



Impact of Gen-Z On the Gaming Market

Confidential. March 2021

AMBER

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Executive Summary

Impact of Gen-Z

Gen-Z, also known as Zoomers is the generation known for being born in the digital world. **97% of which now own a Smartphone, their age is between 9 and 24 years old.**

We found that their **time spent playing can range between 1 and 2 hours on average per day**, mainly on **PC, Smartphones** and looking towards Consoles too.

Games are seen as a time for recreation, to spend time with friends and they're a large part of their media ecosystem. They're familiar with monetization types such as **Gacha, Lootboxes, Time-Gates and RNG; and they dislike them as well.**

In general, **they prefer Multiplayer games, however, they do not necessarily like to meet new people through the games they play.**

Gen-Z throughout, **like RPG and Adventure games the most.** Among them, the older teens prefer Shooter games and Battle Royales followed by Fighting and Survival games.

Gen-Z is also one of the biggest generations (2BN) to enter the workforce so they will deserve lots of attention if any Mobile Game Developer wants to make their mark in the Gaming Market.



Impact of Gen-Z

About the Data
& Methodology

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About the Data & Methodology

Impact of Gen-Z

The data used comes from several research papers published by App Annie and other related articles in order to obtain, not only a broad view of Gen-Z as an audience, but a closer look at their preferences in terms of games, media and other behaviors.

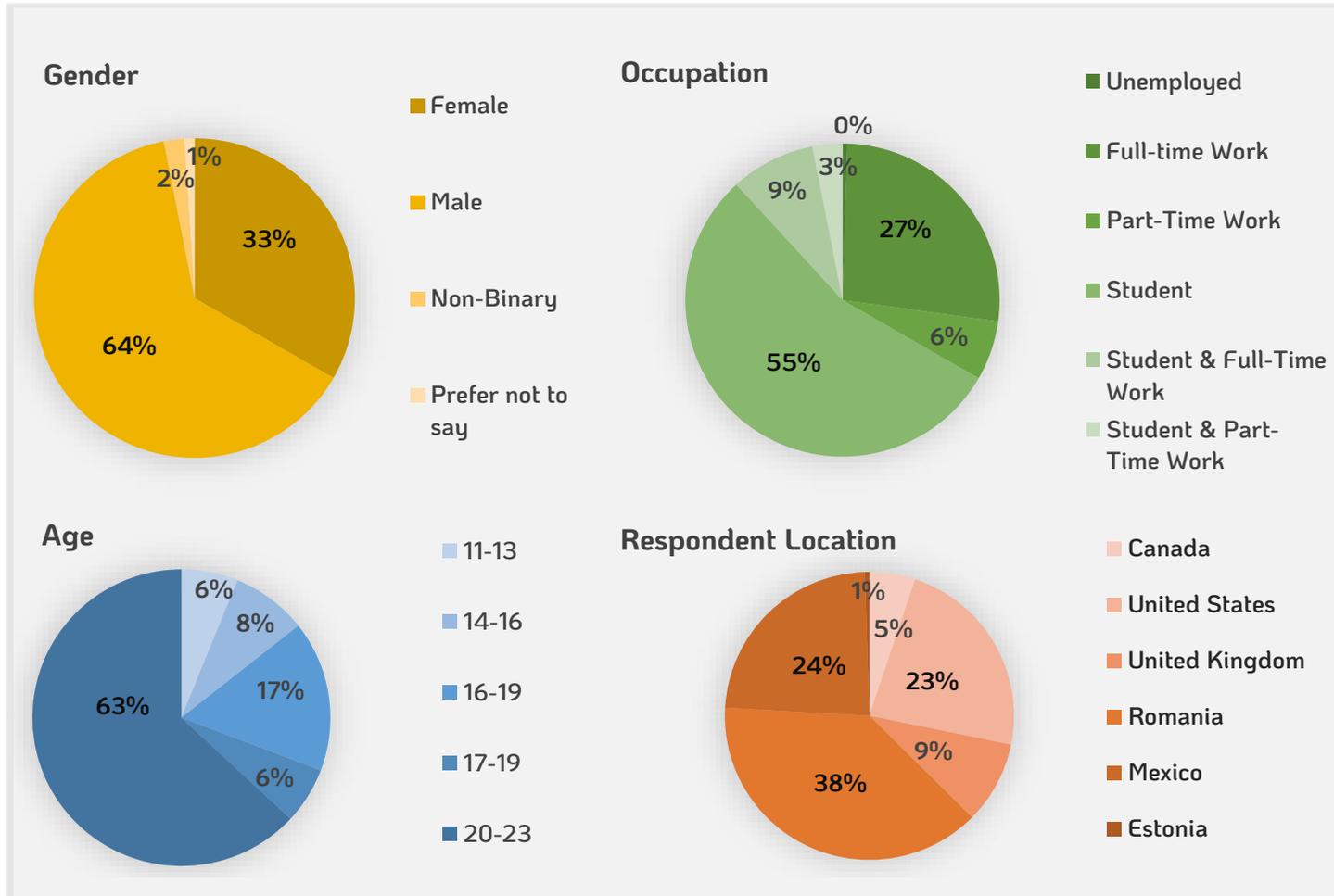
Later in this study, we'll use granular data from App Annie when looking at reference games and user reviews from iOS and Google Play platforms to gather insights from the player's perspective as well.

We also used data from 3 anonymous surveys that targeted the Gen-Z employees within Amber and from Playtest Cloud as well.

The sample size is: 195

Survey – Respondent Data

Impact of Gen-Z



64% of respondents are Male, while Female users comprise 33% which might present a bias in the survey results.

Most users are between the age of 20 – 23 comprising 63% of the cohort. Followed by 17% between 16 and 19 years old.

Most respondents are students (55%) while the 2nd majority is composed of Full-Time workers – 27%.

Users from our survey answered from:

Tier 1 countries – 37%

Tier 3 countries – 63%



The Big Picture

Defining the Generation
Gen-Z Compared
Fear Of Missing Out

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Defining the Generation

The Big Picture

Also known as Zoomers, **Gen-Z is the generation born between 1997 and 2012**. Currently, Gen-Z is the largest generation at almost 2 Billion globally. That means they are 30% of the global population and by 2025 they will make up 27% of the working population. Gen-Zers are known as “generation connected” or “dot com kids”. According to [McCrandle](#) their 5 key traits are:

Digital

97% of Gen-Z own a smartphone. They have been born in the digital world and everything they do for media, entertainment and services is through a digital environment.

They can easily connect with people across the globe through several Social Media platforms including YouTube, Twitch, WhatsApp, Snapchat etc.

Global

Gen-Z is the first generation to be truly global through everything they do from: media, celebrities, entertainment, culture to fashion.

Everything they do and learn is a click away through their ability to stay connected on their smartphone, PC etc.

Social

Through digital technology, Gen-Z is constantly connected to their social peers via Social Media platforms and multiplayer games. And even if they play single player games, they can still share their adventures through dedicated platforms like Reddit, Discord or YouTube to name a few.

Mobile

With more and more powerful smartphones and access to Wi-Fi, 4G connectivity comes the ability to have more apps and more powerful games as well. Gen-Z can play a game and chat with friends through a third-party app in the background.

They can also order food and use other services through a smartphone app as well.

Visual

Gen-Z is constantly exposed to an overload of information. Currently a better part of this information including messages are image based.

Communication has overcome the language barrier via brands that use signs, logos, video and other media to get their message across.

Impact on the Gaming Market

The Big Picture

In 2019 we notice how Gen-Z is growing faster in size in terms of MAU in countries like Indonesia and Japan.

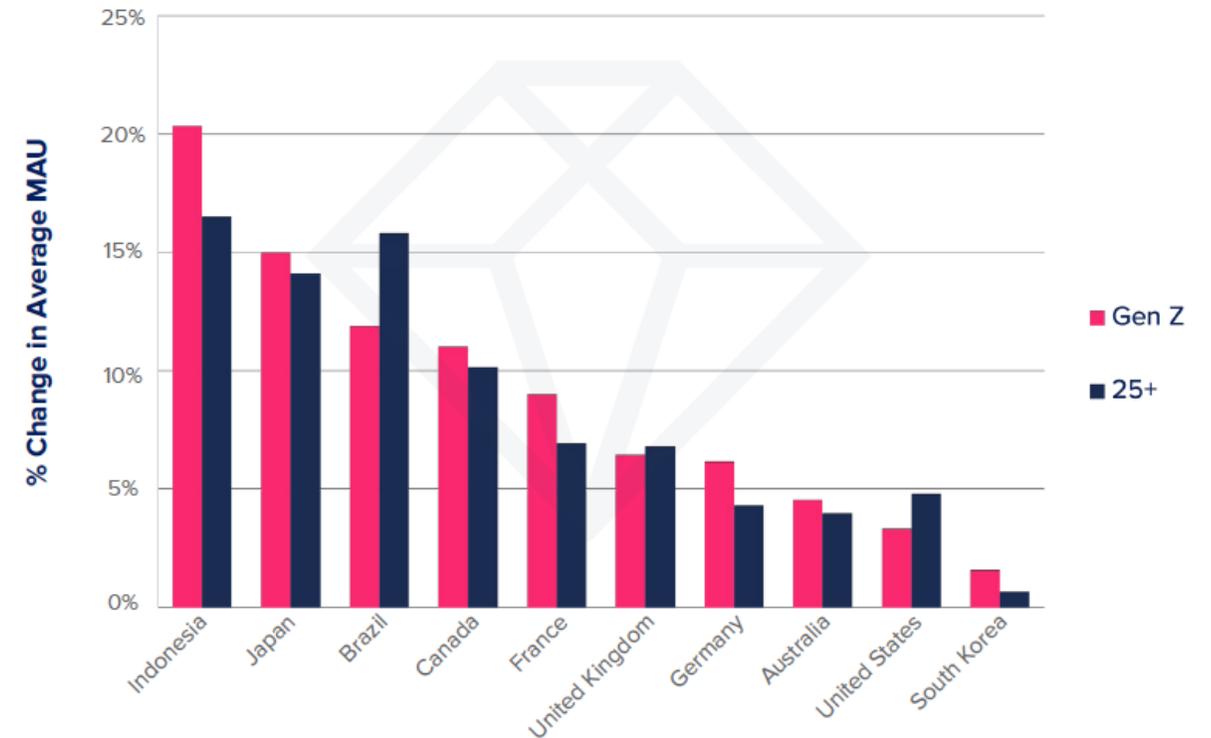
Brazil and the US are the only regions with considerably faster growth in MAU of 25+ users.

The overall trend shows that **Gen-Z is not only catching up, but in some regions outpacing the growth of the older generations** in terms of usage.

Source: App Annie

Growth in Monthly Active Users

H1 2019 vs. H1 2018



Impact on the Gaming Market

The Big Picture

Per 2019, App Annie Reports that Gen-Z :

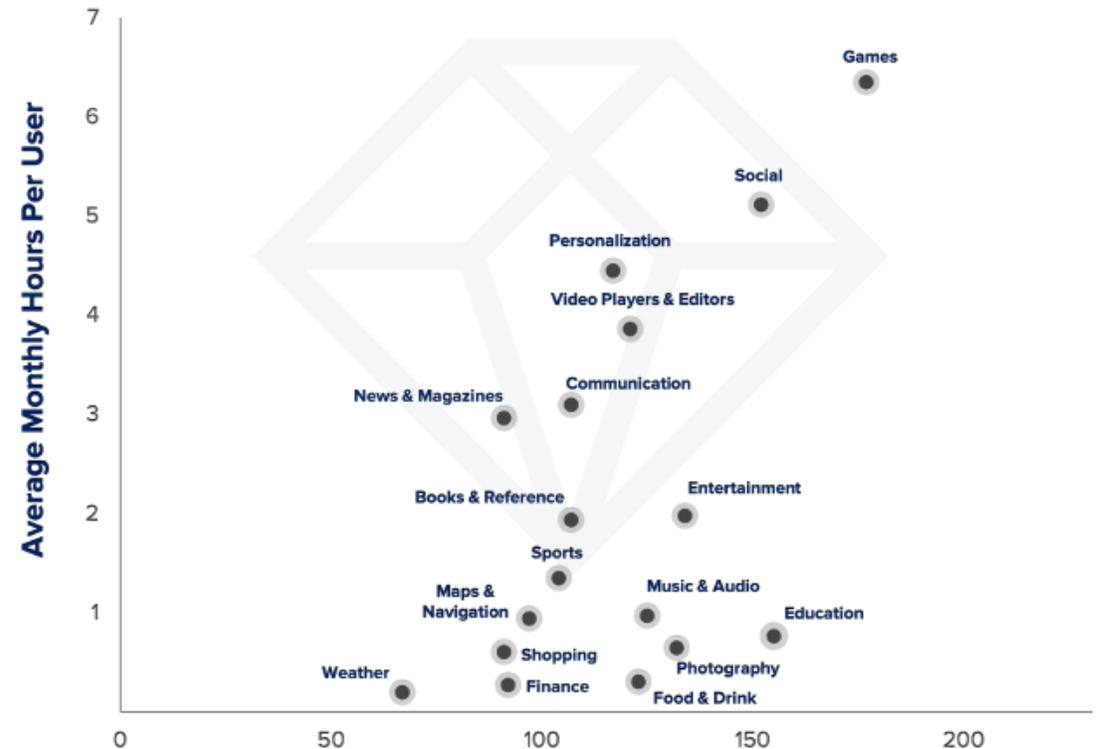
2x more time is spent by Gen-Z on games in Japan than the global average;

On the right we note that games take up most of their time on a monthly basis, quickly followed by Social apps;

Among top gaming apps (by MAU), **over 80% of them skewed towards Gen-Z users.**

Source: App Annie

Gen Z Engagement by Category H1 2019



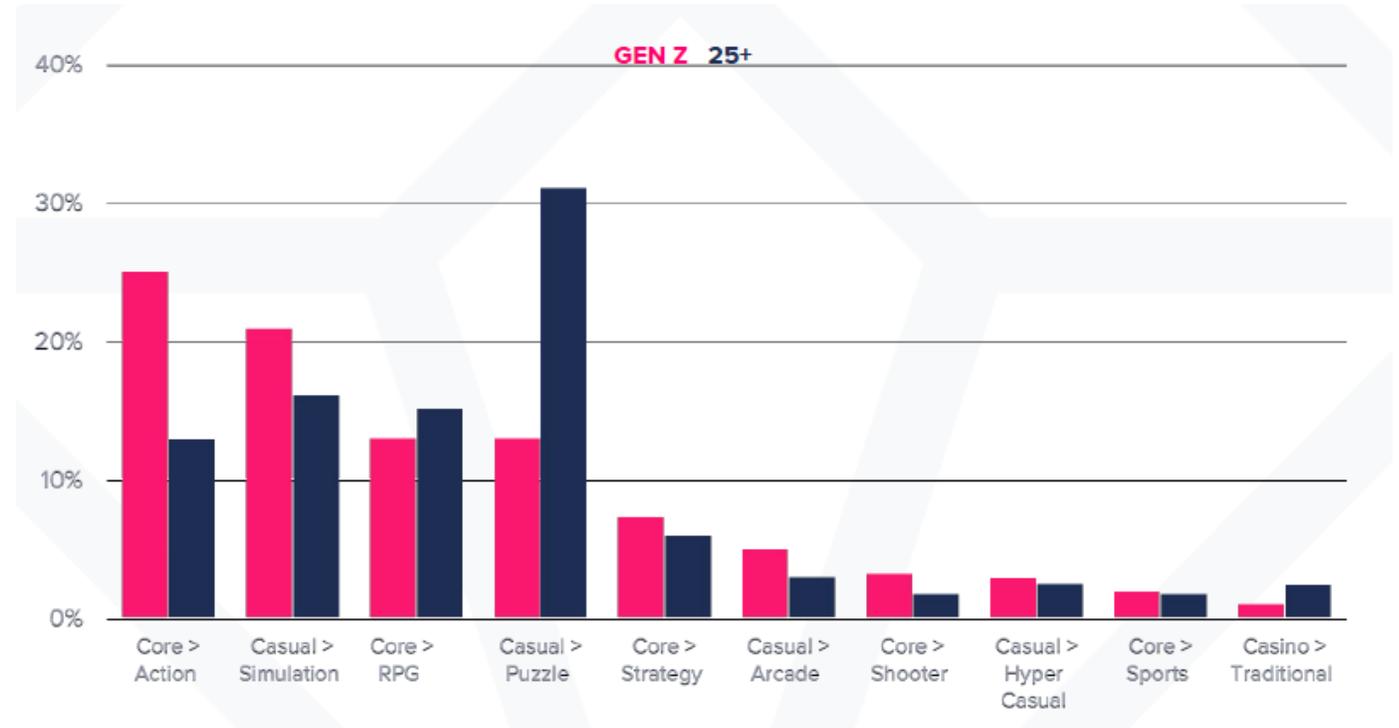
Impact on the Gaming Market

The Big Picture

Games like PUBG Mobile, Free Fire and other Core Action games comprise 25% of the time spent by Gen-Z gamers on mobile.

Following up, are Casual Sim games that include ROBLOX, Minecraft etc.

What these 2 main genres have in common are their **multiplayer focused gameplay.**



Gen-Z Compared

The Big Picture

CATEGORY	BUILDERS	BABY BOOMERS	GENERATION X	GENERATION Y	GENERATION Z	GEN ALPHA
Slang terms	We prefer proper English if you please Born: < 1946 Age: 74+	Be cool Peace Groovy Way out Born: 1946-1964 Age: 55-73	Dude Ace Rad As if Wicked Born: 1965-1979 Age: 40-54	Bling Funky Doh Foshizz Whassup? Born: 1980-1994 Age: 25-39	Fam GOAT Slay Yass queen Born: 1995-2009 Age: 10-24	lit yeet hundo oof m idrc Born: 2010-2024 Age: under 10
Social markers	World War II 1939-1945	Moon landing 1969	Stock market crash 1987	September 11 2001	GFC 2008	Trump / Brexit 2016
Iconic cars	Model T Ford Final, 1927	Ford Mustang 1964	Holden Commodore 1978	Toyota Prius 1997	Tesla Model S 2012	Autonomous vehicles 2020s
Iconic toys	Roller skates	Frisbee	Rubix cube	BMX bike	Folding scooter	Fidget spinner
Music devices	Record player LP, 1948	Audio cassette 1962	Walkman 1979	iPod 2001	Spotify 2008	Smart speakers Now
Leadership style L - Leader I - New leaders	Controlling	Directing	Coordinating	Guiding	Empowering	Inspiring
Ideal leader	Commander	Thinker	Doer	Supporter	Collaborator	Co-creator
Learning style	Formal	Structured	Participative	Interactive	Multi-modal	Virtual
Influence/advice	Officials	Experts	Practitioners	Peers	Forums	Chatbots
Marketing	Print (traditional)	Broadcast (mass)	Direct (targeted)	Online (linked)	Digital (social)	In situ (real-time)

The [McCrindle infographic](#) gives us an interesting clue as to what Gen-Z looks to:

In terms of an ideal leader – in stark contrast to the Builder generation – an ideal leader does not give orders or has a high degree of control, he/she **collaborates and empowers**.

As far as advice and influence, on average, **Forums are one of the information sources** they use.

Their preferred Marketing is based off a **social model on a digital environment**.

When Gen-Z was asked about what impacted them the most during social isolation they answered:

- Boredom – 51%
- Physical Activity – 47%
- Increased Feelings of Loneliness – 41%

Source: McCrindle

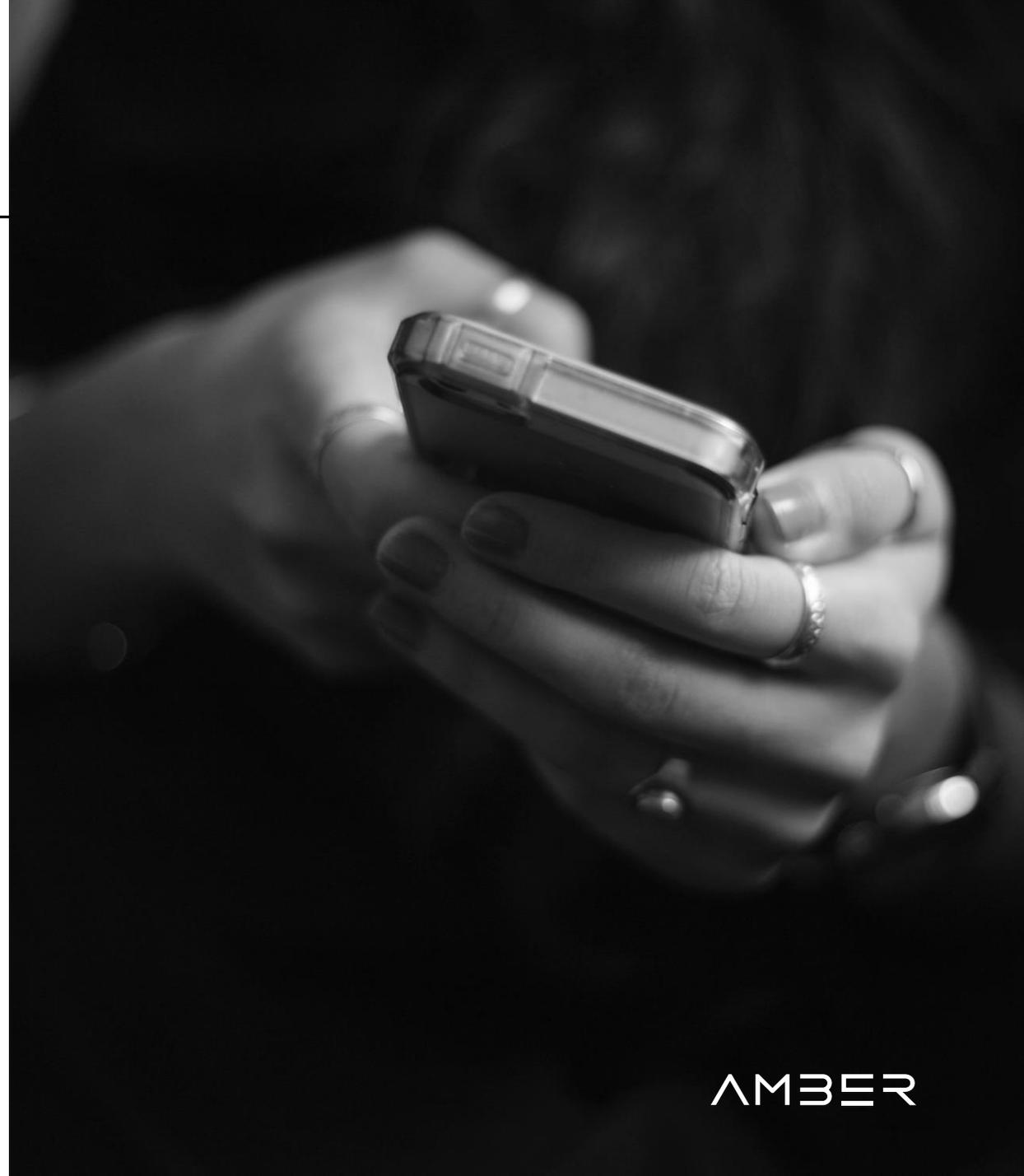
FOMO

The Big Picture

A study conducted by the [CNN on 8th grade children](#), shows that “impulsive checking” is one of the drivers of spending time on Social Media.

“To know what each other are doing, where they stand, to know how many people like what they posted, to know how many people followed them today and unfollowed them ... that I think is highly addictive.” - Marion Underwood, co-Author

Source: [Being 13 Report](#) - School of Behavioural and Brain Sciences, The University of Texas at Dallas

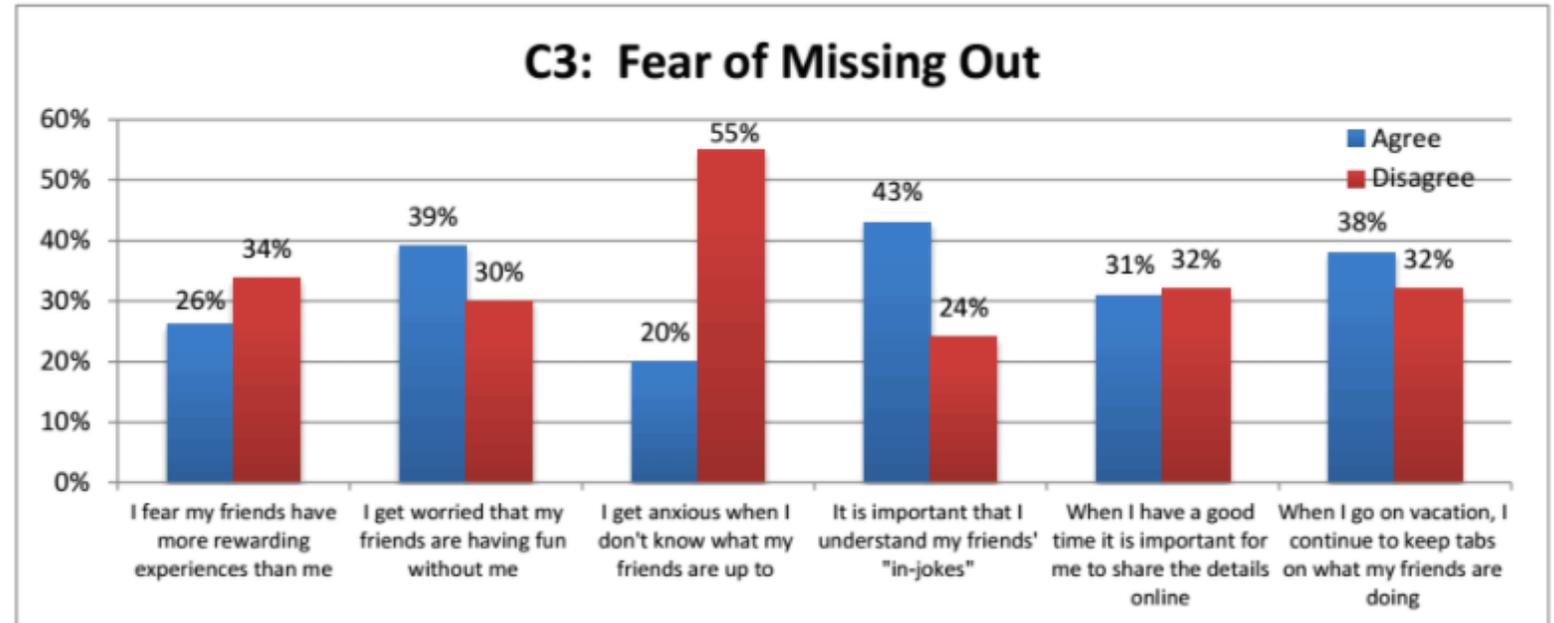


Gen-Z Compared

The Big Picture

Fear of Missing Out is reported to be a generator of social anxiety among teens. They care about being included by their friends, schoolmates etc.

When they notice something on Social Media that they are not a part of, or they are not aware of this will create anxiety or a feeling of desperation. While adults have multiple social groups, they can take consolation of being included in at least one of them. However, young adolescents' main group of peers are their schoolmates and as such the stakes are high for them.



This is an indicator that Social Media is a main tool that helps teens avoid missing out on anything surrounding them. However, this also means that Social Media also acts as an amplifier for FOMO.

Source: [Being 13 Report](#) - School of Behavioural and Brain Sciences, The University of Texas at Dallas



Gaming Preferences

Time Spent Gaming

Preferred Genre & Platforms

Multiplayer Preferences

Popular Games

Reasons for Playing

New Game Adoption

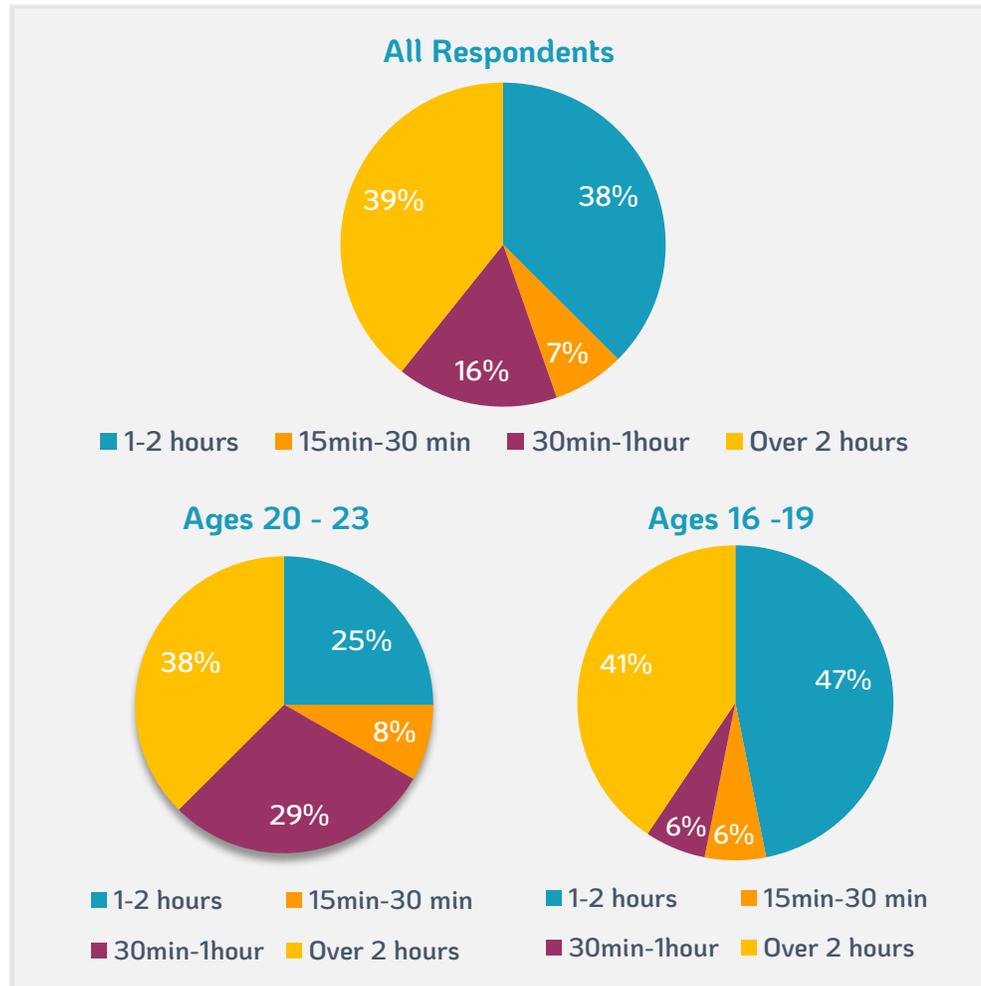
Gameplay Elements

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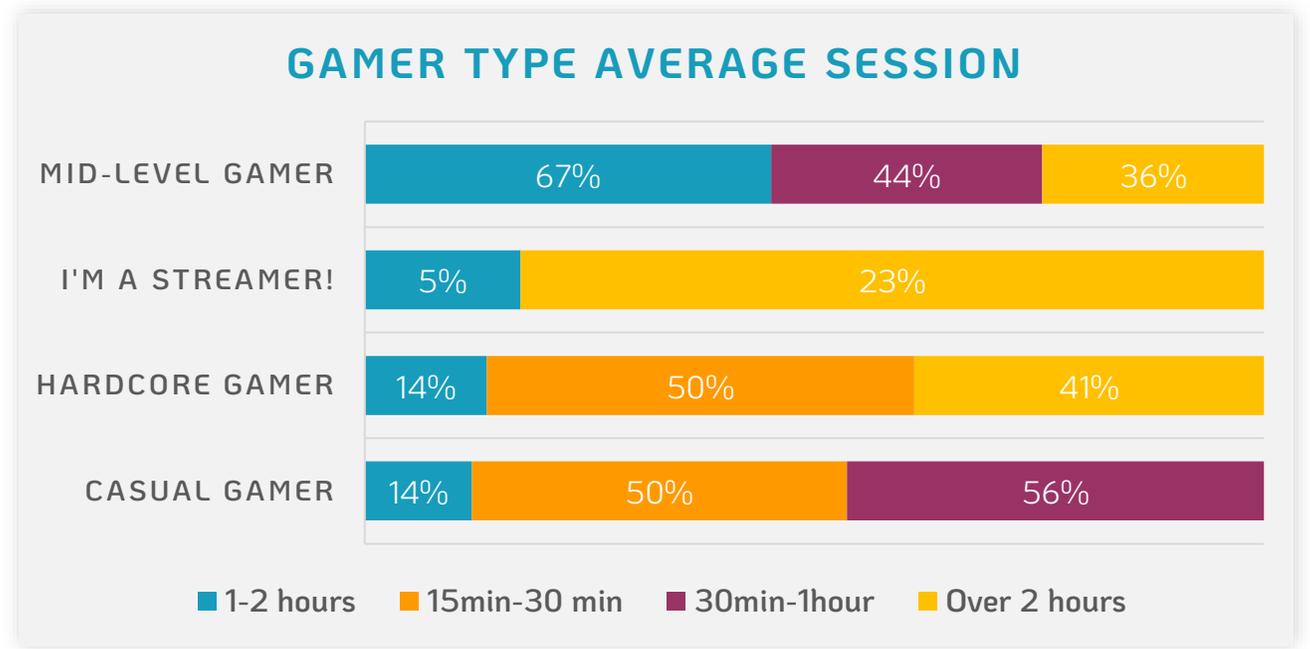
Game Sessions

Gaming Preferences



In terms of average session time, while others play over 2 hours in each session, Self-declared Mid-level and Hardcore Gamers tend to spend more time playing than Casual Gamers.

Younger players spend over 1 hour playing games.

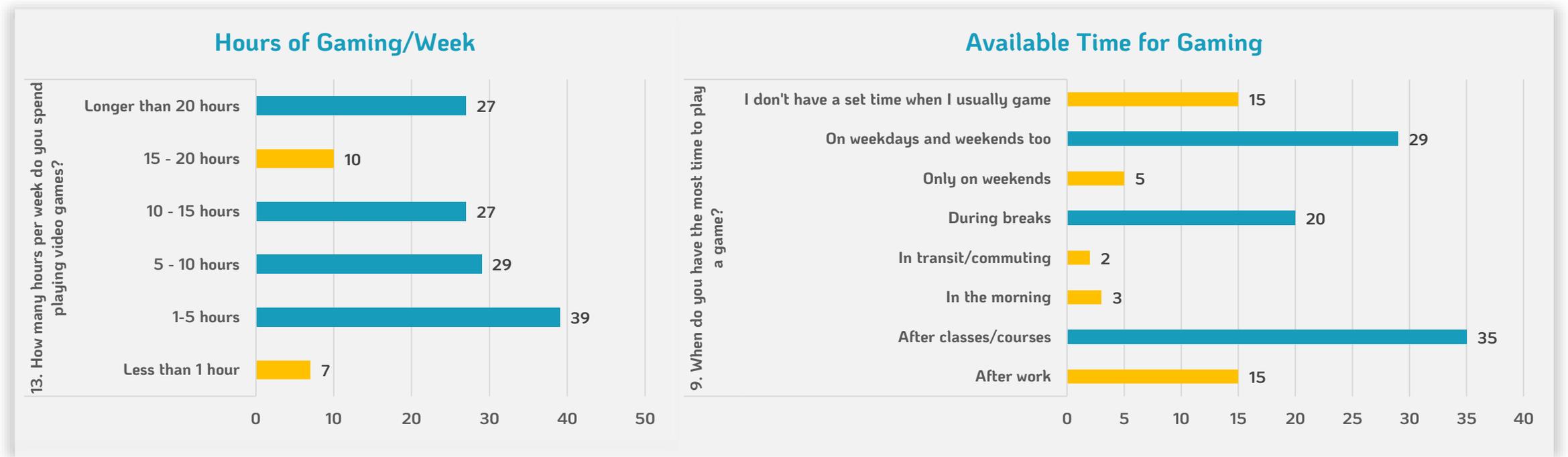


Platform of Choice

Gaming Preferences

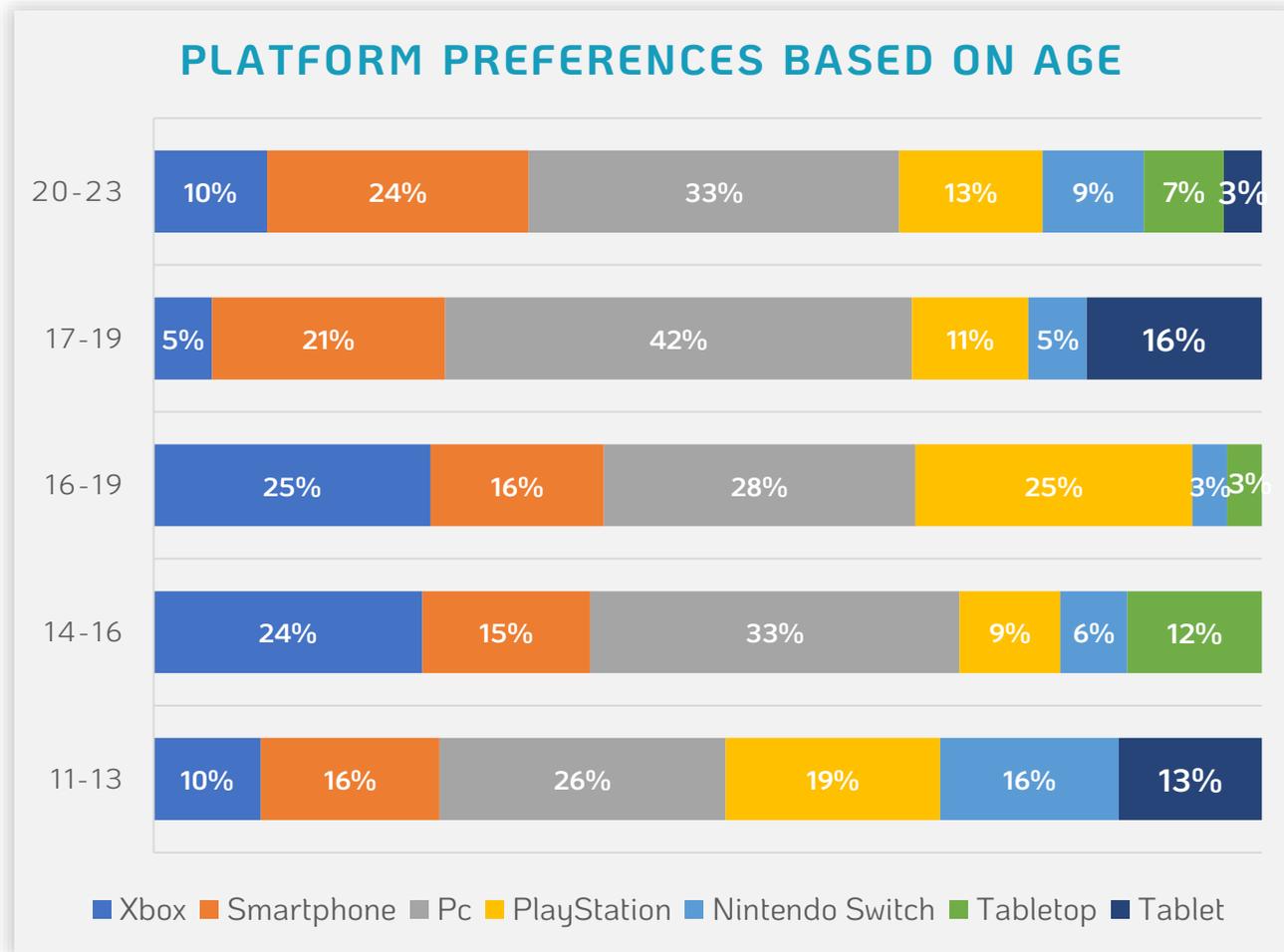
There was a big divide in data when it comes to player's occupation – Students have responded overwhelmingly that they play longer than 15 hours/week, while full-time employees answered that they only have time to game for 1 to 5 hours.

At the same time, regardless of time spent/week, most players preferred setting aside dedicated gaming time instead of playing in transit or before work.



Preferred Platform

Gaming Preferences



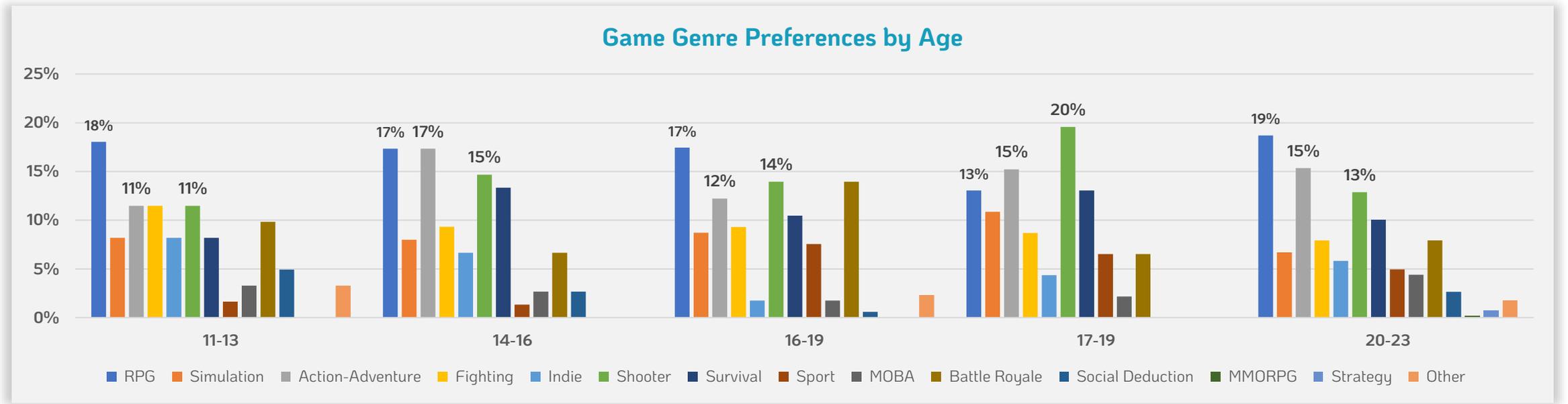
Looking at the survey data, we can see that **older Gen-Zers consider PC their preferred gaming platforms**, while younger players look to consoles much more than their older peers.

Nintendo Switch seems to be quite popular in younger audiences while in older, it's close to not being represented at all.

Across all age groups however, **PC is the winning platform.**

Game Genre Preferences

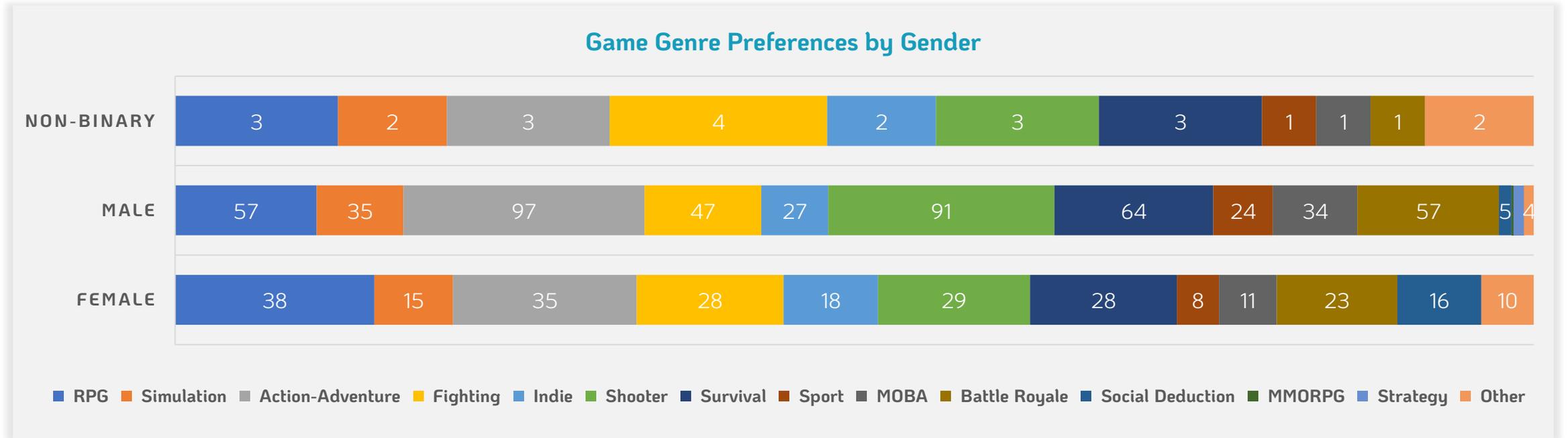
Gaming Preferences



Across all age groups, **RPG and Action-Adventure Games have been the genre of choice**. Older teens have a higher preference for Shooters and Battle Royale while younger players look more towards Fighting, Survival and have the highest likelihood of enjoying Social-Deduction.

Game Genre Preferences

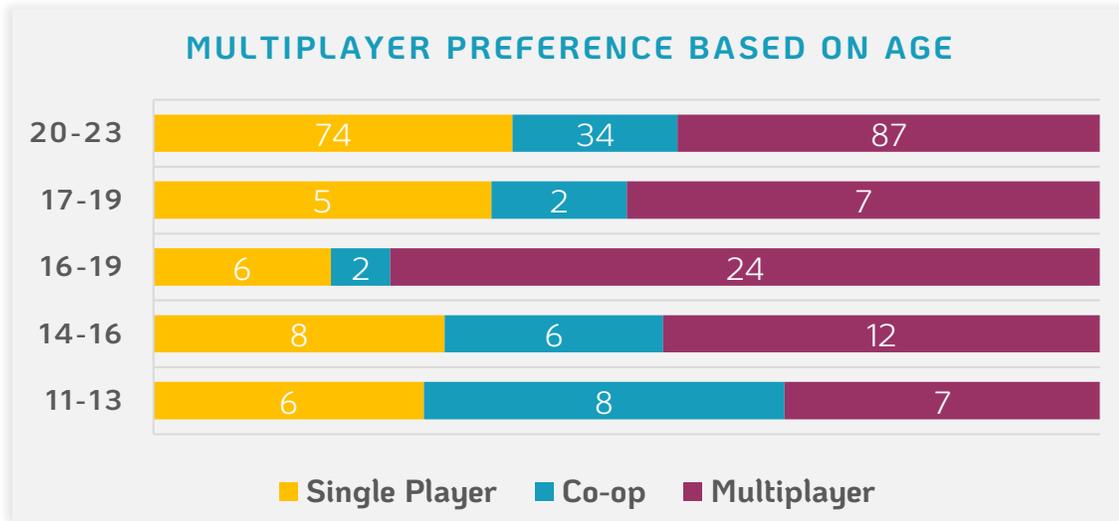
Gaming Preferences



Data split by gender shows us that Social-Deduction game have had a better adoption rate for Female players, who are much more likely to say that one of their preferred genres is Social-Deduction.

Male participants have a stronger preferences for Shooters and Action-Adventure, while female players like RPG the best.

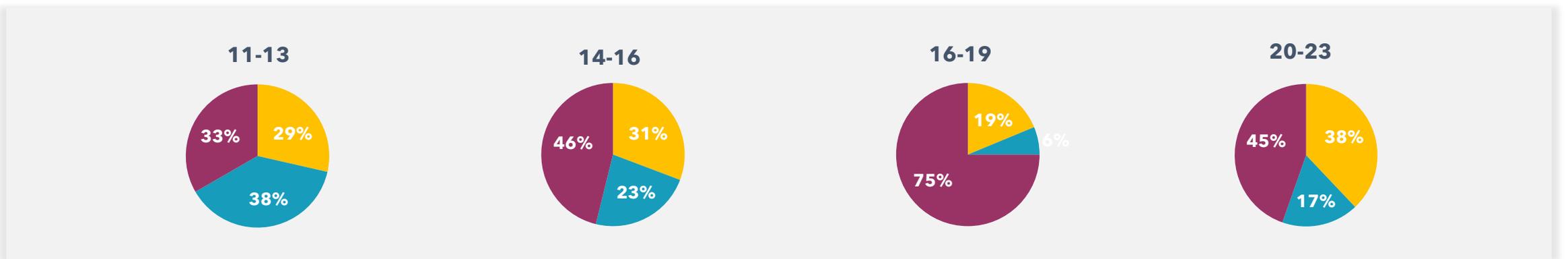
Multiplayer Gaming Preferences



While **overall multiplayer is the highest rating choice and Co-Op ranks lowest.**

If we look at the different age groups, we can see that in **the youngest players, Co-Op is as popular as multiplayer** and in the **14-16 age group, Co-Op is almost as popular as Single-player.**

However, when looking at **the oldest age group, Co-Op takes a backseat in favor of single-player games.**



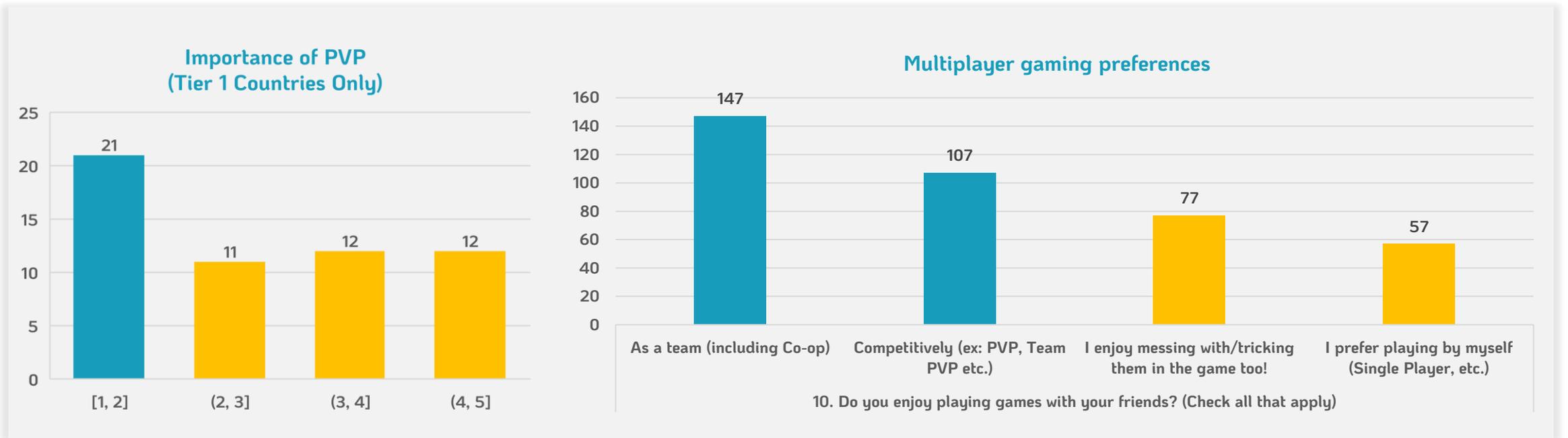
Competition vs Cooperation

Gaming Preferences

When playing with friends, **Team-play is the preferred gameplay mode**, even more than PVP, which is secondary. Alongside Co-Op, players like to troll each other too!

Tips:

- The multiplayer experience doesn't have to be hypercompetitive;
- Team play should focus on roles for players to fit in.



Popular Games

Gaming Preferences

Some of the preferred games among Gen-Z like the ones shown have some significant common denominators in terms of gameplay elements:

Except for Persona 5, the rest of the titles have a **large focus on multiplayer – its an experience shared via chat apps like Discord** – Gen-Z users play them to stay connected with their friends;

All these games are also **part of the Gen-Z pop-culture due to their massive online presence** through streams (Twitch), let's play videos (YouTube) and memes (Reddit, etc.);

Games like Minecraft, ROBLOX and Animal Crossing let their players **express themselves through sandbox gameplay;** moreover, games that sell skins (Fortnite, Among Us!, Fall Guys etc.) offer **another side of self-expression;**



Popular Games – Social Play

Gaming Preferences

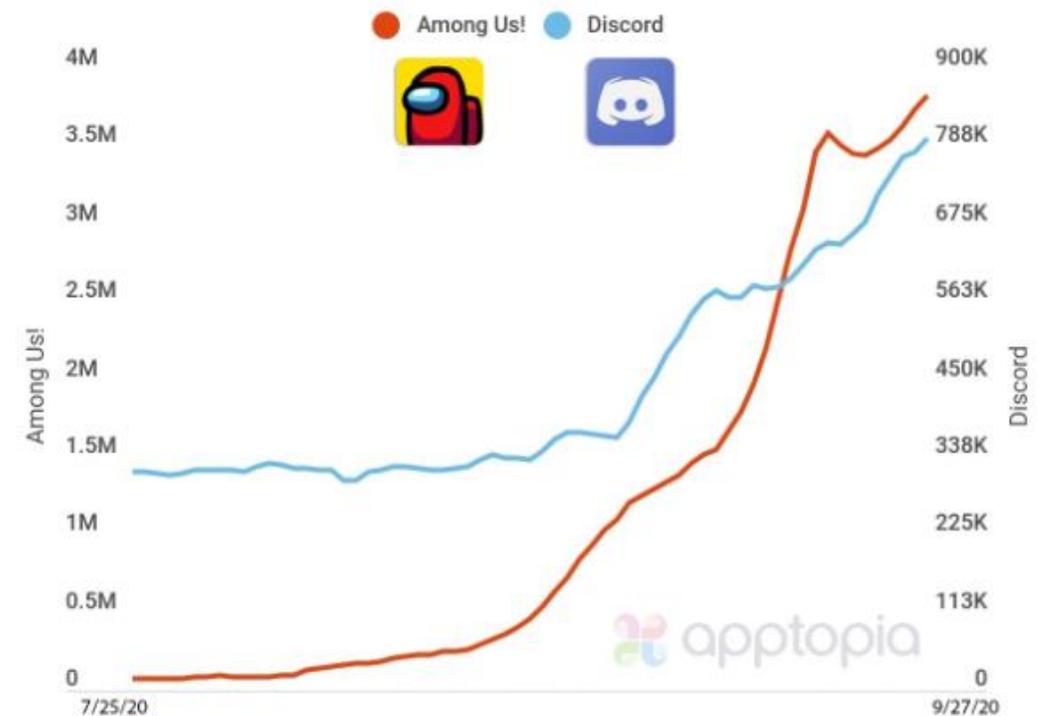
Community and social driven gameplay are a huge part of what Gen-Z is looking for.

Among Us! skyrocketed into popularity along with the COVID-19 pandemic, since many players needed connection during quarantine and isolation.

The increase in downloads for Discord and Among Us! Makes it clear that players prefer to play between friends.

Discord benefits from popularity of mobile game, Among Us!

Daily downloads, worldwide



Among Us and Discord's daily download rates between July and September 2020, from Apptopia.

Reasons for Playing

Gaming Preferences

Why do our respondents choose to play? **The main reasons states is for relaxation and escapism.** This comes to no surprise since games have always been seen as a recreational activity. However, **socializing comes close as the 2nd most important reason for playing.** This is most likely due to the COVID-19 pandemic keeping people inside their home which **created a need to remain connected to close ones.**

When looking at the age differences, **younger players put a higher importance on hanging out with their group of friends** than older generation closer to millennials.

A **casual multiplayer experience**, that focuses on **playing with friends** means players can feel like they have **a space to destress and chat with their buddies while having some fun together.**

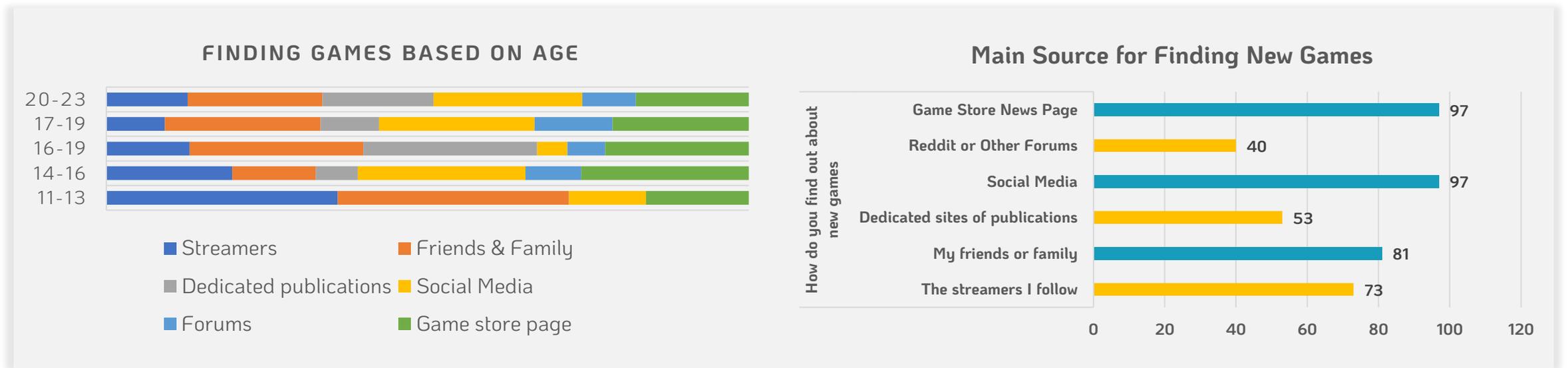


New Game Adoption

Gaming Preferences

In younger Gen-Zers, **Social media, their close social circle and streamers have the highest impact when looking for information about a new game.** The game store page remains a valid constant in all age groups however the influence of streamers decreases as we look at older gamers.

Targeting younger Gen-Zers should be done primarily through word-to-word and content creator, while providing a solid store page presence to increase chance of reaching all audiences. **Adding streamers into the game can boost the adoption in younger age groups,** while offering strong **incentives to bring your friend in the game can mean increasing word-to-word spread of the game.**



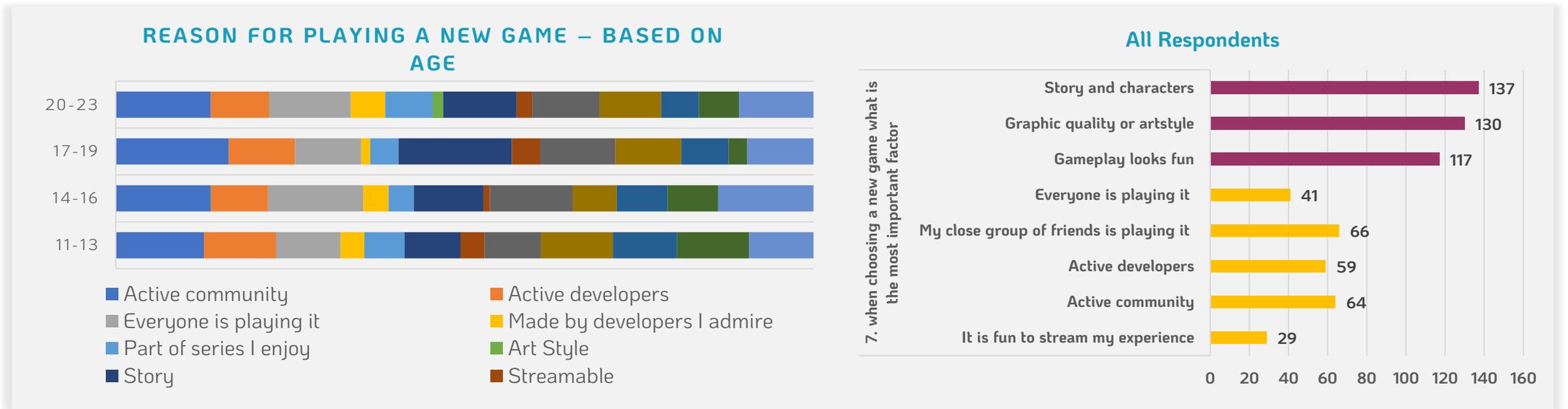
New Game Adoption

Gaming Preferences

Story and characters paired with fun gameplay that looks great in terms of quality and art style is the main combination that Gen-Z looks for in a game.

From a social standpoint – we note that, again, **Gen-Z prefer to play with their close friends and look more inside their close social groups for what to play next. A strong story or theme could further make this meaningful.**

An active community tied with active developers seems to have a lesser impact than all the other factors, however they should not be neglected after the game's launch, since both could nurture the game's retention on the long run.

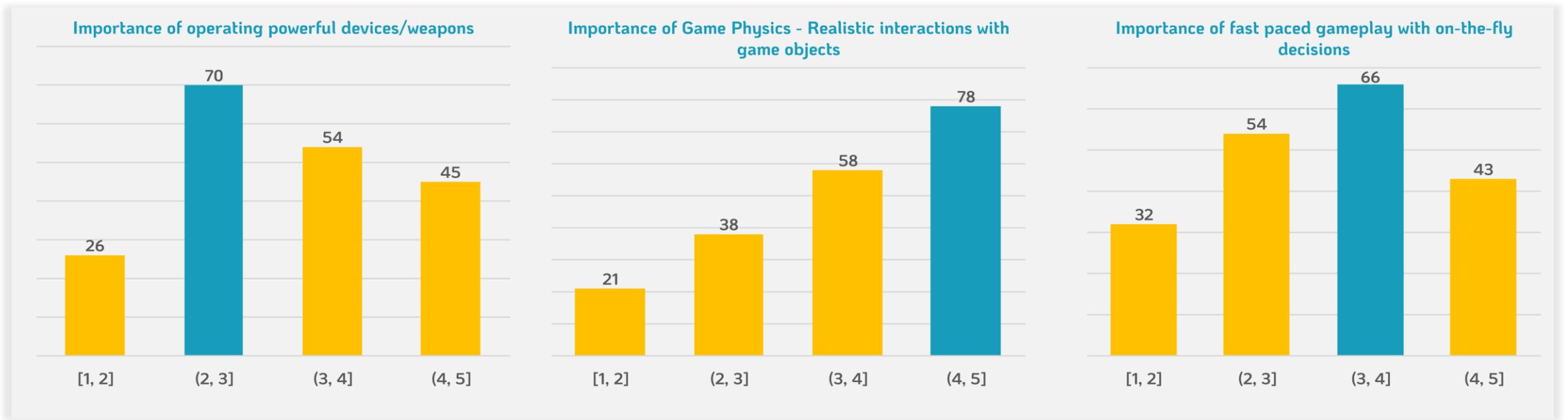


Gameplay Elements

Gaming Preferences

The surveyed players had a clear preference for realistic interactions with gameplay elements, like we see in games such as Overcooked and Moving Out, where objects react to the player's movements in an interesting, unexpected way because of the implemented physics.

At the same time, players do enjoy a fast gameplay experience with decisions taken on the fly by them and their team. Slingshot and projectiles don't need to be extremely powerful for fun emergent gameplay, and **we should rather focus on providing interesting physical simulations and frantic cooperation.**



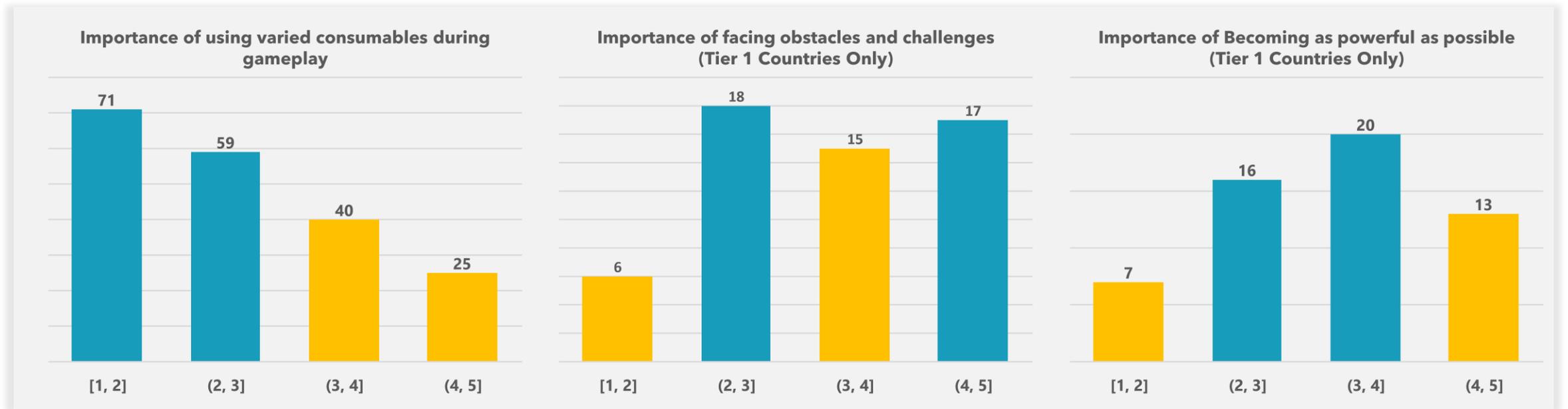
Gameplay Elements

Gaming Preferences

Gen-Z players do not care about using a wide variety of consumables that help them during gameplay.

Despite this there are some **smaller groups within the below leftmost chart that do consider it important** which gives room to think of **ways to develop this and playtest in future.**

Most **players enjoy facing obstacles and challenges** and this opens the options of **giving them the chance of becoming very powerful** throughout the game only after being put in front of adversity.



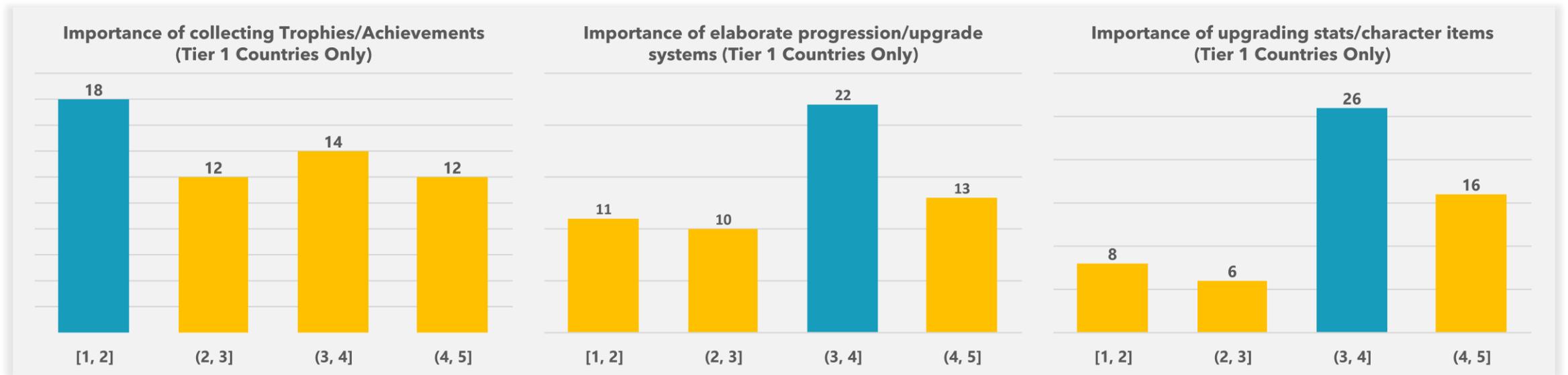
Gameplay Elements

Gaming Preferences

Collecting Trophies and/or Achievements are usually believed to be popular additions to a game, however **Tier 1 Gen-Z players are almost indifferent** to this aspect, this leads us to believe that only a niche of players want to hunt down Trophies or achievements.

Progression systems are the bread and butter of most RPG games and so is upgrading character stats, because RPG and Action-Adventure are some of the most preferred genres among our cohorts, we find it unsurprising that **both these aspects are considered Important**.

An RPG side to a game could be looked at in future including a Leveling system and some basic stats (Dash distance, carry weight, etc.) could be explored in future.



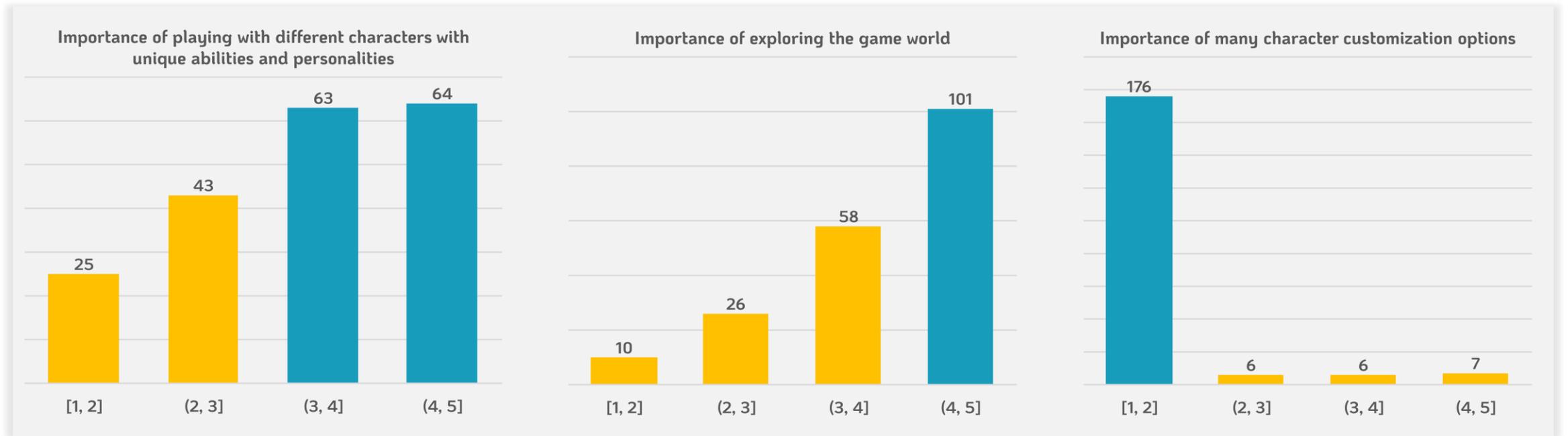
Gameplay Elements

Gaming Preferences

Character customization is considered largely unimportant by most Gen-Z players that we questioned. This aspect should be **further investigated by playtesting various customization options or none to see which are more popular among users.**

World exploration is overwhelmingly important, and this should open the idea of creating various island sizes and designs to see which are engaged with the most by Gen-Z players.

Respondents also like to play with different characters with unique personalities.





Views on Monetization

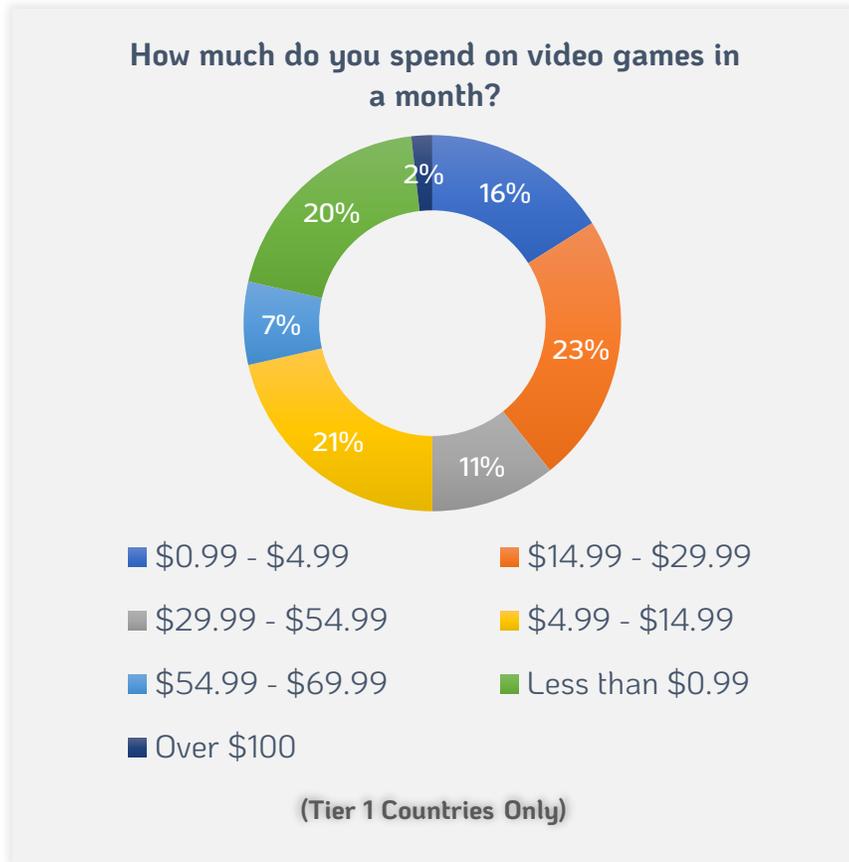
Spending Habits

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Spending Habits

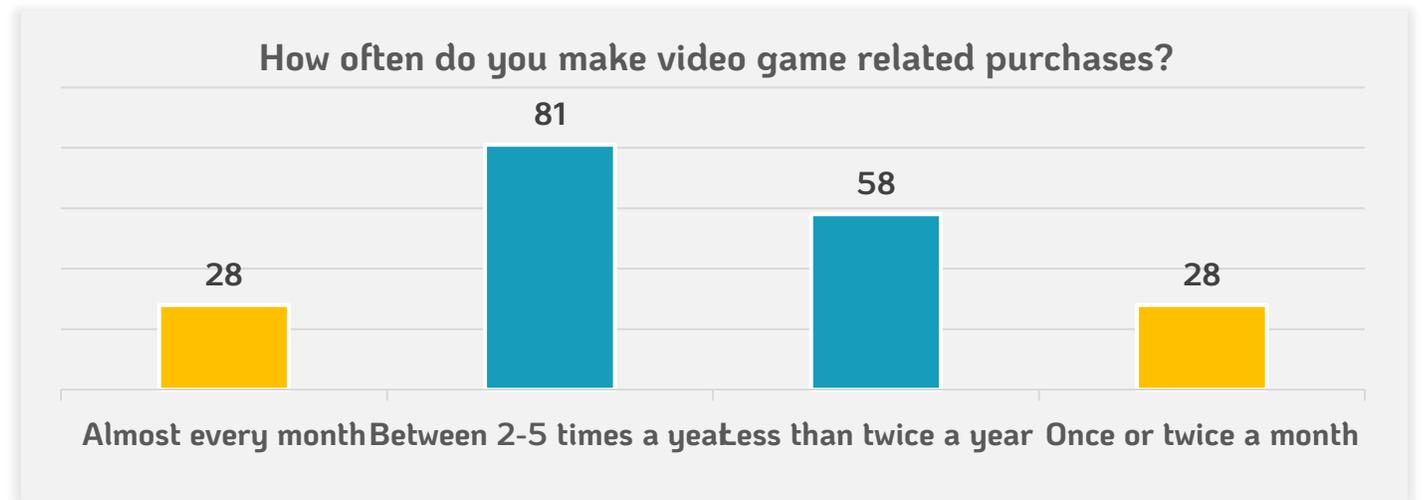
Views on Monetization



Data extracted from Tier1 participants in the survey points to validate one of the hypothesis we had - **Gen-Z doesn't have a lot of available disposable income.**

At the same time, interest in gaming is a very defining feature of Gen-Z and as they enter the workforce, we believe the income they can spend on gaming will steadily increase.

This means that **focusing on offering "perceived value" is key when it comes to monetization.**



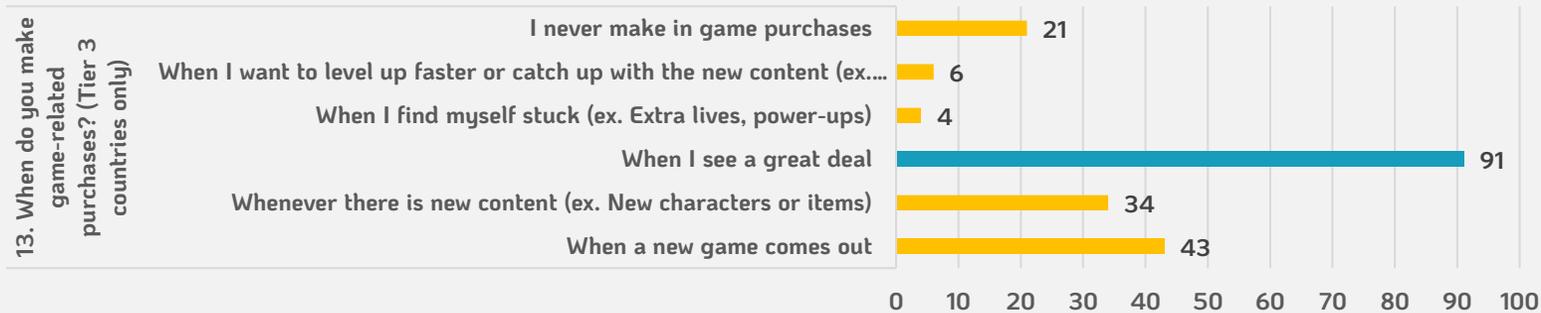
Spending Habits

Views on Monetization

When do you make in-game purchases? (Tier 1 Countries)



(Tier 3 Countries)



In-game purchases are made the most when **players find opportunity to exchange high value for low cost.**

In other words, discounts. **Both country Tiers purchase in-game when they see a great deal.**

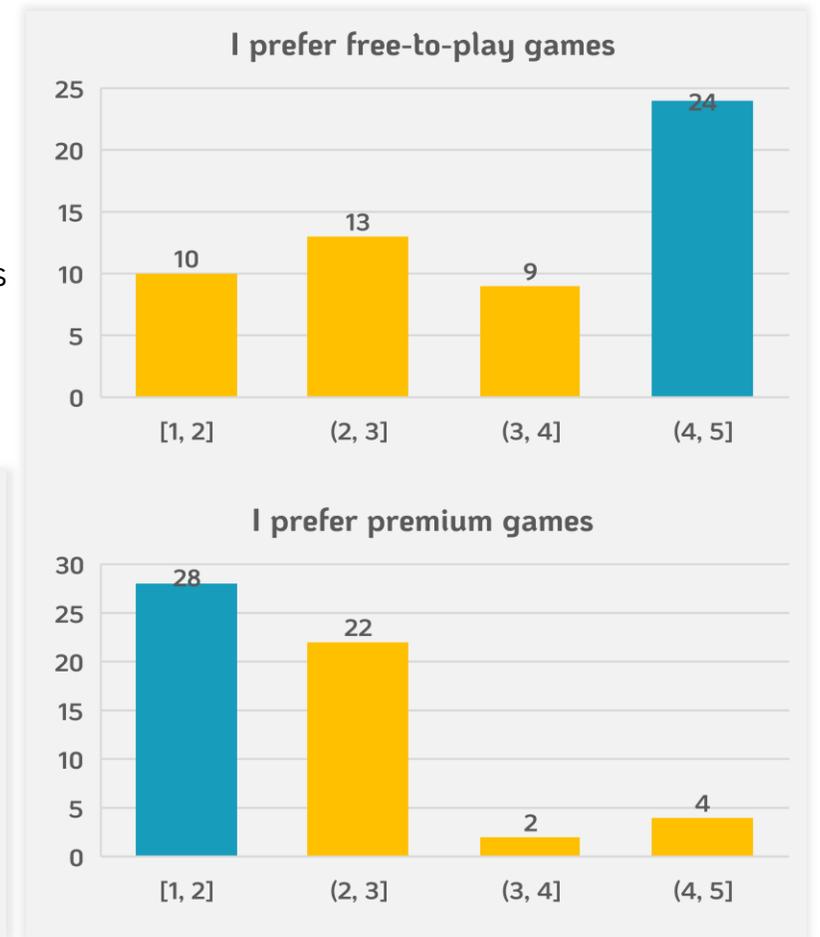
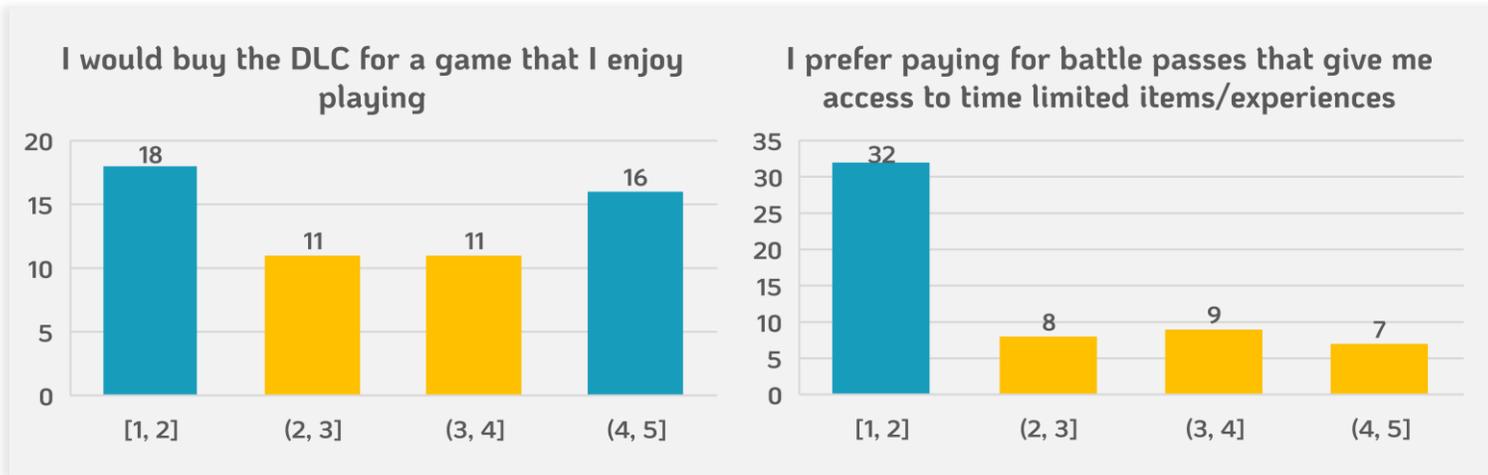
Additionally, some **Tier 1 users will look to buy cosmetics.**

Spending Habits

Views on Monetization

Premium games are not as popular as free-to-play. **Most likely, users who do not like freemium games will look for a great deal as mentioned earlier** (page 35).

There's an almost equal split in likelihood of buying a DLC. For freemium games this opens the opportunity of creating larger content packs that could be purchased in-game like skin/pet packs that Among Us! offers for a low price.



Spending Habits

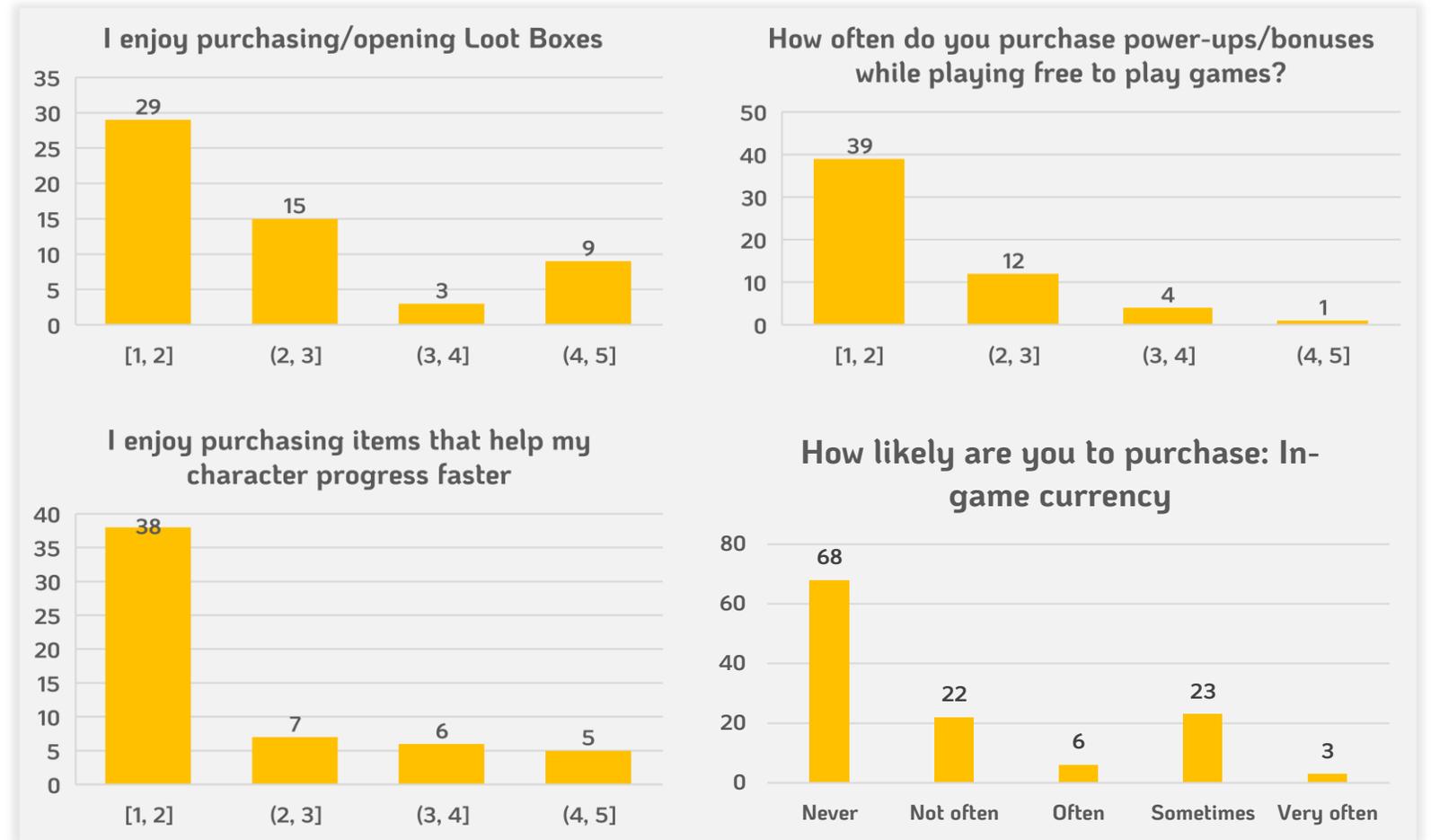
Views on Monetization

There is a clear bias towards in-game purchases, even if they are loot boxes, power-ups or progression items as well.

However, in the rightmost chart we note a slight skew – where a small number of players will occasionally purchase in-game currency.

Takeaways

Game developers **should consider making purchases optional and not impact core gameplay.** Despite a few Gen-Zers that might purchase the occasional Hard Currency, it would be a good start to look at selling cosmetics more than anything else.





Social Media and Gaming

Time Spent on Apps

Preferred Media & Top Apps

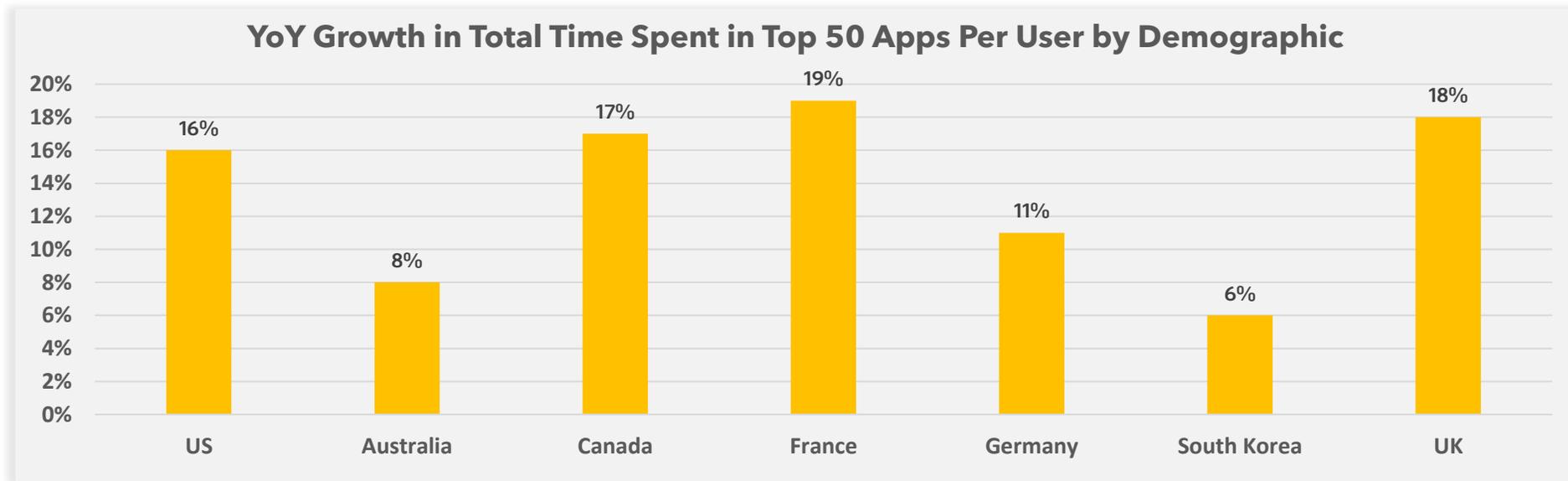
Engagement with Social Media

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Time Spent on Apps

Social Media & Gaming



YoY growth in time spent on top 50 apps reported by App Annie shows that Gen-Z in Tier 1 countries spend between **6% to 19% more time on their favourite apps.**

Source: App Annie

Preferred Media & Top Apps

Social Media & Gaming

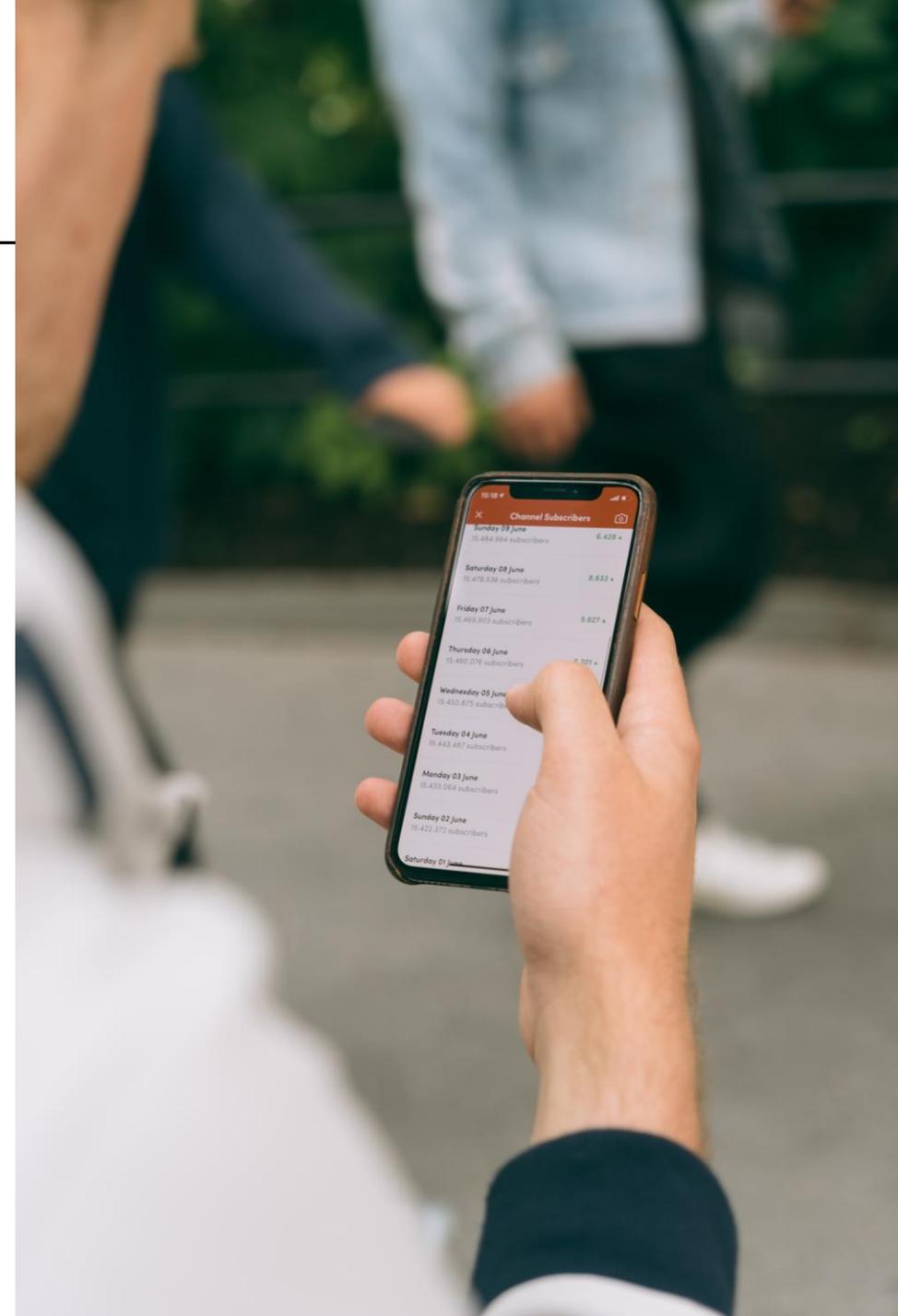
According to McCrindle's research: [Understanding the Impact of COVID-19 on the Emerging Generations](#), the **primary source of information during the pandemic for Gen-Z is:**

Social Media – 49%

Government Websites – 39%

News Websites – 33%

Mainstream TV and radio – 33%



Preferred Media & Top Apps

Social Media & Gaming

According to App Annie's [How to Build a Winning Gen Z Strategy on Mobile \(Q3, 2020\)](#), Gen-Z spends:

Avg. 4.1 Hours

Time spent per month per app, by average Gen-Z users across the top 25 non-gaming apps.

120 Sessions

Accessed by average Gen-Z user among top 25 non-gaming apps, per month.

+35% More Time/Month

Spent by average Gen-Z user in Indonesia than the global average in top 25 non-gaming apps.

2x Faster Growth

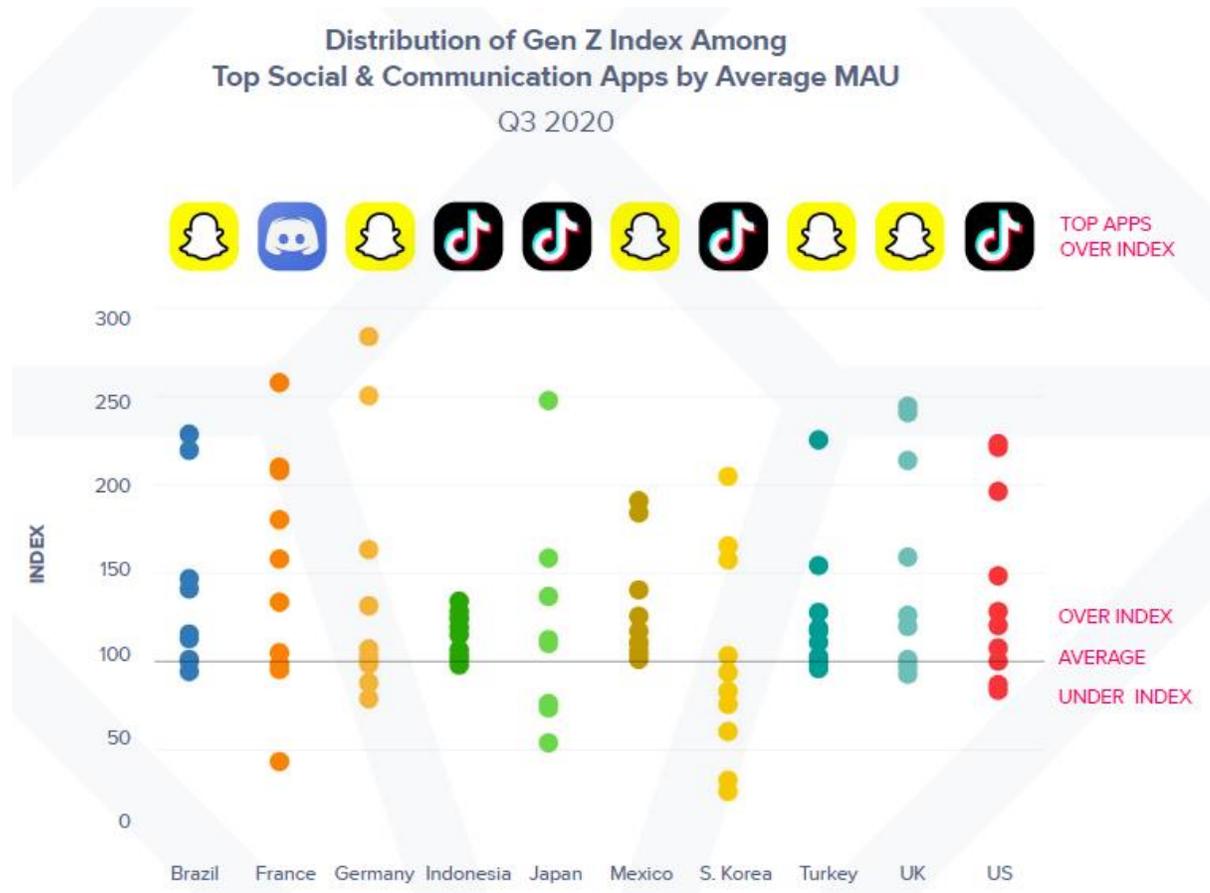
Spent by average Gen-Z user in Indonesia than the global average in top 25 non-gaming apps.

Q3 2020 vs Q3 2019

Source: App Annie

Preferred Media & Top Apps

Social Media & Gaming



In Q3, 2020 the top apps used by Gen-Z are:

Snapchat;

Tik-Tok;

Discord;

Of these 3 apps, 2 are Social Media apps and Discord is a audio/video chat app geared towards gamers.

Source: App Annie

Mobile Apps Affinity

Social Media & Gaming

Most Likely to Use in 2020 by Region							
US	Australia	Canada	France	Germany	South Korea	UK	Japan
Snapchat	Snapchat	Snapchat	Snapchat	Twitch	Snapchat	Discord	IbisPaint
Twitch	Discord	Discord	Twitch	Discord	Twitch	Twitch	SNOW Selfie Camera
TikTok	Reddit	Reddit	Discord	Snapchat	Discord	Naver Webtoons	Simeji
ROBLOX	Spotify	Spotify	Reddit	TikTok	Netflix	Twitter	niconico
Spotify	UberEATS	UberEATS	SkiptheDishes	PRONOTE	Spotify	SNOW Selfie Camera	LINE MUSIC

Looking over the above table we note some of the most used apps by Gen Z. **Snapchat, Twitch, Reddit and Discord are all social apps meant for direct discussions, except for Reddit** which is a Social Media platform that takes the shape of a classic forum mixed with visual message boarding.

Key Takeaways

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Key Takeaways

- Born in the digital world – almost 97% of Gen-Z own a smartphone;
- They live in the era of content creators ;
- Age ranges between 9 and 24 years old;
- Time spent playing can range between 1 hour and over 2 hours;
- Preferred platform: PC, Smartphone and Consoles too;
- One of the biggest generations (2BN) that are entering the workforce;
- Dislike Lootboxes, RNG and Gacha.
- Games are a part of their media ecosystem;
- They play to relax and spend time with their friends;
- Gen-Z doesn't like to meet new people through gaming;
- All age groups prefer RPG and Action-Adventure;
- Older teens like Shooters and BR;
- Younger players like Fighting, Survival games and might adopt Social Deduction more than the other age groups;
- Multiplayer is preferred among all ages
- Younger players prefer Co-Op;
- Co-Op is the least favorite among older Gen-Z players;
- Team-play is the preferred gameplay mode;
- PVP is not as important as team-play or Co-Op;
- Players like to troll each other when playing;
- A small majority of the sample group like to solo multiplayer games;
- PVP or MP should not be hyper-competitive;
- Team-play should feature set roles among players.

About Us



We are an engineering core game development agency.

Full Service



Full Development, Co-Development, Live Ops, Custom Development, Development Support and Market Research.

6 Locations



Bucharest, Botosani, San Francisco, Los Angeles, Guadalajara and Montreal.



The Team

About Us



Gabriela Gherman

Head of Business Intelligence

With almost 10 years of experience in the gaming industry, Gabriela is up to speed with the market novelties, able to work on multiple fields, be it marketing, management or analytics.

Leading the team, Gabriela constantly identifies new opportunities and implements an effective monetization strategy based on insights data.



Florin Curcan

Product Manager

A gamer at heart, Florin has a total of 8 years in the gaming industry. At Amber he transitioned from Senior Data Analyst to Product Manager. His experience includes coordinating reporting requirements and delivered insights and actionable data for over 20 games (from pre-production to live ops).



Popa Andrei

Market Research Specialist

When he's not working on games, he spends his free time playing them. Andrei has been working in the industry for 5 years and now uses data to bring out the story behind the numbers that lead to insights for games and the gaming market.



Mădălin Răileanu

Data Analyst

With 8 years in the gaming industry, Madalin is a result-oriented, ambitious, and driven, Data Analyst. Always setting challenges for himself and always checking that he is on the right path to keep himself inspired. He loves what he does, and his main source of motivation is the need to do his best.



Andrada Drăgan

Junior Data Analyst

After a 1month internship within the BI department, Andrada was selected for the Junior Data Analyst role in the team. She is soon starting her last year of college at the Faculty of Finance, Insurance, Banking, and Stock Exchange. She is passionate about video games and problem solving with an analytical approach.



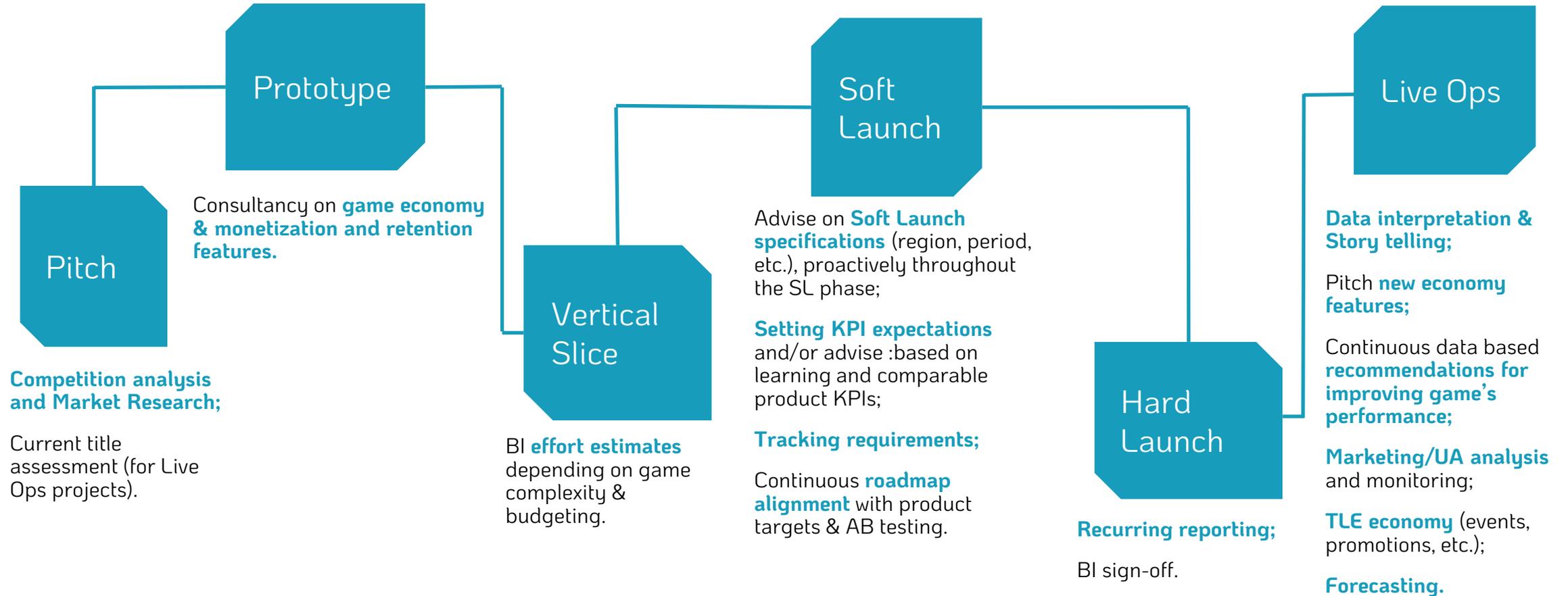
Mona Moghadam

Data Analyst

Mona is all into Player Behaviour in games. She started her journey in the Gaming Industry as a Developer, but then she fell for Analytical Game Design and Data Analysis. With the data driven approach and a background in UX Design, she assembled a toolkit to create better experiences in the games for players.

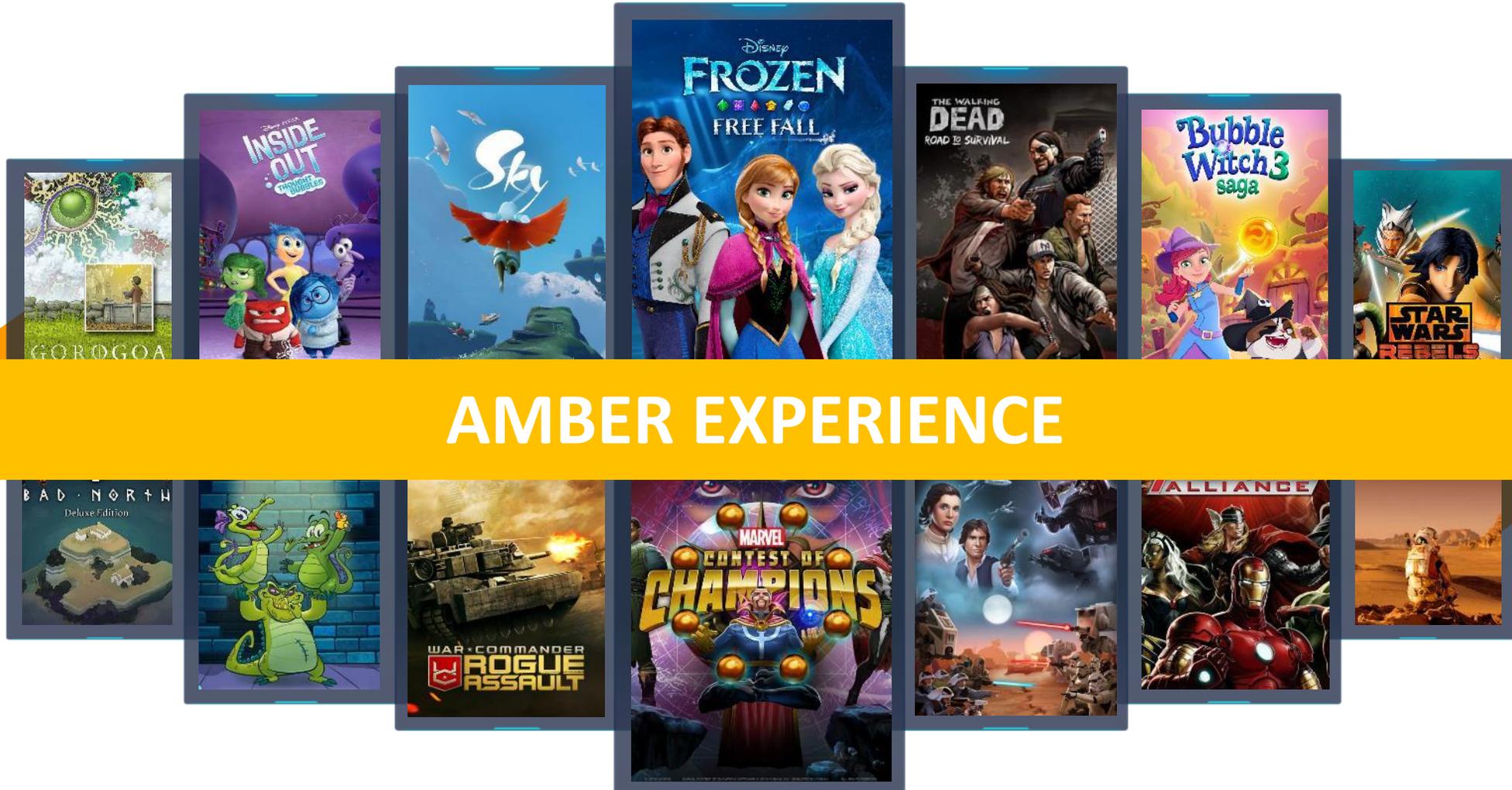
Business Intelligence – Capabilities

About Us



Note: based on a case-by-case necessity, most of these services cascade into later phases and can sometimes even be done in earlier phases.

Our Portfolio



Our Partners



Appendix

[App Annie](#) – for estimates on comparable titles and other data
[App Annie Report - How to Win Gen Z](#) – Understanding the Mobile Generation
[App Annie Report - How to Build a Winning Gen Z Strategy on Mobile](#)
[App Annie Report – The State of Mobile 2020](#)
[McCrindle](#) - Gen Z and Gen Alpha Infographic Update
[McCrindle Report](#) - UNDERSTANDING THE IMPACT OF COVID-19 ON THE EMERGING GENERATIONS
[McCrindle Report](#) – Understanding Gen Z
[Being 13 Report](#) - School of Behavioural and Brain Sciences, The University of Texas at Dallas
[The Verge](#) - Among Us is behind a huge spike in Discord’s mobile app downloads
[TubeFilter](#) - YouTubers, Twitch Streamers, And ‘Among Us’ Are Driving Record Traffic For Discord
[SteamSpy](#) – for estimate on comparable titles
[SteamDB](#) - for estimate on comparable titles
[TwitchTracker](#) - for estimate on comparable titles
[Hostingtribunal](#) – Minecraft stats

[Landedu Blog](#) - The Finances of Fortnite: How Much Are People Spending on This Game?
[Star Wars Fandom](#) – Fortnite X Star Wars
[Forbes](#) - 'Fortnite: Battle Royale' Is Getting An 'Avengers: Infinity War' Crossover Tomorrow
[BBC](#) - Alexandria Ocasio-Cortez Among Us game watched by 400,000
[AppTopia](#) - Among Us! creates a hockey stick for Discord's downloads