



BACK IN THE GAME

POST-PANDEMIC
SPORTS TRENDS & FUTURES

+ WUNDERMAN
THOMPSON

A REPORT BY WUNDERMAN THOMPSON INTELLIGENCE

Welcome to Back in the Game

A report exploring some of the emerging and future trends in global sports in the wake of the pandemic.

COVID-19 brought professional sports to a standstill and the ongoing challenge of combatting the virus continues to drive profound and rapid change. If we ever doubted what fans mean to sports, the forlorn empty stands we have experienced bring that into sharp relief. Athletes across the world – from the NBA's LeBron James to India's cricket captain Virat Kohli – have lamented the absence of the crowd.

Yet this enforced hiatus is also compelling the industry to rethink the way it delivers engagement, accelerating a number of trends. We are seeing the transition to a new era in digital fan engagement, as rights holders and brands hit fast-forward to find new ways to connect with supporters near and far.

The worlds of esports and traditional sports are converging too, unlocking opportunities to reach new audiences and enrich the fan experience, and further driving the fusion of the physical and digital spheres.

Powered by 5G, emerging technologies like extended reality and artificial intelligence are ushering in a wave of immersive and spectacular experiences and opening up new ways to engage fans beyond the stadium.

We are seeing athletes extend their relevance beyond sports, leveraging social media to share their back-stories, creative passions and side hustles. We're also seeing sports and athletes wielding their influence for good, becoming powerful voices for change on a number of fronts, from human rights to sustainability.

These trends were already in motion, but the pandemic has put a foot on the accelerator, bringing the future closer, and unlocking new opportunities for brands along the way. As sports continue to play a key role in the lives of fans, these shifts and innovations are all part of getting everyone back in the game.

Marie Stafford
European Director
Wunderman Thompson Intelligence



1 Future Fan Engagement

2 Leveling Up to Esports

3 The 360 Athlete

4 Tech-Powered Sports

5 Back to Live

6 Sports for Good

7 What it Means for Brands

FUTURE FAN ENGAGEMENT

A new era of fan engagement that prioritises the fan experience across multiple digital touchpoints will emerge post-pandemic.

With live sports on hiatus, rights holders truly discovered the value of engaging fans digitally, with some adapting more easily than others.

Those that excelled at meeting fan demand for digital engagement beyond gameplay were the ones that succeeded during lockdown. They point the way for the future of fan engagement which will truly put fans at the heart of sports, delivering authenticity, connection, great storytelling and shared experiences.



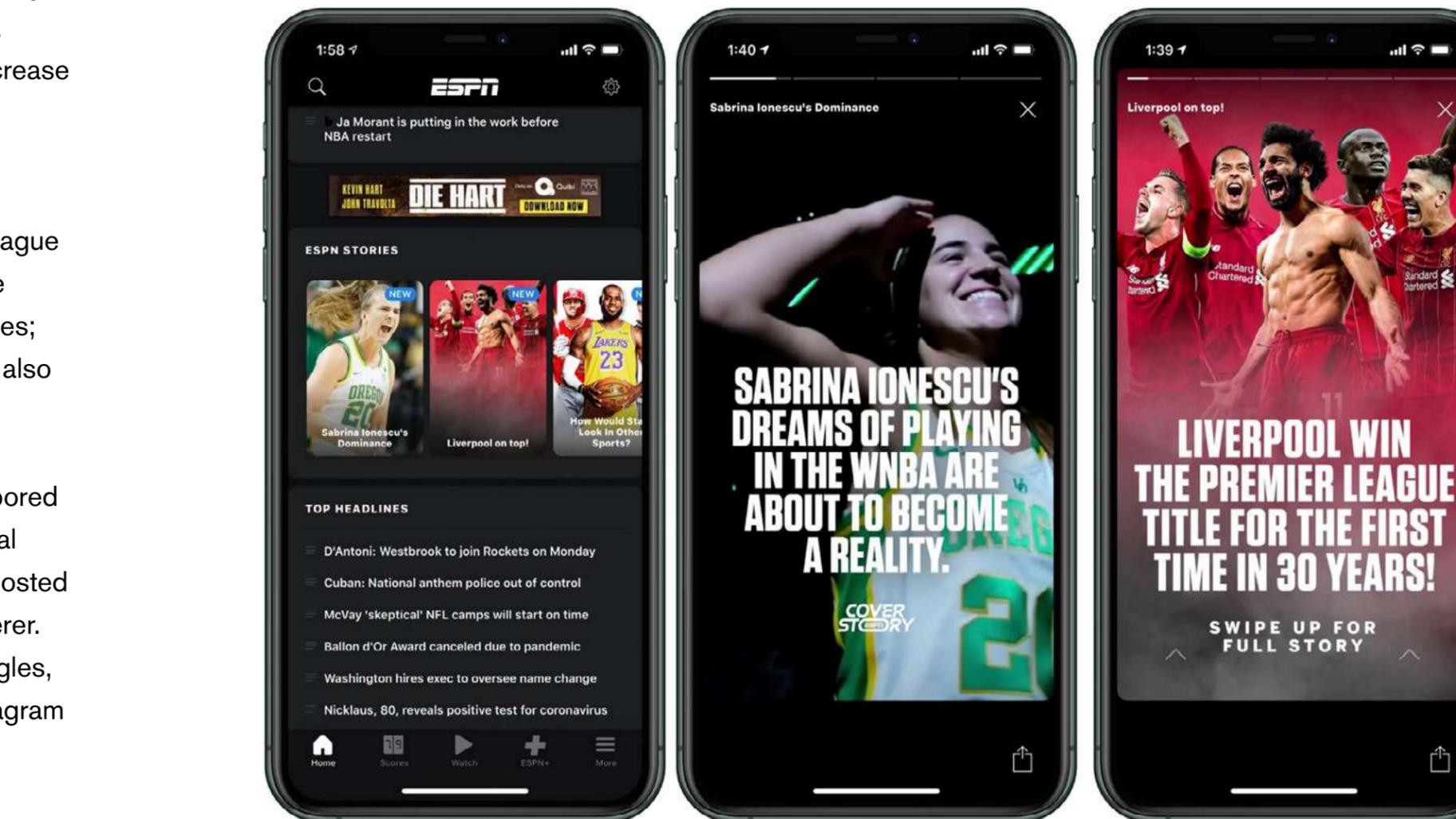
Authentic, Always-on Storytelling

Innovative teams, leagues and broadcasters will keep fans entertained with mobile and social-first content. Today's audience is always-on, seeking a steady feed of push and pull content, not just the matchday spikes. The pandemic only accelerated fans' appetites: a recent study from Redtorch and 90/24 Media found that videos posted to social media by soccer players saw an 82% increase in views during lockdown.

Snackable content, easily digested on the go or in short bursts, is proving popular. In July 2020, Snap signed a new deal with the National Football League (NFL) in the US which tripled the number of highlights shows offered on the platform. That same month, US sports channel ESPN launched ESPN Stories; short-form content compilations that feature not just sporting moments, but also interviews and clips of sports stars and fans alike.

Behind-the-scenes, authentic or unscripted content is also on the rise. As bored athletes took to TikTok and Instagram, fans were afforded access to their real lives, allowing for a more authentic and intimate feel. In April, Rafael Nadal hosted an Instagram Live chat with fellow tennis pros Andy Murray and Roger Federer. The invincible Spaniard endured some gentle ribbing for his technical struggles, with Murray commenting: "He can win 52 French Opens, but not work Instagram Live."

England's women's soccer team, dubbed the Lionesses, harnessed this authentic, behind the curtain feel with their social media content, including a Twitter series sponsored by tire brand Continental called 'Keeping up with the Lionesses.' Each mini episode was hosted by a different player, updating fans on what they had been up to while in lockdown at home, from training, to baking, to taking up new hobbies.



AMAZON ORIGINAL

**ALL OR
NOTHING**
TOTTENHAM
HOTSPUR

prime video



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"Storytelling is the most powerful thing in all of this," Shane O'Sullivan, managing partner at brand-centric sport and entertainment agency Prism, explains to Wunderman Thompson Intelligence. He points to the success of documentaries such as Amazon Prime Video's All or Nothing franchise or Netflix's The Last Dance, the ten-part docuseries that told the story of Michael Jordan's 1997-98 season with the Chicago Bulls, and averaged more than 5.5m views per episode.

Harnessing this power of storytelling might mean amping up the tension and drama to tell sporting stories documentary-style, or just getting playful with content.

"People enjoy engaging with anything that touches them on a deep emotional level," says O'Sullivan, "Rights holders have to start looking at that and think about how they can fill in the moments between gameplay. That means really looking at how people tell stories."

▶ **"People enjoy engaging with anything that touches them on a deep emotional level. That means really looking at how people tell stories."**

-Shane O'Sullivan, managing partner, Prism

Sharing the Experience

Much of the pleasure of being a sports fan comes from sharing the highs and lows. O'Sullivan points to a favorite quote from Mark Cuban, entrepreneur and owner of the National Basketball Association (NBA) team the Dallas Mavericks: "We in the sports business don't sell the game, we sell unique, emotional experiences. We are not in the business of selling basketball. We are in the business of giving you a chance to create shared experiences."

New digital second screening and social viewing experiences are tapping into this. Facebook recently announced it would launch Venue, a social app designed to challenge Twitter as the second screen of choice for live sports events that allows fans to interact with commentators and each other. Twitter meanwhile, is boosting its fan experience with 'Multicasts', which it launched at golf's PGA Tour in June. Featuring nine different content streams across 20 Twitter accounts, it included audio and video commentary from athletes and celebrities on pre-game, practice sessions and the first two holes of competition.

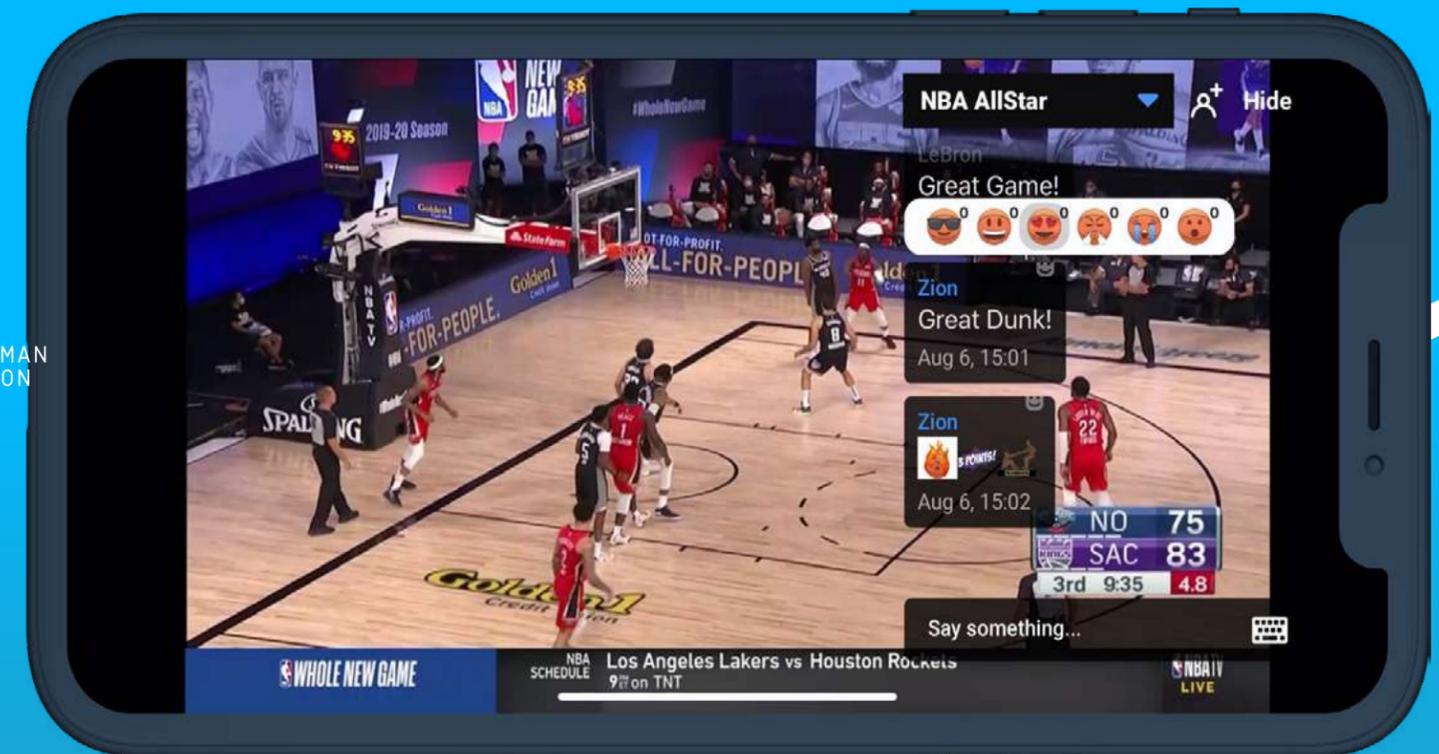
Tapping into the shared experience of sports, watch parties are a growing trend among fans. A recent poll for Genesco Sports Enterprises found that 76% of US fans want more watch party-style viewing options. Some teams, like the Indian Premier League's Delhi Capitals have launched watch parties on Facebook, YouTube and their own websites. In the US, the NBA, working with Turner Sports and Wunderman Thompson, added watch parties to its app in the summer, along with tap to cheer capabilities.

Broadcasters are also injecting a social element to their shows. BT Sport and Sky Sports in the UK and Disney+ Hotstar in India are just some of those offering social watching features. Amazon began broadcasting English Premier League soccer games on Twitch, opening up the platform's enhanced interactivity and chat features to fans.

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▶ **"We in the sports business don't sell the game, we sell unique, emotional experiences."**

—Mark Cuban, entrepreneur and owner of the Dallas Mavericks



NBA Watch party feature on NBA mobile app, created by Wunderman Thompson Apps and Turner Sports. Image credit: Wunderman Thompson

Fan-centricity

“Everything 100% starts with the fans,” says O’Sullivan, explaining why brands must put fans at the heart of what they do. “Fan-centered strategies should encourage, enable fans to engage and make the sport more accessible, interactive and responsive.”

That might mean giving fans more of a voice. In Formula E racing, fans are able to influence the outcome of a race by voting for their favourite driver via a concept called FANBOOST. The top five drivers in a poll receive a power boost that they can deploy during a 5-second window during the race.

Or it could mean hosting fan content, not just franchise-generated posts. A study by Imagen found that 60% of GenZ and millennial sports fans are already posting their own sports content on social media.

It could also mean celebrating the fans. German soccer club Borussia Dortmund regularly hosts fan parties in different cities to show their appreciation to fans, but this year they delivered the fun virtually. After the scheduled game between Borussia

▶ **"Everything 100% starts with the fans."**

-Shane O’Sullivan, managing partner, Prism

Dortmund and Schalke 04 was postponed in March, the league held a special digital-only event in Nanjing, China which featured user-generated content, fan vlogs, gaming contests, a jersey auction and reached almost 3 million viewers via livestream.

Fans will likely play a bigger role in sports broadcasting too. BBC tennis commentator David Law told the SportsPro Insider series conference in May that “Broadcast will feature people at home more. There will be a closer relationship between the sport and the viewer than ever before.”

Matt Rogan, co-founder of sports consultancy Two Circles and a non-executive director in a number of professional and performance sports businesses, believes that the industry will need to up its game post-pandemic to meet elevated fan expectations: “Our threshold as customers is increasing. The pandemic period has made us do without going to sports. As we go back, we go back with our eyes wide open.”

The fences, benches and partitions between fans and athletes are dissolving. The next era of sports spectatorship will bring fans off the sidelines into the heart of the action.



LEVELING UP TO ESPORTS

Athletes transition to virtual arenas, as races, matches and games are reinvented in esports.

The pandemic has fast-tracked a crossover between the worlds of esports and traditional sports, as Robert Rippee, director of the Hospitality Lab and director of the Esports Lab at the International Gaming Institute at the University of Nevada, Las Vegas, explained to Wunderman Thompson Intelligence. “Suddenly many began to discover, esports can be as entertaining as traditional sports,” says Rippee, “it accelerated the convergence of the two.”

Signs are it's here for the long-haul. According to global sports industry leaders surveyed for PwC's 2020 report, Sports Industry: System Rebooting, simulated esports now have the highest revenue growth potential of all sports post-pandemic.



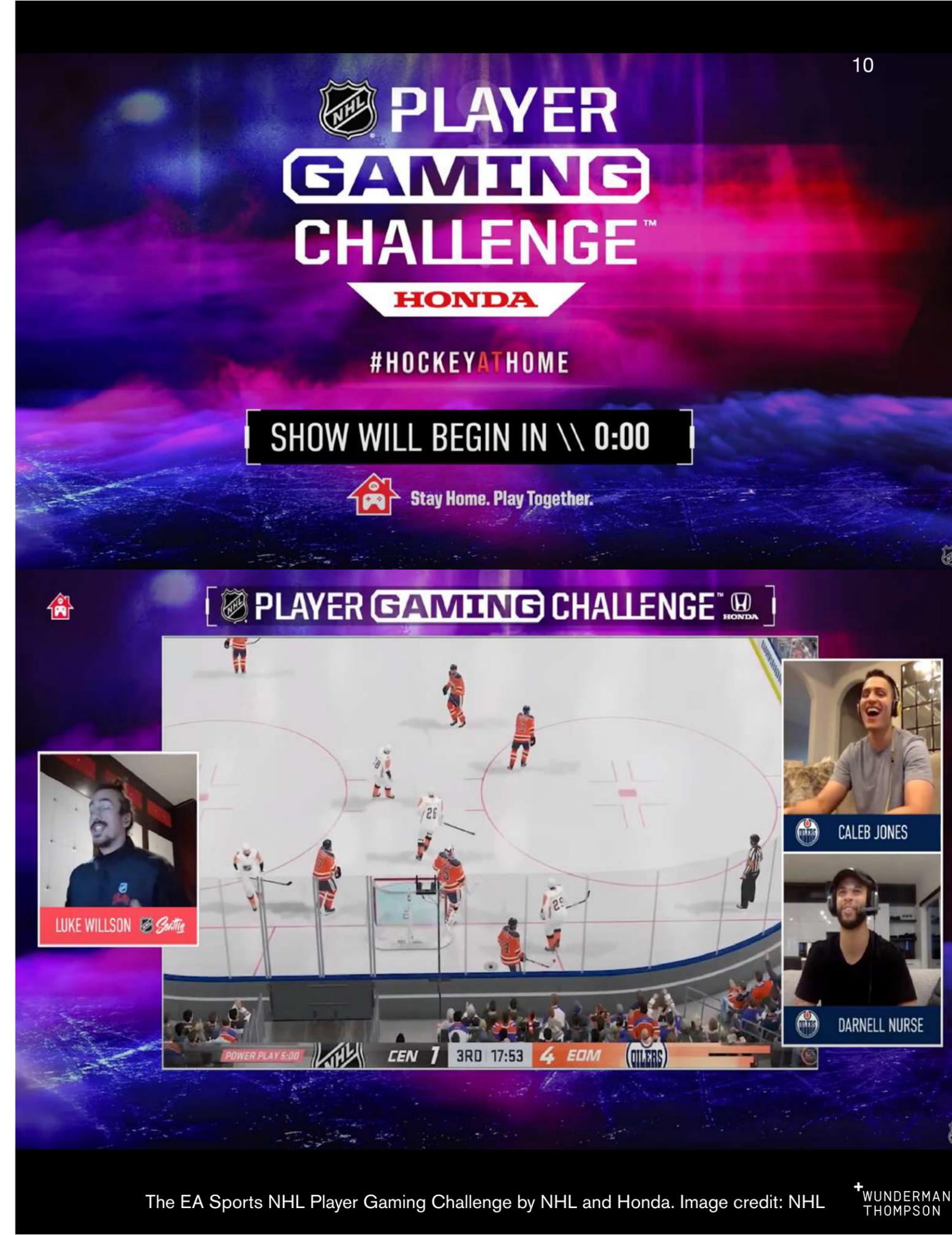
Virtual Tournaments

As live sports shut down, existing esports games played a critical role in getting digital tournaments going quickly, introducing some novel elements in the process.

In April, tennis stars like Andy Murray and Kiki Bertens swapped their rackets for consoles to play in the Mutua Madrid Virtual Open Pro. Madrid's Manolo Santana stadium was recreated in the Tennis World Tour video game and athletes played as avatars of themselves or even each other. Fans also enjoyed the novelty of Murray commentating live on his own match.

In North America, the National Hockey League (NHL) worked with Honda to launch the EA SPORTS NHL 20 gaming challenge when their season was postponed. During the matches, which were broadcast on TV as well as streamed online and on Twitch, players could be heard trading 'smack talk,' where they attempt to demoralize one another, something that's normally inaudible in TV broadcasts.

Many virtual tournaments also enjoyed the glitter of celebrity participation. Adidas and Wunderman Thompson Turkey enlisted celebs to play against soccer players in the Uncancelled Cup. The virtual soccer tournament was broadcast live on Facebook Live, IGTV and YouTube Live and included debate programs, commentary and game teasers: the same content as real life events. Fans could participate with virtual cheers and claps shared in real time with the gamers.



Simulated Solutions

Some sports switched to simulators, introducing physicality into the contest. Already standard in the esports world, motorsport used cockpit-sized simulator rigs to stage virtual tournaments. Drivers are already experienced with these, often spending time in them to develop new cars, test their reflexes and hone their skills. Formula 1's established Esports Series, which has been running since 2017, gave them a distinct advantage in pivoting quickly to virtual amidst the pandemic.

A Grand Prix Series in March saw pro drivers compete against esports sim drivers, celebrities like singer Liam Payne, and even some cross-sport participation from the likes of Belgian goalkeeper Thibaut Courtois. Playing F1 19, each player drove a car of equal spec, in contrast to traditional Formula 1.

In Europe, professional golfers competed in the BMW Indoor Invitational and toured five iconic golf courses through virtual backdrops using Trackman simulators to play the courses.

Cycling has also taken to the virtual world with professional cyclists riding at home on static bikes that are programmed to simulate the terrain of real-life routes using platforms like Zwift and ROUVY.



Racing the Pros

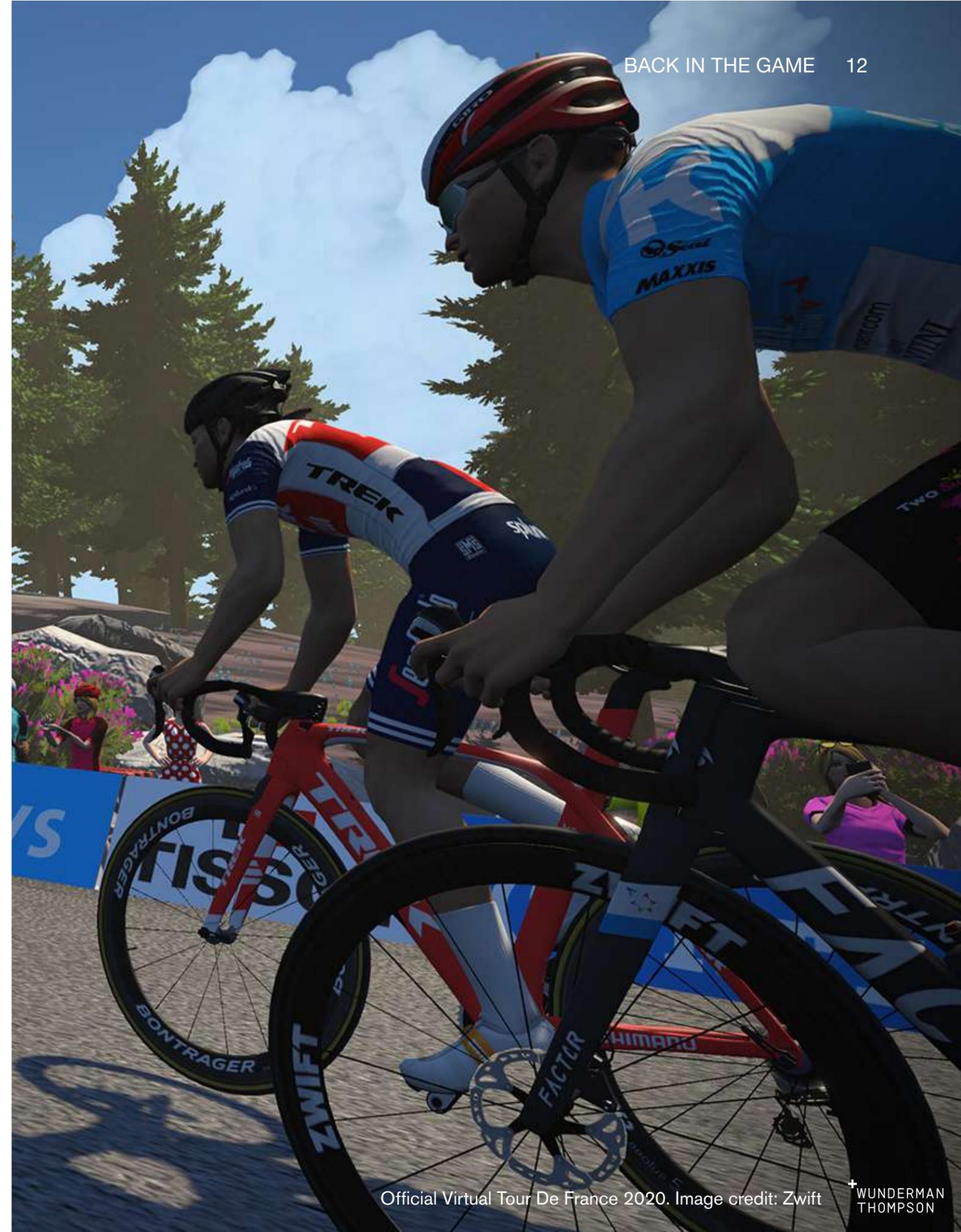
The pandemic blackout drove a wave of experimentation in esports mashups, which included a willingness to allow non-pros in on the game, to test themselves on the same courses or challenges.

The experience of competing against pro athletes is one even professional gamers are excited about. UK-based Twitch streamer Jimmy Broadbent who competed in the F1 Virtual Grand Prix series told The Washington Post, “We’ve been putting on a good show for the fans, and as I’ve said before: The cars might not be real, but the racing is.” Celebrities like country music star Tim Dugger who participated in NASCAR’s virtual race The Replacements 100 in March, also marveled at the ability to be part of a real virtual motor race.

Zwift, the online cycling and running training platform, hosted the first ever Virtual Tour de France in July. Pros competed alongside amateurs in a series of three races. For many years, amateur cyclists have enjoyed testing themselves on a key mountain stage from the Tour de France in L’Étape du Tour, riding exactly the same route and seeing how they measure up. But this year, the virtual race let them ride alongside the pros, all from their homes.

When live sports return, it’s highly likely that elements of these blended experiments will continue, for a host of reasons. Rippee sees new opportunities to enrich the experience, bringing fans closer to the action, not to mention the opportunity to engage a whole new audience. He imagines a future where, “you go home and replay the match on your console and maybe the outcome will be different.”

And in the future, we won’t see a difference between esports and traditional sports, according to Matt Rogan. He points to a new generation for whom, “there is no distinction between a physical game or a digital game. It’s just a game.” How far this convergence goes remains to be seen, but as Rogan predicts, “The thing that is going to last, is being immersed and engaged in the spectacle in an active way, as opposed to a passive way.”



THE 360 ATHLETE

They've always set the cultural agenda, but in the era of social, athletes are empowered to be creative, entrepreneurial and influential way beyond the borders of sports, becoming power brands in their own right.



“A lot of athletes are getting involved in other things, because they've got the ability to now and it's fun,” says Shane O’Sullivan. “They’re getting involved in music, esports, fashion. The way I look at this, everyone can become a creator, everyone can be a lot more creative these days.”

NBA shooter Stephen Curry is channeling his creative energy beyond basketball, co-founding Unanimous Media, a multimedia company that produces content centered on family, faith and sports storytelling. He’s also an executive producer for the ABC show *Holey Moley* and in August this year, he started his own book club on Literati called *Underrated*, sharing his favorite books, which focus on the stories of people who have broken barriers in their lives.

Formula 1 racing driver Lewis Hamilton is also something of an everyman. Not just a vocal campaigner for the environment, equality and the Black Lives Matter (BLM) movement, he’s a fashion ambassador for Tommy Hilfiger, trainer enthusiast and even something of a musical talent who supplied vocals for the 2018 Christina Aguilera track *Pipe* and reportedly plans to release his own collection of songs.

Tottenham Hotspur and England center back Eric Dier is a budding tech entrepreneur and has launched a new app called *Spotlas* that delivers local recommendations for lifestyle spots like bars, restaurants, hotels and museums from friends, family and influencers. Foodie Dier recently told the *Daily Mail* that he was tired of being ‘pigeon-holed’ as a soccer player and wanted to do something creative with his downtime.



Budweiser is delivering this more holistic view of sports stars in its 'Side Hustles' mini-series. The first episode spotlights the fashion business of Wilfried Zaha, Ivorian soccer player for the English Premier League club Crystal Palace. Long Live, the brand he co-founded in 2015, came to fruition after Zaha, excited by fashion, found it hard to find clothes he liked.

"I feel like footballers are just seen to be footballers," Zaha said in the episode, "That's not me at all. My ambition for Long Live is for everyone to understand the meaning behind it: that anyone can come from nothing, have a dream and fulfil it."

Social media is a key driver, giving athletes the opportunity to take control of their public personas, decide which aspects to share, and interact more authentically to build their fanbases. And what fanbases - Cristiano Ronaldo has 240 million followers on Instagram, almost double those of his main sponsor Nike.

During lockdown, fans enjoyed seeing a different side of sports stars, as they goofed around online to keep themselves entertained. Serena Williams created the ultimate "match", posting a TikTok clip of her playing against herself in her backyard. Arsenal's Kaitlin Foord is another avid TikToker, sharing quirky dance challenges, videos of her dog paired with R&B songs and snippets of her exercising with funny voiceovers.

As Adam Jackson, social and culture lead at Gatorade, rightly points out, "sports athletes and celebrities have been at the epicenter of culture for decades." What feels novel is that we are increasingly seeing them as multi-faceted people, not just talented in one way. Social media has given them the freedom to be creative, entertaining, and artistic as well as empowering them to raise their voices beyond sports alone (as our trend Sports for Good demonstrates).

Today more than ever, athletes are brands in their own right.

"I feel like footballers are just seen to be footballers. That's not me at all."

-Wilfried Zaha, professional soccer player



TECH-POWERED SPORTS

Technologies like artificial intelligence, extended reality and 5G are set to transform everything from talent-spotting to gameday performance to broadcasting.

Spectators are already excited by the potential of technology in sports. Beyond diversified digital touchpoints and fan-centric experiences, advances in sports tech offer audiences in-depth player stats, enhanced viewing and immersive perks. In a recent Capgemini study, 69% of global sports fans said the use of emerging technologies such as augmented and virtual reality, artificial intelligence, or biometrics has enhanced their viewing experience.

The pandemic has only accelerated adoption. As Jinsoo Jeon, head of 5GX Service Business Group of SKT, told Wunderman Thompson Intelligence, “normally, you see the early adopters first, and it takes quite a while for others to start using. But the pandemic has torn down these barriers and made it easier for us to drive innovation.”



Virtually There

VR holds great promise for sports viewers, offering users not just the best seat in the stadium, but behind-the-scenes access and enhanced features and data.

Although VR headset sales have been sluggish this year, IDC forecasts a major rebound of 45% in 2021, driven by corporate sales and gaming. Meanwhile Apple has been quietly investing in a number of VR-related businesses this year, suggesting a headset could be on the way. The final piece of the puzzle could be 5G, according to Ed Wooller, global head of strategy at Prism, which he describes to Wunderman Thompson Intelligence as “a game changer when it comes to virtual reality.”

In the interim, the pandemic is boosting innovation. More rights holders are taking the opportunity to launch VR services, potentially bringing the stadium to the living room.

Major League Baseball (MLB) launched an app for the Oculus Quest that allows its MLB.tv subscribers to stream live games in VR. One key feature is 3D Strikezone, which lets the viewer watch from anywhere: the stands, the pitch or right beside the players. Meanwhile the NBA has partnered with Verizon-owned Ryt Studio to offer VR viewing options on some games via its NBA League Pass streaming platform.

“Empty venues are driving innovation in a much more accelerated way towards that virtual stadium idea,” says Wooller. Indeed in Japan, the Yokohama DeNa BayStars collaborated with telecommunications provider KDDI to create a virtual baseball stadium lockdown experience for fans dubbed ‘Virtual Hamasta’. Fans could stroll the concourses and watch the game on giant screens from the pitch as little avatars.

Although VR has still not hit the mainstream, some are continuing to invest in its future, as tech companies from Facebook to XRSpace build out their social virtual world

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concepts. Korea’s SK Telecom is piloting its Jump VR technology, which allows people to watch sports or play games together virtually, while Netherlands-based start-up Beyond Sports is working on allowing fans to become part of the action. CEO and co-founder Sander Schouten told CBS Los Angeles, “If you want to be the star of the show, just add your own virtual character with your own face into that environment and then you can share it as if you made that final shot to win the game.”

Virtual viewing could even help sports meet sustainability targets by offering an alternative to international travel. Russell Seymour, founder and chief executive of the British Association for Sustainable Sport (BASIS), sees opportunities for international sports competitions “to think creatively and use technology to bring their events to a bigger audience, while reducing damaging carbon emissions.”



Users gathering within virtual spaces provided by Jump VR. Image credit: Jump VR and SK Telecom



Virtual Hospitality

The pandemic has called a halt to race or matchday hospitality for the time being, but some sports are already exploring virtual alternatives. Robert Fenwick, chief executive of Right Formula, a sponsorship agency, told SportBusiness.com in June that there has been a surge of interest in virtual hospitality since restrictions have closed the doors at sports events.

Formula 1 experimented with a Zoom-based virtual paddock at its European races in 2020, offering exclusive insight and experiences, while F1 team McLaren debuted a program dubbed Slipstream, which was even integrated with the live broadcast stream. In tennis, the US Open also worked with Zoom to deliver two private VIP virtual hospitality events and a celebrity fundraising event for the USTA Foundation.

Perhaps the most sophisticated offer so far comes from Extreme E, an all-electric SUV racing series due for launch in 2021. Organizers recently trialed the virtual hospitality packages which are set to include an immersive viewing experience complete with your own VR headset, plus access to a VIP portal and exclusives like access to team and driver radios, not to mention a live DJ stream. The luxe version even sends a personal chef to your home to prepare a meal inspired by the race location.

As an organization committed to raising awareness of the threat of climate change, it's important for Extreme E not to be seen encouraging international travel. And while they may never come to replace the full-blown premium experience, sustainability concerns may increasingly act as a driver for other sports considering these virtual alternatives.

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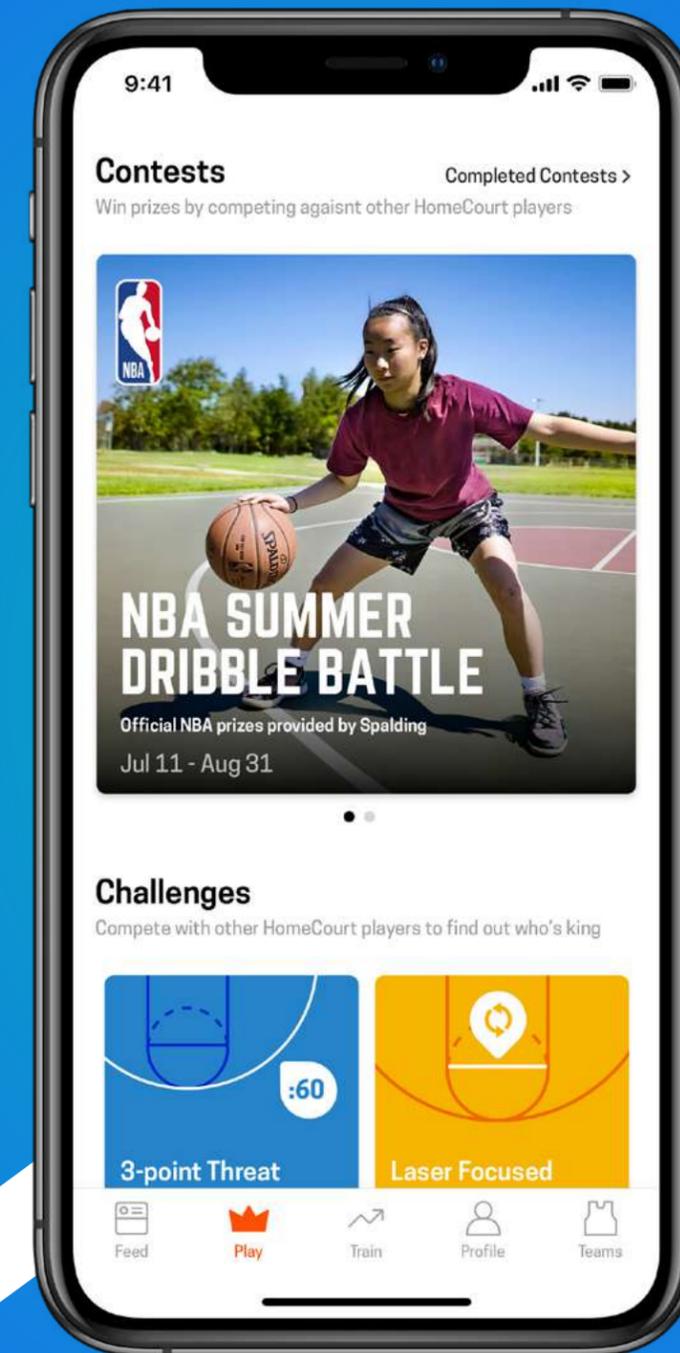
AI Sports

A slew of start-ups is leveraging computer vision, machine learning and other artificial intelligence technologies to revolutionize athletic performance and optimize the viewing experience.

Lockdown was tough on talent scouts, unable to appraise future stars in the flesh, but technology is stepping in to help them narrow the field. IBM's artificial intelligence platform Watson has been deployed by the NBA team Toronto Raptors to identify draft picks for both their basketball and esports teams. Seattle Sports Sciences has pioneered its Skill Analytics technology which is helping soccer teams identify players they might need with specific capabilities, like crossing a ball, or taking free kicks. Also helping to fill the void is US start-up Slants. It is using computer vision technology and AI to analyze video footage of college football games, producing a slew of talent metrics to help NFL recruiters find players.

Once recruited, a number of teams and leagues are using AI tools to boost athlete performance. US start-up Homecourt.ai, used by the NBA, utilizes an iPhone camera to track basketball drills and shots, delivering real-time analysis for pros and would-be pros alike. And intended for launch at the Tokyo Olympics, Intel and Alibaba are working on 3D Athlete Tracking, technology which will use computer vision and algorithms to produce real-time biomechanical data to not only inform coaches but also enhance the viewer experience.

Technology is also helping to minimize the risk of losing a valuable player to injury. Silicon Valley based Zone7 is just one of a number of start-ups that use AI to analyze medical, training and performance data to assess risk, enabling teams to deploy effective intervention strategies. When La Liga's Getafe CF used the technology, they were able to reduce soccer player injuries by 70% over a two-season period.



For viewers, AI promises to enhance and personalize their experience. A number of tech companies are already helping rights holders to deliver automated highlights packages.

IBM, again using Watson, is able to deliver highlights reels for the Wimbledon Championships just minutes after matches have finished, analyzing crowd noise and player gestures to identify the most compelling moments. It's even smart enough to control for local crowd bias. Israeli start-up WSC Sports is doing a similar job, producing multiple highlights reels in real-time. During lockdown, they were helping content owners make the most of their archive footage, introducing their popular split screen feature which plays multiple 'best of' clips on Instagram. Pretty soon, your own personalized highlights package will be par for the course.

In the future, AI might create sports for us. A recent paper published by researchers at Stanford University demonstrated technology called Vid2Player that can generate a hyper-realistic tennis match, having been trained on extensive footage of real tennis players in action. The result is a match that is almost indistinguishable from the real thing.

"For viewers, AI promises to enhance and personalize their experience."



5G & Immersive Experiences

5G promises to usher in a new era of immersive experiences, both in the stadium and at home. And sports fans are here for it: a 2019 study of US and UK sports fans by Deltatre found that 71% of audiences crave 'deeper immersion' when watching live games.

"5G is an enabler of other things," explains Ed Wooller, "and those other things are largely built around virtual reality and augmented reality." While the rollout of 5G is progressing more slowly than intended due to the pandemic, a number of telecoms providers have been showcasing some of the extended reality experiences we can expect to enjoy over the coming years.

SK Telecom, sponsor of the South Korean professional baseball team SK Wyverns, used AR in an experience that brought the club's wyvern mascot to life. The dragon-like beast, swooping and breathing fire, could be viewed via the 5GX AR smartphone app or on the stadium's giant screen. Similarly, the Argentinian soccer club Estudiantes celebrated their season opener by parading a giant AR lion around their stadium.

**71% of audiences crave
'deeper immersion' when
watching live games.**

-Deltatre, 2019





Perhaps the most compelling demonstration to date is the Samsung 5G experience at the NFL's Dallas Cowboys AT&T Stadium. Produced by London-based Nexus Studios, the 5G powered experience featured huge AR holograms of football players striding through the stadium, yelling chants and devouring the the jumbotron. Inside, fans can track the game viewing live player stats or play a game dodging giant defensive robots. Off the field, fans could enjoy a more sedate experience in an AR selfie booth, choosing three players with whom to take a picture.

It's not just about jaw-dropping spectacles. 5G will also unlock a host of new features for fans. The NFL's app OnePass will allow users with a 5G-enabled device to watch stadium action from five different camera angles as well as their seat, pausing and rewinding so they never miss a move. The app will also include AR-powered navigation to concessions, merchandise stands, restrooms and even the fastest way back to your car.

Vodafone partnered with French tech start-up Immersiv.io to give soccer fans a taste of the future in their 2019 5G showcase at Bundesliga club Wolfsburg's Volkswagen Arena. Thanks to Immersiv.io's AR solution ARISE, fans were able to point their devices at a player on the pitch and get a real-time feed of their performance statistics.

More than a third of sports fans in the UK and US expect 5G to have the most significant impact on the sports viewing experience by 2025 according to a 2019 Deltatre study. And in future, the higher bandwidth and low latency of 5G could even empower fans to become content creators themselves, broadcasting their own in-the-moment experiences. For the at-home viewer, 5G promises to unleash new ways to engage with sport, freeing it from the screen entirely, to deliver holographic broadcasts live to the living room.

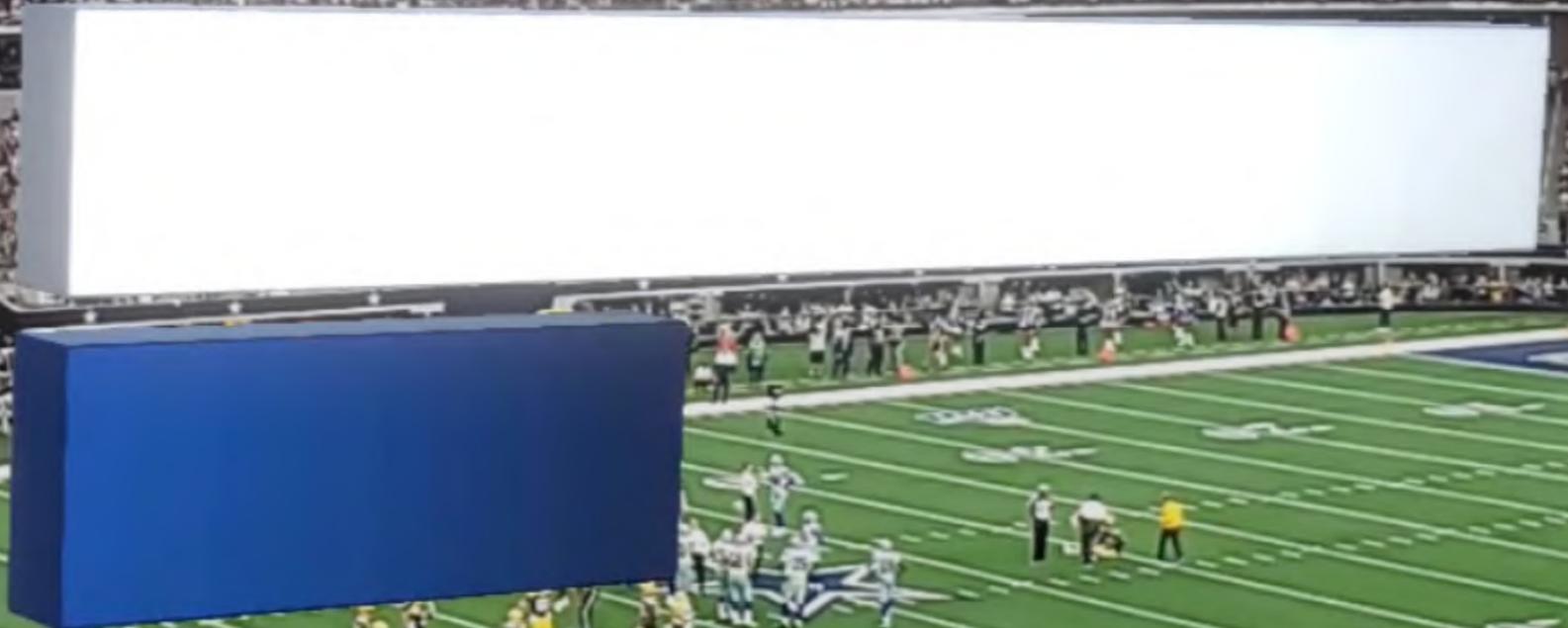


DAK PRESCOTT TOTAL™ PASSING YARDS



2018

2019



3
14

BACK TO LIVE

Venues around the world are innovating to bring athletes and spectators back to the live game.

Packed entrances. Long queues. Stands heaving with spectators jostling for the best view. Once sports fans thought nothing of them, but the pandemic has dramatically reshaped attitudes to crowds. Just 20% of UK sports fans said they would feel comfortable returning to indoor events in an August 2020 Sports Fan Panel survey by Goodform.

“Sports that are most reliant on gate takings as a proportion of revenue are much worse affected now that broadcast is largely back in place,” according to Ed Wooller. Shutting the doors to fans means no ticket or concession sales as well as reduced sponsorship revenue.

In order to get back to live, venues are adopting new hygiene and safety protocols to protect athletes and spectators alike. At the same time, socially distanced viewing experiences are providing alternatives to the stadium or home-viewing.



Competing at a Distance

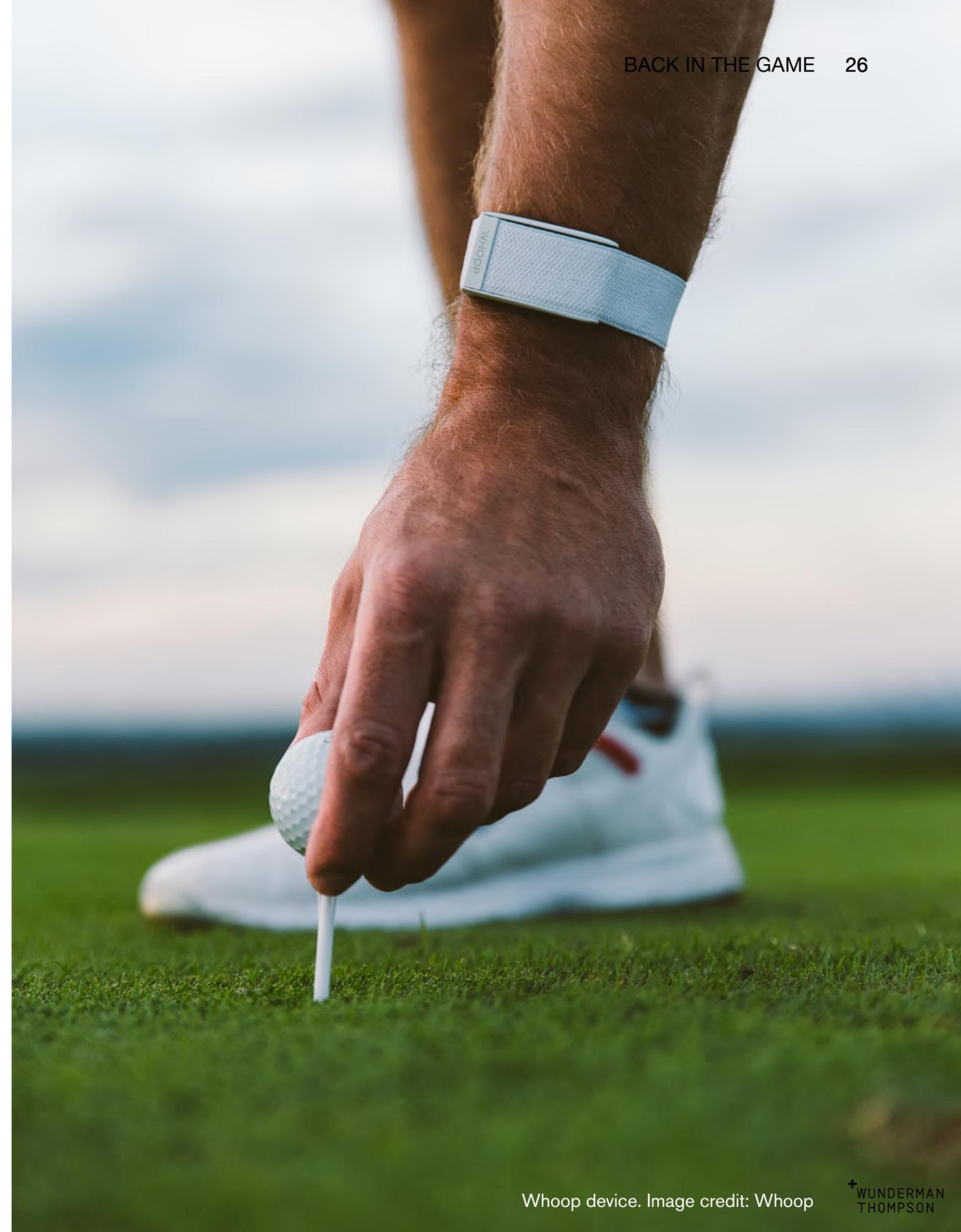
With no clear end in sight to the pandemic, keeping athletes safe is a priority.

A number of teams have deployed 'bio-bubbles,' a concept that ensures that athletes quarantine together to minimize risk.

The NBA was one of the first, quarantining athletes in three different hotels at Walt Disney World in Florida at a cost of \$170m in a bid to save the 2019-2020 season. In September, ahead of the rescheduled three-month long 2020 Indian Premier League series hosted in the UAE, the Mumbai Indians cricket team began their quarantine together in a bio-secure bubble in Abu Dhabi's St Regis Al Saadivat Island Resort. To keep spirits up, their recreation center includes a theater, pool table, karaoke lounge and arcade games to re-energize players during downtime.

Wearable devices are also being brought into play to protect players and staff. Before this year's London Marathon, elite athletes isolated together in a bio-bubble for two weeks but with the addition of a new piece of kit called a Bump device. It sits around the neck like a lanyard and uses radio-frequency technology to alert users when they are too close to others.

The Professional Golfers' Association (PGA) is also investing in wearables, purchasing 1,000 WHOOP devices for players, caddies and tournament staff. Pro golfer Nick Watney previously tested positive for the virus, and only suspected his case after spotting a spike in respiratory rate in the data from his WHOOP tracker.



Tailgating Reimagined

A global study by IMI NextWave found that gen Z and millennial males were missing watching sports with friends and family more than anything else during the lockdown.

While stadia are off limits, some venues are revamping the pre-game tradition of 'tailgating' to help fans feel some togetherness and community. Tailgate parties, where fans meet in the parking lots of stadiums and arenas to hang out, have a beer and barbecue, are a popular precursor to games in the US.

Sports design and architectural firm Populous is collaborating with NBA team the Milwaukee Bucks to create new socially distanced game-day experiences, with some proposals utilizing parking garages, shipping containers and even creating a drive-in movie-like experience.

In September, the NFL team Miami Dolphins and Budweiser launched Gameday Theater at the Hard Rock Stadium, transforming their existing outdoor theater into a socially distanced viewing experience to bring fans back together. The setup allows 386 guests to purchase bean bag loungers, private cabana shells or living room boxes, and enjoy the game as a collective experience.

Pepsi even created a tailgate party for a football superfan in New Jersey, transforming her front lawn into a parking lot and kitting it out with seating, a 65-inch TV screen, grill and a Pepsi fridge.

While not all venues enjoy the luxury of outdoor space, or indeed friendly rivalry between fans, there's a clear opportunity for more outdoor festival or fan park-style experiences. In the long-term, venues will capitalize on their outdoor space to augment or extend the excitement of gameday.





Hard Rock
WUNDERMAN THOMPSON

Miami Dolphins Gameday Theatre by Budweiser. Image credit: Miami Dolphins

WUNDERMAN THOMPSON

New Hygiene Protocols

Hygiene is crucial to safely reopening venues, and to reassure fans on their health and safety efforts, sports teams and leagues are partnering up with new sponsors, dubbing their new collaborators “Official Hygiene Partners”.

In June, the Ladies Professional Golf Association (LPGA) in the US announced a new sanitation partner, Theraworx Protect, while Cambia Health Solutions became the tour’s official mask partner. London-based Saracens rugby team announced a partnership with specialist hygiene company Rentokil, which sees the Allianz Park stadium subject to a host of new disinfection treatments.

These efforts should chime with fans. A recent US survey by FanFood found that 87% of them think sanitation stations beyond the usual bathrooms are the most important thing venues should now consider for a clean and safe environment.

Yet even with enhanced hygiene, pilots to bring fans safely back remain small scale for now. At the French Open tennis tournament at Roland Garros just 1,000 spectators were admitted per day, amounting to just 3% of usual ticket sales. In Asia, South Korea’s baseball team brought 10% of fans back to the game in June and The Grand Sumo Tournament in Tokyo filled a quarter of their arena in July, with roughly 2,500 people in attendance.

One early solution could be rapid testing. In the UK, VST Enterprises has created a COVID-19 finger-prick test kit accompanied by their VHealth Passport app that can give users a positive or negative result within 10 minutes. So far, the cost of £15 (approximately \$20) per test is proving a stumbling block.

For now, restrictions are inspiring venues and brands to create fun, socially distanced alternatives. There is also an opportunity to do more to revamp the at-home experience, creating new traditions and rituals for fans to enjoy. In the future, we’re likely to see venues go further, deploying touchless technologies for entry and payments, leveraging self-cleaning and antibacterial materials and designing friction-free experiences that aim to avoid congestion.



Eliud Kipchoge (KEN) receives his ‘Bump’ device, a social distancing aid, as he arrives at the official hotel. Image credit: London Marathon Events

SPORTS FOR GOOD

Sports leagues, brands and stars are becoming a force for positive change.

In recent months, COVID-19 has driven a spike in philanthropy, much of which was led by athletes themselves. At the same time, many sports are ramping up sustainability initiatives and social justice demonstrations.

This is a growing trend, according to Adam Jackson who tells Wunderman Thompson Intelligence, "I do think the rise of leadership that we've seen with athletes, teams, leagues and even brands using their platforms, influence and resources to address societal and environmental issues and push for fundamental and sustainable change is here to stay."



By partnering up with sports or athletes where they have proven commitment to purpose-led projects, brands have an opportunity to share their credibility and authenticity. “Think about having an intelligent position on Black Lives Matter, but actually doing that through sports,” says Matt Rogan. “Or empowering women, but doing that through sports, as opposed to doing that through a generic platform that never feels that plausible for a brand.”

The fans agree: 77% believe brands are more powerful when they partner with sports organizations to drive social change, according to a June 2020 Nielsen study in the US.

YOU CAN'T STOP SPORT.

We may start from different places,
but together we'll rise stronger.



Athlete Activists

A generation of athletes is wielding its star power and media platform to call for change.

In June 2020, British Prime Minister Boris Johnson announced a U-turn on his government's refusal to provide meal vouchers for children in lower income families over the summer break. The climbdown was not the result of any pressure from opposition parties but in response to a campaign led by the Manchester United soccer player Marcus Rashford. The 22-year-old capitalized on his success by launching a child food poverty taskforce in partnership with major UK brands and charitable organizations. Rashford is also petitioning the government on a series of measures to tackle food poverty in Britain.

Rashford is just one of a wave of young athletes harnessing their profile and social media platforms to speak out across social and political issues. According to Rogan, we're seeing "athletes becoming media platforms in their own right and a meaningful force for good" during the pandemic.

Rogan points in particular to Rashford's savvy in driving his campaign via social and digital channels as key to its success. But athletes are also capitalizing on pre and post-competition opportunities to ensure their message gets maximum attention.



In her successful campaign at the US Open in September, US-Japanese player Naomi Osaka showed her support for the Black Lives Matter movement by wearing a series of face masks bearing the names of Black people who have died at the hands of police or vigilantes, including Tamir Rice, Philando Castile and George Floyd. Asked by a journalist what her intended message was, Osaka replied, “Well, what was the message that you got, was more the question. I feel like the point was to make people start talking.”

It's highly likely we'll see more athletes follow Osaka's lead. Formula 1's Daniel Ricciardo wore his own customized mask bearing the word 'equality' at the Tuscan Grand Prix in September, telling the F1 website he had recognised that it was 'prime real estate.'

Ricciardo's contemporary, six-time world champion Lewis Hamilton has been a highly vocal campaigner for Black Lives Matter during the 2020 season, taking the knee before races and raising his fist in a 'Black power' salute. At the Tuscan Grand Prix, he attracted some controversy for wearing a T-shirt with the slogan 'Arrest the cops that killed Breonna Taylor' but has underlined his commitment to the cause, posting on Instagram: “Want you to know I won't stop using this platform to shed light on what I believe is right.” Hamilton, the only Black driver in Formula 1, has also established The Hamilton Commission, a research partnership that aims to tackle the issue of inequality in motor sport.

Fans are behind them too. 71% of American sports fans support teams and athletes speaking out on social justice and racial equality issues, according to an ESPN survey this year.

Athletes have long played a role in social change of course, and today's campaigners can trace a line back through history to forebears like Tommie Smith and John Carlos, Muhammad Ali, Billie Jean King as well as contemporaries like Colin Kaepernick, LeBron James and many more.



SPORTS FOR GOOD

Believe in something.
Even if it means sacrificing everything.

 Just do it.

Colin Kaepernick in Nike 'Just do it' 2018 campaign. Image credit: Nike

WUNDERMAN
THOMPSON



Basketball players don't change the world, until they do.

▶ **"The days of separating your identity as an athlete from the underlying human are fading."**

– Adam Jackson, social and culture lead at Gatorade

But the sheer number of sportsmen and women seeking to make their voices heard this year is striking. What also feels new, is the sense of inter- and intra-sport solidarity. Summer fixtures across the world in NBA, NFL, soccer, cricket, Formula 1 and NASCAR have seen many participants take a knee in support of BLM. And in August, unauthorized walkouts by NBA players were matched by unprecedented strikes by players in the Women's National Basketball Association (WNBA), tennis and soccer too.

Wunderman Thompson Intelligence spoke to Jerusha Conner, professor of education at Villanova University. She traces this latest wave of activism back to action by the Missouri Tigers: American football players at the University of Missouri in 2015 who refused to play or practice until the demands of a group of black student activists were met.

"That was an incredibly powerful example of the power of athletes when they act collectively to throw a wrench in the gears of profit," explains Conner, "I think that story has been percolating in the minds of people in the sports world because it taught the world about the power these athletes hold when they act as a united front."

Conner describes this trend as "the flipside to cancel culture," in that "what we see the athletes doing is taking their existing platforms and exercising and expanding them to address social wrongs, to force conversations about how we can right these societal ills."

In many ways, the rise of athlete activism reflects a broader trend towards a wider social acceptance of protest. "Society and culture are evolving," says Conner, "to not just accept but actually support and embrace activism."

Supporting social justice is yet another dimension of the 360 Athlete, who refuses to conform to simplistic expectations. As Jackson so succinctly puts it, "The days of separating your identity as an athlete from the underlying human are fading."

Planet-First Sports

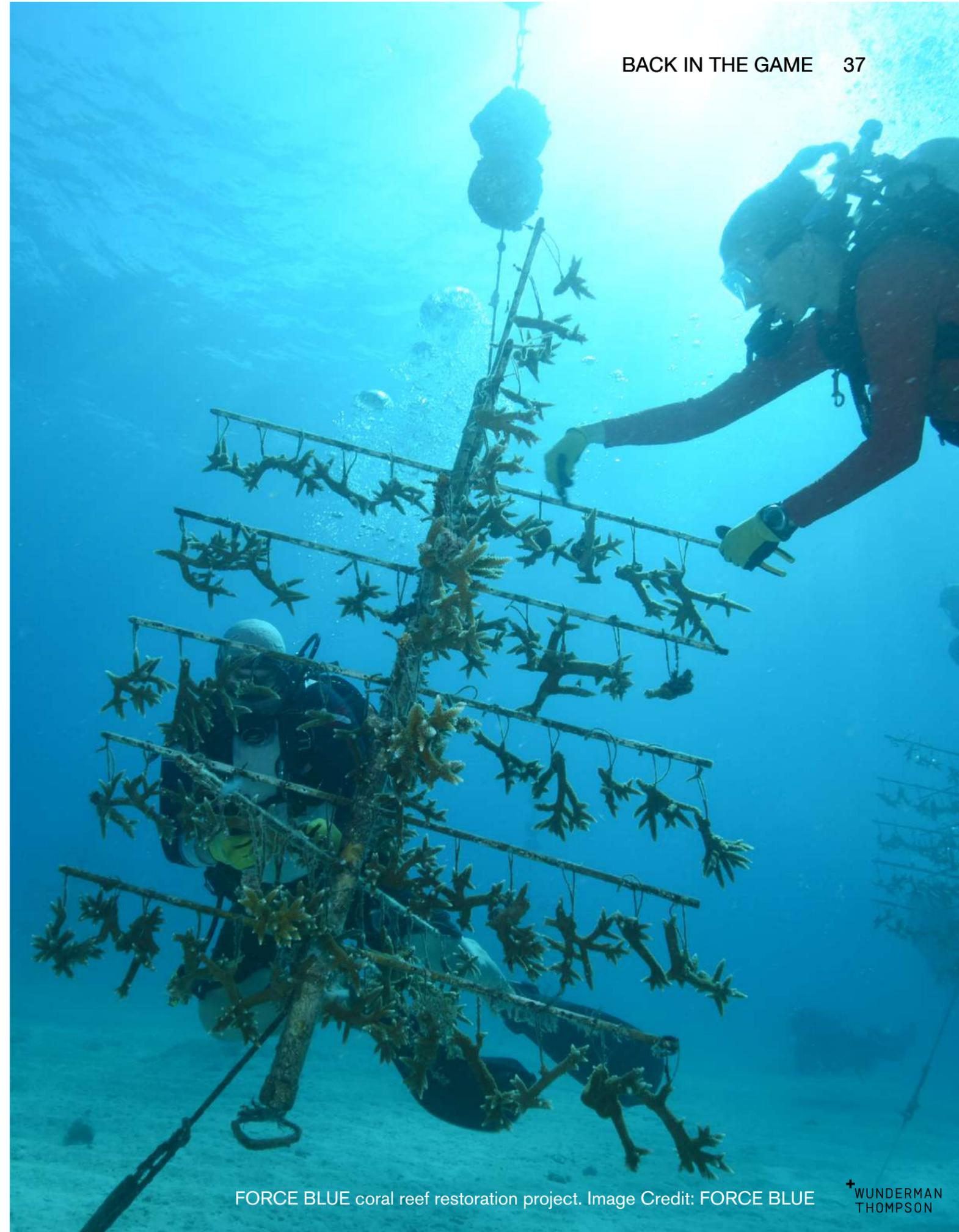
Sustainability in sports is not new, but some are putting it front and center of their strategies. Sally Bolton, CEO of the All England Lawn Tennis Club, organisers of the Wimbledon championships told Global Sports Week earlier this year, many events like hers are recognizing they have the power not only in “reducing our impact but also on contributing to solving the broader environmental challenge.”

A host of initiatives are in play. The IAAF is helping to tackle the problem of air pollution through its Air Quality Project that will install monitors at 1,000 athletics tracks worldwide for example. The NFL and the Miami Super Bowl Committee are helping to restore local coral reefs to commemorate the event’s centenary in partnership with reef conservation non-profit FORCE BLUE.

For some sports organizations, sustainability is rooted in their ethos.

The English Football League’s Forest Green Rovers has been described as the world’s greenest soccer team. UN-certified as carbon neutral in 2018, the club is already 100% powered by green energy, some of which it generates itself using its own solar panels. Even the pitch is organic, watered with recycled rainfall and trimmed with a solar-powered mower. The club’s catering is vegan, so players and fans alike eat meat-free. The club’s new home, designed by Zaha Hadid Architects, will be the world’s first stadium to be constructed entirely from timber.

In Extreme E, the all-electric racing league that was ‘built out of concern for the climate crisis’, Envision Virgin Racing lays claim to the title of cleanest team. It was formed to highlight and accelerate the transition to green energy. It is also certified carbon neutral, using 100% renewable energy and recycling 60% of its waste.







WUNDERMAN THOMPSON

The Ocean Race is the world's toughest, fully-crewed around the world sailing race, described by its sustainability director Anne-Cécile Turner as “sport first, and sustainability everywhere.” Turner explains, “we’re using our Race around the planet alongside the power of sports to bring climate change into focus, through a blue lens.”

As well as raising awareness the Race also contributes to scientific research. Since the racing yachts pass through rarely visited waters, they gather vital data to share with researchers. Many host cities for the 2022-23 edition will also stage The Ocean Race Summits, bringing together leaders and change-makers to focus on issues and solutions related to the restoration of ocean health.

Russell Seymour believes that the wider sports community should now look to “consolidate and generalize the approaches taken by the pioneers and make sure that all sports organizations understand their impacts. That way sports can lead the global push for a more sustainable society.”

He advises treating sustainability issues as risks: “It isn’t just a ‘nice thing to do’, it will have (and probably is already having) an impact on your club, venue or event. And, on current trends, these impacts will only get worse. Treat these issues as risks, in exactly the way you discuss financial risks.”



Sports & The Health Agenda

As Matt Rogan explains to Wunderman Thompson Intelligence, “The human population has never been more aware of the need to be healthy and yet has never found it harder to access, unless they have the disposable income.”

Post-pandemic financial fallout combined with fears over safety is predicted to have a severe impact on grassroots and community sports, which will in turn disproportionately affect those on lower incomes. In Australia alone, 16,000 community sports clubs face collapse due to the lockdown according to the Australian Sports Foundation.

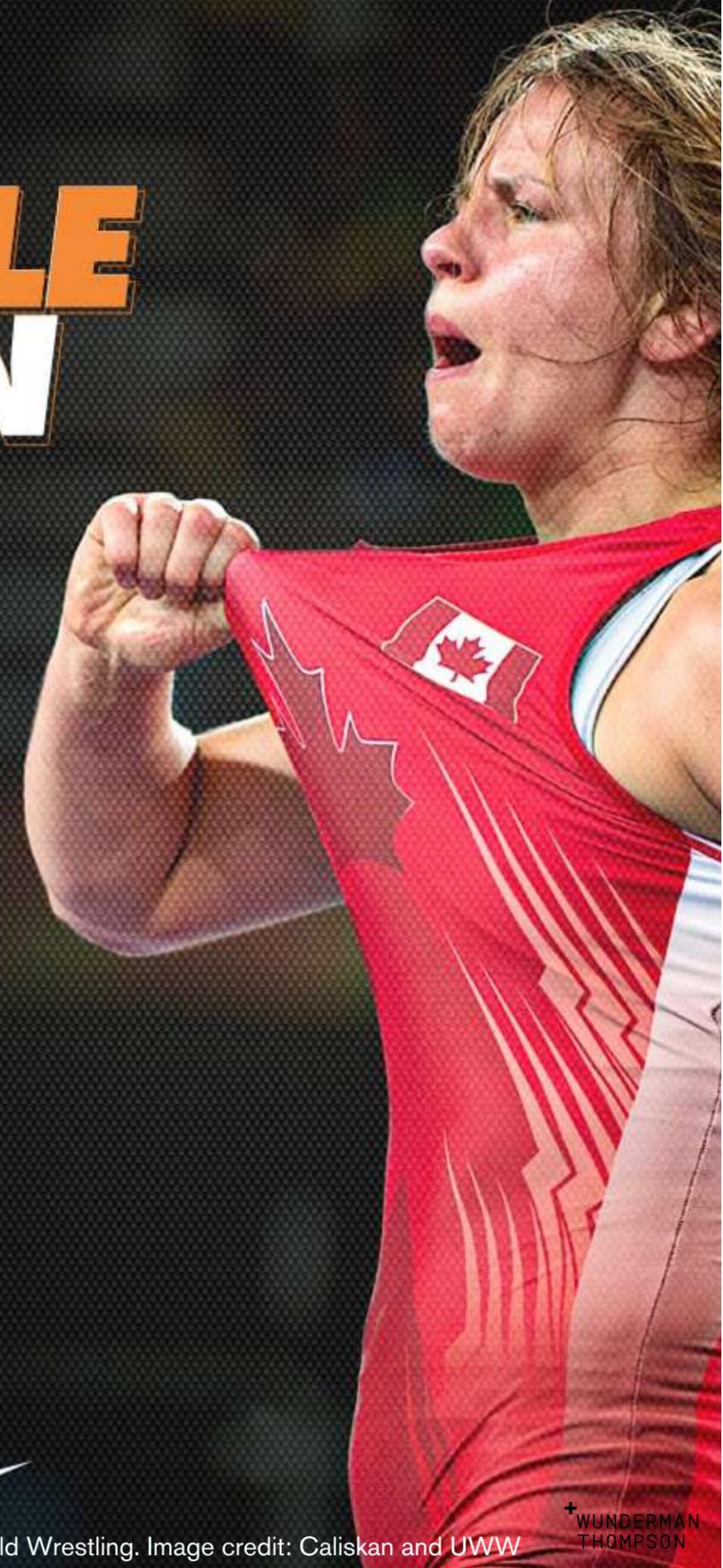
Losing access to opportunities for sports could have far-reaching impacts. Research published in the BMC Public Health journal concludes that short-term changes in physical activity and more sedentary behavior in children during the pandemic could become permanent, driving up the risks of diabetes, obesity and cardiovascular disease in later life. Youth sports participation is also linked to better life outcomes, with 95% of Fortune 500 CEOs reportedly former athletes.

It’s not just physical health that may suffer. A survey conducted by the International Committee of the Red Cross published in October revealed that 51% of respondents across seven countries reported that the crisis had negatively impacted their mental health.

Now more than ever, there is a need for sports to align with public health agendas. In an industry survey by Global Sports Week Paris earlier in 2020, 50% of respondents said that sports have a greater role to play in society going forward, with health being the primary goal.

Since the pandemic began, a number of brands have partnered with sports bodies and teams. One typical route involves teaming up on programs that encourage sports participation.

WE WILL WRESTLE AGAIN



UNITED WORLD
WRESTLING



Disney and the Union of European Football Associations (UEFA) collaborated on its Playmakers program which uses the brand's storytelling prowess to get young girls involved in soccer. During lockdown the campaign was adapted to include free Disney and Pixar Incredibles 2 themed activities that could be done from home.

In the Gulf region, PepsiCo has joined forces with the Saudi Sports for All Federation (SFA) to launch a sports accessibility program that aims to push weekly sports participation to 40% by 2030. The program will include family activity days, neighborhood league soccer and virtual fitness sessions that people can join in from home.

Other brands are helping to provide relief to grassroots and community sports. Nike has partnered with United World Wrestling to drive a global fundraising campaign named 'We Will Wrestle Again', that seeks to provide financial relief to national federations, host cities and grassroots organizations affected by the pandemic. Meanwhile global sports betting and gaming giant GVC Holdings has launched its

'Pitching In' campaign, that will invest in grassroots sports, beginning with the Trident leagues, which represent the seventh and eighth tiers in the English football league.

Fans see brand efforts like these as crucial as sports resume: 76% of US sports fans felt brands should focus on sponsoring a league or team to support the sports community's future according to a survey by Momentum Worldwide.

Seymour sees health as the unifying theme across all aspects of purpose in sports: "Individual health, community health and planetary health. The common thread is the single concept of health that should run through every element of what sports are about: from reducing obesity, to enhancing opportunities and access to contributing to a reduction in climate change."

While there remains much progress to be made, sports have the potential to be a powerful ally in the fight for human, community and planetary health alike.



WHAT IT MEANS FOR BRANDS

Sports and athletes are a compelling proposition for brands, offering authenticity, connections with passionate fans and a place at the heart of the action. What follows are just some of the ways in which brands can leverage the opportunities in this exciting new era.

▶ THINGS TO REMEMBER

1

FANS WANT TO GET CLOSER TO SPORTS

Fans want great content, whether it's about getting immersed in the drama and tension, going behind the scenes, or seeing what happens when the final whistle goes.

FAN ENGAGEMENT

2

FANS ARE THE HEART OF SPORT

The pandemic has highlighted the importance of fans to sports and underscored the need for more thought in the overall fan experience. Consumers are getting used to well-curated brand experiences across the board – whether in-person or digital, and this is driving elevated expectations.

FAN ENGAGEMENT

3

A CONVERGENCE BETWEEN ESPORTS AND SPORTS IS UNDERWAY

Lockdown accelerated a crossover between sports and esports, bringing the virtual game to new audiences. Younger fans will increasingly see no distinction between the two.

ESPORTS

4

ESPORTS ARE COMMUNITY-FIRST

Having grown up in the digital world, esports and the broader gaming world are very much a community of communities, each with their own unique culture and expertise at cultivating shared experiences. To participate, you must be part of the community.

ESPORTS

▶ WHAT THIS MEANS FOR BRANDS

PERFECT DIGITAL STORYTELLING TO FILL MOMENTS BETWEEN GAMEPLAY

Seek to entertain, sharing stories and moments that engage fans on an emotional level. Content does not need to be highly polished; the raw and unfiltered can feel more personal and authentic to fans. Be bold with tone of voice and get on the fans' level.

DELIVER FAN-CENTRIC EXPERIENCES

Fans want engaging, interactive experiences that they can share, whether they are at the game or watching remotely. Above all, they want to feel that they matter too, so create a conversation. Let them have a say. Solicit their content and opinions. Remember there will be different levels of fandom, from the ardent to the fair-weather.

VIRTUAL AND SIMULATED TOURNAMENTS UNLOCK NEW OPPORTUNITIES

Experiment with new creative opportunities in virtual games and esports. The blend of physical and digital opens the door to exciting and enriching opportunities to engage fans beyond core match play.

MAKE SURE YOU BELONG

Brands can't just advertise their way into esports. Instead aim to be a credible participant in the community and show you belong. To cut-through, get involved at a grassroots, authentic level through activations and community event sponsorships.

► THINGS TO REMEMBER

5

ATHLETES ARE FLEXING THEIR CREATIVE MUSCLES

Sports stars are tired of being pigeonholed and want to share who they are in a broader sense: tastemakers, thought leaders and creatives. Fans are engaging with them directly on social media to discover more about their lives off the field.

THE 360 ATHLETE

6

ATHLETES ARE NOW MEDIA PLATFORMS

Athletes are becoming brands and “media platforms in their own right” according to Matt Rogan. Their visibility and reach are virtually unmatched. Cristiano Ronaldo boasts 240m followers on Instagram. His sponsor Nike? Just 122m.

THE 360 ATHLETE

7

TECHNOLOGY PROMISES A NEW ERA OF IMMERSION

New technologies like extended reality and artificial intelligence powered by 5G will unlock a new era of immersive experiences and spectacles for fans in the stadium and at home.

TECH POWERED SPORTS

8

VIRTUAL IS SLOWLY COMING OF AGE

While adoption of headsets remains slow, 5G could be the gamechanger.

TECH POWERED SPORTS

► WHAT THIS MEANS FOR BRANDS

WIDER OPPORTUNITIES TO ENGAGE ATHLETES AS AMBASSADORS

Brands beyond the sports category can now credibly partner with a new breed of athletes who occupy a place at the intersection of music, art, fashion, gaming and entrepreneurship. Consider a blend of visual cues, tone and style that reflect these different aspects of culture.

REACH PASSIONATE AND ENGAGED AUDIENCES

Athletes offer brands opportunities to reach armies of loyal and engaged followers, but remember, sport need not be the only topic of conversation.

GET FANS CLOSER TO THE ACTION

Leverage technology to bring sport and its characters to more people in more ways than ever before, blending real-life with digital image and data overlays to amp up the fun for fans in venues, but also for those watching virtually.

CONSIDER EXPERIMENTING WITH VIRTUAL GAMES AND WORLDS

While still not mainstream, remote participation could be in higher demand for matches and hospitality as fans continue to avoid the crowds. Virtual also offers greater inclusion for fans with disabilities, or those on low incomes, as well as an alternative option for the sustainably minded.

▶ **THINGS TO REMEMBER**

9

FANS ARE NOT JUST MISSING SPORTS, THEY ARE MISSING THE SENSE OF COMMUNITY IT OFFERS

Fans are missing out on the experience of live sports, and in some case, even the opportunity to gather with friends and family to watch together, leaving a real absence of connection.

BACK TO LIVE

10

HOME IS WHERE THE SPORT IS

Coronavirus isn't going anywhere just yet, and until a vaccine is distributed, it's unlikely we'll get back to live any time soon. For the majority of fans, catching up on the action will be an in-home affair.

BACK TO LIVE

11

INDUSTRY PIONEERS ARE VOCAL ADVOCATES FOR A BETTER WORLD

Sports have the potential to lead on purpose, and a number of pioneers are already showing the way, leading powerful campaigns.

SPORTS FOR GOOD

12

COMMUNITY HEALTH IS AT RISK DUE TO DECLINING SPORTS ACCESS

The pandemic has underlined the importance of global health. Yet a generation could miss out on the benefits of sports participation as a result of the financial crisis affecting grassroots sports.

SPORTS FOR GOOD

▶ **WHAT THIS MEANS FOR BRANDS****SEEK TO BUILD SOCIAL CONNECTION**

Brands can consider ways to engineer a sense of community and connection for fans, particularly in regions where people are still unable to gather in groups. Messaging services, watch parties or interactive tools could play an important role here.

LOOK TO OWN THE AT-HOME EXPERIENCE

People will remember what you did for them when times were tough. Can you create new matchday traditions, rituals and experiences that make watching from home extra special?

CONNECT THROUGH SHARED PURPOSE

Brands can no longer sit on the sidelines of debates and must be nimble in their response. Sports offer an opportunity to partner with athletes and teams for the greater good, tackling issues such as racial injustice and inequality, lack of inclusion or the climate challenge on credible shared platforms.

PARTNER WITH SPORTS ON A HEALTH AGENDA

Brands can be a vital supporter of human health, supporting physical and mental wellbeing by engaging with community and grassroots sports organizations. Consider supporting local teams or clubs, get behind community sport initiatives as well as lower tier clubs and athletes.

About Wunderman Thompson Intelligence

Wunderman Thompson Intelligence is Wunderman Thompson's futurism, research and innovation unit. It charts emerging and future global trends, consumer change, and innovation patterns—translating these into insight for brands. It offers a suite of consultancy services, including bespoke research, presentations, co-branded reports and workshops. It is also active in innovation, partnering with brands to activate future trends within their framework and execute new products and concepts.

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For more information visit: intelligence.wundermanthompson.com

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