not "you"

The entertainment industry has learned that paying close attention to specific audiences is a repeatable path to unlocking mass success

From the biggest romantic comedy of the year, to the surprise Marvel hit, to the Netflix-fueled resurgence of the teen-romance drama or age-old stories like Archie and Sabrina

Refreshing Revamps

Witches

Universe Expansion

Customized Game Play

**Authenticity
as Social Capital**

In a world where everything can be faked more and more easily, people are hungering for things that ring true

From athletes speaking their mind on social issues and their passions outside of sports, to pets and animals that are simple and pure

Distrust of
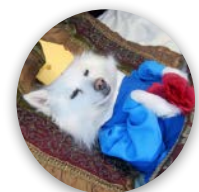Platforms

Everything is
Fake

Con Artists

Big Animals

#MoreThanAnAthlete

Professional
Fans

Pet Cosplay

BIG SPACESHIP

Race to be the Most Woke

Authenticity (by definition) is not something you can chase or fake, but that hasn't stopped everyone from politicians to athletes to brands from trying

Despite their good intentions, for every example of getting it right, there are many more that have gotten it horribly wrong

#MoreThanAnAthlete

Cringing at Brands

Not Understanding Communities

9 for 2019

Nine key themes to pay attention to, across three major shifts

SHIFT 1:
No middle ground

Don't play it safe in the center. Disruption is found in the extremes.

Aesthetic Extremes
Visual polarization as louder, brighter, bolder designs are on the rise, but so are more minimal basic looks (limited palettes, hand-drawn).

Maximalist & Minimalist Experiences
Consumers are looking for visceral, over-the-top, experiences that stimulate the senses, while also yearning for homespun simplicity.

Postmodern Storytelling
Fans are gravitating towards deeper, multi-dimensional stories as well as extremely shallow, absurdist ones (but not in between).

SHIFT 2:
Shareability Redefined

Behavior reflects both better understanding and declining trust in social platforms.

Curated Personas
The more attention is paid to intentionally crafting public profiles, the more content cycle accelerates (particularly in fashion/beauty).

Ephemeral & Private
Rise in privately shared or time-limited content as consumers (particularly younger ones) become sensitive to the permanence of what they post.

Algorithmic Influences
Products and content specifically and intentionally designed to optimize performance with algorithms across different platforms.

SHIFT 3:
Empathy & Understanding

Algorithms are fine, but deeply and intimately understanding people is vital.

Underserved Audiences
The entertainment industry has learned that paying close attention to specific audiences is a repeatable path to unlocking mass success.

Authenticity as Social Capital
In a world where everything can be faked more and more easily, people are hungry for experiences and stories that ring true.

The Race to be the Most Woke
Authenticity (by definition) is not something you can chase or fake, but that hasn't stopped everyone from trying ...and often falling short.

BIG SPACESHIP

Appendix of Cultural Observations

Methodology

Using Cultural & Behavioral Intelligence to drive innovation.

Breadth
Cast a wide net.

Gather signals beyond category and competitors

Depth
Narrow the field.

Focus on the people and topics that matter the most

Agility
Act on the right insights.

Harness actionable trends before they are mainstream

It's one part art.

A diverse team of analysts, strategists and cultural natives that bring context and insight to data-driven observations.

It's one part science.

A diverse set of tools and inputs combined with techniques to understand the complexity behind unstructured data.

Data Science & Marketing Intelligence

General Social Listening

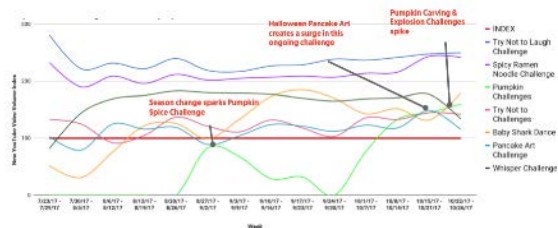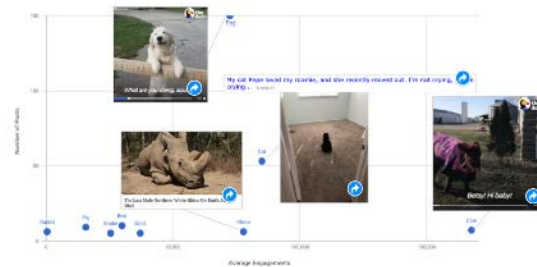**Internet Trends**

Ghost Panels

Machine Learning

We use a combination of proprietary tools to track different types of cultural signals: from indexes based on upload volume via the YouTube API, to forensic analysis of the spread of "viral" content, to mapping the popularity of topics within a content vertical.

In 2018, we created a series of reports that looked at culture and behavior for a range
of Hasbro brands.

Assembling the most salient observations

Across our work with different Hasbro brands, four core trend categories were of repeated interest.

As we documented and assembled relevant trends throughout the year, these categories served as a filter to ensure we were finding and sharing the most relevant trends for Hasbro's business.

1. Internet Culture
Changes in why/how/what people share across platforms

2. Design
Changes in the visual language of the cultural landscape

3. Entertainment
Changes what fans are rallying around and why, across media

4. Product
How cultural shifts are impacting what's produced and bought

Internet Culture

Let's talk about

The State of Platforms

In 2018, **social media** users were more aware than ever about the platforms they were using, and vocal about what they disliked.

Distrust of Platforms

INSIGHT:

Young social media users are growing more suspicious of platforms and calling out their leaders.

WHAT:

Facebook and Twitter CEOs in particular are under fire for how misinformation is spread on their platforms, and of course for privacy concerns as Facebook profited from users' personal data. These concerns have led young Facebook users in particular to leave in droves, and of course to mock Zucc.

IMPORTANT NUMBERS

-11% drop in trust in platforms in 2018 (U.S.), -2% globally*

44% of Facebook users 18-29 have deleted the app off their phone**

4M combined mentions about Zuckerberg & Dorsey's hearings

*Forbes, 2018
**Pew Research Center, 2018
Note: Mentions data is from Twitter, Reddit and News articles, during the week of the hearings, 4/9/18 - 4/16/18 & 9/3/18 - 9/10/18

THE 21 (AND COUNTING) BIGGEST FACEBOOK SCANDALS OF 2018

TECH INDUSTRY

Twitter's huge bot problem is out of the bag

Roasting Jack Dorsey's beard may be petty, but it's also part of a time-honored tradition

Rage, rage against the dying of the Twitter fight

Ian Miles Cheong
@stillgray

The Zuckerberg: Activate expression engine.

Calculating probability of deception success: 97%
Initiating smile module.
Reticulating splines.

Smile module activated.

trey
@treyas1

mark zuckerburg got that WAGON 😟

2:00 PM - 12 Apr 2018

66,093 Retweets 233,641 Likes

Not Understanding Communities

INSIGHT:

Platforms have to evolve and profit to survive, but failing to keep the interests and preferences of the community at heart can be catastrophic.

WHAT:

Snapchat's drastic design changes and prioritization of sponsored content led to a swift decline in usage in early 2018. Amid many other YouTube creator controversies, the platform closed out the year with their most inauthentic YouTube Rewind yet, favoring celebrity highlights over some of the most beloved creators of the year.

IMPORTANT NUMBERS

3M   **users left Snapchat following the redesign***

15M   **Dislikes on YouTube Rewind**

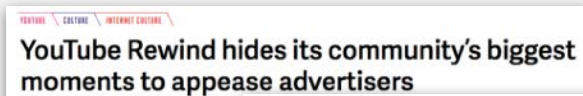**30%**   **of women believe Twitter's Abuse Reporting is inadequate****

*Digital Trends, 2018 **Amnesty International Global Study, 2018

Kylie Jenner @KylieJenner — Follow

sooo does anyone else not open Snapchat anymore? Or is it just me... ugh this is so sad.

1:50 PM - 21 Feb 2018

71,682 Retweets 366,08

TECH \ SNAPCHAT \
Snapchat's redesign cost it millions of users

YOUTUBE \ CULTURE \ INTERNET CULTURE \
YouTube Rewind hides its community's biggest moments to appease advertisers

YouTube Rewind 2018 Officially Becomes Most-Disliked Video Ever

TECHNOLOGY
Twitter's New Features Aren't What Users Asked For
Tackling abuse should be priority number one, many say.

Avery Edison @aedison — Follow

Replying to @jack

Hi, Jack. Features I'd like: the banning of Nazis, white supremacists, etc.; a chronological timeline; enhanced privacy controls; restoration of third-party app abilities; harassment detection and elimination by progressive-leaning moderators; paid accounts;

12:55 PM - 1 Sep 2018

519 Retweets 4,545 Likes

Everything is Fake

INSIGHT:

The ability to tell truth from fiction online is becoming increasingly difficult, and the outcomes can be dangerous.

WHAT:

Sophisticated techniques and computer-generated algorithms are being employed to do everything from bumping up web traffic and views to creating dangerous content using the likeness of real people.

Real people are being incentivized to create fake content too — from negative reviews to fake sponsored content.

IMPORTANT NUMBERS

>60% of web traffic is fake*

~300M fake video ad impressions generated per day via Methbot**

200k customers of Devumi, a company that sells fake social media followers***

*New York Magazine, 2018
**White Ops, The Methbot Operation, 2016
***New York Times, 2018

TECHNOLOGY

Rising Instagram Stars Are Posting Fake Sponsored Content

"It's street cred—the more sponsors you have, the more credibility you have."

The Follower Factory

Everyone wants to be popular online. Some even pay for it. Inside social media's black market.

TECH \ CULTURE \ INTERNET CULTURE

The bots of the future are going to use our own metadata to seem more human

There's been a shift in the way social users communicate and share.

Dark Social

INSIGHT:

Safety concerns and the desire to share meaningfully again are driving growth in private messaging spheres.

WHAT:

Gen Z is driving this trend — it began with Finstas (fake Instagram accounts) to relieve the anxiety of sharing with everyone you know. Similarly, Snapchat, despite losing significantly in 2018, is now a haven for simply messaging the small groups of friends who are still there. Growth in messaging app usage and private chats continues to climb, and is projected to grow to 2.4B users in 2021.

IMPORTANT NUMBERS

+115% increase in dark social messaging from 2016 – 2017*

85% of messages shared on Instagram are between user's same three friends**

2B private messaging users in 2018***

*MarTech Advisor, 2018 **Social Media Week, 2018 ***Statista

The case for having a 'finsta' as an adult

CULTURE

THE DECLINE OF SNAPCHAT AND THE SECRET JOY OF INTERNET GHOST TOWNS

As fewer and fewer of my friends use the platform, Snapchat has become a haven from the grinding utility of the internet

WhatsApp Usage Shows No Signs of Slowing Down
Number of WhatsApp messages sent worldwide per day*

* a message sent to a WhatsApp group is counted as one sent message
Source: Company announcements
©StatistaCharts

statista

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Ephemeral Content

INSIGHT:

Stories are the antithesis to the perfectly curated newsfeed because of their impermanence, but they're also encouraging constant sharing.

WHAT:

Though Snapchat created the temporary story messaging over four years ago, this method of sharing has gone mainstream across private messaging apps and platforms and has become more popular than the newsfeed.

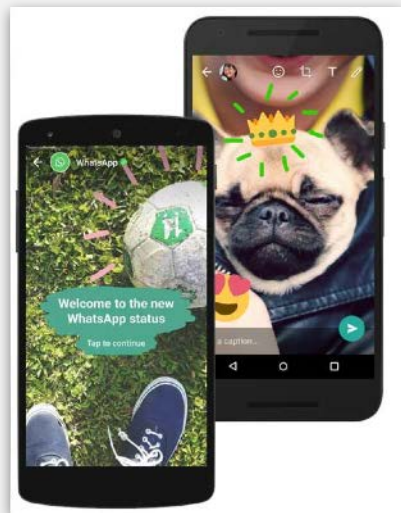**IMPORTANT NUMBERS**

400M   **Daily active Instagram Stories users***

450M   **Daily active WhatsApp Story users****

15X   **Faster growth rate than newsfeed format content from Q2 2016 to Q3 2017*****

Growth of the Stories Format

The platforms that stood out offered new ways to create content and interact.

The All-In-One Platform

INSIGHT:

Users enjoy the seamlessness of using one app when new designs and features meet their needs.

WHAT:

Instagram is staying ahead of the curve and getting users to stay in the app by spotting behaviors on other platforms and creating similar features, including one that taps into the desire for 'dark social' called "Close Friends". They've incorporated longform, vertical content with IGTV, made shopping easier and bookmarking a possibility. These changes roll out gradually, and have reverted back when community response is negative.

IMPORTANT NUMBERS

1B monthly active users as of June 2018*

63% of teens 13 - 17 use Instagram daily*
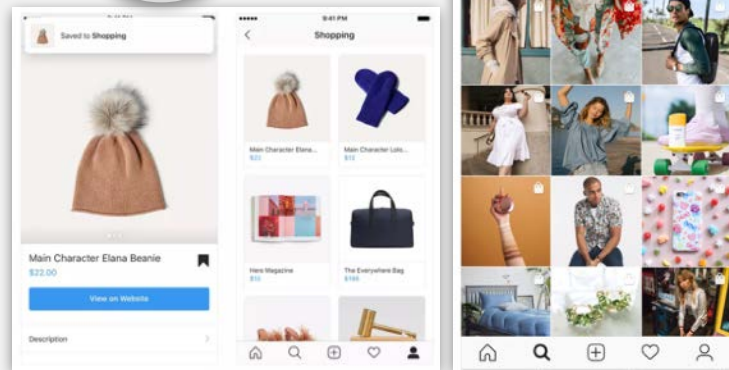
72% of users report making purchase decisions based on something they saw on Instagram*

*HootSuite, 2018
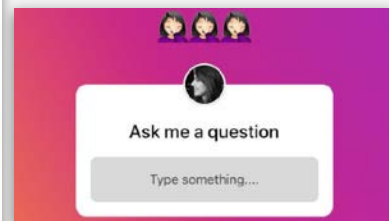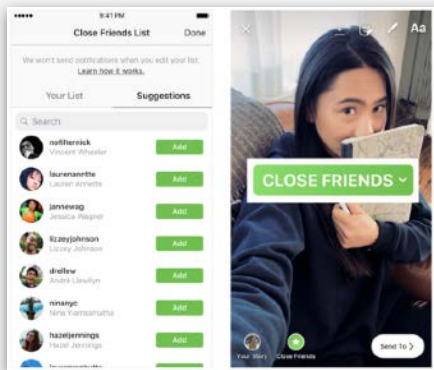
Instagram's IGTV sees growing popularity of episodic videos

SEPTEMBER 14, 2018 by Tim Peterson

The New "Challenge" Platform

INSIGHT:

With a low barrier to entry and easy music integration, challenge culture has found a new home in Tik Tok.

WHAT:

Tik Tok (formerly Musical.ly), is rooted in Vine-style content with user creativity limited to a short timeframe (15 seconds), and the ability to string clips together. The platform surfaces trends via hashtags, the majority of which are challenge-based (i.e. #matildachallenge). Dancing and lip-syncing dominates the platform.
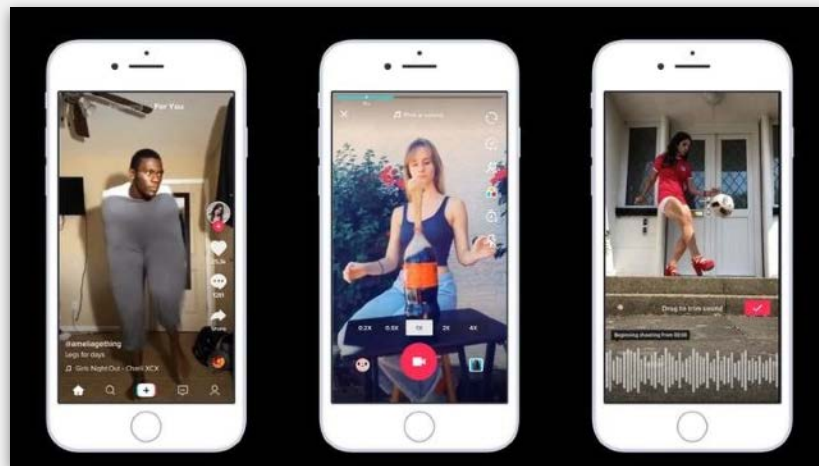
IMPORTANT NUMBERS

500M monthly active users on Tik Tok*

300M monthly active users on Douyin, the Chinese equivalent*

$75B the #1 highest valued tech startup globally (ByteDance, parent company)**

*eMarketer, 2018   **TechCrunch, 2018

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Let's talk about

What People Shared in 2018

The most popular social content emphasized people's desire to **express themselves.**

Dance Challenges

INSIGHT:

The joy of dancing is driving success for new platforms, new and unexpected entertainment, and of course new songs.

WHAT:

Songs and stars continue to spark viral dances like Drake's #InMyFeelingsChallenge spurred by Shiggy and Ciara's #LevelUpChallenge. But dance challenges this year also found success with new platforms (Tik Tok) and permeated other subcultures—gaming, with the #FortniteDanceChallenge.

IMPORTANT NUMBERS

3M mentions of 'In My Feelings Challenge'
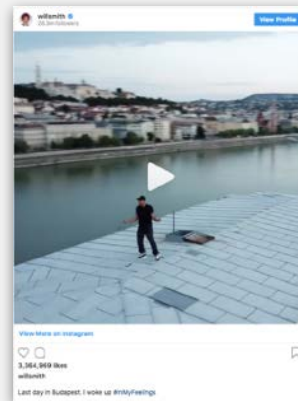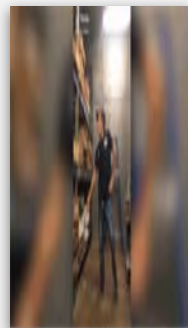
347k mentions of 'Fortnite Dance Challenge'

179k mentions of 'Level Up Challenge'

Note: Source data is from Twitter, Reddit and News articles, from 1/1/2018 - 12/31/2018

It's the Summer of Challenges

Challenges get shared. Challenges get fans. Challenges make hits.

Parties for *every* occasion

INSIGHT:

Social media is both amplifying the pressure to do & share more, and also providing an excuse to get together with people in real life more often.

WHAT:

Social media has fueled the desire to celebrate all life moments, elevating the smaller ones and in turn creating new marketing and business opportunities for everything from Gender Reveals to Godparent Proposals.

IMPORTANT NUMBERS

+374% increase in yearly mentions of 'Gender Reveal' from 2016 to 2018

+152% increase in searches for 'Godparent Proposals' from 2017 to 2018*

35k mentions of 'Divorce parties' in 2018

*Pinterest Newsroom, 2018
Note: Source data is from Twitter, Reddit and News articles

FAMILY

The Over-celebration of Life Events

Gender reveals, post-wedding receptions, divorce parties, promposals—young Americans now have more and more public festivities for milestones that used to be privately celebrated.

ALIA WONG NOV 30, 2018

nicoleni...
556 followers

GENDER REVEAL FAILS!

FREE SHIPPING MUG SET

Only the best AUNTS get promoted to GODMOTHER

Only the best UNCLES get promoted to GODFATHER

Identity Memes

INSIGHT:

People are defining themselves through entertainment, and also looking to astrology to understand themselves and the world around them.

WHAT:

Both of these behaviors are rooted in a desire to share your personality or relate to something, whether it be through characters or the zodiac. For astrology, this stretches beyond memes too—research has shown that younger generations are increasingly less religious, and more interested in astrology as they're looking to something else to find comfort and insight or even escape during stressful times.

IMPORTANT NUMBERS

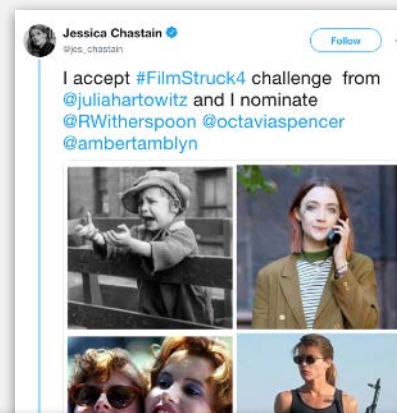**133k** #FilmStruck4 and #DisneyFour mentions

103% increase in mentions about 'astrology memes'

346k followers of @notallgeminis

Note: Source data is from Twitter, Reddit and News articles, from 1/1/2018 - 12/31/2018

Fans are focusing on the visual hallmarks of entertainment and using them in fun and inventive ways.

Costume Breakdowns

INSIGHT:

As franchises grow older (Spider-Man is 57 years old!) fans have begun to pride themselves on being able to celebrate all generations of a character.

WHAT:

These costume and/or actor breakdowns often show the characters in many decades, chronicling how they've grown over the years. We even see this with Hasbro-owned properties, like My Little Pony or Transformers.

IMPORTANT NUMBERS

28 Suits included in Insomniac's blockbuster 2018 PS4 game, Marvel's Spider-Man

1500+ Number of edits on Wookiepedia's entry on Darth Vader's armor

32k Engagements on the evolution of Darth Vader Reddit post

Meme Marketing Power

INSIGHT:

Social users are latching on to a film's few key signifiers, creating memes that substantially drive viewership.

WHAT:

Few movies were memed as much as 'Bird Box' and 'A Star is Born' in 2018. Twitter exploded with hilarious content (and eventually a dangerous challenge) based on Netflix's 'Bird Box', playing on the recognizable bandana. It was inescapable, and with Netflix having such scale, just featuring it prominently in the app + Sandra Bullock's notoriety got 45 million to watch. 'A Star is Born' was also inescapable—even before the film was released. In fact, its earnest (and stereotypical) trailer is what provided so many opportunities for memes.

IMPORTANT NUMBERS

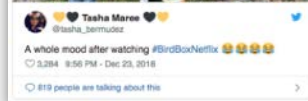**8M** mentions about 'Bird Box' and #BirdBoxChallenge post-release

5M mentions about 'A Star is Born' post-trailer

24M views on 'A Star is Born' trailer (and 1M on the Muppet spoof!)
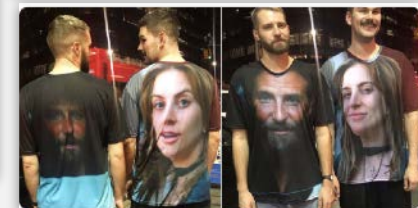

The Truly Viral Movie is Here
'Bird Box' and Netflix's reduction of fiction friction

A Meme Is Born: How Internet Jokes Turned 'A Star Is Born' Into a Hit

Note: Source data is from Twitter, Reddit and News articles

Pet Cosplay (Dogsplay!)

INSIGHT:

It's not enough to dress yourself up in cosplay anymore, real fans dress up their cats and dogs!

WHAT:

Whether it's Game of Thrones or the latest Marvel movie characters, superfans love taking pictures of their animals for social. This lets them celebrate the characters in a new way, and post cute pictures too.

IMPORTANT NUMBERS

152k
Followers of @Cat_Cosplay on Twitter

15k
Instagram posts using #CatCosplay

4k+
Amazon products related to "dog cosplay"

A whole **new level** of absurdity emerged from the content that went viral.

Con Artists

INSIGHT:

Stunts both subtle and outlandish went viral for fooling audiences and the internet.

WHAT:

A photo of Justin Bieber eating a burrito in a bizarre way went viral and turned out to be a staged imitation, friends went viral for a poster they put up of themselves in McDonald's that went unnoticed, and Banksy pulled off a self-destructing hoax at a Sotheby's art auction.

IMPORTANT NUMBERS

380k mentions about Banksy shredding

1M engagements on McDonald's poster prank post

29k mentions about the Justin Bieber Burrito photo

Note: Mention data includes Twitter, Reddit and News articles, from 1/1/2018 - 12/31/2018

Was Banksy's Recent Stunt a Hoax?
Skeptics have offered their own theories about the controversy, some denying it was even shredded at all.

Friends' prank McDonald's poster goes unnoticed for over 50 days

We Fooled the Internet w/ Fake Justin Bieber Burrito Photo

Absurd Fame

INSIGHT:

Social media catapulted a few wholesome and unexpected figures to real fame because… why not? We all needed some positivity in 2018.

WHAT:

What do Gritty, Mason Ramsey and the Hot Duck have in common? They all got their start thanks to social media. People went crazy for their goofy looks, unusual old-school talent or absurd beauty. There's an element of wholesome humor in going crazy for them, and the rarity of that only made it that much more fun to share.

IMPORTANT NUMBERS

34M streams of Mason Ramsey's first hit "Famous"

1M mentions about 'Gritty'

51M likes on "The Egg" Instagram post, most-liked ever

Note: Mention data includes Twitter, Reddit and News articles, from 1/1/2018 - 12/31/2018

Everyone Loves the Hot Duck
By Amanda Arnold

Big Animals

INSIGHT:

These animals and ridiculous terms users created offered lighthearted amusement in an otherwise dark internet.

WHAT:

Similar to 'Absurd Fame', nothing captivated the internet more in 2018 than pictures and videos of large animals and coming up with new terms to describe them: chonk, unit, round boys. This is the next evolution from giving dogs funny nicknames (doggo, puppernino, etc.)

IMPORTANT NUMBERS

742k
mentions of 'absolute unit'

208k
mentions of 'oh lawd he comin'

17k
mentions about 'Knickers' the cow

Note: Mention data includes Twitter, Reddit and News articles, from 1/1/2018 - 12/31/2018

Josh Gondelman @joshgondelman — Follow

People: "If only there were some good news sometimes."
The internet: "Here's a really big cow."
People: "Close enough for now."

2:46 PM - 27 Nov 2018

3,345 Retweets 23,623 Likes

The Museum of English Rural Life @TheMERL — Follow

look at this absolute unit.

Melly Argentum @dreamlandtea — Follow

It's Friday and I've been laughing at OH LAWD HE COMIN for hours

CHONK Chart

7:50 AM - 10 Aug 2018

37,017 Retweets 94,155 Likes

109,230 Likes

And the internet continued to thrive on cringeworthy moments.

Cringey UGC

INSIGHT:

There's a growing subculture around watching unintentionally awkward, or creating intentionally gross content to elicit a cringeworthy response.

WHAT:

'Try Not to Cringe' video compilation creators have gained a new source through Tik Tok, and even brands have picked up on the behavior of being intentionally gross and cringeworthy to get a response from people.

IMPORTANT NUMBERS

271k @boyswhocancook followers

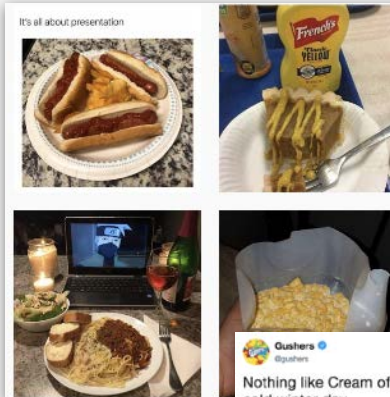**13M** views on the top 10 'Tik Tok Cringe' videos

4M views on the top 10 'Try Not to Cringe Challenge 2018' videos

60

THE TREND IS

Cringing at Brands

INSIGHT:

Brands are often the subject of scrutiny online for trying too hard to resonate with young people and missing the mark.

WHAT:

There were some marketers and platforms in 2018 who were not trying to be cringeworthy. From bizarre event choices (DJ Khaled at Blizcon) to meme-speak, they were trying to appeal to different audiences *insert 'How do you do fellow kids' gif *, but the internet is quick to call out the lame attempts or missteps.

IMPORTANT NUMBERS

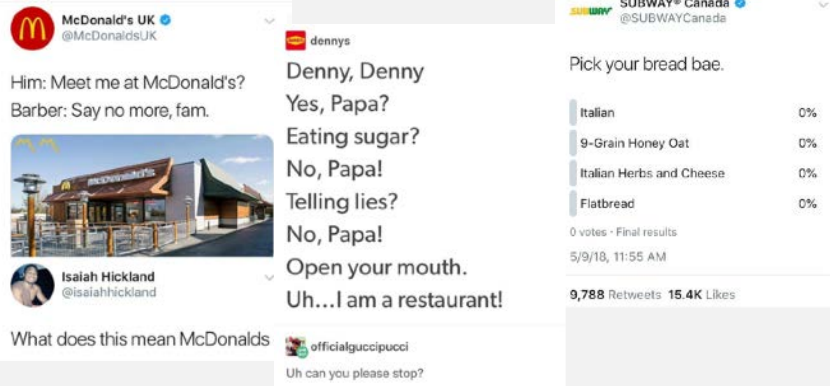**488k** r/FellowKids subscribers

40% of mentions about DJ Khaled's performance at the Overwatch League Finals were **negative**

629k retweets were of posts **mocking** IHOB (making up top 10 most retweeted about the stunt)

Note: Mention data includes Twitter and Reddit, from 1/1/2018 - 12/31/2018

In 2018 we saw:

01 Both a growing distrust in platforms—their policies and content, and dissatisfaction with major platform design changes.

02 Newsfeeds declined while ephemeral content became the new norm and private sharing continued to grow.

03 People latched onto signifiers of new entertainment at an astonishing pace—creating memes that substantially drove awareness and viewership.

04 Escapism through absurdist memes and virality of nonsensical figures like Gritty.
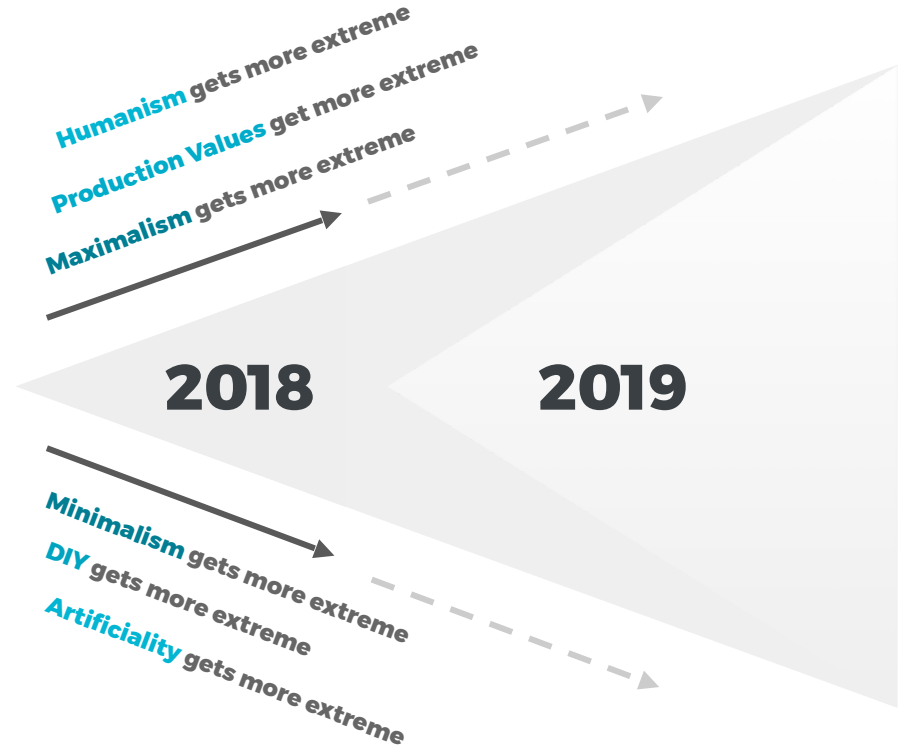
In 2019 we expect:

01 Consumers will continue to grow more cautious about what and where they share, and migrate to platforms that reflect their interests (ex. Tik Tok).

02 User behavior will be further divided between quick, authentic and ephemeral "Story" content and private messaging in smaller circles.

03 Entertainment properties will look to recreate this largely organic trend by creating content that is easily meme-able and shareable (to limited effect).

04 This Dada-esque humor through memes will likely continue, reflecting the political and social climate as well as consumer's desire to escape.

02

Fashion & Design

Design and fashion became more polarized in 2018.

Showing the most extreme version of something is attention-grabbing in a complex, fast-paced media environment.

Humanism gets more extreme

Production Values get more extreme

Maximalism gets more extreme

2018

2019

Minimalism gets more extreme

DIY gets more extreme

Artificiality gets more extreme

Fashion in 2018 went **EXTREME.**

Chunky Sneakers & Dad Fashion

INSIGHT:

These "chugly" sneakers took over runways and Instagram in 2018, bringing new silhouettes to men's and womenswear.

WHAT:

Ugly-on-purpose can be a way of showing fashion bravery; especially in the case of these sneakers, being seen in traditionally "dad sneakers" ironically proves that you are fashionable.

IMPORTANT NUMBERS

239% Increase in mentions about 'ugly sneakers' or 'dad sneakers' from 2017 - 2018
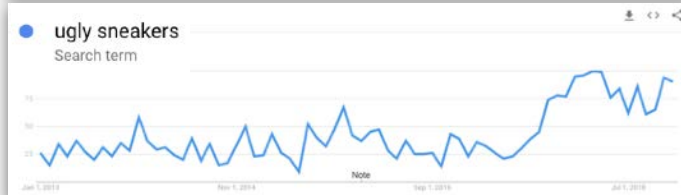
31k #hypebaekicks posts

10k News articles about 'ugly sneakers' or 'Dad sneakers' in 2018

Note: Mention data includes Twitter, Reddit and News articles, from 1/1/2018 - 12/31/2018

Dad sneakers: the 2018 "ugly" sneakers trend

ugly sneakers
Search term

Logomania

INSIGHT:

In an oversaturated market, everyone from high end designers like Balenciaga and Versace to mass market brands like Champion and Fila have adorned merchandise with the name of their brands, a move that helps to build awareness.

WHAT:

In 2018, there was a surge of logo focused merch. Google's most-searched brands were Louis Vuitton and Versace whose logos are clear and conspicuous.

IMPORTANT NUMBERS

104% Increase in mentions of "Logo mania" or "logomania" from 2017 to 2018

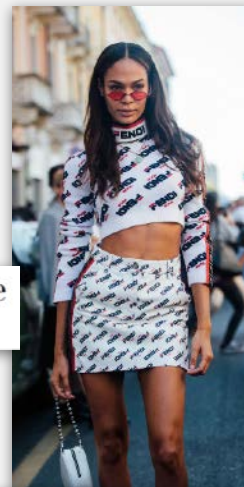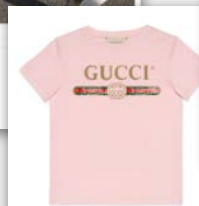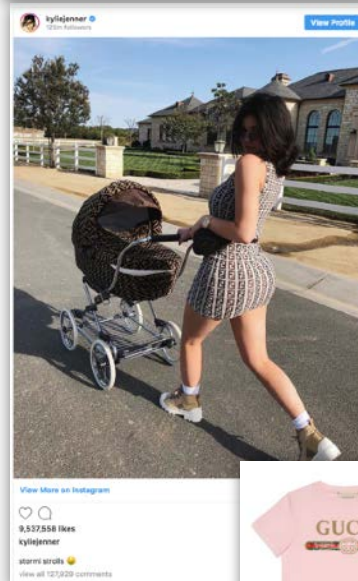**67k** Mentions of #DiorSaddleBag

9.5M Likes on Kylie Jenner's Fendi logo picture

Note: Mention data includes Twitter, Reddit and News articles, from 1/1/2018 - 12/31/2018

Nail the Logomania Trend With These 9 Must-Haves

THE TREND IS

Oversized

INSIGHT:

In a race to make a statement and stay comfortable, fashion has gotten all the more big, especially where outerwear is concerned.

WHAT:

These statement puffers, coats, trenches, and sweaters trended so hard in 2018 that they became meme-able. (The red jacket Kylie Jenner is wearing on the right is a distorted photoshop meant to mock the trend.) It's comfy, it's a statement.

IMPORTANT NUMBERS

381M Views on Kanye & Lil Pump's "I Love It" music video

9k Engagements on the original Kendall Jenner coat meme

130% Increase in searches for 'oversized sweatshirts' thanks to Ariana Grande*

*Bustle, 2018

THE TREND IS

Colorful and Magical Hair

INSIGHT:

2018 became the year where pastel and "princess-y" hair became publicly acceptable for adults to wear.

WHAT:

There is cultural permission for teens and adults to be more creative and self-expressive with their looks; meaning more colorful and "wilder" hair styles. From temporary hair dye to colorful extensions, there are tons of ways to achieve this look.

IMPORTANT NUMBERS

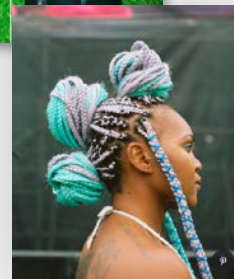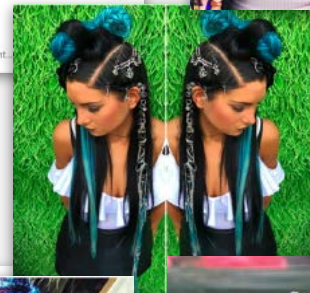**+40%** Growth in "rainbow henna hair dye" Google searches in 2018

81M Festival hair pins on Pinterest

188k Uses of the hashtag #festivalhair on Instagram

Note: Mention data includes Google Trends, Pinterest, and Instagram from 1/1/2018 - 12/31/2018
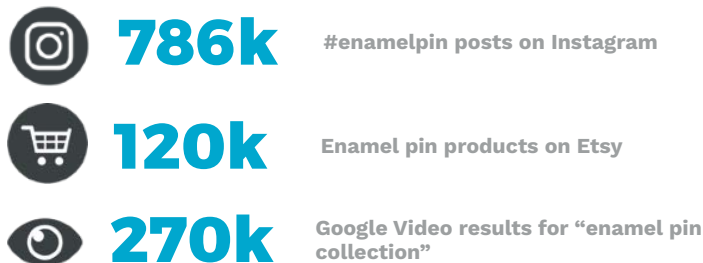
Enamel Pins

INSIGHT:

Picking up steam since 2016, enamel pins reached their peak in 2018. With these small accessories, art is suddenly more accessible. When people want to show off their design aesthetic offline, they can simply pin it to their shirt.

WHAT:

Enamel pins and buttons are a subtle way for people to endorse their design preference or their fandom of their favorite movies, characters and even iconic lines in popular culture.

IMPORTANT NUMBERS

786k #enamelpin posts on Instagram

120k Enamel pin products on Etsy

270k Google Video results for "enamel pin collection"

Note: Search and mention data includes Etsy, Instagram, and Google Video results, from 1/1/2018 - 12/31/2018

70
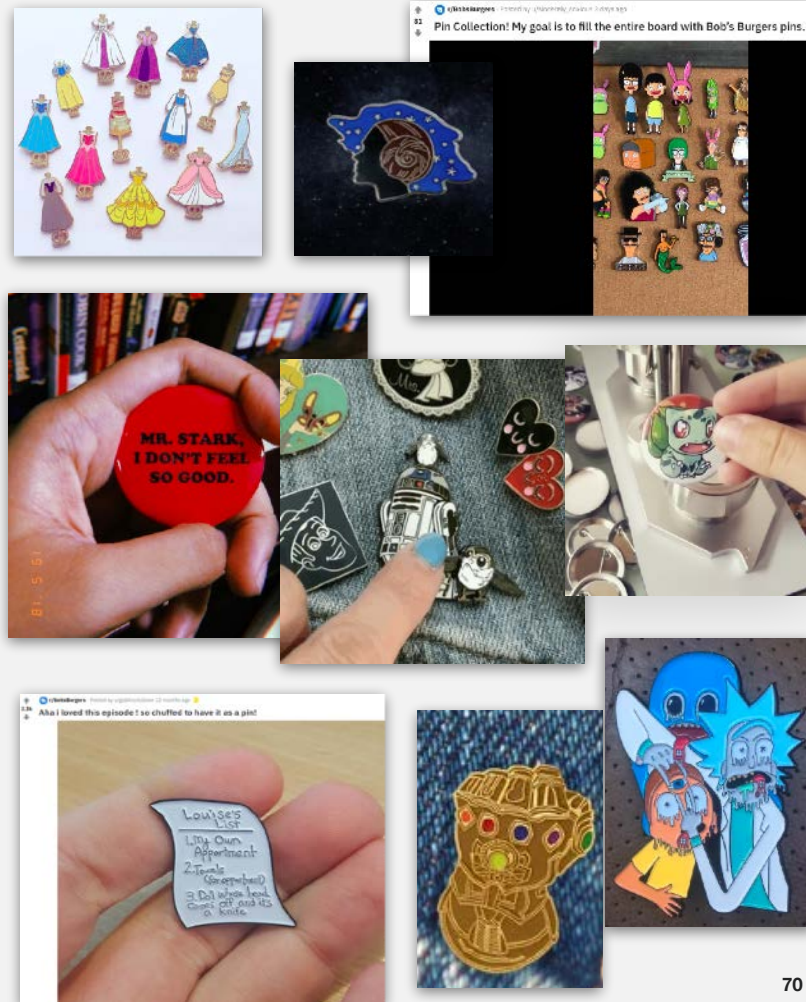
And fashion in 2018 also went **MINIMALISTIC.**

Mini Sunglasses

INSIGHT:

If Instagram didn't exist, neither would the mini sunglass trend of 2018. People embraced the weirder more impractical side of fashion with this trend.

WHAT:
Shades have actually been getting narrower on the runways for a few seasons now but celebrities on Instagram mainly helped to commercialize these tiny shades and make them a LOOK.

IMPORTANT NUMBERS
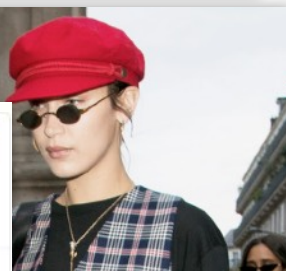
121k — engagements on Mindy Kaling's tweet

44k — mentions of "tiny sunglasses"

3k — news articles about the trend

Note: Mention data includes Twitter, Reddit and News articles, from 1/1/2018 - 12/31/2018

> **Mindy Kaling** ✓
> @mindykaling
>
> I think we will regret this tiny sunglasses look
> ♡ 104K   7:53 AM - May 14, 2018
> ♡ 17.7K people are talking about this

72

Clear Accessories

INSIGHT:

From clear outerwear to see-through boots and bags, the ubiquitous clear material set off by Chanel's 2018 runway show took over many wardrobes in summer 2018.

WHAT:

These clear products give us a peek inside— either in an imaginative way or in reality. They're visually appealing, so they perform well on visual channels like Instagram.

IMPORTANT NUMBERS

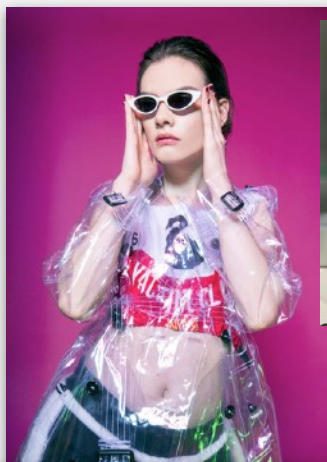**61k** mentions about Chanel's transparent PVC bags

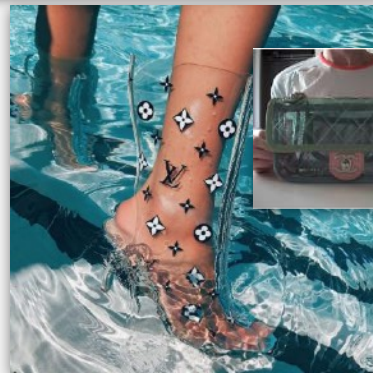**222k** Likes on off white x rimowa transparent suitcase collaboration

681 News articles about the trend

Note: Mention data includes Twitter, Reddit and News articles, from 1/1/2018 - 12/31/2018

Clear Accessories Are The Hottest Trend Of The Season

Ways that people bought clothes also drastically shifted in 2018.

Plastic Recycling in Fashion

INSIGHT:

Brands like Adidas, Everlane, and H&M have made bold brand statements by selling specific recycled-plastic products.

WHAT:

Adidas has already sold 1M+ shoes made out of recycled ocean plastic, and pledges to up that number in the coming years. Other retailers like Everlane and H&M have specific products that lead the category into more sustainable practices.

IMPORTANT NUMBERS

$ **33%** Surveyed consumers who prefer to buy sustainably*

🛒 **1M** Shoes Adidas sold in 2018 made of recycled ocean plastic**

P **+34%** Increase in searches for 'sustainable fashion' in 2018***

*Unilever, 2017. **USA Today, 2018. *** Pinterest Report, 2018

Even Faster Fashion

INSIGHT:

More and more shoppers are buying (or renting) clothes just for the Instagram picture, then immediately returning them.

WHAT:

These "try-ons" are sometimes even sanctioned by the retailers, as ways to get free marketing and social posts out of fashion-conscious users. With the need to constantly post fresh content, fashion influencers have to turn to cost-effective ways to fill their social feeds.

IMPORTANT NUMBERS

1/10 UK shoppers admit to buying clothes to post on social media and then returning them*
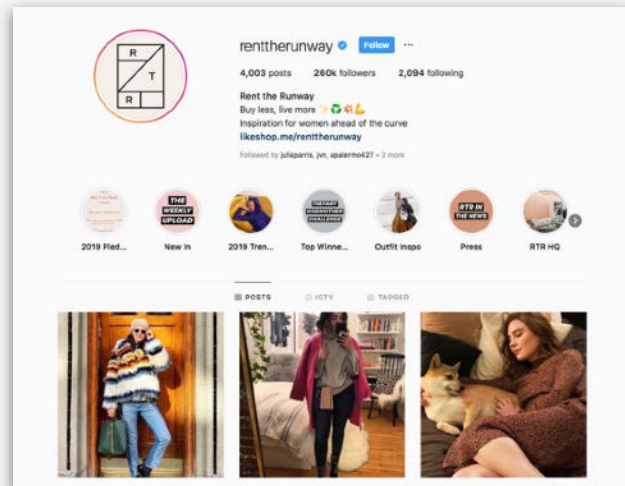
$ 50% Of Rent the Runway's revenue comes from their subscription service, just 2 years old**

79k Instagram posts hashtagged with #RentTheRunway***

*Qz, 2018. **Rent the Runway, 2018. ***Data comes from Instagram, 1/1/2018 - 12/31/2018

Product design leaned into humanist interpretations of minimalism and maximalism as visual representations of fun.

Beyond Plastic

INSIGHT:

Swapping out plastic for something biodegradable (even for only a limited time) can demonstrate brands' commitment to the planet.

WHAT:

Products that traditionally contain a plastic element have swapped out the plastic for biodegradable (or even edible!) packaging. These changes don't have to be permanent, but they demonstrate that the brand is interested in exploring less wasteful production.

Simplicity

INSIGHT:

Plain and minimalistic design uses its soothing effect to draw attention.

WHAT:

Packaging design taking minimalism to the extreme, removing imagery and reducing visible text to the bare essentials.
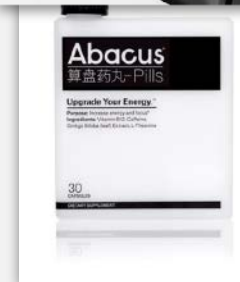
Simplistic branding shifts from 2018

Hyper Personalized Products

INSIGHT:

Companies have been providing more personalized products to provide consumers with the feeling of personal communication to draw them in further to the brand.

WHAT:

Everything in retail revolves around buyer's behavior, demands and transactions. With more data accessible, personalization will continue to grow in a more automated way.

Mimics

INSIGHT:

We feel attracted to odd-looking packaging that tricks our mind into believing it's something else.

WHAT:

From bamboo trees to birds and classic works of art, this packaging draws you in.
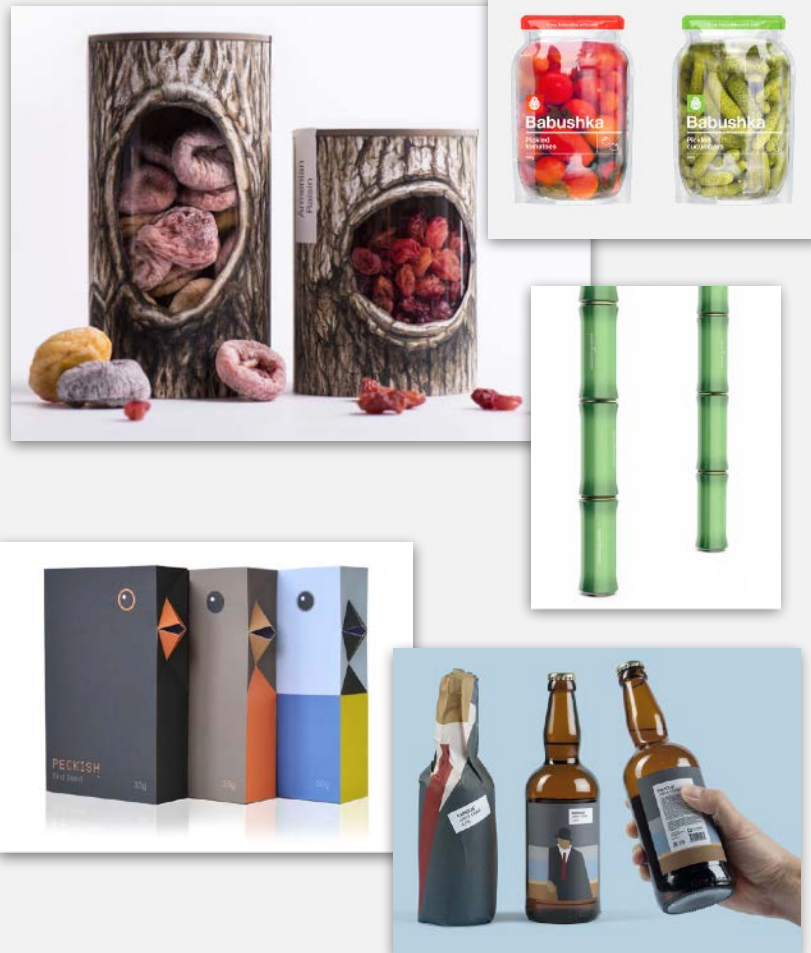
SAY IT LOUD

INSIGHT:

Large bold typefaces paired with fun quirky text are a fun way to stand out on shelves and online.

WHAT:

Packaging focusing on very large text that takes most of the visual room as well as removing any kind of imagery and illustrations.

Doodles

INSIGHT:

Hand-drawn illustrations and handwriting humanize products, standing out from competition that feels overly formal or rigid.

WHAT:

Kid-like illustrations and handwritten text on packaging conveys a more friendly and playful style.

Some brands are using design to situate their products in **specific cultural contexts.**

New cultural contexts freshen up existing properties

Batman
(Franchise)

+

Feudal Japan
(Cultural Lens)

=

Batman Ninja Movie
(Refreshed Franchise)

80s and 90s Nostalgia

INSIGHT:

A global resurgence for nostalgia in these decades has been driven by Gen-Z's obsession with their aesthetics and tropes.

WHAT:

These usually come out in the revitalization and sometimes the relaunch of brands (like Lisa Frank and Trapper Keeper) and media (like The Breakfast Club) from those decades. Recontextualizing established 80s and 90s tropes in modern spaces creates a way for everyone on the internet to celebrate those decades.

IMPORTANT NUMBERS

10k   News articles about 90s fashion in 2018

2M   Posts on Instagram about #90sFashion

14k   Engagements on the Breakfast Club themed Wonder Woman '84 tweet

Note: Mention data includes Twitter, Instagram, and News articles, from 1/1/2018 - 12/31/2018
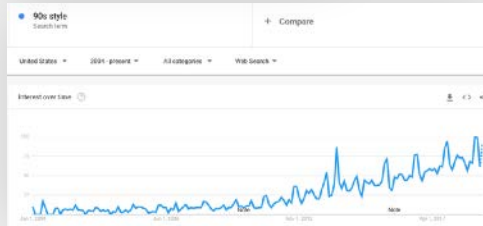
Witches

INSIGHT:

Witches are played in modern culture as "spooky fun" rather than genuinely scary or occult.

WHAT:

Themes of witches and covens are being seen throughout popular culture in relation to the women's movement and recent shows like AHS Apocalypse and The Adventures of Sabrina. Magic themes are relevant in the Marvel series. Witchcraft specifically will be a large portion of the upcoming Avengers 4 film which features the Scarlet Witch.

IMPORTANT NUMBERS

2M #witchesofinstagram posts

55k Witchcraft products on Etsy

22k Engagements on @honest's "watching Hocus Pocus" meme

Note: Mention data includes Etsy and Instagram, from 1/1/2018 - 12/31/2018

88
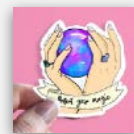
THE TREND IS

Renaissance

INSIGHT:

Renaissance art is so iconic and instantly recognizable that it is fun to apply to modern-day subjects.

WHAT:

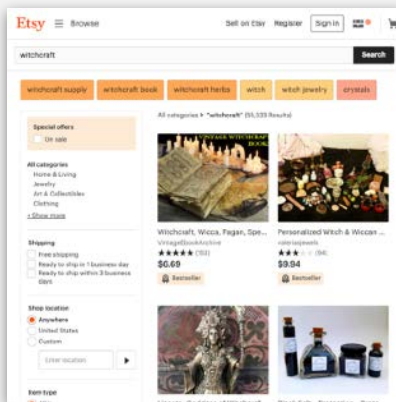People are sharing historic paintings with a humorous twist. This trend ranges from people identifying features similar to themselves or popular figures in paintings to captioning pieces with new-age slang. The merger of revered art from the past with this modern take is not only comical, but it also reveals shocking resemblances.

IMPORTANT NUMBERS

502k Subscribers to r/AccidentalRenaissance subreddit

319k Engagements on @norafrican's museum lookalikes post

84k @chalametinart Instagram account followers

Note: Mention data includes Reddit and Instagram, from 1/1/2018 - 12/31/2018

Someone has photoshopped Timothée Chalamet into historical paintings and the results are glorious

young ass
@norafrican
Follow
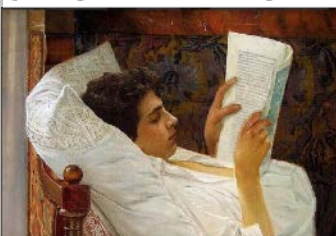
COMMUNITY DETAILS

r/AccidentalRenaissance

469k
Universalis personae

2.5k
polymathes

Welcome to /r/AccidentalRenaissance, the subreddit that showcases photographs that inadvertently resemble well-composed Renaissance style art.

53% Portrait of M.P.Musorgsky
Ilya Repin

The State Tretyakov Gallery
Google Arts & Culture
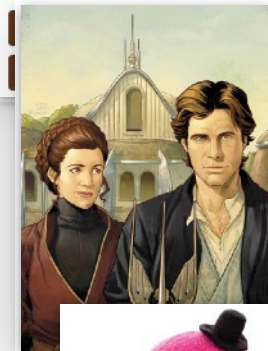
In 2018 we saw:

01 Fashion in 2018 went BIG, BOLD and LOUD.

02 The pace of change continues to increase, accelerated by more carefully curated aesthetic personas.

03 Product design leaned into humanist interpretations of minimalism and fun, light-hearted maximalism.

04 Designing for specific cultural contexts can be disruptive and pull in new audiences.

In 2019 we expect:

01 Fashion will continue to grow more outlandish and attention-grabbing, while balanced with countervailing minimalism.

02 While fast fashion continues to feed our feeds, there is a growing emphasis on what happens to the clothes when you're finished.

03 Humanism in product design may begin to feel forced if deployed inappropriately or if the market becomes oversaturated.

04 Used correctly, cultural contexts can continue to breathe fresh life into brands and franchises. Moving forward we'll see both hits and misses.

03

Entertainment & Fandom

Entertainment brands across the board have made a big splash in 2018.

They've found new approaches to engage with their fandoms.

MOVIES

SHOWS
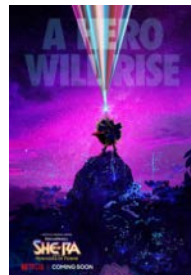
GAMING
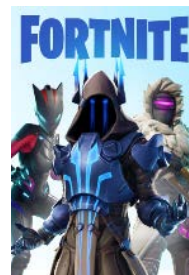
MUSIC

PODCASTS

SPORTS

In 2018, movies and shows have taken a more thoughtful approach to diversity and inclusion.

Universe Expansion

INSIGHT:

Content made for specific groups of fans boosts authenticity, and garners massive buy-in from fandoms.

WHAT:

Blockbusters are adding new and diverse angles to stories by casting and displaying cultural perspectives not seen before in mainstream film. When done with intention fans typically react well, but when the attempt is half baked it leaves a bad taste for fans.

IMPORTANT NUMBERS

1B   black panther international box office sales*

2B   avengers: infinity war international box office sales*

3M   Mentions of "Spider-Man: Into the Spider-Verse" across social

*ScreenRant

Note: Mention data includes Twitter, Reddit and News articles, from 1/1/2018 - 12/31/2018

Spider-Man: Into the Spider...
Spider-Man feel original again

Miles Morales is the hero in a sumptuous animated adventure that hits the superhero jackpot.

By Alex Abad-Santos | alex@vox.com | Nov 28, 2018, 8:00am EST

'Shang-Chi' Marvel's First Asian Film Superhero Franchise; Dave Callaham Scripting, Search On For Director Of Asian Descent

"FANTASTIC BEASTS: THE CRIMES OF GRINDELWALD" SHOWS DIVERSITY DOESN'T WORK AS AN AFTERTHOUGHT

'Black Panther' Helped 2018 Movies Break Box Office Records & It's No Secret Why

Refreshing Revamps

INSIGHT:

Bolder, tighter and more intentional social stances cut through the content clutter.

WHAT:

Foretold stories are being sharpened with thoughtful nuance and a greater sense of social awareness and sensitivity. In order to reinvigorate the classics, films are incorporating themselves into social conversation.

IMPORTANT NUMBERS

2M views on the season 1 trailer for "She-Ra and the Princess of Power" trailer

1M mentions about "The Chilling Adventures of Sabrina" in 2018

67M Box office sales of the "The Grinch" as of 11/11/18*

*Hollywood Reporter

Note: Mention data includes Twitter, Reddit and News articles, from 1/1/2018 - 12/31/2018

Vox FUTURE PERFECT   EXPLAINERS   THE GOODS   POLITICS & POLICY   CULTURE   MORE ▾

How Netflix's Sabrina updates the witch fantasy of the 1990s

The Chilling Adventures of Sabrina smartly confronts the way that witch stories regulate women's power.

By Constance Grady | @constancegrady | Updated Oct 31, 2018, 9:54am EDT

HOME ▸ TV ▸ NEWS   OCTOBER 20, 2018 6:00PM PT

'Chilling Adventures of Sabrina' Stars on the Netflix Show's Feminist Themes

Netflix's She-Ra is a terrific reboot — and a huge step for LGBTQ representation on TV

She-Ra and the Princesses of Power honors and challenges the original She-Ra.

These Grinch Billboards Are Making People Laugh All the Way to the Movie Theater

HOW THE GRINCH'S SUPER-META, TOTALLY GRINCH-Y AD CAMPAIGN TURNED ITS BOX OFFICE GREEN

96

This has led to some discrepancies.

Critics vs. Spectators

INSIGHT:

Spectators and critics have different values when it comes to movies.

WHAT:

With movies and cultural moments happening at rapid pace, the thrill of entertainment is being lost. More filmmakers are taking new angles with their storytelling to keep them compelling, and as a result we get movies like Venom. Though this has been going on for a while, the disparity between critics and spectators is becoming very apparent.

IMPORTANT NUMBERS

855M global box office sales for "Venom"*

9M mentions about 'Venom' in 2018

63% Hereditary audience score on Rotten Tomatoes as opposed to the 89% approved critics score

**Box Office Mojo

Why You Hated 'Star Wars: The Last Jedi' But Critics Loved It

Why is 'Hereditary' such a hit with critics — and an apparent flop with audiences?

OCTOBER 06, 2018 9:30am PT by Richard Newby

Why 'Venom' Is Dividing Critics and Audiences

The growing gaming industry is getting serious.

Gaming Driving Culture

INSIGHT:

Fortnite revealed that games can keep up with and ultimately steer culture with cross-platform cloud gaming and unexpected partnerships to boost appeal.

WHAT:

The Fortnite phenomenon has torn down platform limitations and is bringing in unexpected brand partnerships from Marvel to the NFL. The game has found that by including different platforms and fandoms, they can increase engagement among players.

IMPORTANT NUMBERS

200M Fortnite users worldwide as of November 2018*

590k News articles regarding Fortnite

81M Total views of the Eh Bee Family's "Fortnite Dance Challenge"

*Statista
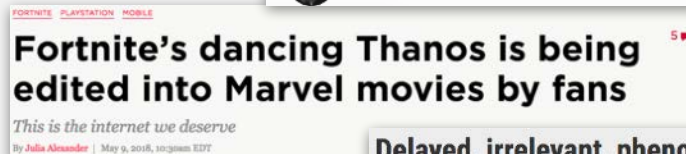
Customized Game Play

INSIGHT:

Gaming meets drop culture with timely, yet snackable content releases finding major success among young gamers and fans.

WHAT:

Sony's Spider-Man is seeing massive success for its open world gaming, dynamic web-slinging gameplay and its large selection of Spiderman costumes for gamers to try out enjoy. A part of Fortnite's success is its continued release of new skins and updates.

IMPORTANT NUMBERS

$ **3M** — Number of Spider-Man copies sold in the first 3 days of release*

💬 **45k** — Mentions about "photo mode" in Spider-Man

$ **300M** — revenue in the month of May from in-game Fortnite skins**

*Hollywood Reporter
**Statista

Note: Mention data includes Twitter, Reddit and News articles, from 1/1/2018 - 12/31/2018

Marvel's Spider-Man's 'photo mode' inspires some very silly memes

Spidey's selfie sense is tingling!

Brittany Vincent—2018-09-11 02:40 pm
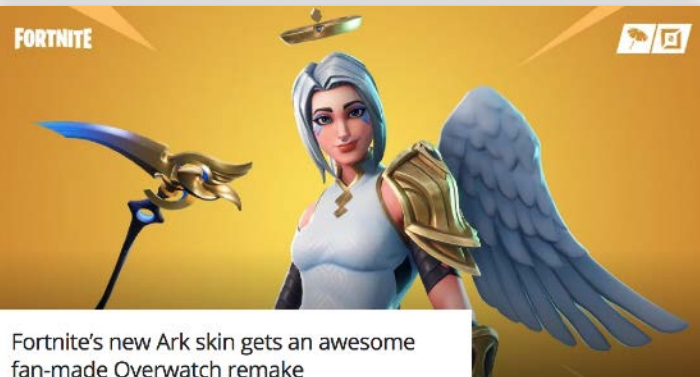
FORTNITE

Fortnite's new Ark skin gets an awesome fan-made Overwatch remake

Gaming for All

INSIGHT:

The gaming industry is making games more accessible and tailored for all gamers regardless of ability.

WHAT:

Gaming companies are making it easier to be a gamer no matter the ability. Microsoft created and released a cool new controller for disabled gamers, Overwatch recently implemented a update specifically for colorblind gamers and streamers, while Spiderman has been applauded for its accessibility options as well.

IMPORTANT NUMBERS

2M — views on the 'Introducing the Xbox Adaptive Controller' video

28k — Reddit upvotes on the Xbox adaptive controller announcement thread

346k — Views on Twitch stream from "Kolorblind" following announcement of Overwatch colorblind feature

LAURA PARKER GEAR 09.25.18 09:00 AM

XBOX ADAPTIVE CONTROLLER GIVES DISABLED GAMERS A POWER-UP

PLUGGED IN
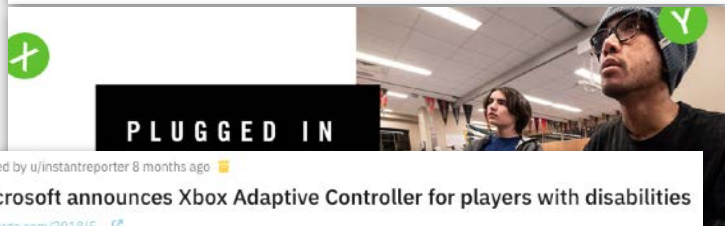
Posted by u/instantreporter 8 months ago

28.9k Microsoft announces Xbox Adaptive Controller for players with disabilities

theverge.com/2018/5...

Gaming

OVERWATCH: STREAMER AND #1 BASTION MAIN "KOLORBLIND" DISCUSSES THE IMPACT OF COLORBLIND FEATURES
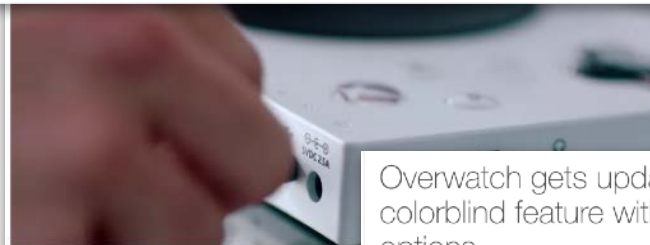
Introducing the Xbox Adaptive Controller
1,884,994 views

Overwatch gets updated colorblind feature with nine color options

Brittany A. Roston · Sep 21, 2018, 8:59 pm CST

FEATURES

Spider-Man's accessibility options, from the people who benefit from them

Industry Growing Pains

INSIGHT:

Influencers, celebrities, and more want their fair shake in the gaming industry.

WHAT:

Gone are the days when becoming a professional gamer was fun and lax. With the rapid success of the growing industry players feel the pressure and businesses, influencers and even military branches are expressing their interest.

IMPORTANT NUMBERS

$ **906M** — estimated eSports market revenue worldwide in 2018*

601k — mentions about Fortnite being sued, for the 'Backpack Kid', 'Carlton' and 'Milly Rock' dances

800 — active members of the Game Workers Unite labor association from 200 in 2017**

*Statista **Polygon

Note: Mention data includes Twitter, Reddit and News articles, from 1/1/2018 - 12/31/2018

Sports
'It's not as awesome as people imagine': Esports players say 'dream job' is more than fun and games

Pro Gamers Are Getting Serious About Unionizing
Maddy Myers
3/14/18 1:30pm · Filed to: OVERWATCH
19.3K 79 12

Fortnite fight: Can the Carlton dance be claimed?

Backpack Kid is also suing Epic Games over a dance in Fortnite
The list of celebrities claiming the game uses their work without permission continues to grow

FORTNITE PLAYSTATION NINTENDO
Epic Games sued for swiping 'Milly Rock' dance for Fortnite

NEWS CULTURE
Why 2019 could be the year video game unions go big
Game Workers Unite says success in the UK is good news for American studios
By Charlie Hall | @Charlie_L_Hall · Dec 27, 2018, 11:00am EST

A few superstars took advantage of 2018 with their approaches to music.

Pop Culture Queen: Ariana Grande

INSIGHT:

The early 2000's are the new red-hot source of entertainment nostalgia.

WHAT:

Ariana Grande, in the past year, has ascended to pop superstardom despite adversity. Grande being awarded Billboard's Woman of the Year delivered for her fans by leveraging an iconic girl-powered past with an rallying cry for self love.

IMPORTANT NUMBERS

283M views on the "Thank you, next" music video

105M views of Ariana Grande's "7 rings" music video

47M monthly listeners on spotify

POP MUSIC

How Ariana Grande Rocketed to Pop Music's Top Rung

She has top singles, a high-profile relationship, and all our attention.

How Ariana Grande's 'Thank U, Next' Became a Viral Video 'Event' in the Streaming Era

Ariana Grande
@ArianaGrande

0:14   14.3M views

11:02 PM · 25 Nov 2018

276,658 Retweets 908,195 Likes

Ariana Grande Fans Rally Around Her After Trolls Blamed Her For Mac Miller's Death

10 September 2018, 14:40 | Updated: 10 September 2018, 15:20

ADVERTISEMENT

Billboard's 2018 Woman of the Year: A Timeline of Ariana Grande's Big Year

105

K-Pop Kings: BTS

INSIGHT:

Being for a specific audience stokes authenticity for massive appeal and success.

WHAT:

BTS has build their brand on the message of 'One Love' and remaining true to self. The group creates music only in their native tongue even with a widening global audience which has only boosted their authenticity. Their fans, 'Army,' made them the most-tweeted about celebrities, gained them the most Twitter engagements by far, and propelled them into becoming social justice advocates.

IMPORTANT NUMBERS

36M total engagements on Twitter in a two month span*

430M views on BTS' "Fake Love" music video

283M mentions about BTS

* Forbes
Note: Mention data includes Twitter, Reddit and News articles, from 1/1/2018 - 12/31/2018

Janet Jackson, With the Support of BTS, Calls Out Sexism and Abuse in Entertainment at the Mnet Asian Music Awards

DECEMBER 14, 2018 12:12 PM

EXPECTED VS ACTUAL ENGAGEMENT ON TWITTER

BTS ARMY: Inside the World's Most Powerful Fandom | MTV News
5/2,785 views
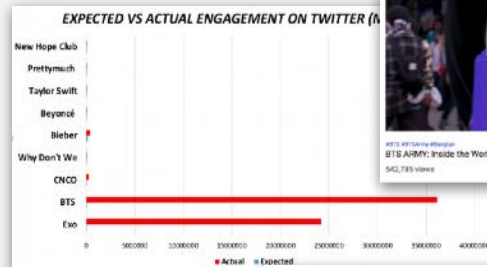
BTS Fans Are Angry After An Interviewer Criticised RM's English

7 October 2018, 17:08 | Updated: 9 October 2018, 15:43

'I Was Lucky I Didn't Give It All Up': K-Pop Band BTS Addresses the United Nations

CULTURE > NEWS

Surprising Exactly No One, BTS Is 2018's Most Tweeted-About Celebrity

DECEMBER 5, 2018 6:50 AM

The Drake System

INSIGHT:

The all-around appeal approach still requires an all-around effort for fan engagement.

WHAT:

Drake, one of the biggest artists in the hip-hop genre today, has repeatedly driven culture through a timely barrage of challenges, viral videos, gossip and memes.

IMPORTANT NUMBERS

8.2B   streams on Spotify in 2018

924M   views on Drake's "God's Plan" music video

3M   mentions of 'In My Feelings Challenge'

*AP News

Note: Mention data includes Twitter, Reddit and News articles, from 1/1/2018 - 12/31/2018

BTS' ARMY Fandom & Drake's 'In My Feelings' Challenge Come Out on Top in Instagram's 2018 Year in Review

SCORPION by DRAKE

PageSix tv

Drake-inspired 'In My Feelings' challenge won 2018

December 18, 2018

What were the biggest viral victories of 2018? This year, the "In My Feelings" challenge dominated pop culture, with A-listers Will Smith, Ciara and C

CHOOSE A PHOTO OF YOUR FACE
OR
USE WEBCAM

Shiggy on Starting a Viral Dance Challenge For Drake, and His Favorite Celebrity Versions

Spotify users push back at the over-the-top Drake promotion

Sarah Perez @sarahintampa / 8 months ago

Drake Gave Away $1 Million in His New Music Video Because He's a Generous Dancing King

While the Podcast space is still long tail, major entertainment brands are backing the category.

The Podcast Boom

INSIGHT:

As podcasting grows and content becomes more niche, monetization is evolving.

WHAT:

The barriers to entry are much lower than they were in the past and we're seeing new and inventive podcasts for just about every niche. Podcasts are starting out small and specific and amassing a following that leads to live shows and ultimately television series, like 2 Dope Queens and Pod Save America.

IMPORTANT NUMBERS

$ 326M US ad spending on podcasts in 2018*

18M views of The Joe Rogan Experience podcast

1.5M average number of listeners of Pod Save America podcast**

*Forbes
**The Guardian

2 Dope Queens
TV-MA | 58 MIN
ON DEMAND: AVAILABLE SAT, JAN 12   TELEVISION: MON, JAN 14, 9:
2 Dope Queens, featuring Jessica Williams and Phoebe Robinson, is a series of fou the hit comedy podcast of the same name. Read More

Joe Budden's 'The Joe Budden Podcast' Lands Partnership With Spotify

Pod Save America Makes Leap to TV
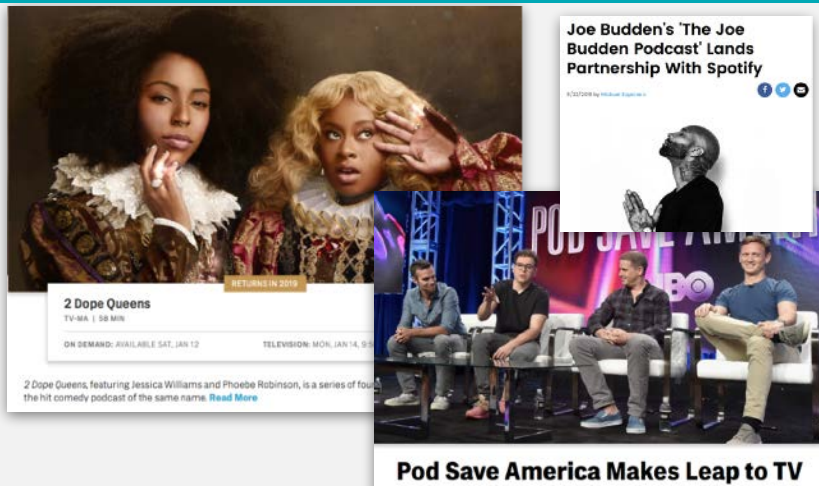
Destinations Needn't Miss Out On The Podcast Boom
Los Angeles Times
DIRTY JOHN

Joe Rogan Experience #1169 - Elon Musk
18,641,922 views

Modern Audio Dramas

INSIGHT:

Brands and podcast networks are making a larger investment in audio dramas.

WHAT:

Podcasts are taking the audiobook to the next level with scripted series for listeners to indulge in, mixing sensory elements into the audio format.

IMPORTANT NUMBERS

5M monthly downloads of Night Vale Presents podcasts*

350M combined downloads of "Serial" season 1 and 2 as of september 2018**

69k mentions about 'Homecoming'

*Night Vale Presents** Vulture

Note: Mention data includes Twitter, Reddit and News articles, from 1/1/2018 - 12/31/2018

'Wolverine: The Lost Trail': Marvel Podcast Renewed for Season 2, Will Return to Stitcher in 2019

Richard Armitage will be back as Logan for a New Orleans-set season, planned for a winter release next year.

Steve Greene
Nov 5, 2018 2:00 pm

'Homecoming' Trailer: Sam Esmail Channels Hitchcockian Paranoia in Latest Look at Amazon's Julia Roberts-Led Thriller

Stephan James, Bobby Cannavale, and Shea Whigham co-star in the upcoming series based on the star-studded Gimlet fiction podcast.

Steve Greene
Oct 22, 2018 11:16 am
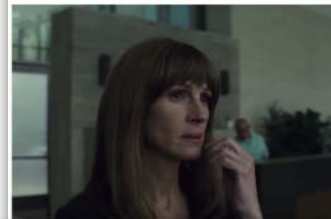
BRIEFING + PODCASTS

Serial Tallies Nearly 3 Million Downloads in Record-Breaking Debut

Modern Audio Drama

Welcome to Night Vale
Night Vale Presents

ILLUSIONOID
Illusionoid/ Entertain...

EOS 10
Justin McLachlan

Our Fair City
HartLife

TANIS
Public Radio Alliance

COMICS

More Marvel Podcasts We'd Listen to After Wolverine: The Long Night

BY JORDAN MINOR 05.23.2018 : 9:00AM EST @JORDANWMINOR

"Love and Luck": An Audio Drama Beacon of Queer Hope

THE LOVE AND LUCK PODCAST

110

Sports, and more specifically its players, are shifting the perception of the Athlete.

#MoreThanAnAthlete

INSIGHT:

We have come to expect athletes to have opinions on issues outside of sports.

WHAT:

The sports world at the top of 2018 witnessed a paradigm shift as its top athletes began to use their voices in hot button political issues. From Colin Kaepernick's peaceful protests to Lebron James' I Promise School, athletes have used their voices and platforms for community-driven initiatives.

IMPORTANT NUMBERS

100k mentions of #MoreThanAnAthlete

27M views of the Nike "Dream Crazy" ad on Youtube

873k mentions about LeBron James' school, 'I Promise'

Note: Mention data includes Twitter, Reddit and News articles, from 1/1/2018 - 12/31/2018

THE TREND IS

NBA Style

INSIGHT:

The tunnel stroll is the new fashion runway for athletes.

WHAT:

NBA players are more seriously being looked to as trendsetters in the fashion category as it has become a real spectacle to see what the players have on when arriving to the arena. Players have social media pages, GQ articles, and other news stories documenting their fashion statements.

IMPORTANT NUMBERS

21k mentions about Russell Westbrook's style in 2018

9k mentions about LeBron x John Elliott

363k followers of @UpscaleHype

Note: Mention data includes Twitter, Reddit and News articles, from 1/1/2018 - 12/31/2018
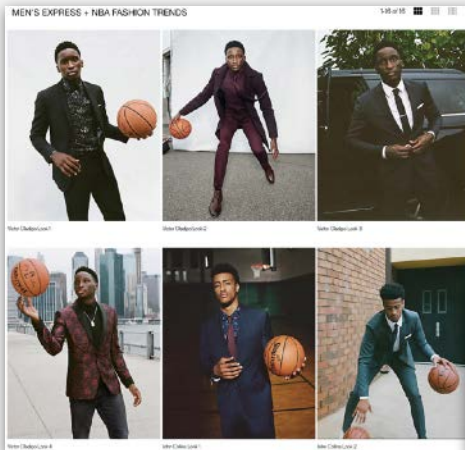
JAMES HARDEN
PIMP ASS SHORT SUIT
Swags Out Before Droppin' 50 on Lakers
EXCLUSIVE DETAILS

NBA
NBA Style: the League's Hottest Trend Is Carrying Your Work Shoes

Style
John Elliott Designed a Brand-New Sneaker for LeBron James
BY SAM SCHUBE
May 23, 2018

How the NBA Dress Code Helped Create a Fashion-Conscious League

Professional Fans

INSIGHT:

Athletes are propelling other facets of culture as a part of the fandom.

WHAT:

Athletes from multiple sports are displaying their knowledge of and participation in fan culture, and garnering intrigue and viewership from these different subcultures and fan intersections.

IMPORTANT NUMBERS

146k views of "On the Sticks" with Iman Shumpert

24k Upvotes on the German soccer teams' Fortnite celebration thread

630k Concurrent viewers on twitch with nfl player juju smith-schuster record breaking

LeBron James @KingJames

Man "What's Free" is one of the hardest, dopest, thoughtful tracks I've heard in awhile! My goodness @MeekMill @RickRoss and Young Hov did they thang on another level. And of course the "What's Beef" Biggie sample, they had no choice! 🔥🔥🔥🔥🔥 ‼️ ‼️ ‼️

2:14 AM - 1 Dec 2018

7,993 Retweets 38,457 Likes

A German soccer team celebrated a goal by acting out a common *Fortnite* scene, which was shared on Reddit:

ON THE STICKS S1 · E4
D'Angelo Russell and DJ Akademiks Test Their Survival Skills in 'PUBG' | On the Sticks

ON THE STICKS S1 · E3
DJ Akademiks takes on Iman Shumpert in 'Forza Horizon 4' | On the Sticks

JuJu Smith-Schuster joins Drake on largest Twitch stream ever

In 2018 we saw:

01 Diverse and inclusive stories focused on speaking to specific audiences found massive mainstream success.

02 A widening disconnect between critical and fan reception across a range of categories and formats.

03 Gaming has fully transitioned from a reflection of existing culture to a primary force creating cultural moments.

04 Athletes stretching their ability to influence different parts of culture, from social causes to fashion and fandom.

In 2019 we expect:

01 Continued efforts for the inclusion of underrepresented communities paired with storytelling that has depth and relatability.

02 Data-driven studios and creators will continue to get smarter about what audiences want. Of course, critical opinion will still be courted.

03 Continued maturation and increasing influence of the gaming industry, fueled by Gen Z, who have never viewed gaming as niche.

04 Continued cross-category conversation and influence. Additional found value in uncovering authentic intersections of passion points.

04

Product

With cultural change and adoption continuously accelerating, toy product design and manufacturing have had to become more agile to stay relevant.

Hyperstimulation Race

The use of tablets, smartphones and consoles have turned hyperstimulation into the new norm, pressuring typically passive toys into becoming more complex and sensory stimulating.

Scent Unboxing

INSIGHT:

While visual stimulates still reign king in collectibles, scent has been more incorporated as a new element of surprise and sensory play.

WHAT:

New collectibles are being created with a focus on scent, and scents are being added as a new dimension to classic toys to enhance the unboxing experience.

IMPORTANT NUMBERS

7M views on the top 10 'Bananas collectible' videos

144k views on the top 10 'Hatchimals Sweet Smelling' videos

Bananas Bunch 1 Scented Surprise Figure Toy Review Unboxing | PSToyReviews

Tactile Unboxing

INSIGHT:

Modern unboxing experiences played an increasingly important role in creating recognizable brands in 2018. Brands continue to find unusual way of revealing the mystery of their new collectible to peak audience interest.

WHAT:

From mermaid themed bath bombs to treasure chests, these collectibles are packaged to enhance the unboxing experience.

IMPORTANT NUMBERS

32M   views on the top 10 'Pooparoos' videos

2M   views on the top 10 'fizz n surprise Color Changing Mermaids' videos

93M   views on the top 10 'Zuru Smashers' videos

Tech redefining play

Technology and video games have become so prevalent among younger audiences that all kinds of play are being infused with tech to create more engaging experiences.

Augmented reality

INSIGHT:

One of the quickest growing and developing technologies is quickly taking over the kids space making it ever the more easily accessible for children to use and play with.

WHAT:

AR Toys offer incredible experiences that are memorable and stimulating to kids imagination, and most of all play!

IMPORTANT NUMBERS

1M
views on the top 10 'Augmoto: AR racing on Hot Wheels' videos

905k
views on the top 10 'K'nex Thrill Rides and Ride it VR App' videos

6M
views on the top 10 'Hero Vision Iron Man' videos

Drones and Robots

INSIGHT:

Kids are drawn to the powerful cool factor that comes with playing with controlling drones and robots.

WHAT:

From working drones and robots used to play predesigned games and sports for kids, to more adult versions that integrate phones or rely on body gestures to be controlled.

IMPORTANT NUMBERS

13M views on the top 10 'Really Rad Robot' videos

14M views on the top 10 'Air Hogs Supernova' videos

62k mentions about 'drone toys' in 2018 (+14% increase from 2017)

Voice Activated Play

INSIGHT:

With voice assistants permeating mainstream family culture, including a voice assistant in gameplay is an easy logical step to up the fun of Game Night.

WHAT:

Reinvented traditional and new games and toys using Voice Activated tech to either enhance or remove the more boring parts of the experience.

IMPORTANT NUMBERS

21M   **Views of the top 10 'Spy Robot' videos**

8M   **Views of the top 10 'Skyrim Very Special Edition' videos**

230K   **Views of the top 10 'When in Rome Alexa' videos**

124

Designed for the Gram

This year we've seen the behavior of doing it "for the Gram" leading to new sparkly and bubbly toys as well as larger than life bundles designed for unboxing videos.

Multilayer Unboxing

INSIGHT:

Revealing collectible mysteries gets kids hyped with excitement and anticipation while also helping to feed their feeds.

WHAT:

Collectible packaging with several components that are revealed progressively through different experiences that keep the unboxing thrill for a longer time.

IMPORTANT NUMBERS

▶ **75M**   views of the top 10 'LOL BIGGER Surprise unboxing' videos

▶ **23M**   views of the top 10 'Pikmi Pops Flips Cotton Candy' videos

▶ **75M**   views of the top 10 'Ryan's World Mystery Egg unboxing' videos

Sequin Plushies

INSIGHT:

With maximalism continuing to trend, kids are getting on into it with sequins' dazzling mix of colors and textures.

WHAT:

Plushies with sequins covering all its surface and others just covering a part of them. Plus, some are also following the surprise trend by coming in egg packaging.

IMPORTANT NUMBERS

12M views of the top 10 UGC Rainbocorns YouTube videos

71k views of the top 10 UGC Shimeez YouTube videos

109% increase in mentions about sequin plushies in 2018

Note: Mention data includes Twitter, Reddit and News articles, from 1/1/2018 - 12/31/2018

Wearable Collectibles

INSIGHT:

Collecting is no longer enough for kids. They're now looking for collectibles they can wear to show off their collection.

WHAT:

Starting with Fingerlings there's been a burst of interactive versions of classic collectibles, some new collectibles designed to react to your moves as well as shapeshifting collectibles that turn into bracelets.

IMPORTANT NUMBERS

24M views of the top 10 'Pomsies' videos

23M views of the top 10 'Twisty Petz' videos

7M views of the top 10 'Fingerlings Hugs' videos

Absurdity = Fun

In 2018, the desperate need for fun and laughter led to OTT absurdity to take over all kinds of toys and games for kids and adults alike.

Gross is fun

INSIGHT:

Kids find all the more absurdly gross themed toys hysterically funny to watch and play.

WHAT:

Poop, farts and bugs were a prominent theme among toys and games. From games about eating bugs, to toys that make unique farting sounds & smells as well as others that combine the world of unicorn poop and slime.

IMPORTANT NUMBERS

18M views of the top 10 Poopsie Slime Surprise videos

7k mentions about Poopsie Slime post-July launch

6k mentions of Don't Step in It post-January launch

Note: Mention data includes Twitter, Reddit and News articles, from 1/1/2018 - 12/31/2018

Internetty Card Games go Mainstream

INSIGHT:

In 2018, the card game aisle exploded with internet humor based games.

WHAT:

From card games inspired by popular memes to others about sabotaging overly curated social personas, internet humor has become mainstream enough that major retailers like Walmart have gotten in on the phenomenon that people of all ages can participate in.

IMPORTANT NUMBERS

18k   mentions of 'What Do You Meme?'

1k   mentions of 'Relative Insanity'

800   mentions of 'Social Sabotage'

Note: Mention data includes Twitter, Reddit and News articles, from 1/1/2018 - 12/31/2018
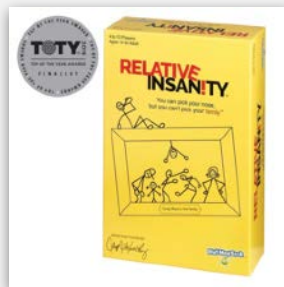
Tech goes DIY

With technology being almost inescapable, we've seen toys and games taking a DIY approach that turns play into a fun learning experience.

Coding Games

INSIGHT:

These games leverage the kids' already embedded love for playing video games with a fun feature to help them learn to code while playing.

WHAT:

From building card games to programming robots, these toys and games revolve around learning to code while having fun.

IMPORTANT NUMBERS

18M
views of the top 10 'Harry Potter Kano Coding Kit' videos

2M
views of the top 10 'Jimu Robot' videos

$ 250K
dollars raised on Kickstarter "17 times more than the target"

133

DIY Video Games

INSIGHT:

Nintendo Labo's popularity skyrocketed by simply adding a physical element to the digital experience making it feel more rich, real and immersive.

WHAT:

Video and computer games that need to be built and put together by the player adds an enticing physical interaction to the digital experience.

IMPORTANT NUMBERS

59M views of the top 10 'Nintendo Lao' videos

26M views of the top 10 'Kano Computer Kit' videos

In 2018 we saw:

01 Our state of constant stimulation has pushed product design into a hyperstimulation race.

02 Tech infused into everything, redefining typical play experiences.

03 Toys and games are being designed to inspire engaging social content.

04 Minimalism and maximalism reflected in products, with absurd items to make us laugh and thoughtful ones to help us learn.

In 2019 we expect:

01 An ever greater variety of new ways to amplify the sensory experience.

02 This tech infusion will continue, counterbalanced with a rise in more simple, lo-fi experiences

03 Embed sharablity in product and packaging will continue, but watch out for unboxing wearout.

04 Continued polarization of product portfolios, balancing silly, highly stimulating experiences with tech-infused immersive skill-building ones.

BIG SPACESHIP

64 observations

Internet Culture

- Distrust of Platforms
- Community Confusion
- Everything is Fake
- Dark Social
- Ephemeral Content
- All-in-one Platforms
- TikTok Challenges
- Dance Challenges
- Parties for every occasion
- Identity Memes
- Costume Breakdown
- Meme Marketing
- Pet Cosplay
- Con Artists
- Absurd Fame
- Big Animals
- Cringe Brands
- Cringey UGC

Design

- Chunky Sneakers
- Logomania
- Oversized
- Colorful & Magical Hair
- Enamel Pins
- Mini Sunglasses
- Clear Accessories
- Plastic Recycling in Fashion
- Even Faster Fashion
- Beyond Plastics
- Simplicity
- Hyper Personal
- Mimics
- SAY IT LOUD
- Doodles
- 80s & 90s Nostalgia
- Witches
- Renaissance

Entertainment & Fandom

- Universe Expansion
- Refreshing Revamps
- Critics v Spectators
- Gaming Driving Culture
- Customized Game Play
- Gaming for All
- Gaming Industry Growing Pains
- The Queen: Ariana Grande
- K-pop Kings BTS
- The Drake System
- The Podcast Boom
- Modern Audio Dramas
- #MoreThan AnAthlete
- NBA Style
- Pro Fans

Product & Packaging

- Unboxing Scents
- Tactile Unboxing
- Augmented Reality
- Drones and Robots
- Voice Activated Play
- Multilayer Unboxing
- Unusual Unboxing
- Sequin Plushies
- Wearable Collectibles
- Gross is Fun
- Internetty Card Games
- Coding Games
- DIY Video Games

BIG SPACESHIP

thank you

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