



GETTING SERIOUS ABOUT

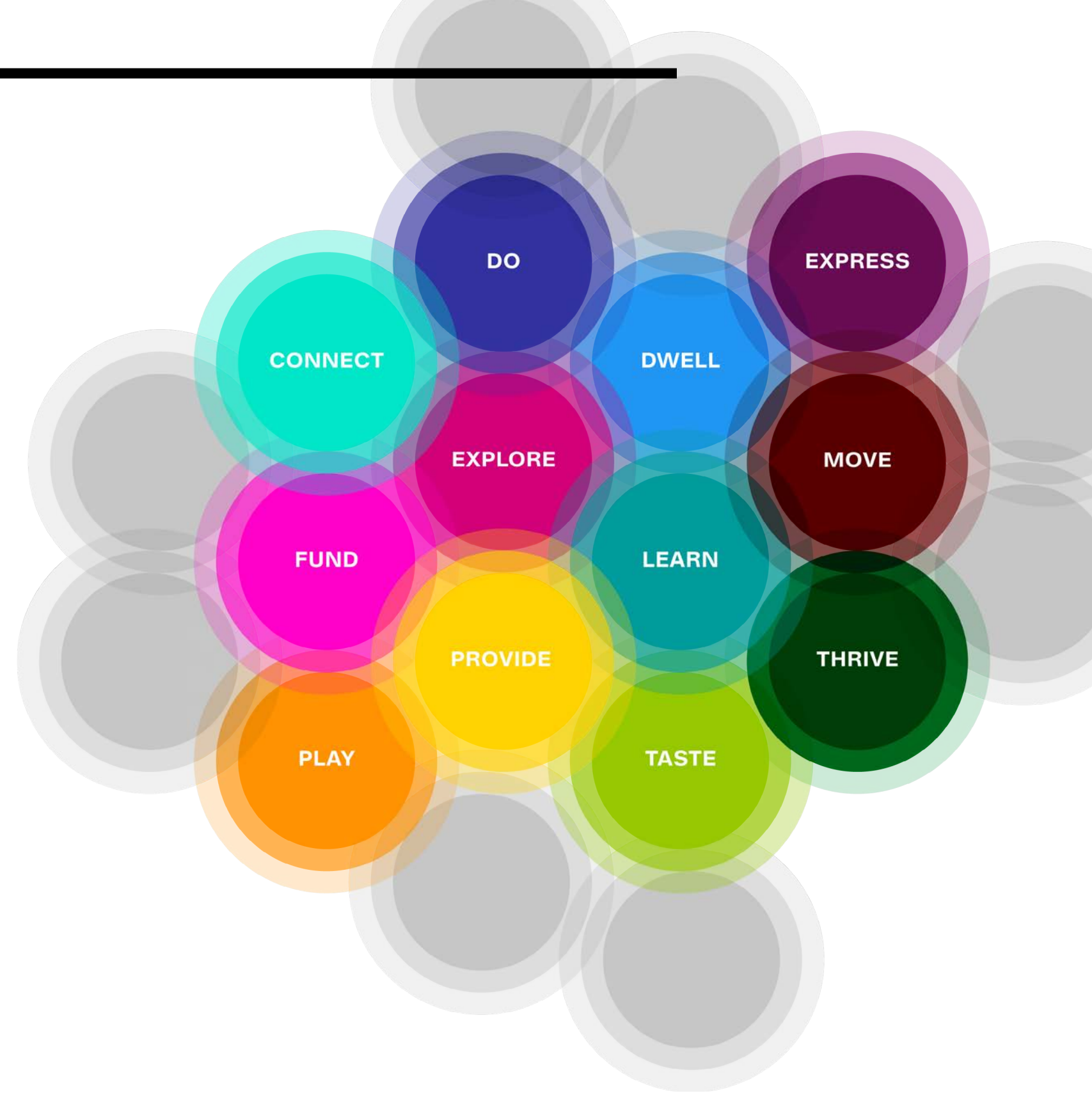
INTERBRAND

Arenas Explained

A breakthrough route to brand growth

Arena Thinking is a new way of driving brand growth. Instead of putting category conventions or industry norms at the center of strategy, Arena Thinking puts human motivation and evolving expectations at the center. Why should you care? The world's most valuable brands use Arena Thinking to fuel their extraordinary growth.

Increasingly, it's difficult to assign the highest-performing Best Global Brands into any single category (what do Apple and Google do?); however, things become much clearer when taking the perspective of customer Jobs To Be Done (**ref. Clay Christensen's JTBD theory**) and looking at which needs they address. Google helps us with multiple "jobs," like how we Learn, Connect, Move – and even Dwell. Nike – not a FAANG – helps us Thrive, Express ourselves and Connect with others. We can put Microsoft and Disney in this set too.



Perhaps the superlative example is Apple; a brand that helps us Connect, Do, Belong, Play and Thrive. At the time of publication, Apple has just taken “a big bite out of the banks” and is, according to the Financial Times, posing a meaningful threat to the category: “The question for banks and other providers of financial services is how worried they should be about a “technology company” with 1.2bn iPhone users, a \$2.6tn market cap and a history of disruptive innovation making moves on to their territory.

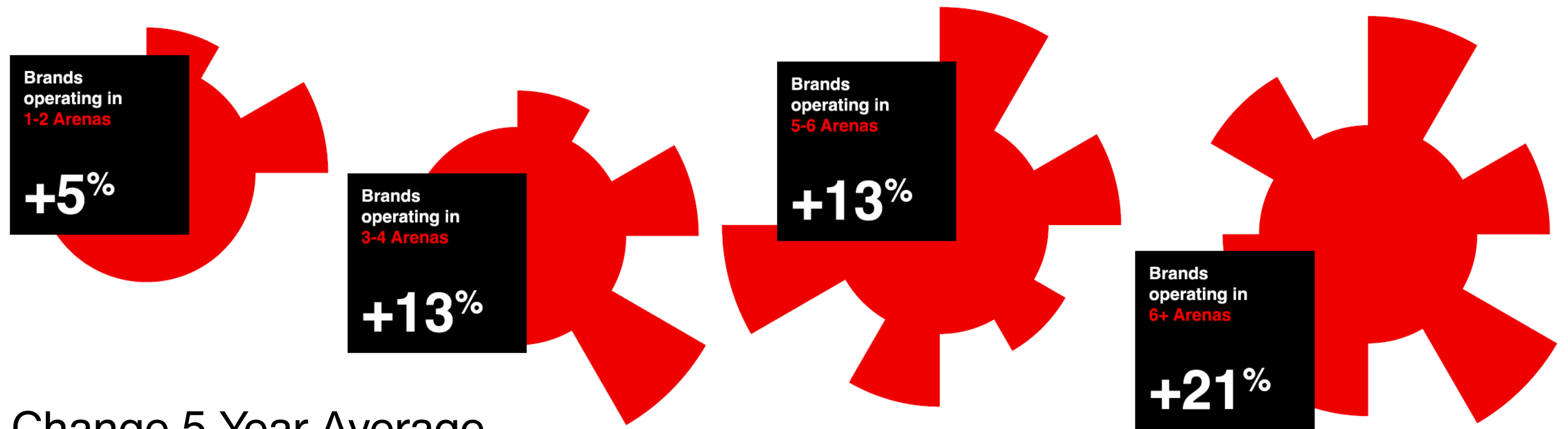
“Apple’s scale makes even the world’s largest banks look little. Its services division alone, where it earns recurring subscriber revenues and App Store payments, generated \$55bn in profit last year — higher than JPMorgan and Citi combined. But it makes up just one-fifth of its total revenues — and the company hasn’t been shy about its ambitions in this space. Jennifer Bailey, head of Apple Pay, said in 2016 that Apple was on a good, long journey, to replace the wallet.” Stephen Squeri, Chief Executive of American Express, told analysts on a global call that he was “paranoid” about Apple and Amazon, which he called “phenomenal” companies with strong consumer relationships.



Ultimately, these corporations are built brand first, reversing the traditional approach to brand building. Rather than build a product or business and then 'brand it', these organizations are building exceptional brands and then adding new products or even businesses around them. Built on a foundation of exceptional experiences and strong integrity, these companies move in multiple directions, growing their share of customers' lives, along with their brand value and market capitalization.

It's the difference between taking a product-led approach like Gillette, Coca-Cola or Canon, in pursuit of organic growth; and a brand-led approach like IKEA, Amazon, Disney or Apple in pursuit of outsized growth – and it's setting them apart from the pack. Further analysis of Best Global Brands data shows that brands that play in more arenas deliver significantly greater growth in brand value over five years (see below). Each of the brands mentioned above are exceptional and each is a Best Global Brand – yet they all take a very different approach; the latter driving outsized growth, compared to the former.

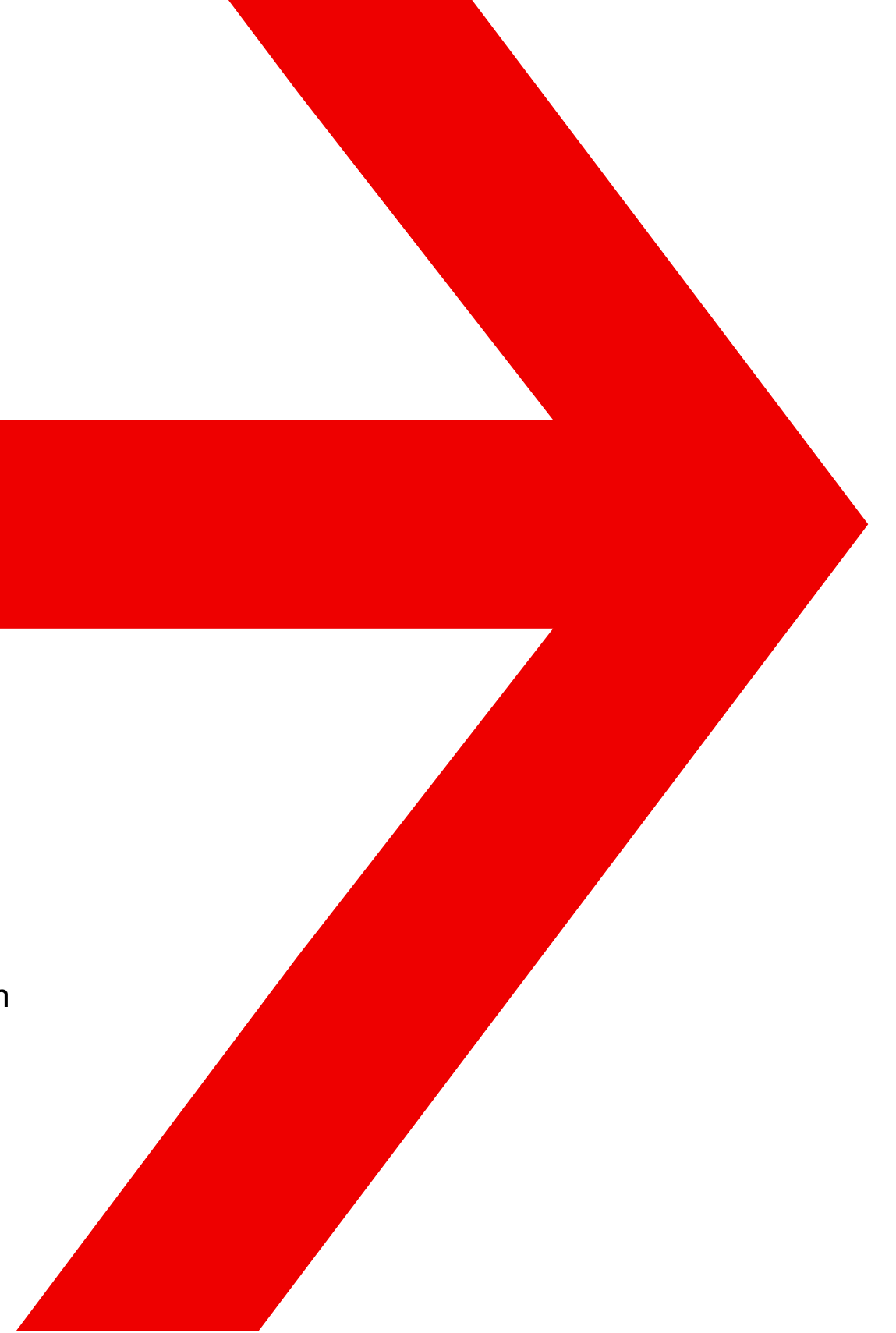
This shift in strategy – from category to arena focus – has a multitude of implications for brands. As a departure point, Arena Thinking opens the aperture on competition, becoming a critical lens through which to mitigate disruption at a time when disruption tends to come from outside of the category / industry. Arena Thinking is also used to open up new growth opportunities – to shift expectation, create new monopolies and drive extraordinary results.



Brand Value Change 5-Year Average

Defensive, Offensive and Expansive approaches to growth

Arena Thinking is used to build defensive, offensive and expansive brand strategies. As context is key to Arena Thinking, we overlay the macro forces driving change in each scenario – whether the influence is from new technologies (Metaverse, VR, AI, just-in-time-production), political and economic factors (recession, global trade issues), socio-cultural factors (emergence of ethics as a brand imperative, shifting expectations following social justice movements, the drive toward more inclusive brand experiences) or environmental topics (legislation on climate-related issues, discourse around ESG, supply chain transparency). It's through examining the interplay between these forces that we can come to the most robust conclusions about the risks and opportunities ahead.



1. Defensive Identifying the next competitive challenges

As Rita McGrath, world's foremost expert on innovation, Columbia Business School Professor and collaborator to Interbrand says: "Thinking your major competition comes from your own industry creates major blind spots."

It's these blind spots that Arena Thinking sets out to mitigate. As technological, cultural and political shifts blur the barriers between sectors, we help our clients widen their aperture on the competitive environment. A strategy that is built around category or industry conventions might view competition as brands that compete for the same time and money by addressing the *same* needs and desires through the *same* types of products and services.

An Arena analysis, however, would include those brands competing for the same time and money by addressing *different* needs and desires through *different* types of products and services.

**AS BARRIERS
BETWEEN
SECTORS
INCREASINGLY
BLUR TOGETHER,
WE MUST WIDEN
OUR APERTURE ON
THE COMPETITIVE
ENVIRONMENT.**

CATEGORY

Competing for the same time and money

By addressing the same needs and desires

Through the same types of products and services

SPACE

Competing for the same time and money

By addressing the same needs and desires

Through different types of products and services

ARENA

Competing for the same time and money

By addressing different needs and desires

Through different types of products and services

CONTEXT

Impacting available time and money in economy

Shifting needs and desires in culture

Driving innovation in products and services

2. Offensive

Exploring Avenues within Existing Arenas



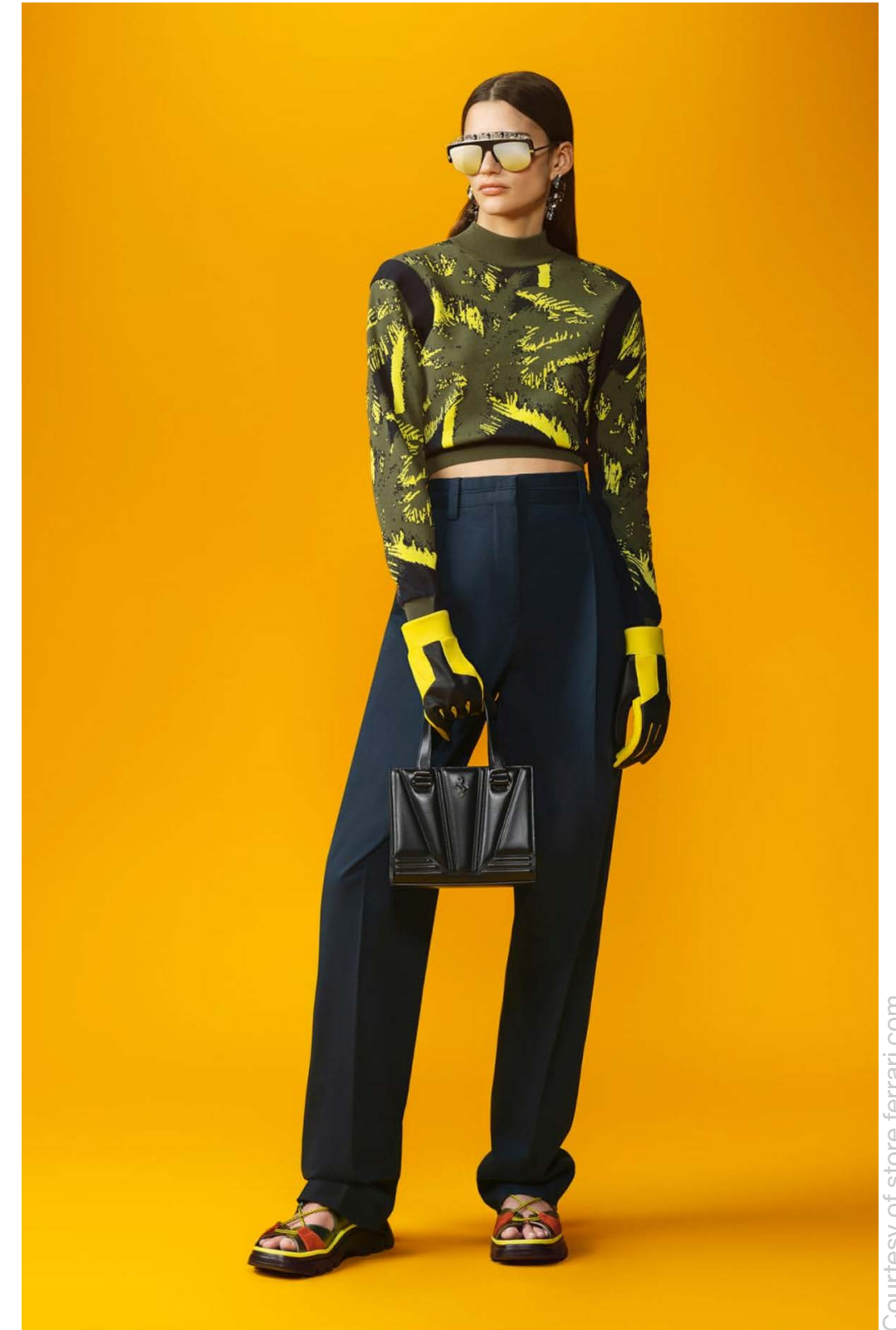
Many brands already span multiple arenas.

Let's take Ferrari as an example.

What sector does it belong to?

Automotive? Let's instead look at what motivations it addresses. The desire to express our self-concept (Express), to revel in the thrill of the ride (Play), perhaps to get us from points A to B (Move), or, more likely, to be our partner in life's most exciting journeys (Explore). An offensive analysis using Arena Thinking determines which arena is core to the brand's growth and the moves a brand should make in order to meet, deepen and exceed expectations in the arena. It would mean looking at the experience benchmarks; it would mean defining an ambition for the brand in terms of the arena it is doubling down on and then identifying a series of moves that propel the brand toward delivering on its ambition.

In the case of Ferrari, the Express arena is growth territory - with the retail experience and runway shows borrowing cues and codes from that world.



3. Expansive New Growth Avenues within New Arenas



As we have already shown, the most valuable brands in our Best Global Brands ranking

are playing in multiple arenas, leveraging their brand and the permission it has created with consumers to address more and more of their needs.

These brands' incremental moves keep them competitive within category, but their Iconic Moves leap them ahead of expectation.

Such moves **shift customer expectations entirely**, creating a leap of utility and/or desire. They **create a temporary monopoly** – setting brands apart for a period of time, becoming the option of choice for customers. They **drive extraordinary results**. These moves are less about the pursuit of organic, stable growth, but to deliver a surge in results beyond an ordinary pattern of incremental growth. Vespa began with an iconic "Move" product, but through a series of partnerships including LEGO and Justin Bieber, has become an iconic Play brand with surging brand value, reaching €906mn in 2022.



Courtesy of vespa.co.id, vespa.com

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PLAY EXPLORED

**Play is serious business,
with an estimated Arena
value of \$7.1bn**

Play is the "beating heart of a cultural revolution," said Elle McCarthy, VP of Global Brand at Electronic Arts. McCarthy points to the paradoxical nature of Play: it functions at an individual and a cultural level simultaneously.

From Barbie to The Last of Us, football to skateboarding, Paralympics to Pride, Play is a place of personal identity and shared meaning. It's about being free to be yourself and cultivating communities of belonging with people "like me." It's passion and affiliation. Now, thanks to digital culture, Play is propagating cultural change at an incredible rate.

In this report, we're going to explore this idea of "mass appeal with a niche feel." Take gaming, for example; it's a global phenomenon – the number one entertainment medium in terms of audience size, growth and time spent – and yet it's largely viewed as a subculture. While preconceptions of "boys in basements" still abound, its users are incredibly diverse. Its super users are moms, African American and Hispanic people.

Soccer might seem like a different world, yet an afternoon on the field at Wrexham AFC will feel like home to those who have played since they were five, even as the rest of the world is streaming their story on Netflix.



Today's most valuable brands connect deeply to peoples' identities and values in order to transcend the limitations of what they make and create new possibilities based on the permission their brand creates. **Play's combination of intimacy and scalability makes it ripe territory for brands looking to grow.** It's how Sony rode the post-pandemic, global anime phenomenon to accelerate its transition from consumer electronics company to global entertainment powerhouse. It's how Juventus Football Club leveraged its sporting heritage to extend its brand into fashion to reach new global audiences. Opportunities don't stop there; Play's influence can be felt in everything from learning to money and beyond.

By tapping into why people Play at an individual level, examining the social and cultural functions of Play, exploring the shifting values within communities and investigating existing barriers, we can understand the drivers of this powerful growth – and how they might be applied to create new brand ecosystems built around shared meaning and value. We've spent the last six months researching Play. We've worked with 503 people in five markets to understand what Play is and why we do it. We also spent time "at the edges" with people for whom Play is non-negotiable. They are a former Paralympian, LARPer, Pickleball players, a swimmer who also happens to be a quadruple amputee, soccer fans, online gamers, tabletop (board) game enthusiasts, soccer players and skateboarders.



Photo: Greg Martin / Cornwall Live

What we heard is that Play feels acutely relevant at a time when many people feel somewhat...constrained. At a time when "who I am" is tied to "what I do," "what I have" and increasingly "what side I'm on," Play invites us to escape the circumstances of our lives.

It gives us the freedom to explore the different parts of our identity that might not otherwise get to flourish. It gives us a space to make those hidden dimensions of our selves meaningful with others who share those values.

We play as kids and, as our research shows, we play again as elders – but somehow, in the middle years, we stop.

Although a majority of adults across the world see play as "necessary," "important" and something with the power to "make the world a better place," they struggle to make time for it.

Children use play to construct their relationship with the world around them. Post-pandemic, aren't adults trying to do the same? **Would more play help us make sense of a world shifting beneath our feet?**



Recreation is a synonym for Play.

It comes from the Latin to “make new” and from the middle English for “mental and spiritual consolidation.” Post-pandemic and amid a social justice reckoning, in a time of shifting values and circumstances, wouldn’t a little recreation do us all a world of good?

This report is part provocation for brands and part manifesto for us all.

Play is a human opportunity to break free of the day-to-day.

Play is mischief.
Play is passion.
Play is fun.

How can we find ways to build more play into the every day? It might feel a little frivolous – but **isn’t that the point?**

Geoff Miller,
Play Arena Lead



Interbrand



PLAY

HAY

GAMERS, STREAMERS, FANS AND DREAMERS

The What:

Getting to the "what" of Play is a little like Hide & Seek.

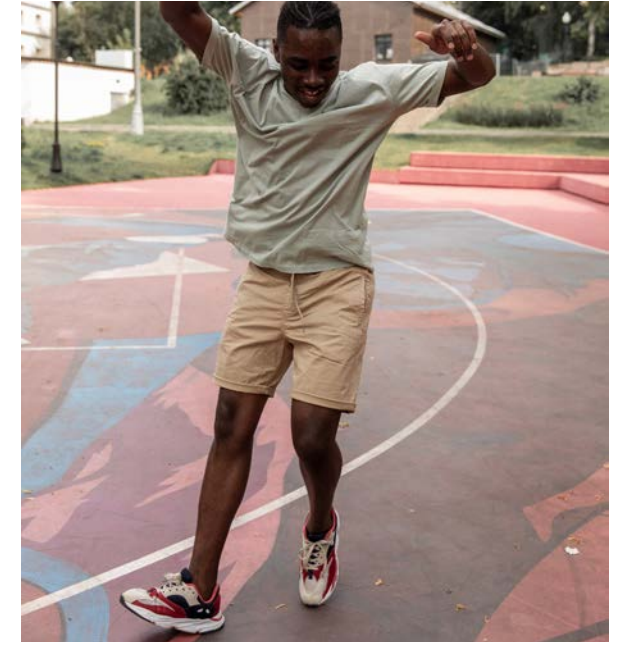
What's Play to you might not be Play to me. Whether drawing, windsurfing, Lego building, football playing, LARPing, whistling, skateboarding, running, collecting or gaming, there is much diversity in Play. Whether an activity is Play or not is determined – literally – by how much fun you're having when you're doing it.

Is preparing dinner Play? Is DIY? Is running? The answer to all of these is...perhaps. If the person cooking or drilling or running is engaged with the challenge and having fun, then it's Play; if the person is feeling disinterested, annoyed or burdened, then it's not. There are no bounds to what activities or tasks can be Play.

If it gives fun, sparks joy and engages a person's mind, it's Play.



Photo: Eszter Papp / coconuts.co



Creative Play

Letting your creativity take over and finding joy in making.

- Drawing
- Painting
- Cooking
- DIY
- Crafting
- Gardening
- Photography

Explorer Play

As we grow older the locations change, but the feeling of discovery and excitement remain.

- Park trips
- Beach Excursions
- Travel
- Scuba diving
- VR

Structured Play

There are rules, strategies, game plays and a common purpose.

- Board games
- Chase
- Football
- Gambling

Imaginative Play

Creating a new reality and having fun exploring possibilities.

- Tea parties
- Imaginative games
- Playing house
- Improv
- Reading

Body Play

All about movement. Joy comes from the physical experience of moving one's body.

- Dancing
- Athletics
- Rough and tumble
- Yoga
- Surfing

Play is the thrill of the ride

Play happens for its own sake.

While there might be an external reward (ex. fitness), none of this matters when you are truly playing; you are in it for the fun of it.

You're not looking to complete the activity in the quickest or easiest way, but in the most enjoyable way. An activity stops being Play when this balance is shifted and the outcome becomes the priority.




And a game of two halves

As people become more proficient or dedicated to their activity, a transition occurs. Play is often the most fun when we're really good at it, but as we perfect our approach, it becomes more like work.

Gambling becomes work when the financial reward is essential; tennis becomes work when winning is the only goal; gardening becomes work when the jobs are all heavy.





What about the Scroll Hole?

Play is about being present and engaged in the moment. **Passively consuming content is *not* Play.** It might be enjoyable and it might be a welcome change from work-mode or parent-mode, but for an activity to really be Play, you need to be present and active in the task at hand. This means Netflix binges, scrolling TikTok and watching a movie all fall in the periphery of Play.

Breaking the passive rule

But even this isn't a hard and fast rule. For example, someone with a football game playing in the background while they cook might be passively consuming the content – but they're not in Play.

Background noise isn't Play.

However, someone else might be watching the game or even actively engaged, cheering, commiserating, betting on a certain team – these are both in Play.

The Why: Breaking Free

In Play, the rules are momentarily different from real life. When we are in these moments – when we feel the freest – is when we connect to our most-me-selves and the others who let us be them.

Play allows us to escape the circumstances of our lives. It gives us the freedom to explore the different parts of our identity that otherwise might not get to flourish. It's a space to make the hidden dimensions of ourselves meaningful with others who share those values.

In Play, we escape the ties of identity. What you do, what you earn and even what "side" you're perceived to be on cease to be the most real thing about you. In Play, you're empowered to be the most *you*. And when the odds seem stacked against you, **Play is your chance to succeed...and have fun along the way.**





CULTURAL TENSIONS FOR PLAY

ME

In a world obsessed with productivity, Play is a radical act of escape.

“SOCIETY ABSOLUTELY DOES NOT RESPECT PLAY. NO, CERTAINLY AMERICAN SOCIETY. BUT I THINK MOST WESTERN SOCIETY, I MEAN, YOUR VALUE IS DETERMINED BY HOW MUCH MONEY YOU CAN MAKE OR HOW MUCH CAPITAL YOU CAN CREATE.”

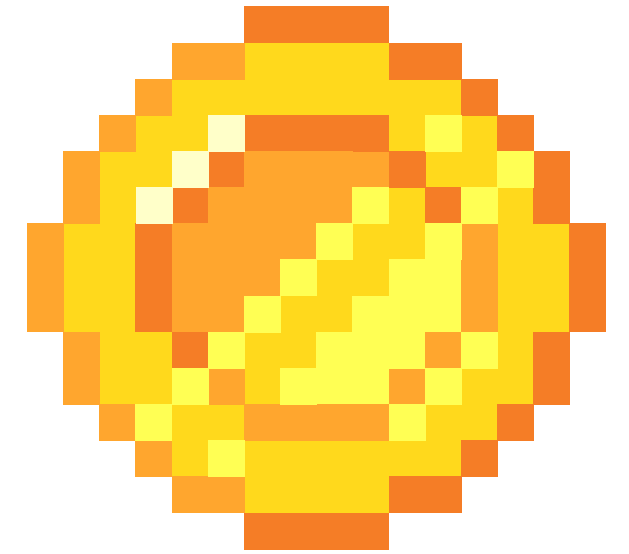
Aki, LARPer, Los Angeles

MODERN LIFE IS CHARACTERIZED BY THE RELENTLESS PURSUIT OF EFFICIENCY AND OUTPUT, AND ACCOMPLISHMENT HAS BECOME DEEPLY INGRAINED IN OUR CULTURE AND DAILY ROUTINES.

Technology has played likely the most significant role in shaping our productivity-driven culture.

The advent of smartphones, digital devices and ubiquitous internet connectivity has enabled constant connectivity and multitasking. People are expected to be reachable, responsive and available around the clock, blurring the boundaries between work and personal life. The rise of productivity apps, task managers and time-tracking tools highlight our preoccupation with optimizing every minute of our day.

Work is increasingly driven by productivity metrics and performance evaluations.



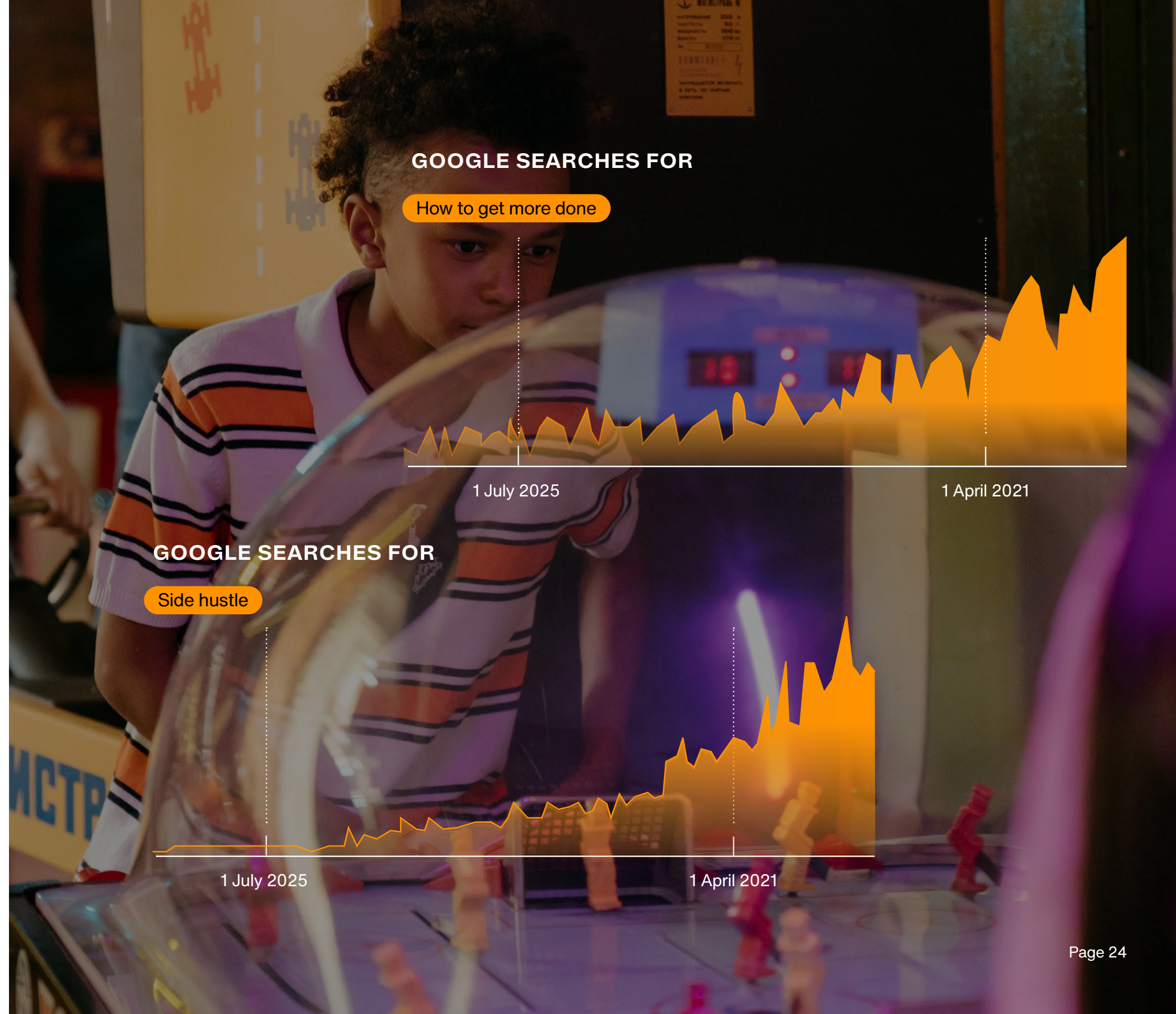
ME

Employees face pressure to meet demanding targets, increase output and demonstrate efficiency.

Measurement and management create high-stakes environment where productivity is rewarded and a lack thereof can lead to negative consequences.

The rise of the gig economy and remote work has intensified the focus on productivity.

With flexible work arrangements and the ability to work from anywhere, people are expected to self-manage, meet deadlines and deliver results independently.



ME

Productivity is about the outcome, Play is about the ride.

“ I THINK PLAY AND REST ARE KIND OF RADICAL IN THE FACE OF A SOCIETY THAT DETERMINES YOUR WORTH BASED ON HOW MUCH YOU WORK, WHAT YOU CAN ACCOMPLISH, HOW MUCH MONEY YOU MAKE OR WHAT YOU CAN DO TO PROVE YOURSELF AS BEING BETTER OR MORE SUCCESSFUL THAN OTHERS. THINGS LIKE LARP OR FOOTBALL OR MOVIES OR THEATERS FEEL SO GOOD BECAUSE IT'S NOT ABOUT DOING IT BECAUSE YOU HAVE TO, BUT BECAUSE YOU WANT TO. IT BRINGS YOU JOY AND IT KEEPS YOU GOING.”

Max / Dani LARPer, Los Angeles

“ SPONSORSHIP NEVER REALLY INTERESTED ME THAT MUCH. IT NEVER REALLY SAT THAT WELL WITH ME BECAUSE SKATEBOARDING IS A FREEDOM THING, YOU KNOW, WHERE YOU'RE ABLE TO EXPRESS YOURSELF HOWEVER YOU WANT. AND WHEN I SEE MONEY COMING INTO IT, IT INFLUENCES THE EXPERIENCE IN A UNNATURAL WAY. AND I REALLY DON'T WANT THAT.”

Alejandro, Skateboarder, Orlando



ME

CASE STUDY

YETI #NoDaysOff

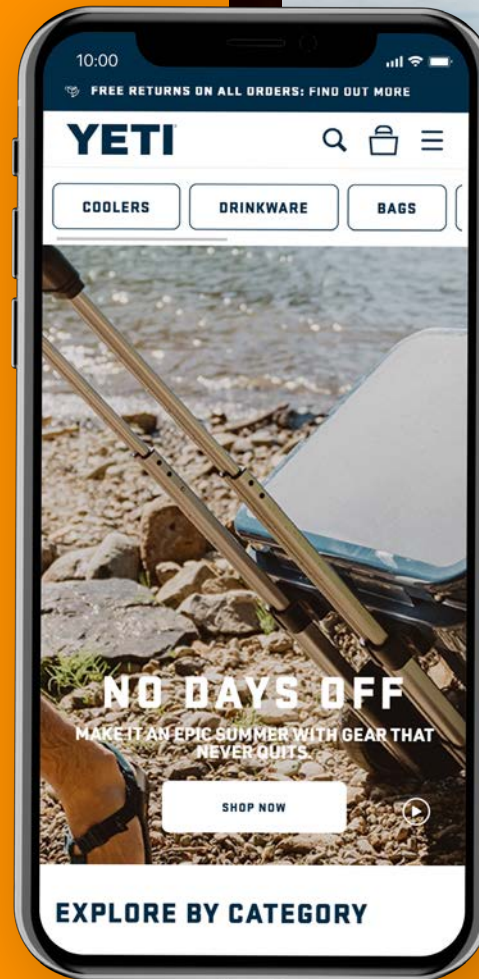
"No Days Off" is a meme that originates from a video of New England Patriots head coach Bill Belichick. In the video, a reporter asked Belichick about his plans for the upcoming holiday season. In response, Belichick said, "We can't afford to take days off. There are no days off!" Belichick's stern response soon went viral, leading to the "no days off" meme.

It has since been widely shared and adapted in various contexts beyond sports, serving as a subversive way to capture the relentless work ethic associated with the modern "hustle" culture.

By contrast, Yeti is an American manufacturer specializing in outdoor products such as coolers, drinkware and accessories. It's also a company that's experienced significant revenue growth in recent years. For the fiscal year 2022, the company reported net sales of \$1.16bn, representing a 13% increase compared to the previous year.

Its continued growth is credited to its successful brand positioning, which is about connection with nature and outdoor adventures. Product imagery often showcases rugged albeit photogenic landscapes, camping scenes, fishing, hiking and other outdoor activities. This use of nature-related semiotic cues talks to exploration, freedom and the joy of outdoor experiences for their own sake.

Yeti's most recent brand campaign, "No Days Off," contrasts the culture we're calling "workism" with the liberation experienced in the outdoors and the simple enjoyment of nature.



WE

In a world
where we all
feel a little
odd, Play
is a chance
to belong

In a fragmented and polarized world, it's easy to feel like the odd one out. Your real-life relationships with family or classmates might not reflect your true values or interests. Or your interests might be somewhat...niche.

Social isolation has become a prevalent issue. Despite the rise of social media and digital connectivity, studies indicate that people are experiencing higher levels of loneliness. A lack of meaningful face-to-face interactions and a sense of community can leave individuals feeling disconnected and unusual in their need for genuine human connection. **Polarization in society has created an "us versus them" mentality, fostering divisiveness and alienation.**

Political, social and cultural differences have become more pronounced, making it challenging for individuals with alternative perspectives to find acceptance or understanding, making people feel like outsiders, leading to a sense of being unusual or marginalized.

Play is the stage that allows us to express different parts of our identity, and to have those parts seen, acknowledged, and validated by people who share the same values.

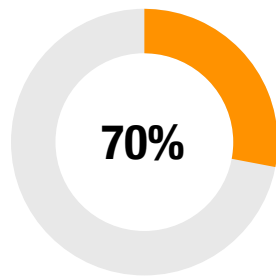
“**MORE THAN PREVIOUS GENERATIONS, WE NO LONGER CARE ABOUT FITTING IN WITH THE MASSES OR ADHERING TO THE STATUS QUO, INSTEAD WE TRY TO SEEK A DEEP UNDERSTANDING OF WHO WE ARE IN ORDER TO CONNECT WITH INDIVIDUALS THAT SHARE OUR DEFINITION OF NORMAL.**

THIS YEARNING HAS LED US TO BUILD COMMUNITIES THAT TRANSCEND GEOGRAPHIC LIMITATIONS, MADE POSSIBLE THROUGH SOCIAL MEDIA, FORUMS, STREAMING. GROUPS ARE FORMED ON THE BASIS OF REPRESENTING THEIR SHARED INTERESTS, CREATING A SPACE FOR MEMBERS TO CONNECT, COLLABORATE AND SIMPLY COMMUNICATE.”

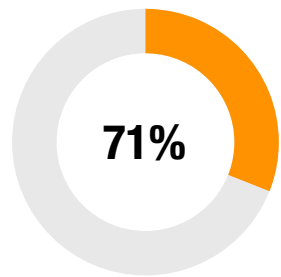
Seth Godin, We Are All Weird

WE

Play opens up communities of likeminded people.



Play allows me to meet people I wouldn't have otherwise.



Play provides me with a sense of community.

“ I THINK BEING A NERD USED TO MEAN BEING ISOLATED. TO BE POPULAR WAS TO BE THE MANLY MAN WHO WAS INTO THE WEIGHTS AND THE THINGS YOU EXPECTED A MANLY MAN TO BE INTO. BUT IF YOU WERE A GUY WHO WAS IN THE DUNGEONS AND DRAGONS AND NOT SPORTS, THEN YOU WERE ISOLATED AND THAT MADE YOU A NERD. STAR WARS WAS A REBIRTH. IT OPENED FANDOM TO SOCIETY, WITHOUT FEELING LIKE YOU'RE HAVING TO HIDE SOMETHING. OR BEING OTHERED.

Gabe, Gamer, Orlando



WE

CASE STUDY

Peanuts and Anime: Sony's Expansion into Play

Sony has transitioned from Japan's biggest consumer electronics business to a Play business over the course of a decade. The following analysis was reported in The Financial Times in March 2023. "For long-term Sony watchers, The Last of Us symbolises the culmination of a decade-long metamorphosis. It is a corporate transformation carried out under two successive chief executives and set to be entrusted to a third...This process, which veteran Sony analyst David Gibson at MST Financial describes as 'remarkable', has steadily converted Japan's best-known consumer electronics brand into a less well-understood blend of specialist-hardware maker and international media giant." This transition drove a sharp rise in Sony's brand value, with successive growth YOY from 2015 (\$7,702m) to 2022, (\$16,989m).

It is Sony's focus on media that defines the new Sony: a company that has over time developed capabilities in a number of different entertainment channels and properties. According to the Financial Times, almost 50% of Sony's profits now come from games, music, films and television. That ratio is expected to climb to more than 56% by March 2024. "Those same analysts, traditionally obsessed with Sony's TV sales and fluctuating competitiveness in mobile phones, must now comb media news for reviews of Spider-Man movies, the buzz around trailers for TV shows based on Sony games and the record-breaking streaming numbers of Mariah Carey's hit song 'All I Want for Christmas Is You'," writes the FT.

Among Sony's strongest new propositions is the distribution of Japanese anime — a business that has been significantly expanded both financially and geographically by the advent of streaming services. Bolstered by the \$1.2bn purchase of AT&T's anime streaming service Crunchyroll in late 2020, which now has 10 million paid subscribers, the group has built what is generally understood as the world's largest portfolio of anime.

As a result, Sony has adopted a unique distribution strategy — distributing titles across multiple rival streaming platforms to maximize profits. "In terms of owning the IP and distribution for animation, Sony owns most of them," said Jefferies analyst Atul Goyal. "They're making all the right moves in video games, animation and TV. They are now essentially a media company."



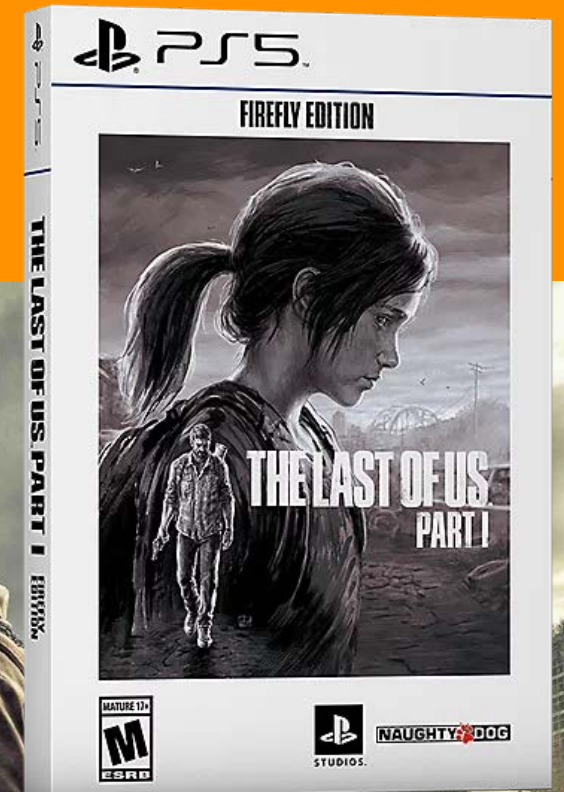
WE

CASE STUDY

Sony's anime strategy has evolved at a key moment. According to figures from the Association of Japanese Animations, Japanese anime spread more extensively to audiences outside Japan during the pandemic. Figures from 2021 show the global market for Japanese anime grew to a record high ¥2.7tn (\$20bn). Estimates produced by SkyQuest Technology Consulting — and used by several Sony analysts to inform their own forecasts — suggest that the global anime market is now growing at about 10% a year and could reach a value of \$47.14bn by 2028. More importantly, the market outside Japan represented ¥1.3tn of that 2021 total. In the intervening months, say analysts, the balance will have shifted definitively in favor of the global market and anime will make more money overseas than in its domestic market for the first time.

But *The Last of Us*, said Macquarie analyst Damian Thong, marks an important next step in Sony's transformation, in which it is able to leverage its different media businesses to better profit from its intellectual property. *The Last of Us* was first launched as a 2013 PlayStation game from one of the company's in-house studios, around the time the campaign to reinvent Sony began. The title became a broader game franchise that sold 37mn copies, earning a fan base that guaranteed a significant global audience for the show, even before it had been made. The *Last of Us* TV show, currently being streamed by HBO in the US, was described by Thong in a note to clients as "possibly the best-ever video game adaptation for television or cinema." Others have dubbed it "Sony's Game of Thrones."

(Source: Financial Times)



WE

CASE STUDY

Transition and Growth via Fandoms

Sony introduced PlayStation Vue, a live streaming television service.



Partnership with Spotify, to integrate Spotify's service into Sony's PlayStation Network.



Sony established ForwardWorks, a subsidiary focused on developing mobile games and content for smartphones. This move aimed to leverage Sony's intellectual property and gaming expertise to tap into the growing mobile gaming market.

Sony made a strategic investment in MUBI, an online film streaming platform specializing in independent and international cinema.

Acquisition of The Orchard, a global independent music distributor and label services company.



Sony acquired Funimation, a leading anime distributor, in 2017.

Sony made a significant investment in Peanuts Worldwide, the company behind the iconic Peanuts comic strip and characters like Charlie Brown and Snoopy. This investment allowed Sony to expand its portfolio of intellectual property and explore various media opportunities with the beloved Peanuts brand.



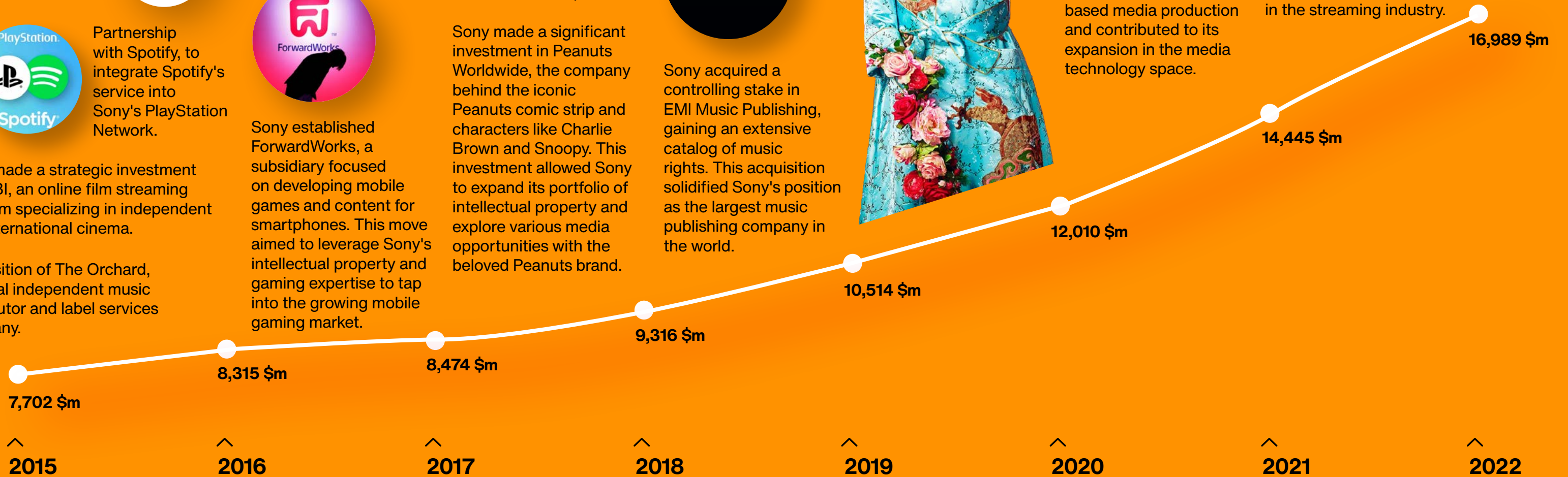
Sony acquired a controlling stake in EMI Music Publishing, gaining an extensive catalog of music rights. This acquisition solidified Sony's position as the largest music publishing company in the world.



Sony acquired Nevia, a Norwegian provider of virtualized media production solutions. This move strengthened Sony's capabilities in IP-based media production and contributed to its expansion in the media technology space.



Sony announced the acquisition of Crunchyroll, a prominent streaming service for anime. This acquisition expanded Sony's existing presence in the anime market and strengthened its position in the streaming industry.



WORLD

For a world
in recovery,
Play is a
chance of
recreation.



For many, we're in an era reflection, recovery and reimagination. We're in recovery – both from a pandemic caused by a virus we still do not fully understand and the economic response to contain its spread.

In "The Pandemic Is a Portal", author Arundhati Roy writes, **"Historically, pandemics have forced humans to break with the past and imagine their world anew. This one is no different. It is a portal, a gateway between one world and the next."** Due to the pandemic and the resulting accelerated transition to digital, many of life's functions – work, school, health, dining out, media, travel, commuting – are all being reimagined. Almost as broadly, the West is in a period of reflection.

Similar to the sweeping societal change of the 1960s, the 2020s are giving cause to re-evaluate. Social justice movements have gained momentum in recent years, sparking critical conversations and raising awareness about systemic inequalities and injustices.

These movements challenge existing power structures and call for meaningful change. They have ignited a collective reckoning with issues of racial injustice, discrimination and social inequality, prompting individuals and institutions to reflect on their own roles and responsibilities. Play has an outsized role in both sparking change and creating acceptance of its results?

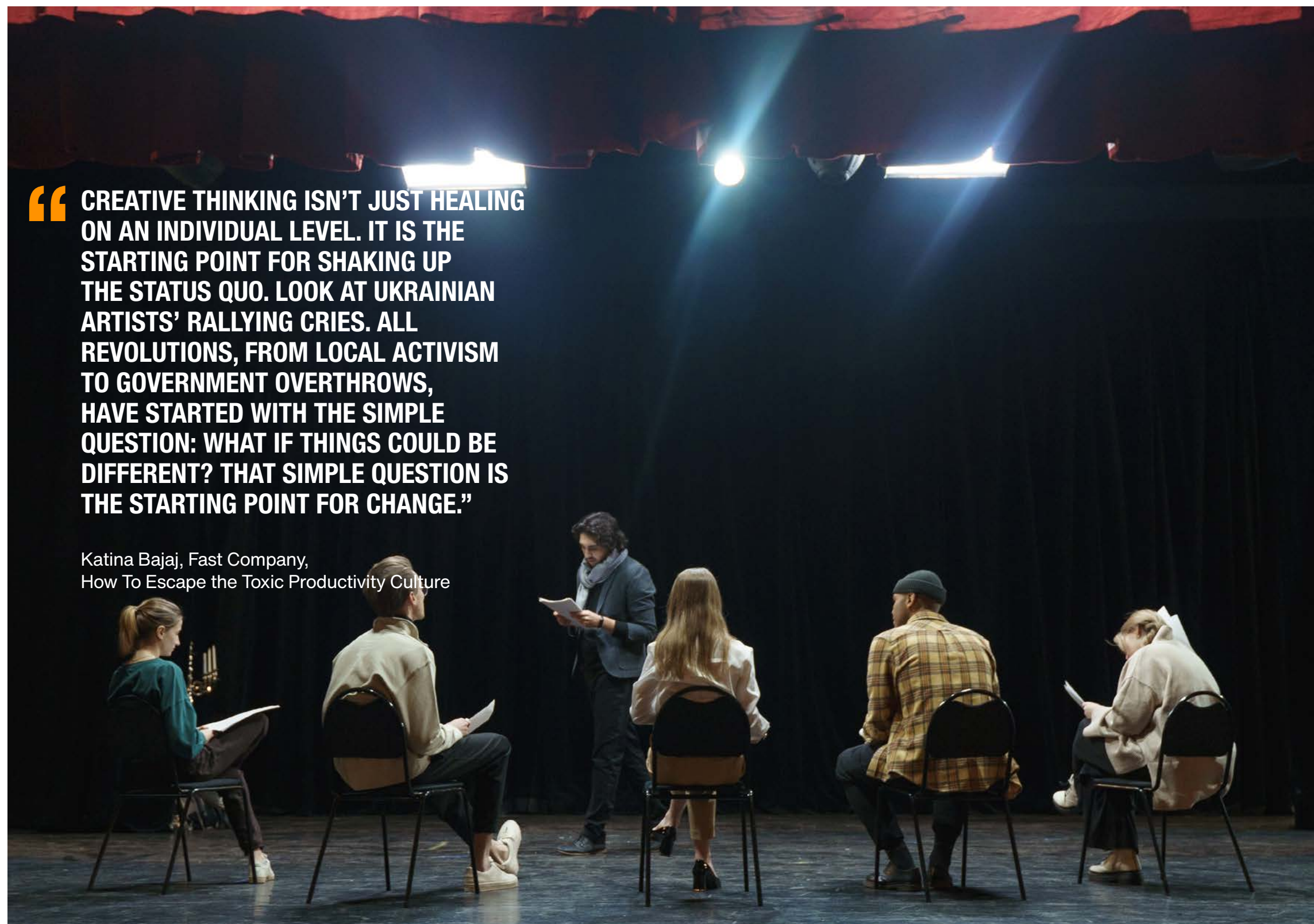
WORLD

“ I'M SO PROUD OF MY FOOTBALL TEAM. THEY'RE SUCH AN ACTIVIST TEAM. THEY RUN LOADS OF DIFFERENT CAMPAIGNS - "STAND UP TO RACISM", "KICK JUNK FOOD OUT OF FOOTBALL". FOR A WHILE IT WAS UNCOMFORTABLE FOR ME TO GO TO A GAME - I DON'T WANT TO BE AROUND PEOPLE WHO AREN'T TOLERANT OF DIFFERENCE. BUT SINCE I'VE BEEN GOING TO SEE THE HAMLETS...IT'S SO MUCH MORE INCLUSIVE AND I FEEL MORE AT EASE KNOWING OTHER PEOPLE CAN BE AT EASE.”

Jacob, Soccer Fan, London

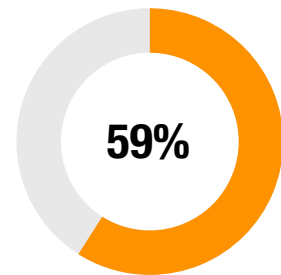
“ CREATIVE THINKING ISN'T JUST HEALING ON AN INDIVIDUAL LEVEL. IT IS THE STARTING POINT FOR SHAKING UP THE STATUS QUO. LOOK AT UKRAINIAN ARTISTS' RALLYING CRIES. ALL REVOLUTIONS, FROM LOCAL ACTIVISM TO GOVERNMENT OVERTHROWS, HAVE STARTED WITH THE SIMPLE QUESTION: WHAT IF THINGS COULD BE DIFFERENT? THAT SIMPLE QUESTION IS THE STARTING POINT FOR CHANGE.”

Katina Bajaj, Fast Company,
How To Escape the Toxic Productivity Culture

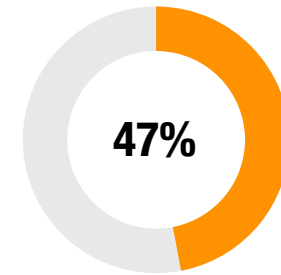


WORLD

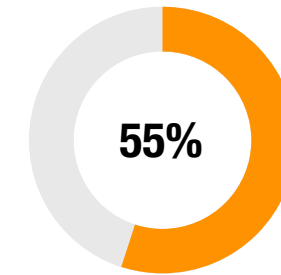
Across the world, adults see **Play** as **'necessary,' 'important'** and even **'making the world a better place.'** And yet ...**37%** **'don't have enough play in their lives.'**



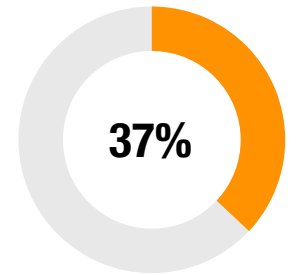
"Play is important"



"Play makes the world a better place"



"Play is necessary"



"I don't have enough play in my life"

WORLD

The barriers

Limited availability in underserved communities

Unequal access

Limited representation in play media and marketing

Cultural taboos or restrictions

Sensory processing challenges

Social anxiety

Homelessness and unstable living conditions

Educational systems that prioritize academic performance over play

Limited options for inclusive play

Ageism and age-specific limitations

Digital divide and limited access to technology for virtual play experiences

Too silly

Too busy

Too immodest

Too difficult

No safe spaces

Work pressure

Discrimination based on race, ethnicity, or religion affecting inclusion in play communities

Lack of awareness or understanding of neurodiversity, leading to exclusion in play settings

Gender stereotypes and biases

Mental health challenges that impact engagement and enjoyment in play

Language barriers

Financial constraints

Lack of representation and diversity

Restricted mobility

Social stigma



WORLD

CASE STUDY

MAC Cosmetics

MAC Cosmetics is an inclusive brand that empowers people to experiment with their identity by playing with makeup, spanning the Express and Play arenas.

With its diverse product range and forward-thinking approach, MAC fosters a culture of self-expression and creativity for all. By featuring individuals from various backgrounds in their campaigns and collaborations, MAC showcases the beauty and artistry of makeup, dismantling societal norms and encouraging everyone to embrace their unique style.

MAC's commitment to inclusivity extends beyond representation. It actively engages with its community, organizing events and workshops that celebrate diversity and provide a platform for individuals to explore and play with makeup. Through these initiatives, MAC creates a safe space where people can experiment, learn and express themselves without judgment.

MAC also provides a wealth of educational resources, tutorials and beauty tips that cater to all. Its approachable and informative content encourages both men and women to push boundaries and try new looks. By offering a wide range of products designed for diverse skin tones, textures and needs, MAC ensures that everyone feels welcome and supported in their makeup journey.

Ultimately, MAC Cosmetics empowers individuals of all genders to unleash their creativity, embrace their individuality and have fun. By promoting inclusivity and playfulness, MAC redefines beauty norms and encourages a vibrant and diverse community of makeup enthusiasts who are free to express themselves authentically.



WORLD

CASE STUDY

Football x Empowerment

"I never imagined I'd be the co-founder of a professional soccer team," says Nathalie Portman in the recently released trailer for HBO Max docuseries, "Angel City." The new club, backed by the largest female co-ownership in professional sports, is built from the bottom up in order to create a more inclusive future for soccer. "In order to change systems you have to start over and you have to rebuild it from something different," Portman said. "We are so committed to building a new future for the next generation. We believe that for women's football to grow, we have to fill that stadium."

That's exactly what the star-studded group of backers have set out to do by becoming the first women's sports team with a valuation of \$1B. Portman's inspiration to create the team came in part from her son's enthusiasm for women's World Cup soccer. Seeing the impact of the female athletes, she felt compelled to contribute to the cultural change surrounding women in sports. "It's important to me that, when I see in the stadium all these children, all genders, looking up to our female athletes, it just feels like culture change," Portman said.



Courtesy of angelcity.com

Football x Climate Change

PARK

Can Play change the world? This brand thinks it can. PARK, an impact-driven, digitally native DTC sports apparel and equipment brand, uses the profits of every product sold to help kids across the world with inequality and climate change.

With partnerships — including one with EA Sports on their FIFA video game series — and collabs with Uniqlo and Red Bull and a c2zero partnership, which locks away Carbon whilst producing footballs — PARK is utilizing its strong brand identity and purpose-led vision to excite the masses about using the beautiful game to make positive change.

Park also fosters a partnership of sorts with its consumers, stating that when you buy a ball, "you're becoming part of a movement to improve many young lives through the sport they love." Park's approach seeks to "level the playing field" of global inequality, putting both people and planet at the core of the conversation. Impact is baked into every element of the brand — from purpose to product, making this a key example of Playing for good.



Courtesy of parkssc.com

HOW IT COMES TOGETHER



So What?

For brands looking to make the move into Play, there are some simple pointers. **People are sick of the rules being ascribed to them** and hunt for ways to break free, even momentarily. In polarized and socially isolated times, people feel safest in their tribe; this means mass marketing approaches can miss the mark unless they have a micro-feel and are built with commitment from the grass roots up. Finally, the breakthrough brands in Play are leading with acceptance of the human condition, inclusion and an optimism for a better world. **How can your brand lean into impact and make space for everyone to Play?**

PLAY BREAKS RULES

HOW CAN YOUR BRAND GIVE US PERMISSION TO HIT PAUSE AND PRESS PLAY?

PLAY STANDS OUT

HOW CAN YOUR BRAND HELP CONSUMERS USE PLAY TO EXPLORE AND EXPRESS THEMSELVES?

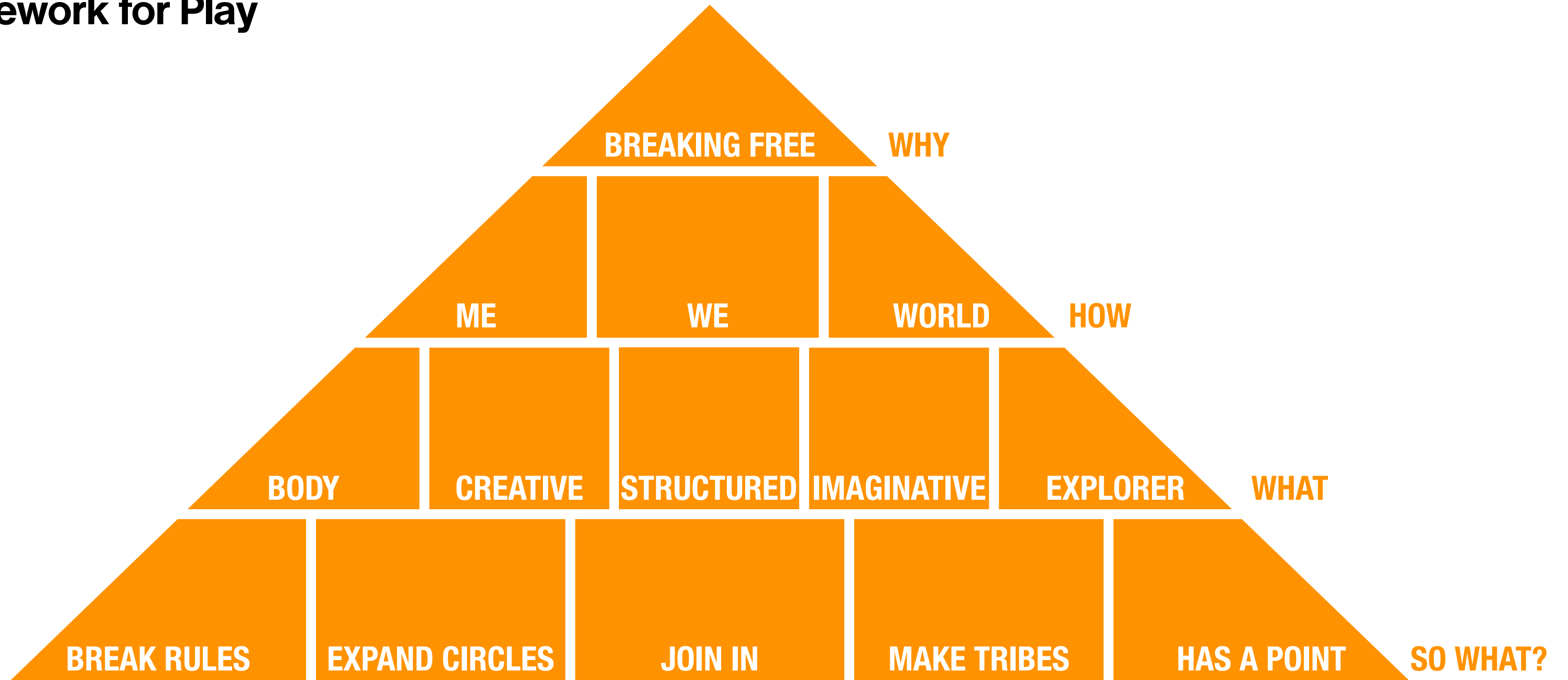
PLAY JOINS IN

HOW CAN YOUR BRAND USE PLAY TO HELP US FIND AND CONNECT WITH OUR TRIBES?

PLAY HAS A POINT

HOW CAN YOUR BRAND USE PLAY TO RECREATE NORMS AND EFFECT CHANGE?

A framework for Play



Bring Arena Thinking into Your Brand Strategy in one of our interactive workshops

Let's collaborate to explore the possibilities of what Arena Thinking could mean for you, your business and your brands...

Together, we can explore what are the defensive, offensive and expansive moves that will keep your brand competitive and push it beyond expectations?

- Expand your frame of reference, create space to think beyond the day-to-day
- Engage & inspire your colleagues and peers in strategic questions
- Inform your strategic outlook, exploring fundamental human motivations in their present and future context
- Identify potential strategies to de-risk, defend and expand the core business
- Identify potential strategies to disrupt and grow beyond the core business
- Cut-through the clutter & noise to enable precision strategic choices informed by market & customer orientation

MoveShop

Exploring Defensive & Offensive Strategies in your Arena

Remote / ~8-12 attendees

MoveShop

Exploring Defensive & Offensive Strategies in your Arena;

with expert input and a keynote speaker

In person or Remote / ~10-15 attendees

Iconic Moves in Iconic Locations

Defensive, Offensive Strategies and Expansive Strategies across multiple arenas with consumer and expert input, and a keynote speaker

In person / ~20-30 attendees

email Hello@Interbrand.com to find out more

Play Arena Methodology

WE CONDUCTED

Activities with a community of 503 consumers in UK, USA, India, China and Germany

February 2023

15 in-depth interviews

March 2023

A quantitative study among a nationally representative sample of the US digital audience 18+; sample size n=2,200

April 2023

WITH THANKS TO OUR PARTNERS AND ADVISORS

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