

Pop Culture & Media

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In 2020, brands and media companies will make good on the promise of transmedia, as four key shifts in consumer behaviour create the perfect environment for content that lives and breathes across multiple contextually aware touchpoints.

Summary

Golden Age of Transmedia

We are entering the golden age of transmedia – where content is cross-pollinated across many distinct platforms, made contextually relevant, and experienced and interacted with in more personalised ways. It's an increasingly vital way for storytellers in every industry to build brand equity and affinity.

Desire for Digital Campfires

Consumers are beginning to retreat from big public platforms to smaller and safer online environments, where they can be more in control and focus on their niche interests and passions. Storytelling can capitalise on the attention of these highly engaged, lean-in audiences, enabling narratives that can unfold episodically over longer time periods, while also taking advantage of contextual signals to personalise them.

Democratisation of Storytelling

Fresh formats across video, gaming and online media are enabling a new class of creative consumer to turn social sharing and fandom into content. The result is an increasing democratisation of storytelling and transmedia broadcasting that brands can align themselves with.

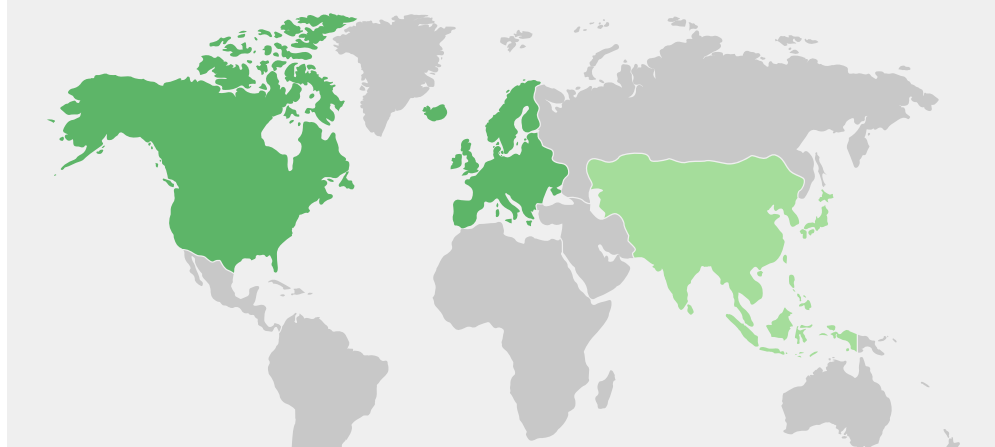
The Power of Epic Narratives

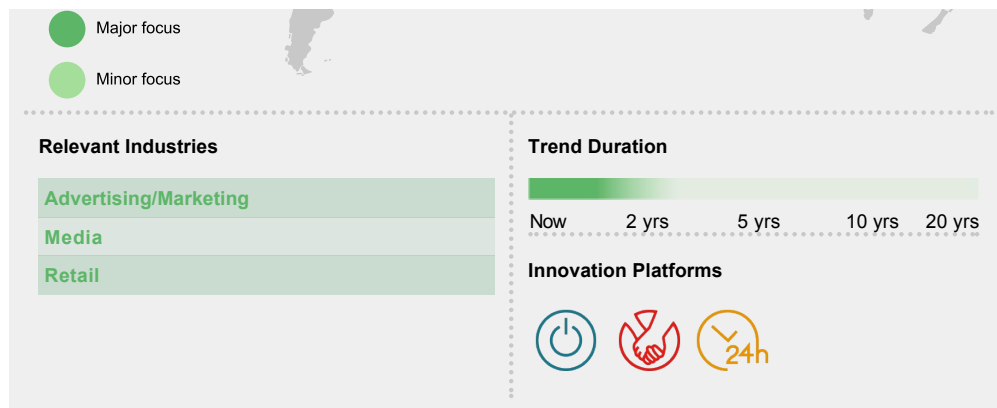
Transmedia storytelling is becoming more effective as audiences continue to embrace franchise-driven, epic narratives. The dominance of fictional universes, where audiences engage with multiple story strands over extended time periods and contexts, has implications for all brands engaging via content.

The Shift to Ambient Media

The increasing sophistication of smart speakers and headphones, and immersive tech such as virtual and augmented reality, is enabling consumers to engage with storytelling in ways that blur the real and the digital. It's no longer the case that narratives need to be consumed passively in front of screens, but can be enjoyed on-the-go in more contextually-aware and personalised ways.

At A Glance The Regional Focus of this Report – Global





Key Stats



Golden Age of Transmedia

- 33%** In the US, 33% of men unsubscribed to other platforms after signing up for Disney Plus, compared to 22% of women
- 50%** Over 50% of US 18 to 38-year-olds have subscribed to Disney Plus

Desire for Digital Campfires

- 62%** Among American 12- to 34-year-olds, Facebook usage declined from 79% in 2017, to 62% today – Twitter is down from 36% to 29%. Pinterest is down from 36% to 31%, as well as LinkedIn being down from 23% to 21%
- 66%** Snapchat usage is stable, at 62% usage among 12- to 34-year-old Americans. The only social network growing among young Americans is Instagram, up from 64% to 66% in the past two years

Democratisation of Storytelling

- 58%** Fifty-eight per cent of UK viewers say the video content they watch gives them something to talk about
- 660bn** In 2019, 660 billion minutes of Twitch content was watched
- 1 in 4** More children watch video-on-demand (VoD) than watch live broadcast TV. Viewing of VoD has doubled over the last five years. One in four children do not watch live broadcast TV at all

The Power of Epic Narratives

- \$16bn** The global content marketing industry was worth \$16bn in 2017

Golden Age of Transmedia



The success that comes from selling a brand ethos is not just a snappy commercial or a good direct mailing, but telling a convincing story. What's starting to happen, is the effective medium for a story is going transmedia.

Matthew Ball, Digital Media Analyst

We are entering the golden age of transmedia – where content is cross-pollinated across many distinct platforms, made contextually relevant, and experienced and interacted with in more personalised ways. It's an increasingly vital way for storytellers in every industry to build brand equity and affinity.

- **Using Transmedia to Build Brand Equity:** The concept is not new (we've been tracking [transmedia projects](#) on Stylus for years). But it's a trend that's now becoming central to the content strategies of the biggest entertainment brands in the world – most notably, Disney.

Digital media analyst [Matthew Ball](#) believes "2019 was a watershed moment for how [intellectual property] was expressed." That year, Disney released The Mandalorian, its first TV spinoff from the Star Wars universe, and also rehomed many of the new Star Wars trilogy's key moments within a comic book series. In China (where affinity for the Star Wars universe is low), Disney has teamed up with e-book firm China Literature to license and distribute 40 translated Star Wars novels for Chinese readers. As Ball commented: "Disney hopes that it can use text to build love (or 'brand equity') that can carry over to its film series."

- **Transforming Brand Storytelling:** Brands across industries are learning the lessons of Disney and other major transmedia ecosystems. "We're going to see the same thing that Disney is doing [across all media]," said Ball. "We're going to have a long-form version of a story that spans outlets, times, formats to create something that not everyone needs [to engage with in full], but everyone starts to feel and understand differently. And when you start to think of all these other interactive products that personalise, we're going to see that brand storytelling [becoming] unlike anything we've seen before."

Additionally, it's a trend that extends beyond entertainment and content marketing into areas like retail. As we discuss in [Dynamic Youth](#), we're seeing the blurring of retail-media boundaries as brands embrace more narrative-driven and episodic retailtainment strategies.

This transmedia phenomenon is driven by four key shifts in consumer behaviour that are creating the perfect environment for new and commercially impactful modes of entertainment and brand storytelling. Let's explore them in greater detail.



The Mandalorian being filmed with Stagecraft technology

Desire for Digital Campfires

Consumers are beginning to retreat from big public platforms to smaller and safer online environments, where they can be more in control and focus on their niche interests and passions. Storytelling can capitalise on the attention of these highly engaged, lean-in audiences, enabling narratives that can unfold episodically over longer time periods, while also taking advantage of contextual signals to personalise.

- **Safe Spaces:** "After years of constructing these curated and well-tended-to online identities and accumulating friends, [consumers] just want to be their [true] selves and connect to their real friends," said Sara Wilson, founder of LA-based content consultancy [SW Projects](#). Wilson dubs these spaces "digital campfires", and they're enabling new forms of more intimate, personalised media consumption to arise, often around niche interests and passions.

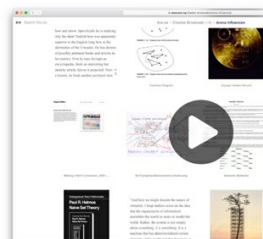
Such "[passion economy](#)" platforms include [Are.na](#) (a mindful social network for designers), [Discord](#) (see [Teen Media Trends: 2019 Update](#) for more), and the in-beta [Bonfire](#), a digital campfire app which, in the words of co-founder Austin Valleskey, will be part of an "evolution of social [that] throws away the social anxieties of yesterday (likes, counts) while emphasising their privacy and community-first values."

- **Engines for Brand Fandom:** Digital campfires offer brands opportunities to collaborate and co-create with their most engaged customers. US beauty brand Glossier uses instant messaging platform Slack as an engine for fandom, enabling customers to chat with the brand and offer product suggestions. Wilson commented: "It used to be known as consumer research, but now the Slack group is just a way for Glossier to do deep social listening and connect with consumers, while learning about what they want."
- **The Return of SMS:** Focusing on safe spaces and more meaningful engagement is driving a shift in online communications. SMS is making a comeback: [Community](#) is an app launched in October 2019 that enables celebrities to connect with fans via text message, "without getting buried by social feeds and algorithms."

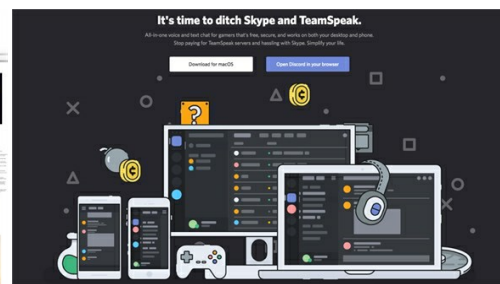
Bavarian broadcaster Bayern 2 employed messenger platforms WhatsApp and Telegram to tell the story of the Bavarian revolution on its centennial, through the 'voice' of the revolution's leader Kurt Eisner. The [Ich, Eisner](#) campaign sent multimedia messages from Eisner to participants' smartphones, relating true events from 100 years previously in real time. Over 15,000 people followed the daily narrative over four months from autumn 2018 to spring 2019.

D2C [direct-to-consumer] brands are also increasingly turning to SMS for communications. In November 2019, SMS-based boutique [Whym](#) was launched in the US, enabling consumers to get product suggestions from an adviser in real time and purchase them – all within a text conversation.

Are.na



Are.na

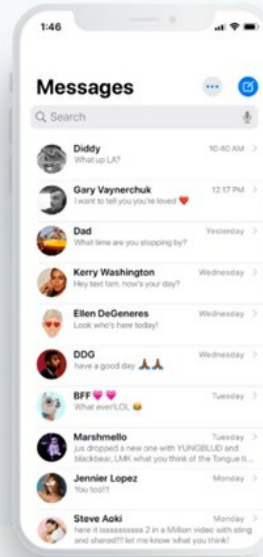


Discord

A MILLION TO ONE

Conversation superpowers

Communicate one-to-one with millions, without getting buried by social feeds and algorithms.



Community



Whym founders Rhenee Bartlett and Kelly Nyland



BR's Ich.Eisner campaign

- **Mobile-Centric Content:** The resurgence of SMS is one of many trends arising, as creatives tap into personalised and intimate mobile-first design principles. Pioneers of mobile-centric narratives include UK author Kate Pullinger's 2018 smartphone story [Breathe](#), which used the phone's GPS and camera to adapt the story to the reader's context.

In 2020, US smartphone video platform [Quibi](#), founded by ex-Disney chairman Jeffrey Katzenberg, will take this idea to the next level, with a series of shows designed specifically for mobile viewing. Users will be able to switch between vertical and horizontal views in the middle of an episode, and stories will adapt to context. For example, *After Dark*, a horror series helmed by Steven Spielberg, will only be able to be watched at night time.

Quibi is betting on mobile-centric content delivering a much more intimate and meaningful relationship between audiences, creatives and advertisers. "Quibi doesn't just offer creators a new way to tell stories," said Meg Whitman, Quibi's chief executive. "It offers advertisers a new opportunity as well – a premium, brand-safe platform that targets the millennial audience during their lean forward, on-the-go moments."

- **Appointment Viewing 2.0:** We discussed how appointment viewing made a comeback in our last [State of Media](#) report, and has spread to retail via Instagram (see Digital Drops Reboot Appointment Viewing in [Retail Meets Media](#)). This desire to congregate around a specific moment is another aspect of digital campfire behaviour – one that's being picked up by major brands including Amazon.

In October 2019, Amazon-owned streaming platform Twitch launched [Watch Parties](#), where Twitch streamers could watch a selection of Amazon Prime video content on their channel with their viewers.



Quibi CEO Meg Whitman at CES 2020



Democratisation of Storytelling

These sorts of fresh formats across video, gaming and online media are enabling a new class of creative consumer to turn social sharing and fandom into content. The result is an increasing democratisation of storytelling and transmedia broadcasting that brands can align themselves with.

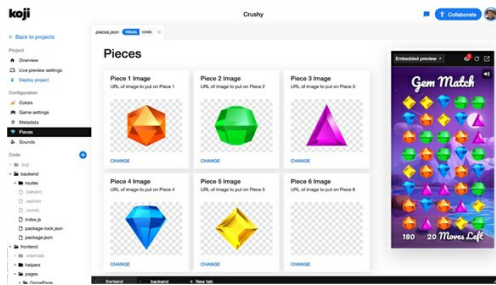
- **Nurture Creativity:** New tools are democratising all aspects of storytelling and creativity. US platform [Koji](#) enables anyone to create interactive posts, including minigames, to share on social media. Chinese service [Lizhi](#) is powering live audio streaming, with 5.7 million average monthly active content creators. In December 2019, Snapchat announced the launch of [Cameos](#), offering Snapchat users the ability to add their own faces to shareable memes.

Brands should take notice of these trends to offer tools to facilitate creativity. In February 2019, US fashion label Tommy Hilfiger teamed up with [Unfold](#), a US company that offers a "toolkit for storytellers", in the agency's own words, for use in creating Instagram Stories, including professional-looking templates. Tommy Hilfiger-branded templates were produced, inspired by its Spring 2019 [TommyXZendaya](#) collection, which users could combine with their own photos and videos.

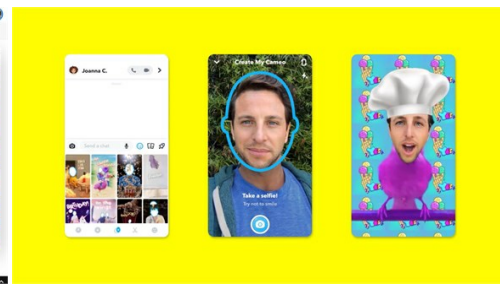
- **Live Broadcasting for All:** Twitch is at the forefront of a democratisation of broadcasting. In November 2019, the platform launched [Twitch Studio](#), software that enables anyone to easily start live-streaming content. "We don't want to throw an hour of set-up at you," said Cheng Cheng, Twitch's director of product management for the creator experience. "We want you to just actually get started, and start to enjoy what you're passionate about." The move will bring a new generation of broadcasters to the platform, which already attracts 3.9 million monthly streamers.

Audiences for live game streaming are huge: 660 billion minutes of content were watched in 2019 ([TwitchTracker](#), 2020). In-game opportunities are burgeoning for brands: in November 2019, Disney debuted exclusive footage from The Rise of Skywalker within Fortnite, which has 250 million global users. More than 3.1 million viewers watched live streams from the promotion, according to Barcelona-based esports analyst [Stream Hatchet](#).

- **Blurring Boundaries:** As all these tools become more accessible, opportunities for more imaginative transmedia storytelling will arise, for consumers and creators alike. [NBA Desktop](#), part of US sports and culture website The Ringer (acquired by Spotify in February 2020), is a great example of broadcasting that blurs boundaries between live streaming, vlogging and television. Host Jason Concepcion discusses NBA news while browsing relevant websites – viewers see both him and his desktop screen concurrently. The show won Outstanding Digital Innovation at the 2019 Emmy Awards.



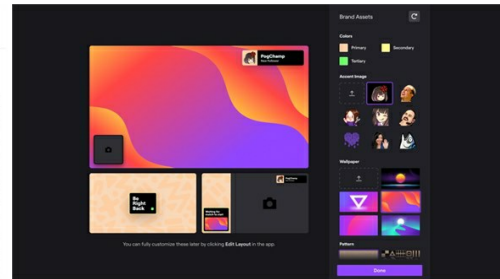
Koji



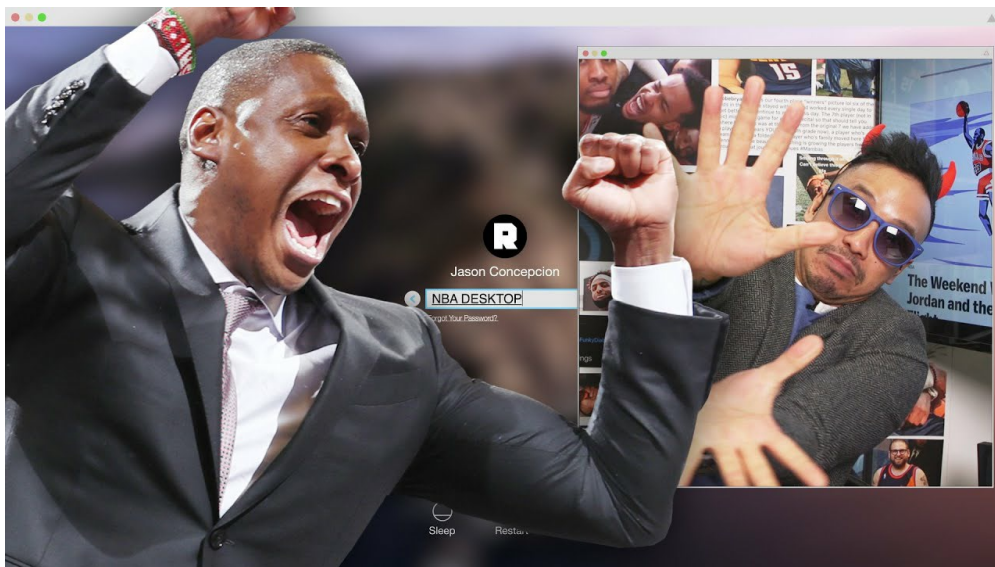
Snapchat Cameos



Hilfiger x Unfold



Twitch Studio



The Power of Epic Narratives

Transmedia storytelling is becoming more effective as audiences continue to embrace epic franchise-driven narratives – a shift that began with the Harry Potter franchise in the early 00s and continues to the present day, with the Marvel Cinematic Universe [MCU].

As Ball points out, Disney is "buying all the character universes" (Star Wars, the MCU, Pixar) because it's a powerful way "to translate brand equity into new revenue streams and grow affinity." The dominance of fictional universes, where audiences engage with multiple story strands over extended time periods and contexts, has implications for all brands engaging via content.

- **Episodic Engagement:** Mobile-centric storytelling is fuelling a return to episodic narratives. Similar to the strategy being pursued by Quibi, US e-book platform [Serial Box](#) delivers e-books in bitesized chunks released on a weekly basis. The service adds a transmedia twist: every book can be read in standard e-book format or listened to like an audio book, and users can switch seamlessly between the two modes. The platform has been [described](#) as "the HBO of serialised fiction."

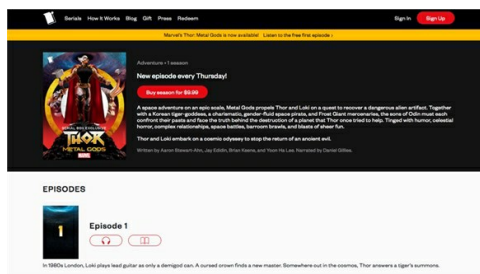
Episodic and structured storytelling is being translated from entertainment to brand and retail environments. 'Drop' culture continues to be an effective way for fashion brands to continuously engage consumers over extended time periods, a strategy successfully employed by US shoppable broadcast platform [Ntwrk](#): see [Retail Meets Media](#) for more.

As Jenny Quigley-Jones, managing director of UK YouTube creator/influencer marketing agency [Digital Voices](#), commented: "Brands so often do something on one topic, and then ditch it to move on to another. Series work because people want to learn and follow ideas. Don't trial something unless you intend to do six episodes."

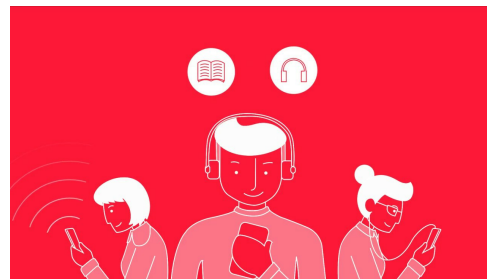
- **Living Content:** The next iteration of this trend will be content that can live beyond its initial transmission, be reworked and remixed, and constantly improved to drive continued engagement. As Ball suggests, over the next decade "the idea of 'locked' content is likely to dissipate, and with it the idea of single-release versions of a title."

He adds: "Beyond that, the fundamental structures of content will change – when is it made, who does it focus on, what is the experience versus the packaging, who designs it, how does it evolve over time, when does it start or stop?"

- **Rise of the Rewatch:** One nascent example of this idea, and one that marketers can apply to their own narrative-driven content, is the rewatching trend. In the [Office Ladies](#) podcast, launched in October 2019, stars of US TV comedy The Office break down an episode of the show and tell behind-the-scenes stories. It follows similar rewatch podcasts for [The West Wing](#) and [Battlestar Galactica](#). YouTube series [RetroReplay](#) applies the same idea to classic games.



Serial Box



The Shift to Ambient Media

The increasing sophistication of smart speakers and headphones, and immersive tech such as virtual and augmented reality (VR and AR), is enabling consumers to engage with transmedia storytelling in ways that blur the real and the digital. It's no longer the case that narratives need to be consumed passively in front of screens; they can also be enjoyed on-the-go in more contextually aware and personalised ways. We're heading towards a future of "ambient media".

- **Windows in Time:** The potential for AR technology to deliver seamless virtual-real experiences is becoming more of a reality as 5G begins to supercharge on-the-go smartphone connectivity for consumers. In April 2019, the BBC trialed a 5G-powered 'window in time' experience at [Bristol's historic Roman Baths](#), where reconstructions of the baths from key moments in history were aligned with, and superimposed upon, the same location in the real world, in real time.

"The physical position of the smartphone was sent to a remote computer which used that information to draw a live VR view of the historical scene before streaming it back to the smartphone for display," [writes](#) Bruce Weir, senior engineer at BBC Research & Development. The BBC believes this technology has wide potential uses for "smart tourism" applications.

- **Potential of Audio AR:** US tech writer Drew Austin considers wireless headphones to be AR devices. "As audio-based platforms take off, network effects would kick in, strengthening the incentives to leave earbuds in for longer and longer," he writes. "We might learn to split off a small, continuous share of auditory attention for the headphones we leave in – a rebalancing of sensory inputs to expand our sonic world beyond the merely local."

Paris-based tech investor Brett Bivens sees the potential for audio platforms like Spotify to leverage this concept to create [contextually aware aural experiences](#). For example, a "Tourist Mode" for "proximity-based pushes of podcasts and music about or from the area."

US audio firm Bose is already experimenting in this area with its [Bose Frames](#) product, launched in early 2019. Described as "AR audio sunglasses", Bose Frames feature miniature wireless speakers in the spectacle arms. In April 2019, San Franciscan content and research studio Tomorrow Never Knows updated its AR podcast [Pilgrim](#) for Frames, enabling wearers to [digitally 'walk' alongside hikers](#) at Camino de Santiago in Spain while hearing their stories.

- **From Storytelling to Story-Living:** Again, this technology clearly has huge potential for tourism and travel brands, but it can also be used for immersive storytelling. Unscramble the Oracle is an interactive audiobook built for Bose Frames which, [according the developers](#), enables participants to "walk, dance, and tap your way through a fairy-tale world."

As explored in [Brand Spaces: 11 Trends & Opportunities, 2020/21](#), further developments in ambient media – from sentient spaces to neuro-controlled experiences – will drive a paradigm shift in branding and marketing from storytelling to 'story-living'.



Future Insights

Embrace the Episodic

Episodic and structured narratives, from serialised content to regular product drops, are now key ways to keep consumers engaged over the long term. Design your marketing to follow a serialised, appointment-centric narrative as a way to cut through the chaos of cultural noise and remain a fixture on consumer radars.

Develop Ambient Strategy

"[Who will own] our collective 'ambient hours' in the same way Netflix and Fortnite have staked claims to our stationary attention?" asks Brett Bivens. This is the next transmedia frontier for audience engagement. Brands have a unique opportunity to get a head start in this space, particularly in the retail and tourism sectors.

Facilitate the Democratisation of Creativity

Tommy Hilfiger's Instagram story templates are a great example of how marketing can become a facilitator of consumer creativity. As media formats evolve, seize the chance not just to use them for your own storytelling, but to enhance content creation opportunities for consumers, too.

Approach Digital Campfires with Care

"For brands looking to engage with digital campfires, it's about picking the right influencers to partner with or offering real value," said Sara Wilson. Consider Glossier's route: empowering superfans in small, closed communities to become active participants in brand narratives, not just passive customers.

Topics

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