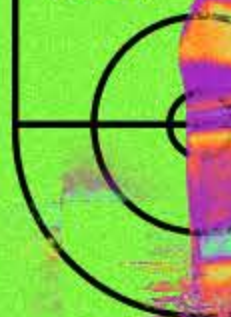


FUTURE OF SPORT

FAIR PLAY



THE
DISRUPTION
COMPANY
2024



AUGUST 2024



backslash

DARK
HORSES

CHAPTER 3

INTRODUCTION

Welcome to “Future of Sport,” a four-part series from Backslash and Dark Horses that unpacks what will—and more importantly what should—come next in the world of sport. In our third chapter, we explore how the notion of fairness is changing.

Fairness and sport have a complex relationship. On one hand, fairness is deeply ingrained in the sporting code. Moral values of sportsmanship and integrity have been baked into sport since the Victorian era, and they’re still drummed into kids today from a very young age. As such, we find the idea of cheating in sport abhorrent. In some cases, our society even finds it harder to forgive cheating athletes than real-life criminals. Just look at how Lance Armstrong has been condemned to a “life sentence” in many fans’ eyes. In this way, sport is the ultimate beacon of fair play.

What’s less readily accepted is the fact that sport is also inherently unfair. It’s hard to talk seriously about a level playing field when your place and time of birth, socioeconomic status, genetic ability, physical traits, and gender all define your chances of success. Sport is about fierce competition and the very best rising to the top, and as such, it often amplifies injustice more than other widely celebrated areas of culture.

In this chapter, we’ll look at how definitions of fairness are changing through the lens of three core questions: Who has the right to compete? Where do we draw the line when it comes to performance-enhancing advantages? And what level of physical and mental risk is acceptable?



BACKSLASH & DARK HORSES
FUTURE OF SPORT



CHPTR 03



“The sporting arena is a contrived system of obstacles and rules, unlike the natural obstacles and playing fields provided by ‘life.’ As such, we can manipulate them. We can attempt to make them fair. Sport can truly embody what we want out of life, while still not straying from life itself.”

Jack Bowen, author and sports ethics blogger

Instincts around fairness are being challenged by a growing push for inclusivity, athlete protections, and optimized performance.

DRIVING THE SHIFT

→ Progressive forces are driving a reckoning around how sport is structured and who gets to participate.

41% of young people support trans inclusion in sports as of 2023, up from 35% in 2021.¹³ This year's Paralympic Games in Paris is also expected to reach its largest audience in history.

→ New advantages are driving ethical debates about what is and isn't fair in regard to athletic performance.

While some governing bodies are banning performance-enhancing equipment, other businesses are exploring how psychedelics and neurofeedback could give athletes an edge.

→ Alarming medical research is demanding a reevaluation of sport's mental and physical risks.

From CTE diagnoses to rising suicides, we now have irrefutable evidence of the toll that sports can take on the mind and body.



RIGHT TO COMPETE

WAY IN 1

The segregation between male and female, disabled and able-bodied athletes dates back several decades. But as gender norms shift and inclusive innovations allow for new possibilities, we'll witness a cultural reevaluation of who gets to compete and on what stage.

All-abilities sports

For individuals with disabilities, accessing and participating in sports has historically been a major challenge. In recent years, however, we've witnessed a shift in how we treat and talk about disabled athletes. No longer are they rare exceptions battling the odds as portrayed in Channel 4's Meet The Superhumans. Instead, we now understand that disability is far more common than we once thought with about 1.3 billion people, or 16% of the global population, living with some form of disability.¹⁴ This approach should help normalize disability in sport, yet 47% of people with disabilities still think that physical activity isn't for "someone like them."¹⁵

The good news is that the future of sport looks much more inclusive, thanks to a growing push to welcome in athletes of all abilities. For instance, Toyota's permanent platform Every Body Moves with Paralympics GB includes virtual home workouts for people with disabilities; organizations like I GOT LEGS are hosting exoskeleton walking competitions for paralyzed athletes; and initiatives like "All disabilities, All sports!" are building a network of local sports clubs for people with disabilities. Looking forward, we could also see sports like pickleball (which can be played in a wheelchair) or surfing (which can be done in an adaptive way) championed as key activities for mixed-ability athletes.

Sports equipment is also getting an inclusive redesign with the help of big brands. One notable example comes from AT&T, which recently designed a connected football helmet for deaf and hearing impaired players that projects the plays in AR within the visor, communicating information from their coaches in real time. A less techy but equally important enhancement are the industry-first adaptive wheelchair basketball uniforms from Adidas. Adidas worked directly with wheelchair-bound players to design a jersey that reduces bulk and maximizes comfort while seated—demonstrating what's possible when you design hand-in-hand with underserved users.

While the majority of today's innovations aim to level the playing field between disabled and able-bodied people, future advancements could end up giving disabled athletes a remarkable edge. This is especially true in esports, thanks to the emergence of brain computer interfaces. Earlier this year, American quadriplegic Noland Arbaugh became the first patient to receive a brain-computer chip implanted by Elon Musk's startup Neuralink. During a recent podcast appearance, Arbaugh said the upgrade has given him superhuman reflexes that are incredibly helpful for gaming, comparing it to having "an aimbot in his head." This has sparked lively discussions on Reddit and beyond, with some predicting that we'll one day have separate leagues for people with BCIs in order to maintain fairness.



CHAPTER 03

Transgender participation

While the future of sport for disabled people is on a positive path toward progress, the debate over transgender athletes is far more controversial. Whether trans athletes should be allowed to compete as equals is a question that confuses society's notion of fairness. On the one hand, a sense of sporting fairness is strained by the idea of one group having a natural physical advantage. On the other hand, our instincts on inclusion mean banning transgender athletes feels inherently wrong.

This ongoing tension is highlighted by recent legislative decisions. In March 2023, World Athletics banned male-to-female transgender athletes from women's elite competitions (including the Paris 2024 Olympics) if they have undergone "male puberty." The governing body of World Cycling has also ruled that transgender women will be banned from competing in women's cycling events, and the NCAA is under pressure to follow suit.

Pro-trans advocates take issue with the fact that many of these blanket bans fail to accommodate any nuance. As the debate on transgender inclusion continues and individuals and organizations become more educated on the complexities of gender transition, sports governing bodies are likely to develop more comprehensive policies grounded in scientific research. This could involve creating specific criteria around hormone levels, transition timelines, or other aspects to ensure fair competition while still honoring athletes' identity.

We can also expect trans rights and human rights organizations to put up an even bigger fight against discriminatory policies. The Women's Sports Foundation, founded by tennis legend and LGBTQ+ supporter Billie Jean King, recently launched a campaign featuring famous athletes that advocates for trans participation across sports. Meanwhile in Seattle, LGBTQ+ advocacy leagues like the [Puget Sound Pronouns](#) are giving queer and trans players a safe space to play softball.

Whichever stance brands or individuals take going forward, most important will be fostering empathy and spreading education rather than stoking further division. We've already seen trans participation become a platform for polarization, which is only serving as a distraction from what should ultimately be our main focus: creating a sporting culture of inclusivity, respect and mutual understanding.

"Rather than delving into the complexity and wrestling with how to create fair competition as gender norms shift, we are succumbing to a panic that forces us to choose between the extremes of firm exclusion and full inclusion."

Jerry Brewer, *The Washington Post*

Winning with inclusivity

While it will ultimately be up to sports governing bodies to rewrite the rules, brands can challenge the system by creating opportunities for people of all abilities and gender identities. Players like Nissan are already doing this through their [Possibilities Project](#), while Adidas has shown support by partnering with LGBTQ+ nonprofit [Athlete Ally](#). As we throw out old ideas of who gets to play, we'll see sport flex to take on entirely new shapes and put inclusivity first.

WHAT IF...



Brands invited underrepresented athletes to be part of their innovation teams? Implementing a "design for one, scale to many" approach.



VR experiences fostered empathy by allowing able-bodied athletes to experience sports as a disabled person?



Fitness brands developed special training programs for athletes who have recently undergone gender-affirming surgery and hormone therapy?

WAY IN 2

THE OPTIMIZED ATHLETE

Extreme feats of athleticism have always drawn people to sport. But in 2024, the limits of possibility are being shattered thanks to advances in neuro training, specialized equipment, and an evolving take on drugs. With these new advantages will come new debates around the need to maintain the purity of sport vs. the desire to optimize performance at all costs.

Bending the rules around PEDs

Today, it's widely believed that doping undermines the integrity and fairness that is fundamental to sport. But it wasn't always this way. The concept of doping as immoral didn't appear in Western sport until the mid-1900s; the NFL didn't begin testing players for steroids until 1987; and it was only 25 years ago that the World Anti-Doping Agency was established.

Now the narrative around doping is being challenged once again. Most notable is biohacking billionaire Peter Thiel's creation of the Enhanced Games—a modern reinvention of the Olympics where athletes are encouraged to dope in order to "push the limits of humanity." The competition, which is set to take place next year, has unsurprisingly been met with concerns around both safety and morality. Nonetheless, the event organizers say that millions of dollars have been raised and over 900 athletes have expressed interest, though retired Australian swimmer James Magnussen has so far been the only one to do so publicly.

In Magnussen's view, the fact that every single athlete will be doping openly actually makes the Enhanced Games "the first time there's a truly level playing field in international sport," pointing out that almost every other competition has some athletes taking PEDs in secrecy.

It's also true that PEDs are much more complicated than people have been led to believe. There's still a great deal of subjectivity involved in deciding which substances are prohibited in sport, much like the laws around why tobacco and alcohol are legal while other recreational drugs aren't. The lines drawn between natural substances vs. artificial ones, what's considered safe vs. too much of a health risk, and fair vs. too performance-enhancing are continually being bent and blurred.



New drugs enter the arena

While the Enhanced Games is aiming to change the discourse around drugs that have long been used in sport, other drugs are being welcomed into sport for the first time. One such drug is marijuana, which the NCAA just [voted to remove](#) from its list of banned substances for Division I players in June. Psychedelics, more specifically ayahuasca and psilocybin, are also making major waves. In golf, some PGA Tour players [have credited](#) microdosing psilocybin with their success, saying it improves focus and allows them to better assess their shots without fear. Meanwhile in Oregon, where magic mushrooms are legal, a 36-hole resort called Juniper Reserve is applying for permission to conduct research on how psilocybin affects golf performance. Outside of golf, NFL quarterback Aaron Rodgers is also making headlines for shamelessly spending his 2024 offseason on an ayahuasca retreat in Costa Rica.

As lawmakers move to decriminalize and legalize these drugs, we can expect even more athletes to openly advocate for their use—marking a significant shift from the days when mind-altering drugs were thought to impede physical performance rather than boost it. At the same time, though, deeper debates around athlete autonomy and what constitutes a fair vs. unfair advantage are sure to ensue.

“I think most people have had a conversation with their friends saying ‘Imagine if Usain Bolt or Michael Phelps could take Performance Enhancing Drugs, what would sport look like? How fast could we be? How high could we jump?’ We’ve all mused about that scenario, and I think that’s broken the ice around the idea of the Enhanced Games.”

James Magnussen, retired Australian swimmer and future participant of the Enhanced Games

Neuro training

The biggest performance shift in recent years has been from body to mind. Three decades ago, sports psychology was hardly a topic of discussion. Today, neuro training is considered essential to the cognitive performance of top athletes like Cristiano Ronaldo and Serena Williams. This emerging field focuses on optimizing brain function in order to enhance physical performance, combining elements of neuroscience, sports psychology, and physical training to develop holistic programs tailored to individual athletes.

One specific method becoming popularized within the field is neurofeedback. And while not a totally new phenomenon (Tom Brady has talked about using a brain training app and Liverpool works with neuroscience company [Neuro11](#)), the technology is getting better and the use cases are expanding. An especially interesting example comes from Tel Aviv-based [i-BrainTech](#). The company’s proprietary training system is a sports video game that players can control without moving a single muscle. It works by having them wear a special cap fitted with wires, and then using only their mind to control a digital avatar that replicates the physical movements they would perform in real life. The system is primarily intended for athletes recovering from an injury, helping to strengthen neuromuscular pathways and preserve motor skills while their bodies heal.

Beyond recovery, new uses of AI are also providing deeper insight into an athlete’s mental state. A startup called [PeakAI](#) is at the forefront of this. Athletes simply record themselves responding to a short daily prompt, and Peak AI’s natural language processing system analyzes their tone of voice and word choice to determine their frame of mind. Coaches can then leverage this data to tailor training strategies to an athlete’s unique mood, understand what motivates them, and know when to intervene if an athlete is overly tired or stressed. Looking forward, as more health wearables begin to monitor emotion, you can imagine how this same level of analysis will become available to everyday athletes. If you’re especially anxious, for example, perhaps your wearable will suggest a somatic workout that day. Or if you have lots of energy to burn, maybe it’ll dial up the intensity of your training.

Striking a balance

For brands playing in this space, the challenge going forward will be striking the right balance between optimizing performance and maintaining fairness. Accessibility will also be a crucial consideration. Businesses should pay close attention to who gets access to these new advantages and at what cost, taking care to consider the underrepresented amateurs just as much as the highest-paid pros.



The equipment advantage

Another key topic in the integrity vs. optimization debate is equipment. Throughout the last few decades, we've seen impressive technological advances in sports equipment that have allowed athletes to achieve a level of performance that was once unimaginable. Smart clothing, connected baseballs and basketballs, and Iron Man-like exosuits are all evidence of this progress.

But while the majority of equipment is still being designed to boost performance as much as possible, we're also seeing the pendulum begin to swing in the opposite direction as governing bodies move to dial things back. In golf, for instance, environmental concerns led to a recent decision to downgrade golf ball technology in order to limit the distance it can travel. Essentially, pro golfers were hitting the ball further because of technological advances in equipment, which meant that golf courses had to be extended, which meant that precious land was being used up at an unsustainable rate (not to mention the amount of water needed to maintain that land). Though this decision may seem heretical to the performance values of sport, it's also a realistic example of how equipment will need to evolve alongside modern ethics going forward.

Similarly, some sports governing bodies have recently banned the use of "super trainers" that contain performance-enhancing materials like carbon fiber and ultra-lightweight foam—saying that these shoes enhance speed and comfort to a degree that's unfair to competitors using traditional footwear.

These decisions are unlikely to be the last of their kind. As governing bodies fight to maintain the purity of sport and equipment manufacturers look to push the limits even further, we could see a separation between minimalist and maximalist sporting competitions going forward. Will there be bionic racing or skiing competitions where the focus is on the exosuit technology as much as the athletes? Will we see a return to old-school sporting events that champion a tech-free, back-to-basics approach? Historically speaking, the rules of equality tend to favor an all-or-nothing approach.

WHAT IF...



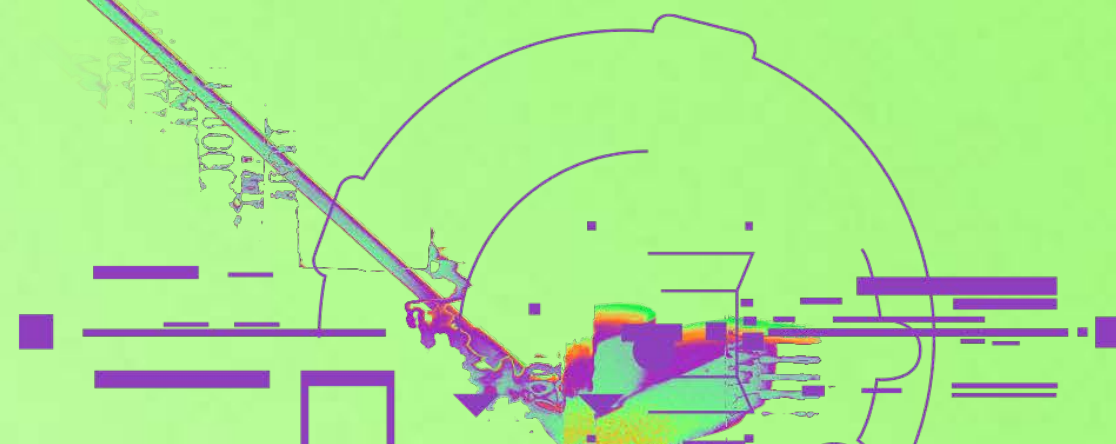
New types of competitions had athletes compete with and without the help of psychedelics to measure effects on performance?



Bionic competitions of the future awarded medals to the makers of the most advantageous equipment rather than the athletes?



Emotion-recognition tech quantified the connection between mood and athletic performance?



SAFETY FIRST

The physical exploitation of athletes

It's hard to look at superstar athletes as victims, but the uncomfortable truth is that as sport becomes more commercialized and spectacularized, the demands being placed on players are increasingly risky. Crucially, the fact that athletes are willing to take these risks should be irrelevant. It's not fair to expect a young, ambitious and highly competitive athlete to make educated decisions about their long-term welfare. It is on others to help safeguard them.

Head injury is the most high-profile example of this. Unacknowledged publicly by the NFL until 2016, research is now proving the full scale of the connection between chronic traumatic encephalopathy (CTE) and sport. [Boston University](#) found early signs of CTE in amateur athletes who passed away before the age of 30.¹⁶ And in rugby, former athletes are currently [suing](#) governing bodies for head injuries they sustained in their careers.

Thankfully, however, progress is underway. New rule changes in rugby such as restricted tackling until certain age groups, the proposal of headgear, and HIAs (Head Injury Assessments) are being accompanied by technological solutions such as [smart mouthguards](#) that can detect when a player should be medically evaluated. Looking forward, we could see similar technology incorporated into equipment for football players, cheerleaders, boxers, breakdancers, and more.

WAY IN 3

The general assumption is that sport is healthy for us. But while exercise is important for a strong body and mind, the same is not automatically true of sport, which can do damage to both. As responsibilities around athlete well-being shift from the people playing to the people making the rules, new tools and regulations will make the future of sport safer for all.

As these safety enhancements roll out, some initial resistance to change can be expected. We saw this when Formula1 introduced the halo head-protection device—a wishbone-shaped titanium bar that sits on top of the cockpit and wraps around the driver's head. In 2016, Lewis Hamilton called it the "worst-looking modification" in the sport's history. But a few years later Hamilton [said](#) it had saved his life in his crash at the 2021 Italian Grand Prix. It is now considered F1's greatest safety success story.

If the argument around athletes' well-being isn't convincing enough for leagues to enact change, then perhaps they'll be swayed by the fact that failing to implement safety measures will seriously threaten a sport's future growth. We're already witnessing this in the U.S. with concussion concerns driving a decline in tackle football enrollment among youth. Participation in tackle football for kids ages 6 to 12 has dropped [29%](#) from 2016 to 2021, while flag football rates have gone up 15%.¹⁷ At the high school level, the 2021-22 school year was the first on record with [fewer than a million](#) players participating in football in America since the turn of the century.¹⁸ The message is clear: put safety first or risk being left behind.

BODY
DEBATES

INCLUSIVE
BY DESIGN

MIND
MAINTENANCE



The gender injury gap

For female athletes, the risk of injury is further compounded by the fact they're competing in a sports world designed by and for men. Research and data bias in sports science means that female athletes have been marginalized, misdiagnosed and mistreated for decades. But thanks to rising interest and investment in women's sport, the issue is finally gaining the attention it deserves.

Soccer in particular is under the spotlight due to a recent spate of ACL injuries among top female pros. As many as 37 players are thought to have missed last year's Women's World Cup because of ACL injuries.¹⁹ Far from a coincidence, multiple studies have concluded that women are 2-8 times more likely²⁰ than men to suffer an ACL injury, and 1.7 times less likely²¹ to make a full recovery, often leading to career-ending consequences.

In addition to promoting female-specific training techniques and injury prevention programs, a simple first step is designing equipment with female athletes in mind. Nike's release of the Phantom Luna boot ahead of the Women's World Cup is a prime example. Similarly, Allyson Felix's brand Saysh is making running shoes that fit women's higher arches, wider forefeet, and different heel structures. The brand even offers a complimentary pair of sneakers if your shoe size changes during pregnancy.

In the years ahead, the most important mission will be closing the research gap. And this starts with shattering the stigma. Swimmer Fu Yuanhui, golfer Lydia Ko, and sprinter Dina Asher-Smith are doing their part by talking openly about how their period affects their athletic performance. Brands can heed the call by spearheading deeper research around not only menstruation, but also pregnancy, menopause, and female anatomy in general—laying the groundwork for science-backed solutions made by and for female athletes.

The mental toll

The physical risks of sport may be more visible, but the recent suicide of PGA Tour golfer Grayson Murray is a stark reminder that the mental toll of sport can be just as dangerous. A new study from the NCAA also revealed that suicides among U.S. college athletes have doubled in the last 20 years.²²

Under pressure to show no signs of weakness, many athletes have suffered in silence, often with tragic consequences. But things are changing as a global mental health movement makes athletes more comfortable sharing their vulnerabilities. High-profile stars including Kevin Love,

Simone Biles and Ronda Rousey are leading the way by hailing the prioritization of mental health as a sign of strength. NBA star DeMar DeRozan has even launched his own YouTube series called "Dinner with DeMar," where he chats openly with fellow athletes about their mental health struggles.

Brands are also playing a role by supporting athletes on their mental and emotional journey. Adidas is doing this through their latest global campaign called "You Got This," which uses neuroscience to figure out how and why negative pressure hinders play, then offers guidance around how athletes at all levels can disarm this feeling. It's also a sign of progress that sprinter Sha'Carri Richardson, banned from competing at the 2020 Tokyo Olympics for marijuana use following the death of her mother, is now featured prominently across advertisements ahead of Paris 2024.

A shift in responsibility

Sport is an industry that can chew up and spit out athletes. Future leaders in sport will not see athletes as pampered superstars, but as potential victims exposed to incredibly high physical and mental demands from a young age. A combination of technological advances, scientific research, and empathetic decision-making by those in power can create a safer place to play for all.

WHAT IF...



New policies required leagues to either enact rule changes or risk being shut down if they surpassed a certain number of life-threatening injuries?



Sports brands funded women's health research as a first step toward creating more effective equipment for female athletes?



Athlete mental health monitoring was made mandatory across professional sports organizations?

THE TEAM

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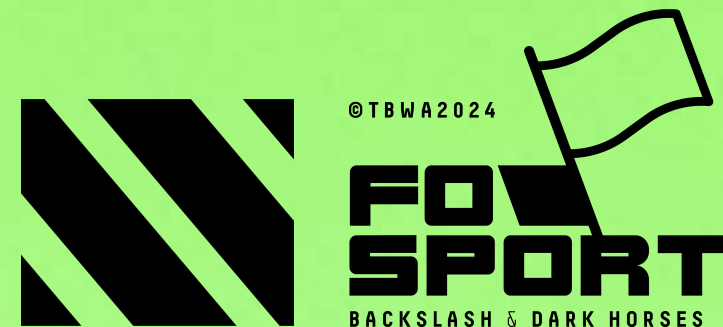
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EDGES SHAPING THE FUTURE OF SPORT

CHAPTER 03

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BODY DEBATES

Our bodies are officially up for discussion—and there’s little consensus on what’s right. As conversations around everything from drugs to diets escalate, once-personal decisions will move to the center of very public debates around the right to bodily autonomy vs. the need for regulation.

COUNTER CANCEL

A hyperpolarized society is ready to trade toxic intolerance for a commitment to progress. As the war on “wokeness” rages on, a growing group of people are refusing to participate in a divided world. The Counter Cancel movement will call people in to learn rather than calling them out— trading public shaming for healthy, nuanced conversation.

INCLUSIVE BY DESIGN

Inclusivity isn’t a checkbox, it’s a form of design thinking. As expectations around inclusivity skyrocket, hypercritical consumers will sniff out tokenism and expose empty promises. Genuine inclusion requires an entirely new blueprint—building laws, spaces, products, and experiences to be accessible from the bottom up. A fairer future awaits.

MIND MAINTENANCE

Once-invisible mental health struggles are moving center stage. As the taboo is broken, mental healthcare will go from reactive to proactive, from a nice-to-have to a need-to-have. Mind maintenance is our new common priority, and we’re practicing it daily.

MOOD GEISTING

Human emotions are being analyzed and enhanced in entirely new ways. A modern wave of mood-boosting products are promising to make us calmer, happier, or even euphoric. And the emerging field of emotion AI is giving us— and the brands we buy from— advanced insight into how we feel. The market for mood modulation is booming.

OPTIMIZED ANATOMY

A desire for control has us taking biology into our own hands. From disease interventions to ultra high-tech tools, a growing category of treatments and products are helping people hack their way to a healthier, stronger, younger version of themselves. In the business of self-optimization, no upgrade is out of reach.



METHODOLOGY

This report was born from months of in-depth qualitative and quantitative research, strategic ideation, and collaboration between Backslash and Dark Horses. It also includes input from 56 Backslash Culture Spotters across 22 global TBWA offices. Our Spotters bring expertise from their work on some of the world's biggest athletic companies and sports sponsors—from Adidas to Gatorade to Nissan.

This is an independent research report. None of the entities or individuals referenced herein has endorsed or otherwise participated in this report.

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