

DARK HORSES

OPPORTUNITIES FOR THE RETURN OF FOOTBALL



WE BELIEVE THIS IS A

ONCE IN A CENTURY OPPORTUNITY

It's here. 17th June. The date fans have been waiting for since football came grinding to a halt. The date when topflight football in this country returns.

Many will argue this will be a compromised product. Empty stadia create an eerie and somewhat deflating effect on the excitement of the show. As Luis Enrique barbed this week “*[football without fans] is sadder than dancing with your sister*”. Added to the lack of atmosphere are unfamiliar restrictions, neutral grounds and of course a Premier League itself which is all but won.

Come 17th June however none of this will matter. Any negative fears will be swept aside by a wave of celebration as the nation's most loved sport returns. We'll see an interest level that resembles international summer tournaments rather than a standard close to a domestic season.

A unique set of circumstances are coming together to create an equally unique opportunity for brands. The following pages will look at why we believe this is an unmissable cultural moment. If this is a once in a century event, it's also a once in a century opportunity.

WHAT WE KNOW SO FAR

Firstly, nothing is guaranteed yet. All these plans are subject to government approval but as of 1st June these are the most important facts that we know:

- ♦ **A summer return:** Matches will begin on 17th June. A period usually reserved for international tournament football, now set to continue an already glorious English summer.
- ♦ **No fans in stadia:** This is an obvious restriction and we know broadcasters are looking at a multitude of ways to artificially substitute ‘canned crowds’ in different ways.
- ♦ **TV coverage:** All 92 remaining Premier League games will be televised. With no fans in stadia, there is no risk of cannibalising match-day attendances. This is an unprecedented broadcasting opportunity.
- ♦ **Free to air:** Live broadcasters will include the usual crowd of Sky Sports, BT Sport and the less familiar Amazon Prime. For the first time ever however BBC will be showing live Premier League games - four of them to be precise. As Gary Lineker says “that’s something for us to be excited about, actually covering a live Premier League game”. What’s more SkySports will make at least 25 games free to air.
- ♦ **A viewing feast for fans.** The condensed schedule will include games throughout the week and during evenings, whilst both Saturday and Sunday will include back to back fixtures almost all day.

These events are creating somewhat of a perfect storm for brands - sponsors and non-sponsors alike. As one Liverpool fan noted on a fan forum “*Our 19th league title will be the most famous title win by any club in history*”. This is a moment of cultural history not just an asterisk in the sporting annals.



A CULTURAL CELEBRATION

It is an event bigger than football alone. The return of the Premier League is a landmark victory in the tussle with the virus that has darkened our days for the last three months.

Many anti-sport fans have used this period to question the role of - and indeed even the need for - sport. Matthew Parris wrote last week that “*Most people don’t care when football is coming back, or whether it’s ever coming back*”. When lives are on the line and key workers replace sporting idols as national heroes, is football and sport in general an ultimately pointless endeavour?

True fans however will know that it is precisely the needlessness of sport that makes it so fundamental to our lives. It is because it is done purely for pleasure and entertainment that makes it so worthwhile at a time when we have been restricted to our homes and kept apart from our loved ones.

The world is a richer place with sport in it. The narratives it creates inspires us on a daily basis. The sharing of those narratives brings us together. One does not have to look back far to see the impact England’s 2018 World Cup run had on this country when ideology and political stalemate threatened to tear it apart.

This sporting return - spearheaded by the football season - will have a bigger impact than ever. The old adage that absence makes the heart grow fonder can be seen in the global success of the German Bundesliga - the first major European league to return. In the US we see the same. NFL ticket sales are up 234% on 2019, and that’s despite the fact that the season was largely unaffected. The hunger for sport is that much greater because of the fast of the past few months.

We are talking about a cultural moment here not a sporting one. Coinciding with the summer sunshine and wider COVID-19 relaxations, football’s return is a promise of better times ahead. As BBC’s Barbara Slater puts it “*At a time when sports fans across the country are in need of a lift, this is very welcome news.*”

Over the last three months we’ve seen brands scramble to adjust messages to match the mood of the nation. Heartfelt empathy has been the order of early spring but as we move into summer, consumers want to look ahead not backwards. The return of sport is an unrivalled opportunity for brands to show they understand this shift and to connect with fans through shared passion.

A FESTIVAL FOR FANS

Sporting festivals, whether they be World Cups or Olympics are based on two core tenets; a concentrated - and extraordinary - event schedule and broad access to all. The remainder of the Premier League season will follow this formula.

Firstly, we will have a condensed action-packed schedule. Matches will be played throughout weekday evenings and weekends will see up to four games back to back. This will help make this period feel even more celebratory and special.

Football feels like a holiday to us because we have been programmed to see it as a holiday activity. For over a century football has been played on certain days, namely market days of Wednesday and Saturday. There's a reason why we have condensed playing windows in Christmas and in summer tournaments.

Secondly, these games are open to a much broader audience. Following the precedent set by Sky Deutschland in Germany both Sky and BT will offer more free to air opportunities. Sky Sports in particular have committed to 25 games meaning the Premier League will be poking its head over its paywall for the first time in almost three decades. Furthermore, for the first time ever the British Broadcasting Corporation will be airing live Premier league Football. Even though it is only four games the point is symbolic and helps democratise the 19/20 season even further.

These two factors of free to air and condensed scheduling will culminate to create a festival atmosphere. Watercooler moments may now be zoom calls but they will still be happening up and down the country.



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CONSTRAINTS LEAD TO CREATIVITY

There will be many constraints when football returns.

Restrictions on stadia, dressing rooms and of course the pitch itself. If there's one thing we've seen in the last two months however, it's that great constraints lead to great creativity.

In particular we've seen crowdsourced creativity from both players and members of the public making light of the situation they find themselves in. We've seen these inventive and humorous clips spread like wildfire across social networks – particularly WhatsApp. Be prepared for fans to show off how they're watching the game in the 'new normal' in ever inventive and creative ways.

When it comes to clubs we've already seen a host of inventive new ways to overcome these restrictions. Borussia Mönchengladbach have stolen a march on all football clubs and have reaped the rewards with their cardboard cut out fans. Similarly we've seen the first virtual grandstand thanks to Aarhus Gymnastikforening in Denmark. Or FC Viktoria Plzeň hosting a drive through for fans.

The biggest innovations however will come from those for who it matters most - the broadcasters. Attempts to change the traditional at-home match day viewing experience have not been easy. Whilst widescreen and high definition have become essential, innovations like 3D technology, alternative

commentaries and camera angles have largely been rejected by fans once their novelty wore off. In truth, apart from getting better in quality the traditional way of watching a game on TV at home hasn't changed that much.

This could be a great opportunity for broadcasters to change that. Very much aware that they will have to fill the atmosphere void, we will see a host of new inventive solutions. On top of the expected dubbed crowd noises and clever use of technology to simulate excitement, we'll see a host of new initiatives to dial up the TV viewing experience. This is something we've already seen in other, arguably less progressive, sports such as golf who recently announced players will be mic'ed up on the European Tour.

The restrictions that limit football's return will easily be countered by a host of inventive and creative hacks from fans, clubs, players and broadcasters. This is a perfect time for creativity.

OPPORTUNITIES FOR ENGAGEMENT

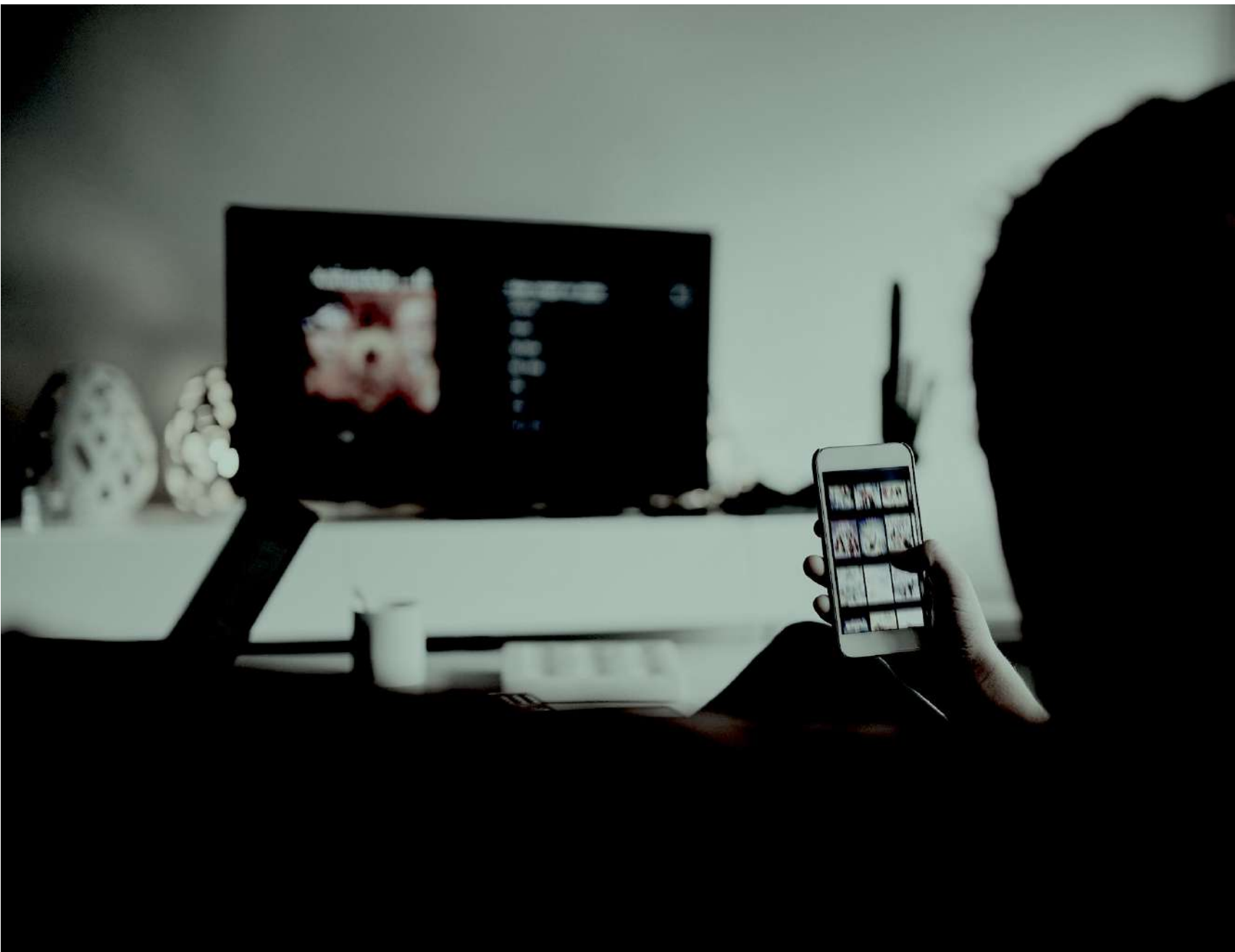
New ways of doing things will create new opportunities for engagement. The biggest opportunity for brands is the online conversation that will happen around the games.

The second screen - use of social media conversation or gamification around a live broadcast event - has been a key battleground in the sports industry for more than a decade now. Perhaps the most famous brand-led example might be Heineken's Share The Sofa platform. But despite pockets of success it's fair to say that second screen activations haven't become mainstream in the way many hoped or anticipated.

This situation will be our best chance to change that. The insight that led to Heineken's campaign was that 76% of fans were watching at home alone. We can safely presume that this figure will significantly increase during this unique period. The at-home audience will now also include the most dedicated fans who are used to watching games with their fellow fans whether that be in stadia or other venues. This audience will be desperate to stay connected to the wider fan community.

Another problem we've historically faced is that most fans aren't that interested by technology. We obsess in our industry about the latest social and tech innovations, but they are a long way down the list of priorities for most sports fans. Since March however those fans have been through what is essentially a crash course for how to take part in the second screen conversations. They have had to live their social lives almost entirely virtually. Even the most ardent technophobes will be used now to connecting with friends and family across social media and virtual conversations. Expect that to make a significant impact on how people behave in the next few months.

The need to be part of the conversation and feel connected during this season finale will be immense. We've seen this in Germany and the success of clubs like Borussia Dortmund and their online fan parties. In the UK expect to see significantly increased levels of social conversation - a lot of it on dark social - across these fixtures. Brands that can find authentic and entertaining ways to add value to these conversations have the potential to reap great rewards.



NEW RITUALS ESTABLISHED



Sport is built on tradition and ritual. Sporting narratives work because they can be compared to historical achievement. That comparison only works because sport changes at a glacial pace and often with heavy resistance. A football match played for 90 minutes in a stadium today is easily comparable with the same one more than a hundred years ago. Andy Murray's Wimbledon victory was played on the same court with the same rules as Fred Perry's eighty years earlier. Consistency gives fans, pundits and players points of comparison. Familiarity is not boring or repetitious for sports fans, it establishes context that gives meaning and purpose to the events we're watching. Sport changes slowly.

As a result, the behaviour of sports fans is also repetitious and ritualised. In football this is particularly true. Children tend not only to support the clubs their parents do, but they also follow the same rituals their parents did. Routines and match-day rituals are passed down from generation to generation. Groups of friends will regularly meet at the same places for the same reasons week after week, year after year.

Not in 2020 however. The rituals we had as fans have been ripped up. The traditions of sport have dissipated. For one season only this will be totally unique, like nothing before it. New rituals will have to be made. New experiences created. And this is a golden opportunity for new brands to play a role as well.

It matters much less if your brand hasn't had a traditional foothold in a sport. A brand shouldn't fear turning up uninvited to a well-established club. The club doesn't exist anymore, it's become a street party. If you're a brand looking to take part in sporting culture, now is the time to do it when new norms are being forged.

IN SUMMARY



Let's consider the sheer uniqueness of this situation.

Its cultural importance in setting the mood of a nation. The opportunities for creativity and problem solving which it offers. The level of engagement and social conversation that will be happening around it.

This is a perfect storm for brands to make a contribution. And not just entrants new to sport, every brand has an opportunity to be considering what their move is in reacting to this national talking point.

There will be rewards for those who think and move fast, who can use creativity to stand out in the conversation and above all add value to the fans.

At Dark Horses, we exist for those who want to break away from the field. And that belief is built on a very real passion for moving our industry forward. If you have any thoughts or questions on any of this or would like to talk about how your brand can play a role in this very unique moment, get in touch.

To continue the conversation please contact:



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