Innovation Study 2019

Change is the status quo. Are you ready?
“It is not the strongest of the species that survive, nor the most intelligent, but the one most responsive to change.”

Charles Darwin
Introduction

SRI is a global executive search and talent consulting firm committed to shaping the future of businesses across the media, content, technology and sport landscape. We develop research-substantiated insight, intelligence and human resource solutions for clients seeking to drive growth and secure market share through organisational change.

Through our work, we observe daily how mastering change has become a fundamental business challenge. In an environment that offers little time for reflection, we decided to pause for a moment to ask our clients and the wider market what impact disruption is having and about their response. We wanted to know whether they felt emboldened by change or fearful about the future.

This prompted a three-part survey, in partnership with Springwise, to understand current attitudes and approaches to disruption and innovation, as well as to provide real-life examples of ‘the innovation responses’ from a number of companies around the world.

The research included:

1. An online study of 348 global executives. Most hold the top or very senior roles within their businesses. They were globally located, with the majority working across the converging media, content, technology and sport landscape, and also from other consumer facing industries such as retail and financial services.

2. Interrogating Springwise’s global database of 10,000 innovations to enhance our understanding of current key innovation trends across the entertainment sphere, and to identify illustrative examples of these trends.

3. Interviewing seven leaders at the forefront of innovation to add additional perspectives and insight.

* In addition to core industry groups surveyed, we had a very small number of respondents from a wide range of additional sectors including, but not restricted to, esports, sporting goods & fashion and marketing agencies.
Steve Lohr, writing in the New York Times, once described innovation as, ‘the crucial ingredient in all economic progress — higher growth for nations, more competitive products for companies, and more prosperous careers for individuals.’

Just as Darwin argued that evolution was necessary for survival in the natural world, Lohr argues that change is necessary for survival in the business world.

Legacy players that quickly respond will survive; those that do not will die. This has long been the mantra of the disruptors of Web 2.0. But just as these digital pioneers were once peripheral threats and are now among the most powerful conglomerates, this adage has truly gone mainstream.
Key findings

Change is the status quo

One overwhelming message is that change is now accepted as the status quo. Booming levels of innovation are disrupting the old ways of doing business and bringing new, more efficient methods to the fore. This is no cyclical blip; there is no way back to ‘how things were’. The majority (63%) describe levels of disruption as ‘high’ or ‘highest it’s ever been’, and over three quarters (77%) agree that the pace of change is only accelerating.

Consumers are in the driving seat

While technology is still seen as a major disruptor, changing consumer behaviours & demands was rated as the top driver of innovation. We are in the age of the ‘prosumer’, said one, as customers have the whip hand – and technology is giving them the power to wield it. We feature some current examples of innovations designed to satisfy the increasingly discerning and demanding customer in the ‘Innovation in Action’ section of this report.

Leaders are embracing change, not running from it

Far from being fearful, leaders we talked to are bullish about the future. Nearly three quarters (73%) said they embraced change as a net positive for their organisations, and more than half reported that they are thriving in a rapidly-changing environment. This is perhaps the most surprising – and affirming – theme to emerge from the data. Contrary to the idea that industry leaders are negative about change, most see it as a good thing and are excited about the possibilities.

Proactive disruption breeds confidence; but for each disruptor there is a disrupted

Innovation may be in the eye of the beholder. Half of our respondents agreed they were ‘disrupting the industry in which they compete’. Those that view themselves as ‘disruptors’ are more confident in every dimension: about their vision, culture, skills and processes.

However, almost the same number felt they had been ‘significantly disrupted by competitors or by external industry trends’. This could suggest that for every disruptor there is a disrupted – a Yin and Yang of disruption if you will – but some of the former category also fall into the latter. Disruption is fluid and disruptors quickly become disrupted if they stand still. The need for continual self-disruption has never been more pronounced.

Confidence in leadership and skills to execute lags vision

The overwhelming majority (80%) feel confident in their vision for innovation however much less (only 57%) agree that they have the right skills to execute their strategy. Tellingly, every single respondent who felt ‘very negative’ about the change affecting their business also reported that they did not have the right skills.

Innovation must be led from the front

Finally, it is clear that innovation strategy starts at the top. Our respondents considered the CEO/Board to be more than twice as influential with regards to innovation within their company compared with the Chief Marketing Officer or Chief Technology Officer. However, a CEO cannot drive innovation alone and needs the right self-disruptors to deliver an agreed vision.
Part 1

The State of Innovation
The State of Innovation

1.1 Change is the status quo

Change is the status quo
Disruption is the ‘new normal’. The majority of our respondents (63%) rate current levels of change as high, or the highest it has ever been and over three quarters agree that it is significantly accelerating.

What best describes the level of change and/or disruption that you are currently experiencing?

- HIGHEST EVER: 15%
- HIGH: 48%
- MODERATE: 29%
- LOW: 7%
- LOWEST EVER: <1%

63% of respondents are experiencing high levels of disruption.

Do you agree that the pace of change and disruption is significantly accelerating?

- STRONGLY AGREE: 33%
- SOMEWHAT AGREE: 44%
- NEITHER AGREE NOR DISAGREE: 13%
- SOMEWHAT DISAGREE: 8%
- STRONGLY DISAGREE: 2%

77% of respondents agree that disruption is significantly accelerating.
1.2 Consumers are in the driving seat

We found that the most significant driver of change, more important than new technologies or competitors, was new customer demands or behaviours. In most regions (except the Middle East), these were rated substantially higher than economic, political or regulatory factors.

What are the primary drivers of change in your industry?

![Bar chart showing average scores for different factors]

The impact of changing customer behaviour is being felt in different ways. For example, one respondent reported “being ahead of the curve and anticipating what customers want next, so we proactively adapt, and not react.” Another spoke of the need for greater transparency in the age of the ‘prosumer’. For another, the biggest effect was from changing patterns of media consumption and “a generational shift in people’s willingness to pay for content.”

“We listen to our customers. They are the most important metric.”

Chris Golier
VP, NHL

Consumers are in the driving seat, with a technology engine fuelling an innovation explosion. The entertainment sphere is conjuring ever more inventive ways to form deeper relationships with their fans and customers, a selection of which we share in the “Innovation in Action” section of this report. It is clear that organisations are more likely to win if they attune to their customers’ changing demands. Or, as one of our respondents put it, make it easier for people to “spontaneously ‘rock up’ and participate.”

“...the fan attending the game, the fan in the city where the game is being held and the fan anywhere else in the world. All will enjoy the experience from a slightly different perspective but all need servicing utilising the technology channels now available to them.”

Keith Dobkowski
Director Club Media Strategy, NFL
1.3 Leaders are bullish

They have the vision; execution is the challenge

Having a great vision does not determine success, as Xerox will attest to. Despite creating the first personal computer in 1970, it was Bill Gates and Steve Jobs who took the concept to market after visiting the copier giant’s research centre.

Among our respondents, ideas are not in short supply. A majority (80%) felt that their organisation had a vision for innovation. And, nearly three quarters (73%) saw change as a net positive for their organisation. More than half reported that they are thriving in a rapidly-changing environment.

Do you agree that your organisation thrives on change?

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<tr>
<th>Opinion</th>
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57% of respondents agree that their organisation thrives on change.
However, respondents were less sure they had the right skills in place, with only 57 per cent agreeing they were well placed to execute their strategy. Tellingly, every respondent who felt ‘very negative’ about the change affecting their business agreed they did not have the right leadership for innovation.

We saw noteworthy variations in relation to having the right skills across geographies and industries. Australia and New Zealand are significantly more confident in their execution capability versus Europe and North America. The media and entertainment respondents were the least confident, followed by sport and retail. Respondents working in technology services or product companies were the most positive that they had the right skills to execute their innovation strategies.

“We executing on ambitious innovation plans is hard. There’s a shortage of talent with everyone competing for the brightest minds and those that can take a ‘portfolio view’, combining strategic understanding and vision with successfully bringing ideas to market.”

Ryan Paterson
Chief Global Officer, STATS
1.4 Proactive disruption breeds confidence

But for each disruptor there is a disrupted
We compared the responses of those that described themselves as ‘disrupting’ to those that did not, in relation to vision, culture, processes and skills. We found a marked difference, with the disruptors being significantly more confident across the board and markedly so in relation to their processes and skills.

Interestingly, 50 per cent of those who agreed they were ‘disrupting’ their industry answered that they had been significantly disrupted by competitors or by external industry trends.

This is a clear reminder of the non-binary nature of ‘disruption’. No sooner is your business turning an industry on its head, changing consumer behaviours and expectations, new technologies or competitors are putting pressures on your market share. While one part of your business is steaming ahead, another is being disintermediated. Now more than ever, and regardless of maturity or past success, organisations need to self-disrupt to stay competitive.

“Some of the most successful companies today have grown extremely quickly from their innovative roots. Agility is in their DNA. It can be harder for more traditional businesses to adapt and change. With the pace of change accelerating, fast forward even ten years, and it’s likely that some companies that are today considered household names will not exist. And that’s exciting.”

Ryan Paterson
Chief Global Officer, STATS
“The marketplace drives my leadership team’s innovation strategy. We collaborate every 90 days in a two-day off-site session around innovation projects.”

Jim Cavale
CEO, INFLCR

1.5 Innovation must be led from the front

With the right senior management team

We saw overwhelming agreement amongst respondents that the CEO/Board have the greatest influence over innovation vision and strategy, significantly more so than the CMO or CTO or Chief Digital Officer.

Consistent with where innovation leadership must reside, our respondents agreed that the most important skillset for driving forward innovation, by a large margin, is strategic thinking. This was rated more than twice as important than technology strategy, or marketing and brand strategy.

Level of influence on innovation strategy and leadership

Which skill sets are most important for driving innovation in your business?
Part 2

Innovation in Action
Introduction

To supplement the online survey, SRI, in partnership with Springwise, scoured over 10,000 innovations from around the world to identify trends across the entertainment industry.

As we’ve seen, rapidly shifting consumer demands and behaviours coupled with technology advancing at break-neck pace are fuelling an innovation explosion. The trendsetters in the sector are conjuring ever more inventive ways to form deeper relationships with their customers. In examining the innovation response from companies around the world, we noted three key themes.

1. From personalisation to hyper-personalisation

   Just as technology allowed greater market segmentation, the power of AI, coupled with vast quantities of personal data, is driving hyper-personalisation: creating segments of ‘one’. Personalisation on the basis of purchasing habits and digital preferences is common place, but the opportunity is for organisations to identify patterns within patterns and pinpoint customer intent.

2. Deeper connections to customers to win their loyalty

   In exchange for loyalty, customers want brands to know them better. Through the proliferation of smartphones and social media, we are in a world where everyone is connected to everyone else through technology. We are in a new economic era in which all businesses must orchestrate memorable events for their customers, and that memory itself becomes the product – the experience.

3. Smart technology for uber performance

   A key challenge, particularly in the sports segment, lies in providing higher integration of smart tech and the Internet of Things (IoT) to deliver enhanced monitoring and evaluation. According to a Deloitte report, “many teams are implementing IoT capabilities into their stadiums and organisations, but the solutions are often independent and don’t work together, preventing organisations from realising the full potential of IoT.” Innovation in sports tech is facilitating previously impossible levels of injury prevention and performance enhancement.
The companies that win in the 2020s will be designed to constantly learn and adapt to changing realities, combine artificial and human intelligence in new ways, and harness the benefits of broader business ecosystems.

BCG Henderson Institute, *The Science of Organizational Change*

**USA**

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**UK**

Epson glasses to make theatre more accessible for those with hearing loss. Custom voice-following software keeps track of exactly where the show is in the script. The software also uses lighting, sound and video cues to stay on track. Unlike projected captions, a synced transcript of the dialogue onto the lenses allows viewers to follow the lines in real-time, concurrent with the actors on stage.

**New ways to engage customers and fans**

**USA**

**ORB Innovations** UK based start-up has developed a mouthguard designed to detect head injuries instantly. The sensors measure half a million data points every minute via custom-made circuit boards and software. This is unique because it collects data in real-time on the pitch, providing advanced performance insights e.g. coaches can use the data to know when athletes are too tired to perform.

**ORB Innovations**

**Challenges**

Luxury Italian shoe brand Sergio Rossi has partnered with the Chinese, multi-purpose messaging, social media and mobile payment app WeChat to create a sense of privilege and personalisation for its Chinese customers. The specially-designed WeChat mini-program allows customers to design their own shoes – choosing the material, colour, length of the heel and customised lettering. Additionally, the campaign was conceptualised and launched by CuriosityChina, which develops platforms to integrate retail store information into WeChat.

**Sergio Rossi**

**Traditions**

UK-based startup provides unique experiences for sports fans (e.g. playing golf with former Manly Sea Eagles captain Steve Menzies, or traveling to a game with the Central Coast Mariners) while supporting charities at the same time.

**FAN+**

**Australian**

**Sports tech company STATS has** developed a system which uses a 50-hertz sampling frequency to allow coaches to monitor up to 100 players in real-time. The system includes GPS vests embedded with textile heart-rate sensors. During practice, the STATS GPS system allows coaches to receive real-time information on metrics. After practice, coaches can also use the STATS Dynamic online portal to have detailed session reports ready by the time players walk off the pitch.

**Aussie Soccer**

**New consumer behaviours & demands are the number one drivers of change**

**China**

Manchester City recognised China’s huge potential for market growth last year, with 60 percent of the population expressing an interest in football. In order to target this far-off demographic, they launched an online team for the FIFA esports series. This was a first for any other Premier League team. This virtual team could then compete in the Online Star League (OSL). Highly sought-after players, such as 2017’s Most Valuable Player Zhang Jun, and Anuya and Liu Chao, made the team.

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**USA**

**Grabb-it**

**Innovation in Action**

**From personalisation to hyper-personalisation**

**Switzerland**

**Mammut Sports Group AG** has released a new mobile app that uses near-field communication (NFC) technology to connect with its products. The Mammut Connect app will allow users with an NFC-enabled smartphone to scan chips embedded in their Mammut products to learn more about them. The app also acts as a built-in social platform allowing users to share photos, videos and maps of their outdoor adventures.

**Mammut Sports Group AG**

**Smart technology for uber performance**

**Germany**

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**Saarland University**

**New ways to engage customers and fans**

**USA**

**Major League Baseball (MLB)** and blockchain game studio Lucid Sight have teamed up to develop a blockchain game, MLB Crypto Baseball. It runs on the Ethereum blockchain and includes officially licensed, digital sports collectibles called Cryptos. Each Crypto commemorates well-known people or moments in baseball history.

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**Mammut**

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Appendix

Ten Innovations
GPS technology improves sports performance

A GPS-based monitoring system aims to improve athlete performance by measuring a wide range of metrics.

Sports tech company STATS has developed a system which uses a 50-hertz sampling frequency to allow coaches to monitor up to 100 players in real-time. The system includes GPS vests embedded with textile heart-rate sensors. The company claims it is one of the most advanced on the market.

During practice, the STATS GPS system allows coaches to receive real-time information on metrics. This information includes, accelerations, decelerations, energy expenditure, count of zone entries, and time, distance and power thresholds. After practice, coaches can also use the STATS Dynamix online portal to have detailed session reports ready by the time players walk off the pitch. The reports are fully-customisable and can include individual player summaries. Additionally, the information gives more than 300 different performance metrics, including cardiovascular metrics, running, and explosive and brake symmetry. The system also allows sports scientists to apply the results to historical data.

Takeaway: Access to the latest technology is vital for teams and conditioning coaches who are seeking to ensure that players stay at top levels of health and fitness. Supplying coaches with real-time performance information allows them to make in-the-moment decisions. In 2017 alone, injuries cost Premier League football teams more than £177 million. Products like STATS could help players and teams to avoid injuries by alerting them to potential physical issues before they become dangerous. The ability to monitor athletes ever-more closely could lead to better overall sports performance and save clubs money.

Website: www.stats.com
Contact: www.stats.com/contact
Football team goes virtual to attract fans

Fan engagement is taken online, as a UK football team creates their own virtual players to compete online.

Manchester City recognised China’s huge potential for market growth last year, with 60 percent of the population expressing an interest in football. In order to target this far-off demographic, they launched an online team for the video game, the Fédération Internationale de Football Association (FIFA). This was a first for any other Premier League team. This virtual team could then compete in the Online Star League (FSL). Highly sought-after players, such as 2017’s Most Valuable Player Zhang Jun, and Aruya and Liu Chao, made the team. All the players had strong FSL reputations, making them popular choices in this online tournament. The team also included two players chosen via a fan competition.

25 percent of esports players across the globe are from China, making it a strong choice for Manchester City’s focus. The club’s attention has been very much focused on spreading their fan base across the globe. The youth in China therefore represent a huge market opportunity that has as yet gone untouched.

Takeaway: According to a 2017 Red Card+ report, two-thirds of Chinese football fans who follow European teams intend to buy products from a football club’s official sponsor, while more than half consider sponsoring brands to be highly influential due to their partnerships with the clubs. This means that not only will clubs who expand into China have access to an enormous market, but brands associated with those clubs will be able to capitalise on this growth. This will include esports, which is expected to generate revenues of $210 million in 2019, making this the second-largest global region in terms of revenue. Linking sports and esports through China could create a generation of a globally engaged fan base.

Website: www.mancity.com
Contact: www.mancity.com/contact
Interface tattoo allows for tactile wearable computing

The world’s thinnest interactive surface could bring huge breakthroughs for the immersive technology sector.

Tacttoo is the result of research from the Human Computer Interaction team at the Saarland University. It functions as an ultra-thin interface that can pick up and give out electrical signals. It can lie directly on the user’s skin, much like an electric temporary tattoo. Its extreme lightweight features mean that it can function on various complex body geometries, including the fingertip. This makes it ideal for intuitive use in various forms of technology, including haptics and other immersive machines. It is also able to scale up to suit various body locations. Measuring less than 35μm, it breaks the record for thinnest tactile interface for wearable computing so far.

Tacttoo can maintain the same level of flexibility and sensitivity of standard skin whilst delivering high-density tactile output. This therefore allows for seamless integration into common activities. Immersive technology that relies on movement and skin contact could improve in responsiveness and accuracy with Tacttoo.

Takeaway: With sales of VR headsets forecast to grow by 54 percent in 2019 alone, and VR gaming predicted to be worth $4 billion that same year, consumers will soon be looking for advances that make VR more realistic. Innovations like Tacttoo could help deliver this by allowing VR haptics to be integrated seamlessly into a wide array of immersive activities. Instead of cumbersome suits or gloves, Tacttoo could allow haptic elements to ‘feel’ more realistic, and perhaps be integrated into everyday life.

Website: www.saarland-informatics-campus.de
Contact: info@saarland-informatics-campus.de
Location based ads on rideshare car windows

A company has created a device that can transform car windows into digital screens and display ads to anyone outside.

Grabb-It is a location based advertising platform that can convert a car window into a digital screen. It offers brands an ‘always on’ advertising platform as the ads cannot be switched off, skipped or hidden. The device also offers high levels of reach as its advanced online platform lets brands hyper-target a specific audience. Campaigns can be scaled for a demographic or a specific area. As campaign prices are flexible, brands can choose to run their campaigns for any period of time, from one night to one year. Ad content can also be updated at any time.

Grabb-It also offers real-time analytics, letting brands track their campaigns and view impression counts. It does so using Wi-Fi beacon technology from mobile phones within the vehicles range. Grabb-It is free and easy to install on windows for ridesharing drivers. The ads can be viewed day and night and the device fits any car window. In addition, Grabb-It offers drivers an additional source of income.

Takeaway: Grabb-It offers advertisers a dynamic digital OOH (out-of-home) solution to reach consumers near the point of purchase. OOH is an expansive category, and today represents spending of about $29 billion across key markets around the world. OOH ads appeal to advertisers because they are unblockable. Research has shown that consumers are more likely to click on a mobile ad if they have been exposed to an OOH ad first. Placing OOH ads in novel locations, such as car windows, also helps to draw consumers’ attention. The technology used here could eventually be expanded to other types of windows or spaces.

Website: www.grabb.io
Contact: contact@grabb-it.io
A shoe brand is using a messaging app to add direct-to-customer personalisation online while also engaging with millennials and Gen Z luxury consumers.

Luxury Italian shoe brand Sergio Rossi has partnered with the Chinese, multi-purpose messaging, social media and mobile payment app WeChat to create a sense of privilege and personalisation for its Chinese customers.

The specially-designed WeChat mini-program allows customers to design their own shoes – choosing the material, colour, length of the heel and customised lettering. Additionally, the campaign was conceptualised and launched by CuriosityChina, which develops platforms to integrate retail store information into WeChat.

As customers experiment with different options, they can also see in real-time how their choices affect the price of the shoe. Users can change their options as often as they like. When customers are finished, the program allows them to view a 360-degree preview of the completed design. This is important, as there are no refunds on the customised shoes, and they cannot be returned. When customers are satisfied with their design, they can pay via the WeChat mini-program, and even use the app to share their purchase on social media.

Takeaway: The direct-to-consumer trend is growing rapidly in a wide number of markets, in addition to China, especially among luxury brands and with digital-savvy customers. According to Forbes, direct-to-consumer sales now represent more than 13 percent of all e-commerce. By connecting direct-to-consumer with social media apps like WeChat or Instagram, companies can reach customers where they spend the most time, as well as add a greater level of personalisation. Apps like this could also be used for a variety of products, such as selling media content tailored to individual tastes and likes.

Website: www.sergiorossi.com
Contact: www.sergiorossi.com/contact-us
Outdoor clothing brand uses NFC technology to digitise products

An outdoor equipment maker is using NFC technology to connect users with their products.

Outdoor equipment maker Mammut Sports Group AG has released a new mobile app that uses near-field communication (NFC) technology to connect with its products. The Mammut Connect app will allow users with an NFC-enabled smartphone to scan chips embedded in their Mammut products to learn more about them. Mammut claims it is the first outdoor brand to use NFC chip-reading technology in this way. The app also acts as a built-in social platform allowing users to share photos, videos and maps of their outdoor adventures. In addition to its other features, the app will also include videos and news relating to Mammut-sponsored professional athletes.

Swiss-based Mammut is hoping its new app will resonate with customers who want to communicate more with the brands they use. According to Mammut CEO Oliver Pabst, Mammut is building an entire ecosystem. “With Mammut Connect — a broad portfolio of real customer added value — we are creating an innovative platform and underlining our ambition to become digital leaders in the outdoor sector.” Pabst points out that customers today have much more concrete demands and want to actively contribute and give feedback.

Takeaway: Mammut’s use of NFC technology blends the offline and online worlds in order to digitise the entire retail experience. When customers use the app, they become part of a wider digital community, which provides a unique experience and aids in brand loyalty. The same technology could be used in other types of products, in order to combine the physical and digital spaces. This approach could also offer sports and media companies the opportunity to collaborate on developing mixed offerings, such as football gear that connects to team apps.

Website: www.uk.mammut.com
Contact: www.uk.mammut.com/contact
Partnership pioneers cryptocurrency baseball game for sports fans

A partnership has developed the first blockchain game based on a global sports league with an aim to boost fan engagement.

Major League Baseball (MLB) and blockchain game studio Lucid Sight have teamed up to develop a blockchain game, called MLB Crypto Baseball. The game runs on the Ethereum blockchain and includes officially-licensed, digital sports collectables called Cryptos. Each Crypto commemorates well-known people or moments in baseball history. Using blockchain ensures that each MLB Crypto is unchangeable and only has a single owner at any one time. This gives them the same rarity as a traditional physical collectible.

As in the hugely popular blockchain game CryptoKitties, players compete to acquire Cryptos, as well as abilities and upgrades for the Cryptos. The Cryptos can also be sold or traded within the game. The game developers are hoping to attract players who are not already familiar with blockchain or using Ethereum, especially young players. The game has been rolled out in stages so that people can get used to the concept.

Takeaway: This MLB game could well bring the use of blockchain and cryptocurrency into the mainstream of sports memorabilia collectibles. At the same time, the implementation of blockchain could be extended to other sports and entertainment uses. Other uses of blockchain that are currently in the works include securing ticket sales and preventing scalping; decentralising ticket resales and ticket sharing. Blockchain technology could also ensure the authenticity of official sports brands and allow ordinary people to invest in up-and-coming players in exchange for a share of their future earnings.

Website: www.mlbcryptobaseball.com
Email: contact@lucidsight.com
Smart caption glasses sync with theatre shows

New software allows smart caption glasses for the hearing impaired to sync up exactly with theatre performances.

There have been a number of innovations aimed at people with hearing loss, including a system that translates between sign language and spoken English. However, it can still be difficult for those with hearing loss to attend the theatre. Captioning and sign language interpretation is not available at all shows, and can be difficult to see from all seats. Now, the National Theatre (NT) in London is pioneering a way to make theatre more accessible with captioning smart glasses.

The Epson glasses use custom voice-following software to keep track of exactly where the show is in the script. The software also uses lighting, sound and video cues to stay on track. Unlike projected captions, a synced transcript of the dialog onto the lenses allows viewers to follow the lines in real-time, concurrent with the actors on stage. The size, colour and position of the typeface seen by the user can also be set before the show starts.

The project was developed in an ongoing collaboration between the NT’s technical team and speech and language experts at the University of Roehampton.

Takeaway: The software used in smart caption glasses can be adapted to other forms of entertainment. For example, they could be used at sporting matches to provide play-by-play commentary in real-time, or for movies or concerts. The improved accessibility could in turn boost revenue for a wide variety of entertainment and give people more choice and freedom about when and how they access entertainment of all types.

Accessibility features in products and services can lead to multiple benefits removing architectural, digital, and social barriers that can often get in the way of innovation.

Website: www.nationaltheatre.org.uk
Email: boxoffice@nationaltheatre.org.uk
UK

Smart mouthguard helps athletes improve performance and safety

Sensors in the mouthguard collect data on performance and injuries

UK-based startup ORB Innovations has developed a smart mouthguard to improve athlete performance and reduce injuries. The ORB smartguard uses sensors to collect biodata in real-time. It fits in an athlete’s mouth like a regular mouthguard. The difference is that it uses custom-made circuit boards and software to collect data on an athlete’s performance. The sensors measure half a million data points every minute.

It is designed for rugby but monitors three factors that affect all athletes: fitness, fatigue and effort. The smartguard is unique because it collects data in real-time on the pitch. Coaches can use the data to know when athletes are too tired to perform. Data could also help identify concussions at the point of occurrence on the pitch as well as predict and help prevent stress-induced injuries.

Takeaway: Concussions account for 25 percent of all injuries in contact sports. Despite the magnitude of the problem, there is still no accurate way to identify a head injury at point of occurrence on the playing field, according to ORB Innovations. The smartguard aims to change that by collecting biodata from athletes in real-time. That insight should help sports bodies improve the welfare of players. Smartguard underscores the growing role of smart technology in sports. A report by Deloitte found sports teams are increasingly using smart technology and the Internet of Things to develop players, improve player safety and increase fan engagement.

Website: www.orbinnovations.com
Contact: info@orbinnovations.com
Startup offers sports fans unique experiences

A new company offers sports fans the chance to have unique experiences with sports teams and personalities.

A Sydney-based startup is aiming to provide unique experiences for sports fans, while supporting charities at the same time. FAN+ offers experiences such as playing golf and eating lunch with former Manly Sea Eagles captain Steve Menzies, and traveling to a game with the Central Coast Mariners.

FAN+ acts as a centralised marketplace to connect fans with sporting clubs, athletes and sports personalities. The company was co-founded by Rod Harys, former boss of the National Basketball League’s Sydney Kings. Harys came up with the idea while seeing how desperate fans were to connect with their favourite athletes.

FAN+ works with charities and community organisations in Australia and New Zealand to raise funds through the purchase of experiences. Any supplier to FAN+ can also donate a percentage of the sale back to their nominated charity or foundation. Experiences vary widely in price, with some experiences as low as 250 AUD. The startup takes a 30 percent cut of all sales, and most experiences are valid for 12 months from the date of purchase.

Takeaway: For clubs and personalities, FAN+’s centralised marketplace offers a new revenue stream and an extension to their sales teams. Although FAN+’s target market is people who are willing to pay a premium fee for the experience of a lifetime, the same model could be extended to other activities and market segments. For example, a chance to see how a favourite product is manufactured, or how a video is shot. The marketplace concept could also be expanded globally, to sell sports experiences around the world, perhaps in collaboration with travel companies.

Website: www.fanplus.com
Email: info@fanplus.com
Conclusions and takeaways

Effectively adapting to changing consumer and fan demands, more quickly and efficiently than the competition, defines winners and losers.

What our findings underline is an upbeat attitude to these changing times, especially among those that consider themselves to be the disruptors. Leaders in the media and entertainment sector are more emboldened by the opportunities than fearful of the threats.

Technology is no doubt a vital enabler, in this context, but leadership and talent remain the most important ingredients of success. While the CEO and Board must lead from the front, they need the right technical capability in their C-suite to support and execute the vision.

The challenge for leaders is how to continually innovate – to embrace ‘creative destruction’, identified by Richard Foster at Innosight in 2012, or become a victim of it. As WeChat demonstrates in the ‘Innovation in Action’ section of this report, even an agile start-up has to work hard to create and maintain the culture, mindset and environment where innovation can flourish. Otherwise, it risks becoming just another big business stuck in time, prone to an inevitable outcome of Darwinism: extinction.

“If you don’t put yourself out of business, someone else will.”

Jim Cavale
CEO, INFLCR
# Ten Tenets for Successful Innovation

SRI has curated Ten Tenets for successful innovation, which are intended as a start point for discussion.

<table>
<thead>
<tr>
<th>Tenet</th>
<th>Description</th>
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<tbody>
<tr>
<td>1. Lead from the top</td>
<td>With the right senior management team. How often is innovation on the Board meeting agenda?</td>
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<tr>
<td>2. Disrupt</td>
<td>Regardless of where your business is on the maturity curve. What are you doing to create the next big idea?</td>
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<tr>
<td>3. Cross-pollinate</td>
<td>Across teams in your organisation and between your business and other businesses. How are your marketing and IT teams encouraged to collaborate to create new ideas, for example?</td>
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<tr>
<td>4. Staff for tomorrow</td>
<td>What are the skills you need in your business to succeed in 2020?</td>
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<td>5. Fail fast</td>
<td>Does your culture encourage or even allow calculated risk taking?</td>
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<tr>
<td>6. Cultivate diversity of thought</td>
<td>Beyond gender. Beyond race. Are you blending styles, socio-economic backgrounds to prevent group-think?</td>
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<tr>
<td>7. Take technology off the pedestal</td>
<td>How are you ensuring people reign supreme in your organisation? Especially in tech businesses.</td>
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<tr>
<td>8. Growth mind-set</td>
<td>Is your team continually learning?</td>
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<tr>
<td>9. Be agile</td>
<td>Is your business structured to flex?</td>
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<tr>
<td>10. Future focus</td>
<td>How are you anticipating future customer demands and trends?</td>
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Contact SRI

Our team work collaboratively across the globe within media, content, technology, sports, esports, and sporting goods & fashion sectors.

Reach out to our team who can advise on a wide range of talent issues.

Europe

Jim Chaplin
CEO
London
jchaplin@sriexecutive.com
+44 (0)7827 828 874

Mike Squires
Chairman
London
msquires@sriexecutive.com
+44 (0)7990 581515

Paul Chidley
MD, SRI Connect
London
pchidley@sriexecutive.com
+44 (0)7432 735 900

David James
Partner, Core Sport
London
djames@sriexecutive.com
+44 (0)7808 639 563

Chris Jordan
Partner, Esports
London
cjordan@sriexecutive.com
+44 (0)7827 345 758

Alistair Milner
Partner, High Performance
London
amilner@sriexecutive.com
+44 (0)7500 105 208

Mark Moreau
Partner, Digital, Technology, Media
London
mmoreau@sriexecutive.com
+44 (0)7826 555 550

Ashling O’Connor
Partner, Digital, Technology, Media
London
aoconnor@sriexecutive.com
+44 (0)7824 821 000

Patrick Albrecht
Partner, Sporting Goods & Fashion
Lausanne
palbrecht@sriexecutive.com
+41 (0)78 612 54 83

North America

Jay Hussey
CEO, North America
New York / Boston
jhussey@sriexecutive.com
+1 650 787 3075

Keith McAllister
Partner
New York
kmcallister@sriexecutive.com
+1 646 732 3175

Glenn Horine
Partner, Sports
New York
ghorine@sriexecutive.com
+1 203 814 7307

Christine Venditti
Partner
Boston
cvenditti@sriexecutive.com
+1 650 906 6092

Jamie Waldron
Partner, Media & Entertainment
Los Angeles
jwaldron@sriexecutive.com
+1 310 924 2960

Asia-Pacific

Helen Soulsby
Head of APAC
Singapore
hsoulsby@sriexecutive.com
+65 9061 1411

Jonathan Harris
Partner
Sydney
jharris@sriexecutive.com
+61 (0)413 939 993

Josie Lahey
Partner, Sport
Melbourne
jlahey@sriexecutive.com
+61 (0)478 803 255

Tom Watterson
Head of Hong Kong
Hong Kong
tomwatterson@sriexecutive.com
+852 9335 5915

Zhaolong Liang
Senior Consultant
Beijing
zliang@sriexecutive.com
+86(0) 1891 025 1737
SRI

SRI is an executive search and talent consulting firm focused on shaping the futures of clients and candidates across the media, content, technology and sport landscape. We have deep expertise in these dynamic, disrupted and increasingly interconnected sectors.

We partner with our clients to find the game changing talent that will help them thrive. SRI has worked with a broad range of companies from content owners to fast growth consumer technology disruptors to shape their businesses.

Our services include executive search, emerging leaders search, hiring strategy, board assessment, succession planning, salary benchmarking, new market entry consulting and multi-vacancy projects.

Find out more at sriexecutive.com

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