



Her Love of the Game.

A Global Overview of
Female Sport Fandom

2024



WASSERMAN
THE COLLECTIVE

Are We Overlooking the Power of Female Sports Fans?

Out of approximately 1B females across our 30-country sample, our research shows there are approximately

684M fans of female sports

a **10% increase** over the past three years, creating a rapidly growing fan base for brands and rights holders.

With increased media consumption and distribution with this notably influential consumer group, we set out to explore the economic potential of this demographic, highlighting how their unique engagement and consumer behaviors are pivotal for shaping marketing strategies and media offerings.

Our research delves into the nuances of female sports fandom across both men's and women's sports leagues and events by analyzing data from 30 countries, to shed light on key trends, behaviors, and opportunities within this critical target market. Our data is comprised of more than 35,000 respondents across six continents, representing approximately 2 billion global consumers.

Defining Female Fans of Sport

This report focuses on females around the world who are fans of any sport. While we prefer to use the term “woman” over “female,” we are using “female” in this case to differentiate between female fans of all sports (men's or women's) and fans of only women's sports competitions (“the female sports fan” vs. “women's sports fans”).



Level Set.

The importance of understanding female fans of sport cannot be overstated - and while the world's eyes are opening to the power and vitality of women's sports, the big picture for global growth demands a greater understanding about how the perspectives, behaviors and purchase decisions of female fans can unlock the potential of all areas of sports - for people and leagues of all genders.

This insight becomes even more crucial as female consumers not only shape the future of sports but also wield substantial influence over the global market with their purchasing power.



Right now, **women** make up
4 BILLION
people of the world's population.

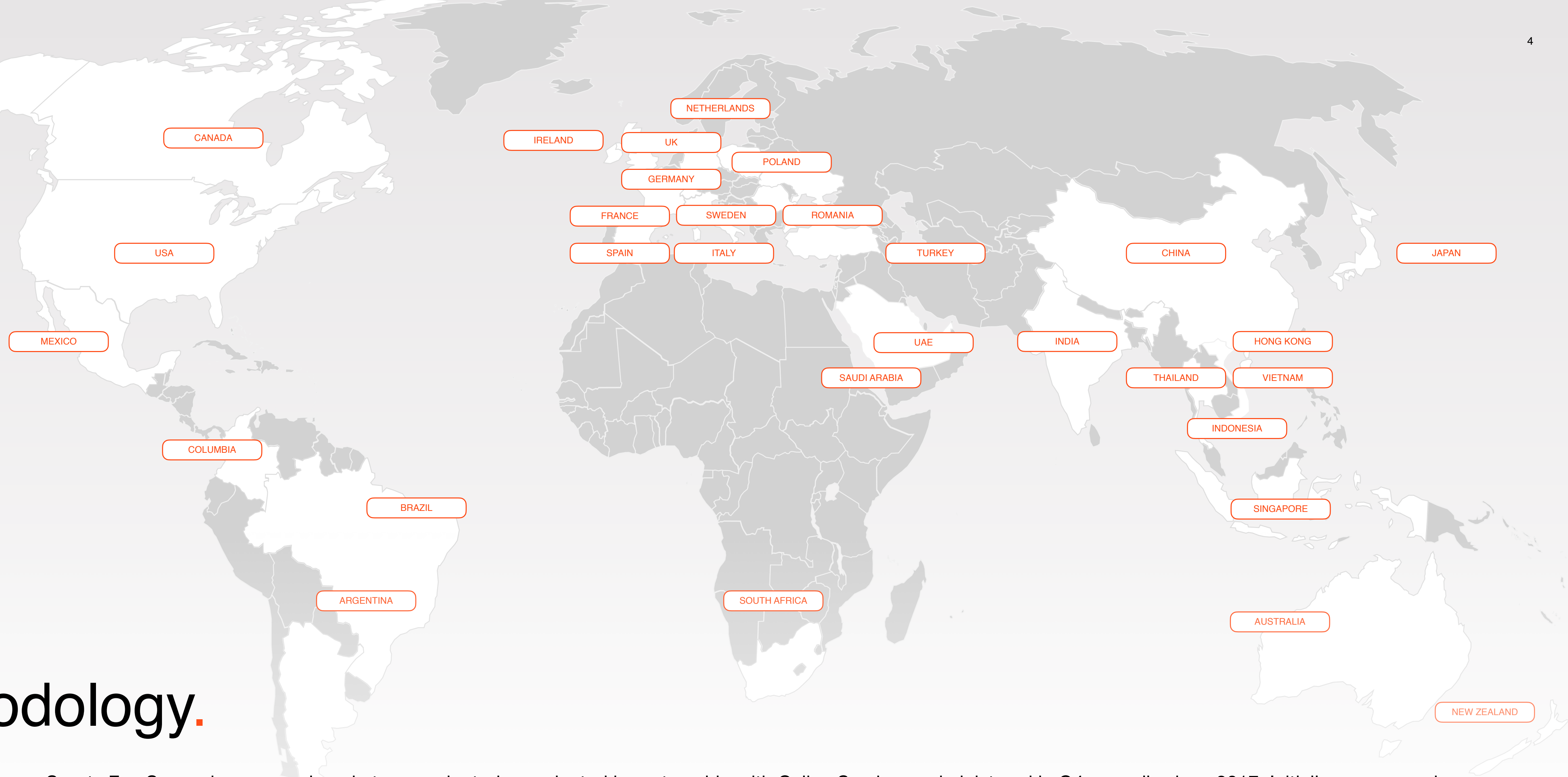
With
\$31.8 TRILLION
of today's discretionary spending in their control, they are emerging as the most powerful set of consumers in the global economy.

It is projected that by 2028 women will control
75% of the world's discretionary spending
leading brands, rights holders and governments to sit up and take serious notice.

With significant global shifts in technology, political landscapes, and economic conditions, we continue to reflect on **five key elements** that resonate with female consumers, particularly those in the Gen Z and Millennial generations.

- | | | | | |
|--|--|--|---|--|
| 1 | 2 | 3 | 4 | 5 |
| On Demand | On Purpose | For Her | For All | For the Better |
| The world needs to serve her on demand with personalized, anticipatory service | She often bases her purchasing decisions on her values | She wants to feel individually seen and acknowledged | But she wants it to also feel inclusive | She is committed to the improvement of herself and the environment |

Source: The Collective New Power Players (2020)



Methodology.

The Wasserman Sports Fan Survey is an annual market research study conducted in partnership with Calico Services, administered in Q4 annually since 2017. Initially encompassing 18 countries, the survey expanded in 2023 to include 30 major global economies, with a total sample size of 35,563 respondents - representing a global population of approximately 2 billion individuals.. Participants are sourced from pre-existing panels managed by third-party providers, with samples weighted according to the adult (18+) population in each country, employing interlocking quotas based on age and gender in alignment with United Nations data.

The survey covers interest in 40 spectator sports and over 230 events and consumer demographics, sports participation, and purchasing behaviors across various product categories. Furthermore, data from the Global Web Index (GWI), collected in Q4 2023 and comprising responses from 34,000 individuals across 18 countries, is leveraged to enhance the analysis, offering a comprehensive and nuanced view of global sports fandom.



01

Passionate Fandom: The Core Identity of Female Sports Fans

It starts with **HER IDENTITY** as a sports fan.

The surging presence of women as sports fans is a major economic force that deserves close attention and thoughtful engagement. At the heart of this shift is the concept of identity, which significantly shapes consumer behavior. Women's identities as sports fans are dynamic - constantly evolving to influence their preferences, values, and behaviors throughout their lives.

The majority of women around the world —*nearly three out of four*— see themselves as serious sports fans. For a quarter of them, sports aren't just entertainment; they're a key part of who they are. This strong sense of being a fan shapes everything from the games they watch to the products they buy, making their interests a big deal for brands and rights holders in the sports world and beyond. Understanding what drives these women as fans can help organizations better cater to a powerful audience, resulting in growth for commercialization efforts across the ecosystem.



72%

of women globally identify as **avid fans** of one or more sports

1/4

of female fans of sport globally agree that following my favorite sports is one of the **most important** things in my life

And impacts **HER VALUES.**

The values held by female fans of sport are far more than personal preferences; they represent a powerful call to action for rights holders and brands looking to tap into this influential market. Female sports fans consistently prioritize brands that demonstrate integrity and social responsibility, showing a clear alignment with companies that champion positive change both on and off the field.

These fans are drawn to brands / rights holders that lead the way in promoting inclusivity, sustainability, and community impact. For brands, consideration of aligning with these values is beneficial for capturing their loyalty and engagement.

Female Fans of Sports...



favor brands that demonstrate they

care about **the environment**

32% female fans of sport vs. 29% men



favor brands that demonstrate they are

socially responsible

30% female fans of sport vs. 27% men



are more likely to buy from a brand that supports

something they care about

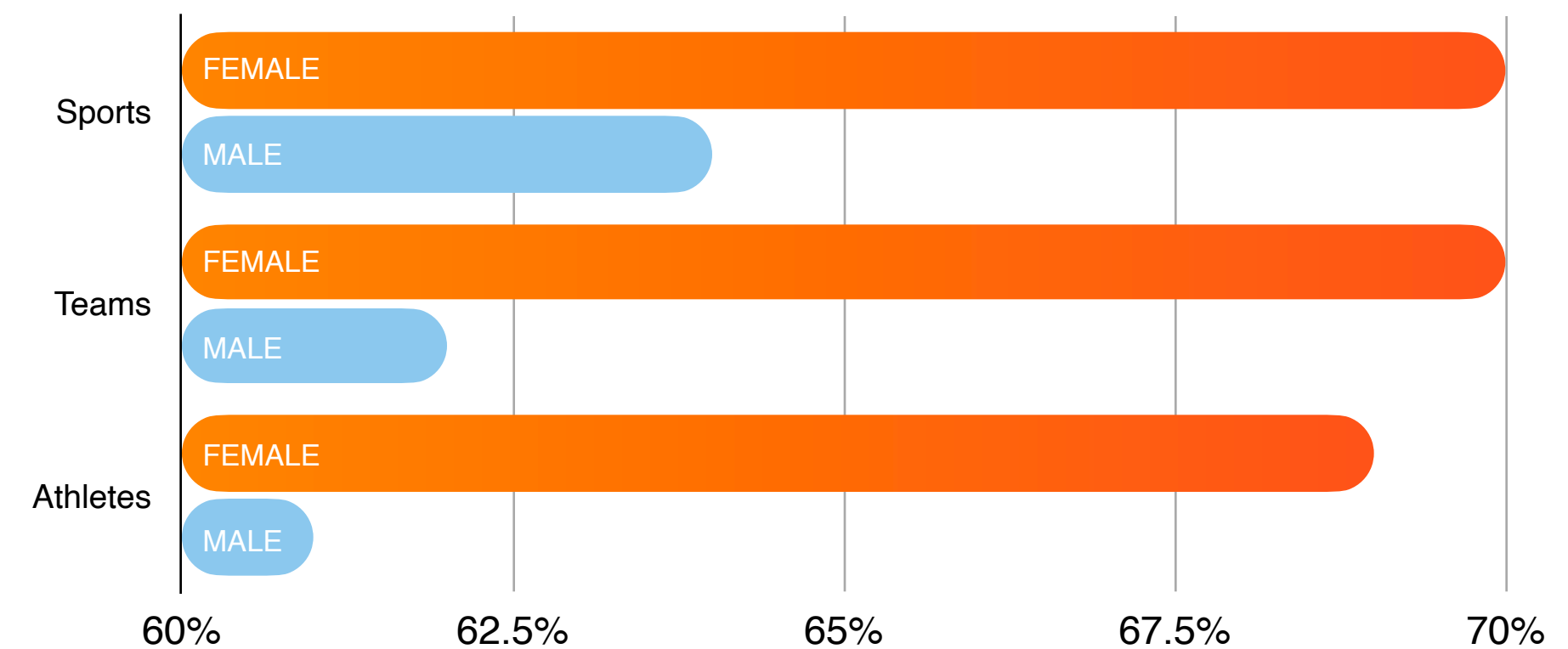
29% female fans of sport vs. 28% men

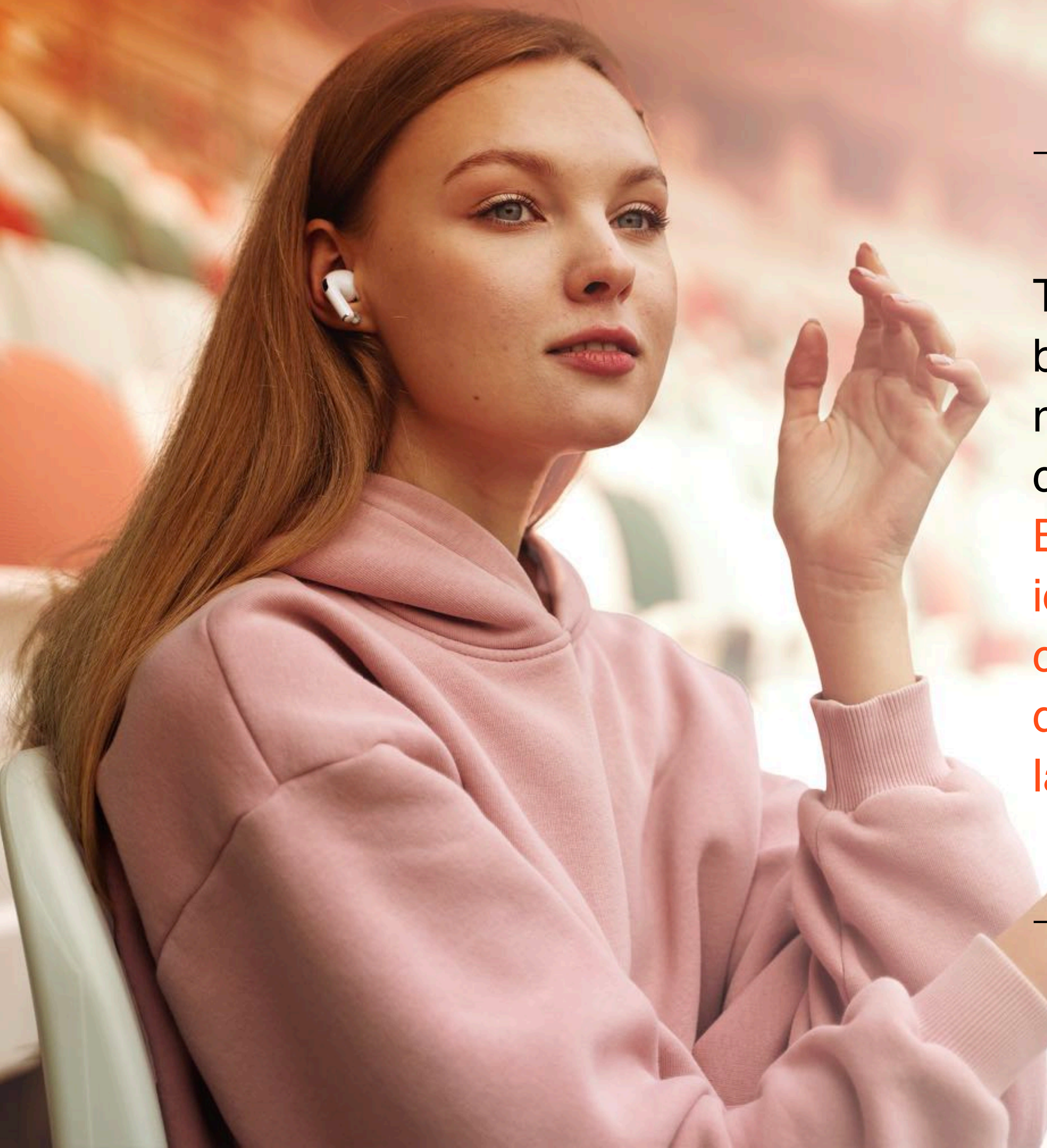
Female Fans of Sports...



Are more likely to believe that

teams, leagues, and athletes **should support social causes**





To engage female sports fans authentically, brands must integrate these values into their marketing strategies, demonstrating a genuine commitment beyond sports.

By aligning with the unique and evolving identities of this global demographic, brands can create resonant strategies that build deeper, more meaningful connections and earn lasting loyalty.

Case Study:

FC Barcelona x International Women's Day

With the slogan “Equality is in Our Colors. Empowering Future Generations,” the Club launched a dynamic campaign that pushed the boundaries of socially aware marketing, showing the power of aligning with female fans’ values. In collaboration with Catalan designer and devoted blaugrana supporter María Escoté, the Club unveiled an exclusive unisex T-shirt designed to champion equality and inspire the younger generation. This powerful symbol of solidarity made its debut across key games in March at Estadi Olímpic Lluís Companys, Estadi Johan Cruyff, and Palau Blaugrana, visually reinforcing the Club’s commitment to gender equality in football.

The Highlights

The initiative gained further momentum as major Club partners, including Nike, Spotify, and Estrella Damm, adopted the ‘Lila Barça’ color in their advertising, showcasing their alignment with the cause on LED pitch-side boards during matches. The campaign’s impact extended beyond the stadiums, with all proceeds from the sale of a specially designed tote bag going directly to CF Tramontana La Mina to support neighborhood girls’ participation in sports.

The Impact

The “Equality is in Our Colors” campaign stands as a blueprint for how rights holders can authentically connect with female fans by driving socially conscious messages into the heart of sport. By transforming high-profile games into platforms for equality and empowering the next generation, the Club not only raised awareness but set a precedent for the industry to follow, demonstrating that inclusive marketing isn't just an option—it's a powerful strategy to engage fans and drive change.

02

Redefining the Arena: Unpacking Female Sports Fan Consumption



Female fans of sport crave more than just game-day action; **they seek storytelling, enhanced athlete engagement, and more accessible viewing experiences.**

Viewing sports is a social activity rooted in community, where the narratives around teams and athletes are as valued as the competitions themselves. Tapping into this multifaceted fandom means delivering content that fosters emotional connections and facilitates social interactions - crucial for engaging this influential demographic effectively.

The #1 way that global female sports fans consume sports...

is **at home** with **friends and family** (44%)

suggesting that fandom is as much about social connections as it is the game itself.



When engaging with their favorite sports, female sports fans **seek content and experiences** *beyond* on-field action.

31% feel that availability of more content beyond games would increase their interest in a sport

(+6pp more likely than global male sports fans)



Female fans enjoy the full experience at **live sporting events.**

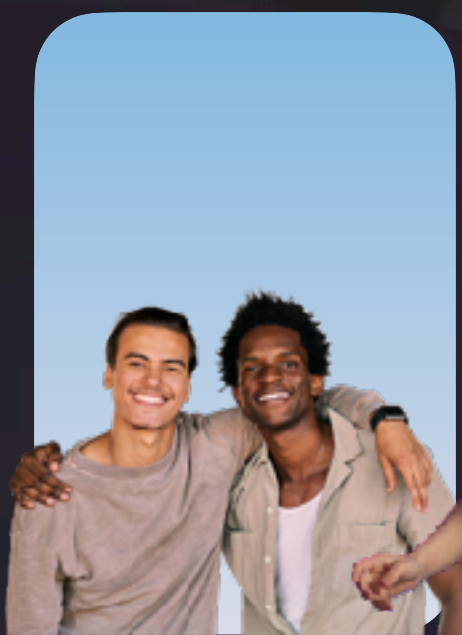
Even though only 22% of female sports fans attend live professional sporting events, those who do are significantly more engaged with the surrounding sportscape, and are more likely to visit fan zones, interactive experiences, and branded activations. They are also more likely than male sports fans to participate in event-related activities, explore brand offerings, and engage deeply with the overall atmosphere, enhancing their connection to the sport and the brands involved.

Female sports fans are **16%** more likely to....



notice **branded experiences/ pop-up shops**

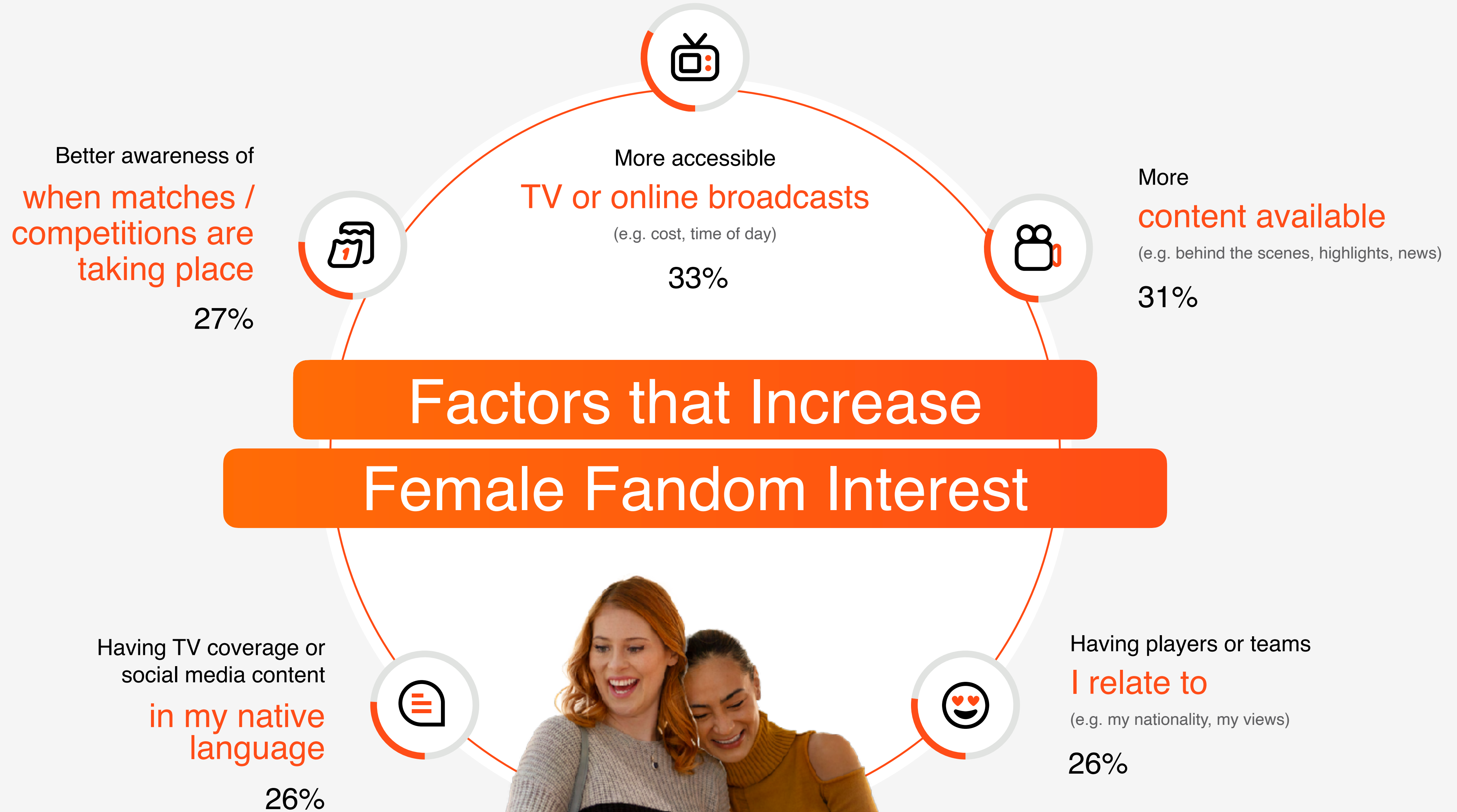
at sporting events



Female sports fans are

9% more likely

to have visited **experiential spaces or fan zones** at sporting events



Case Study:

ESPN's Creator Network

In February 2024, ESPN launched the second iteration of its Creator Network program with an all-female roster of emerging sports content creators, furthering ESPN's commitment to amplifying diverse voices in sports media.

ESPN's Creator Network is designed to engage younger audiences through social media by offering emerging female sports creators access to ESPN's sports properties.

The Highlights

The 2024 campaign featuring all women elevates females as valid sport content creators and "super fans" across events such as the NFL Draft, NBA Finals, the ESPYs, and Women's Final Four, among others.

The Impact

The ESPN Creator Network's all-female lineup ensures that the female perspective and voice is prominently featured, resonating with female fans seeking content that reflects their experiences. By including diverse female creators covering major sports events, the program provides varied and engaging content that aligns with fans' passions. The involvement of these emerging creators fosters authenticity and relatability, as they create content that understands and shares the interests and challenges of their audience.



ESPN

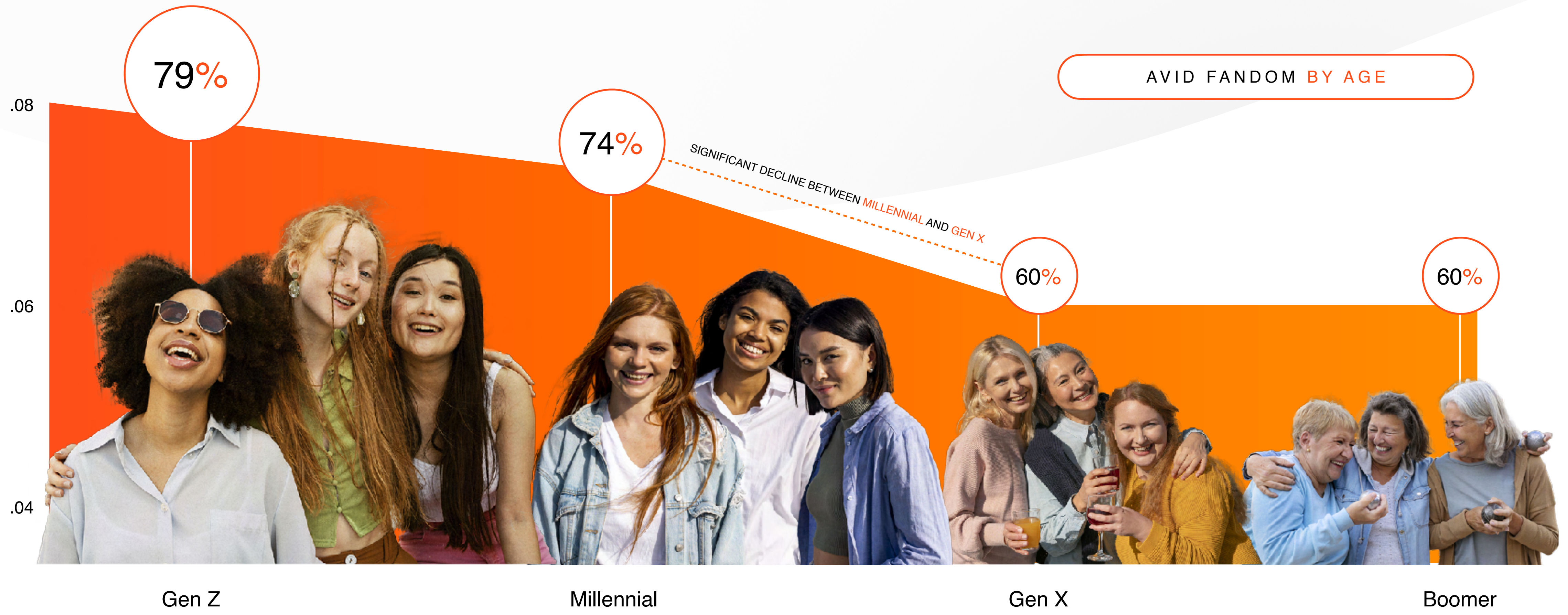
03

Bridging the Gap: Reaching Female Sports Fans Across Generations



Generational Fandom of Sports

Female sports fandom varies significantly by generation, revealing different interaction and celebration methods. Globally, as female fandom grows, younger, more passionate fans are reshaping sports consumption and engagement. Social, cultural, and technological shifts drive these differences, with younger fans displaying more avid sports enthusiasm than older ones.



Source: GWI (2023)

Female sports fandom varies by generation, revealing **different habits and preferences** around sports engagement.



GEN Z

1997 - 2012

HOLD SPORTS ORGANIZATIONS TO A HIGHER STANDARD

1.3x

More likely than other generations to agree that sports is too male dominated

1 in 4

Gen Z women sports fans believe sports organizations and athletes should take a stand against social issues



MILLENNIALS

1981 - 1996

MOST LIKELY GENERATION TO ATTEND SPORTS EVENTS AND MOST RECEPTIVE TO SPORT SPONSORS

1 in 4

Watch sports events in person

65%

Agree that companies that sponsor their favorite sports or teams improve their image

63%

Have become aware of new brands because of a sponsorship of their favorite sports or teams



GEN X

1965 - 1980

PREFER LIVE, TRADITIONAL SPORT BROADCASTS

1.3x

Less likely than other female sports fans to stream content while on the go

75%

Prefer a continuous live broadcast of one competition instead of "whip-around" live sports coverage that lets them keep up with multiple games at once (U.S. market)



BOOMER

1955 - 1964

HIGHLY VALUE THE ROLE OF SPORTS IN SOCIETY

51%

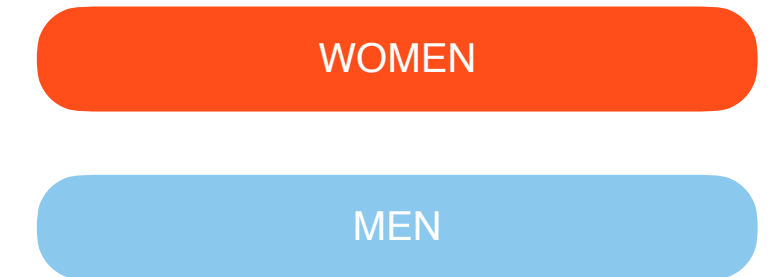
Agree sports bring people from different backgrounds together, 1.1x more likely than other generations

47%

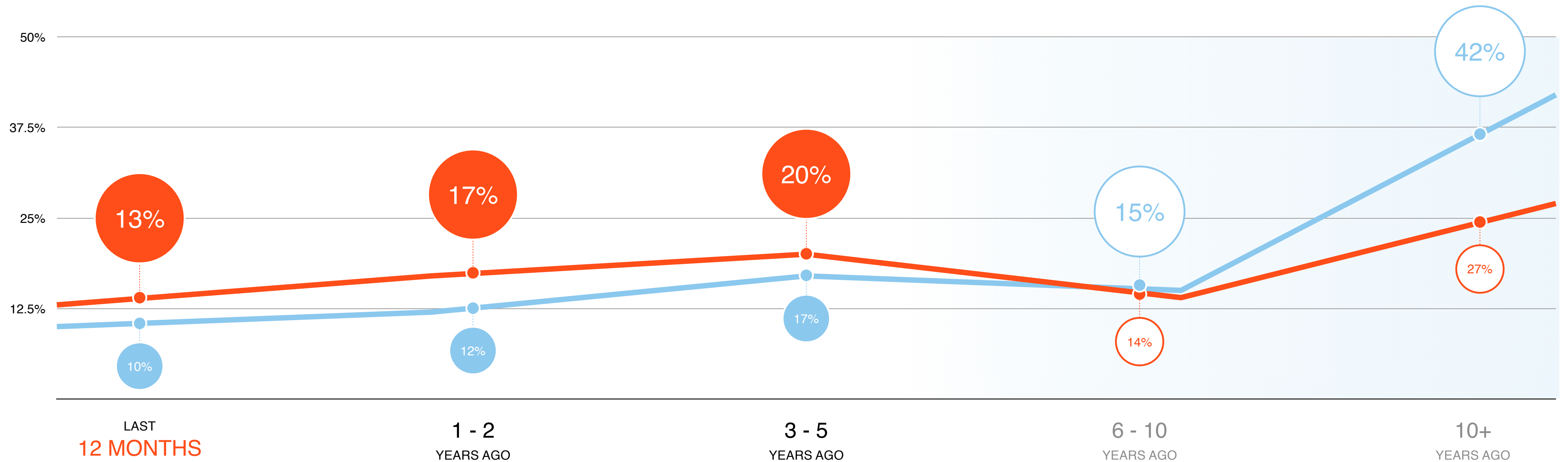
Agree sports is culturally important

As sports and sports culture become **more accessible**, women are emerging as a key growth segment in sports fandom.

Data reveals a shift in how younger generations, particularly females, are becoming sports fans. Unlike male fans, who typically develop their interest in sports over many years, women are embracing sports fandom more rapidly, with their numbers increasing significantly. This recent surge in female sports fans signals a need to rethink how sports are consumed, talked about, and marketed.



WHEN FANS **FIRST STARTED** FOLLOWING THEIR FAVORITE SPORT



Source: Wasserman Global Sports Panel (2023)

Case Study:

From Gridiron to Grand Prix: F1 and the NFL's Evolution in Attracting Female Fans

Over the past decade, the landscape of sports fandom has shifted dramatically, with notable growth in the number of female fans engaging with traditionally male-dominated sports like Formula 1 (F1) and the National Football League (NFL). This surge in female fandom is not only reshaping the fanbase of these leagues but is also prompting brands, media, and the sports themselves to evolve and cater to this influential demographic.

F1

Formula 1 has seen a remarkable increase in female fans, driven in part by the Netflix series *Drive to Survive*, which brought the sport's personalities and behind-the-scenes drama to a wider audience. Since the show's debut in 2020, female viewership has grown by nearly 30%, especially in key markets like the United States, the UK, and Latin America.

F1's commitment to diversity through initiatives like "We Race As One," increased visibility of women in key roles, and engaging social media content has further attracted female fans. This evolution has transformed F1 from a niche motorsport into a broader cultural phenomenon, engaging women who connect with the sport's stories, strategy, and personalities.

NFL

The NFL has experienced significant growth in viewership among multi-generational female sports fans, highlighting the league's expanding appeal to women. Overall NFL viewership grew by 7% year-over-year in the 2023-24 season, with notable increases among females aged 12-17, who saw an 8% rise. Super Bowl LVIII set a record with 58.8 million female viewers, a 9% increase from the previous year, with more than half of these viewers under the age of 35.

Early 2023 "Sunday Night Football" broadcasts saw dramatic spikes in female viewership, including a 53% increase among teen girls, 24% among women aged 18-24, and 34% among women over 35. These trends reflect a variety of cultural convolutions like the impact of Taylor Swift, as well as the NFL's efforts of increased storytelling content and attention to highlighting women in all aspects of the game.

This emerging interest in sports **among women** presents a significant opportunity for **brands to build loyalty with a new fan base.**

As female fandom continues to evolve, the industry must adapt to meet these fans where they are—newly invested, highly engaged, and ready to support the teams, athletes, and brands that reflect their values.



04

Female Fans as Champions of Women's Sports



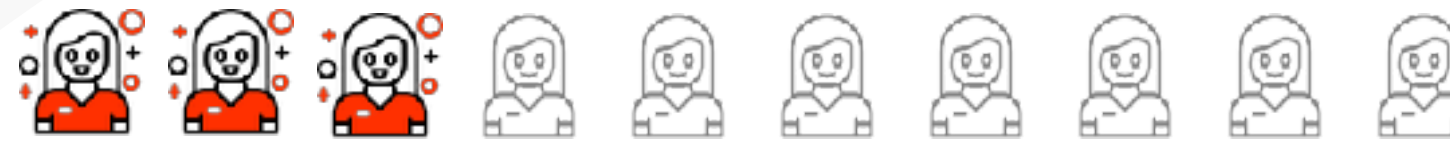
Tapping into the **Passion** of Female Sports Fans

While men's interest in women's sports is on the rise, female sports fans express a deeper commitment to the growth and investment in this space. Female fans of sport are strong advocates for increased investment in women's sports, actively supporting brands and initiatives that drive visibility and growth. Their commitment goes beyond fandom—they champion brands that back women's sports, recognizing the broader impact of such investments on the development and success of athletes, teams, and leagues.



27% of female fans of sport agree

they are more interested in women's sports
than they were **3 years ago** (vs. 23% of male sports fans)



58% of female fans of sport are

more likely to think positively of a brand
that sponsors women's sports, compared to 38% of male sports fans



34% of female fans of sport say they'd like to see

more brands become involved in women's sports
compared to 27% of men

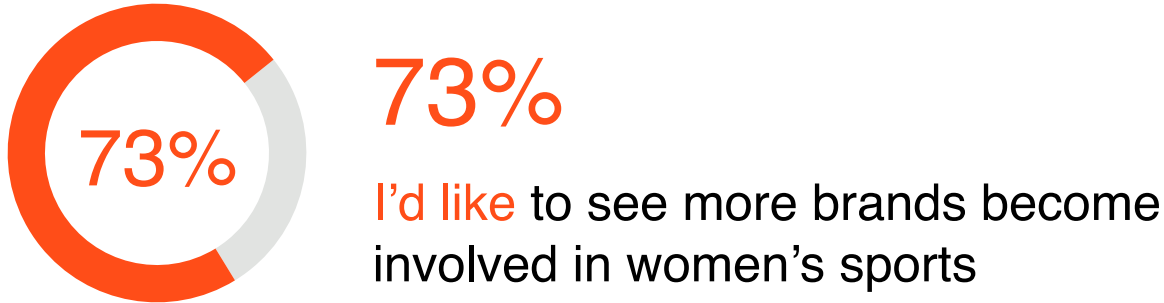


Source: Wasserman Global Sports Panel (2023), The New Economy of Sports (2023)

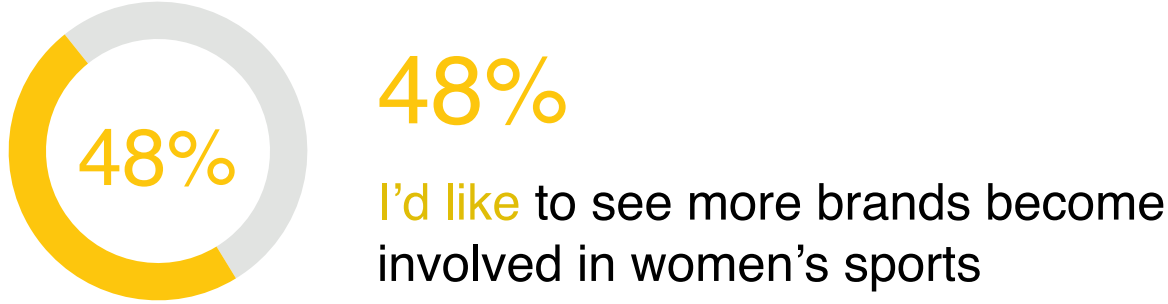
Female Sports Fan Attitudes Towards Women's Sports

Interest in women's sports has been growing at varying rates across continents, with Europe and North America showing some maturity in terms of professional leagues, fan engagement, and media coverage. Regions like Asia, LatAm, and the Middle East witnessing rapid development through grassroots initiatives and increasing investment. This is evident in female fan responses being more interested in women's sports, and wanting to see more brands supporting professional women's sports.

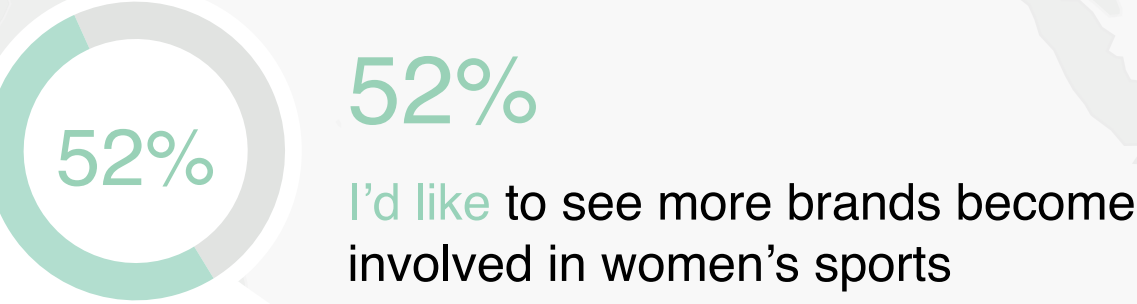
Latin America



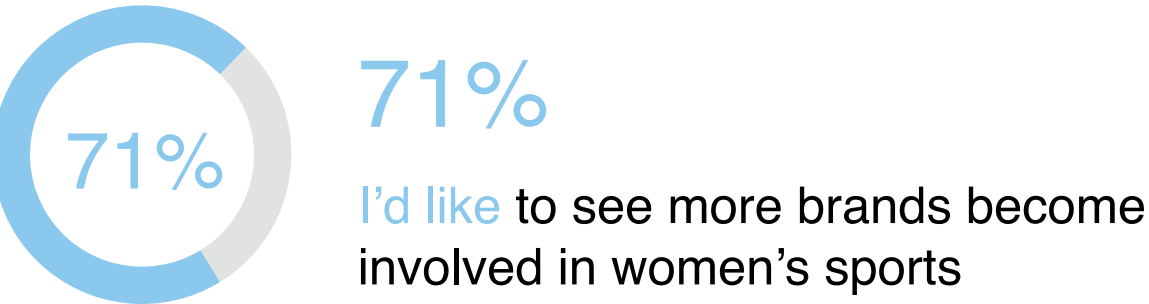
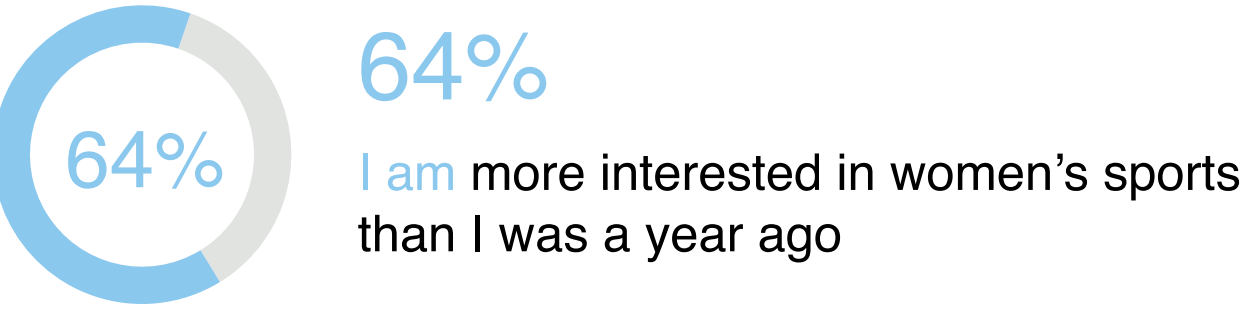
North America



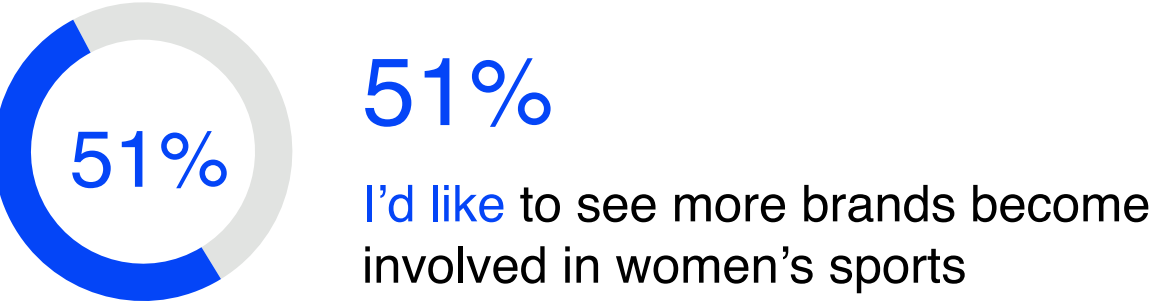
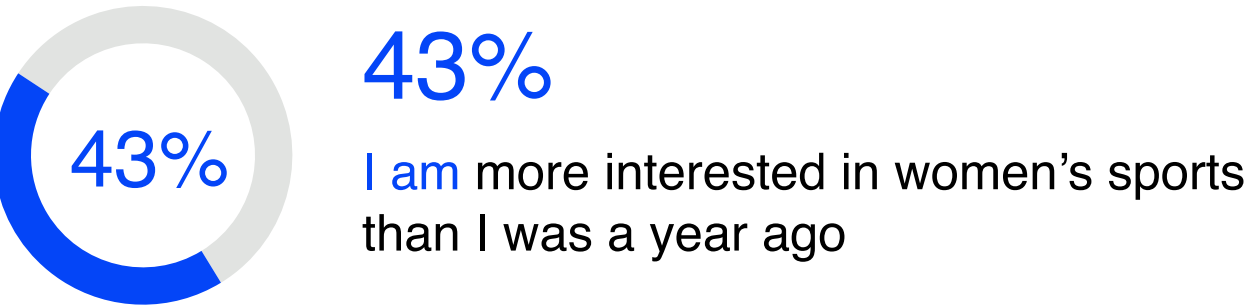
Europe



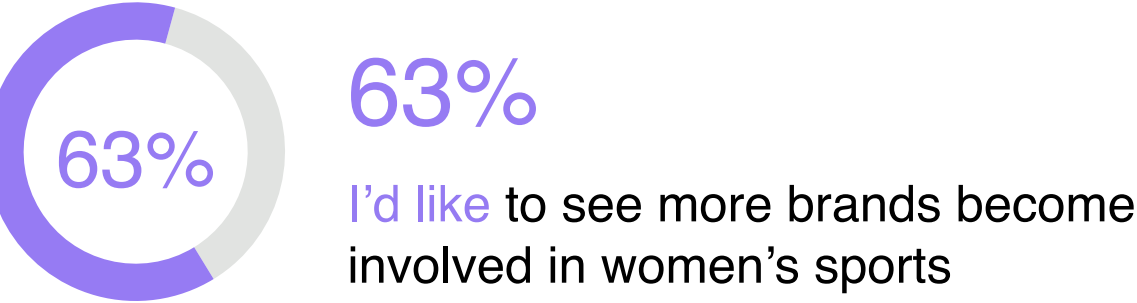
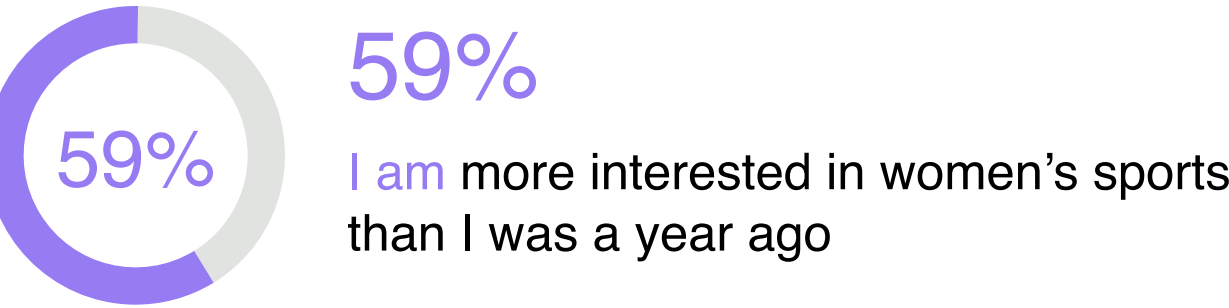
Asia



Pacific



Middle East

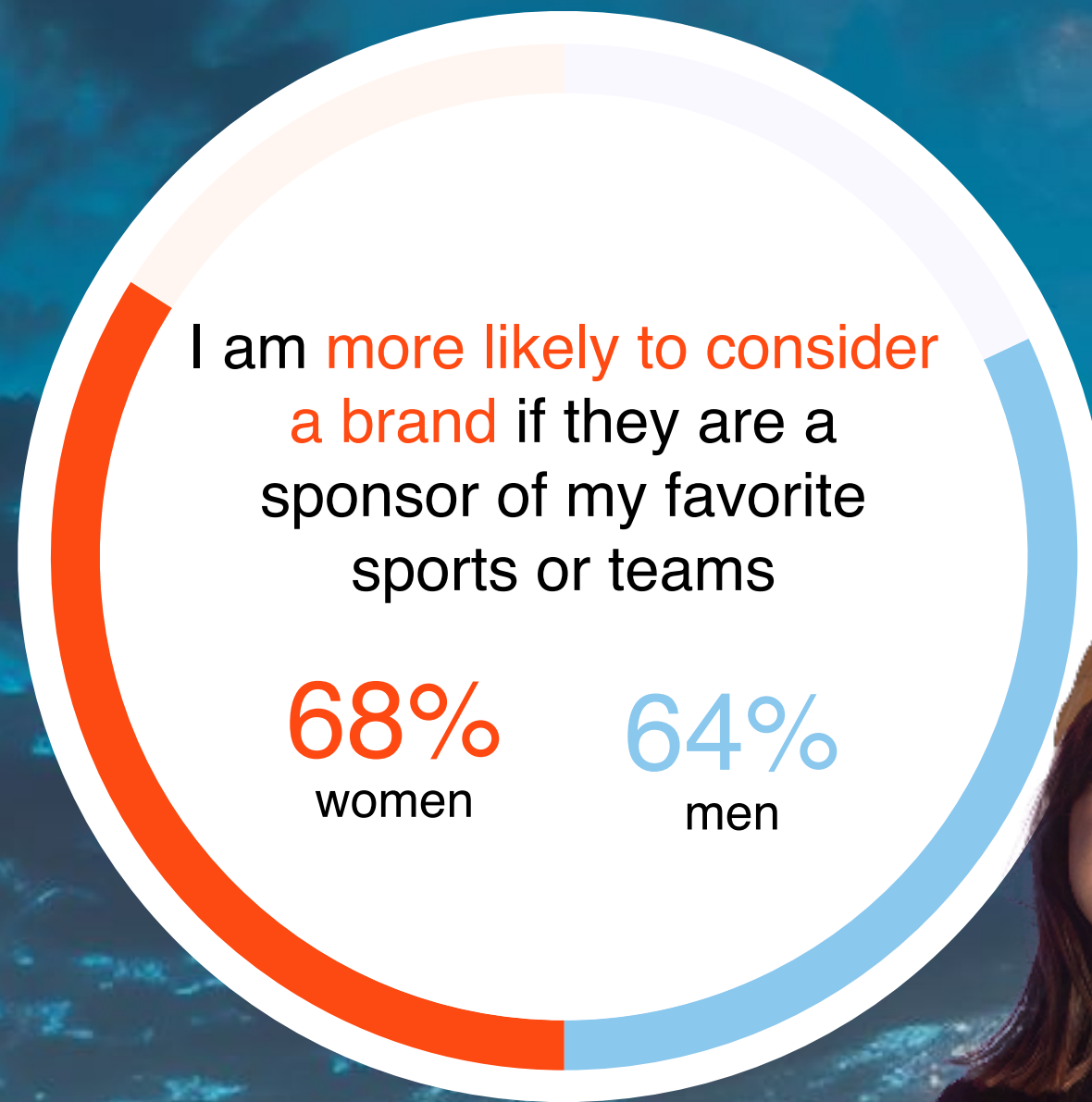
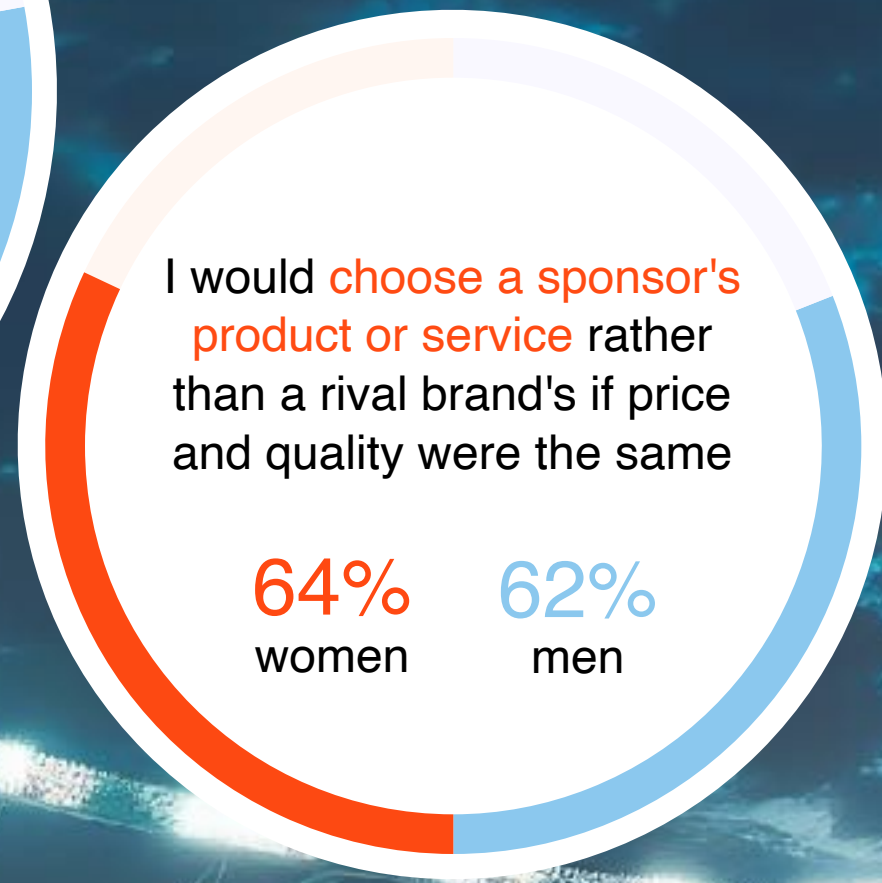
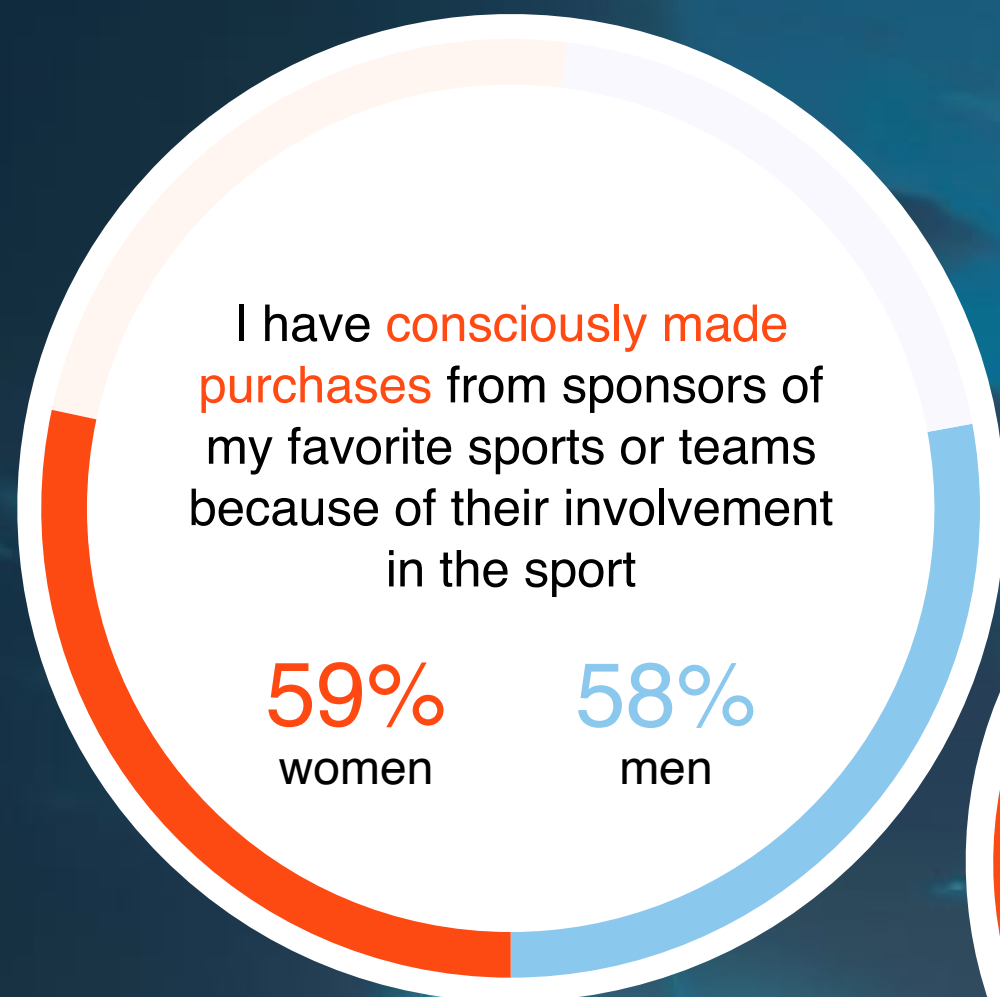


05

The Brand Advantage: Leveraging the Loyalty of Female Sports Fans



Female fans of sports favor brands who sponsor their favorite sports or teams.



Source: Wasserman Global Sports Panel (2023), GWI (2023).

Activate Female Sports Fans for Business Impact

Female fans of sport hold significant buying power, and are highly responsive to brands sponsoring their favorite sports. Female sports fans are not only active consumers but also early adopters of various products and services. Their engagement with sports content means they have a big influence on which brands succeed, and is a beneficial audience to test out new products, models, and merch.

Early Adopters



23%

Innovators

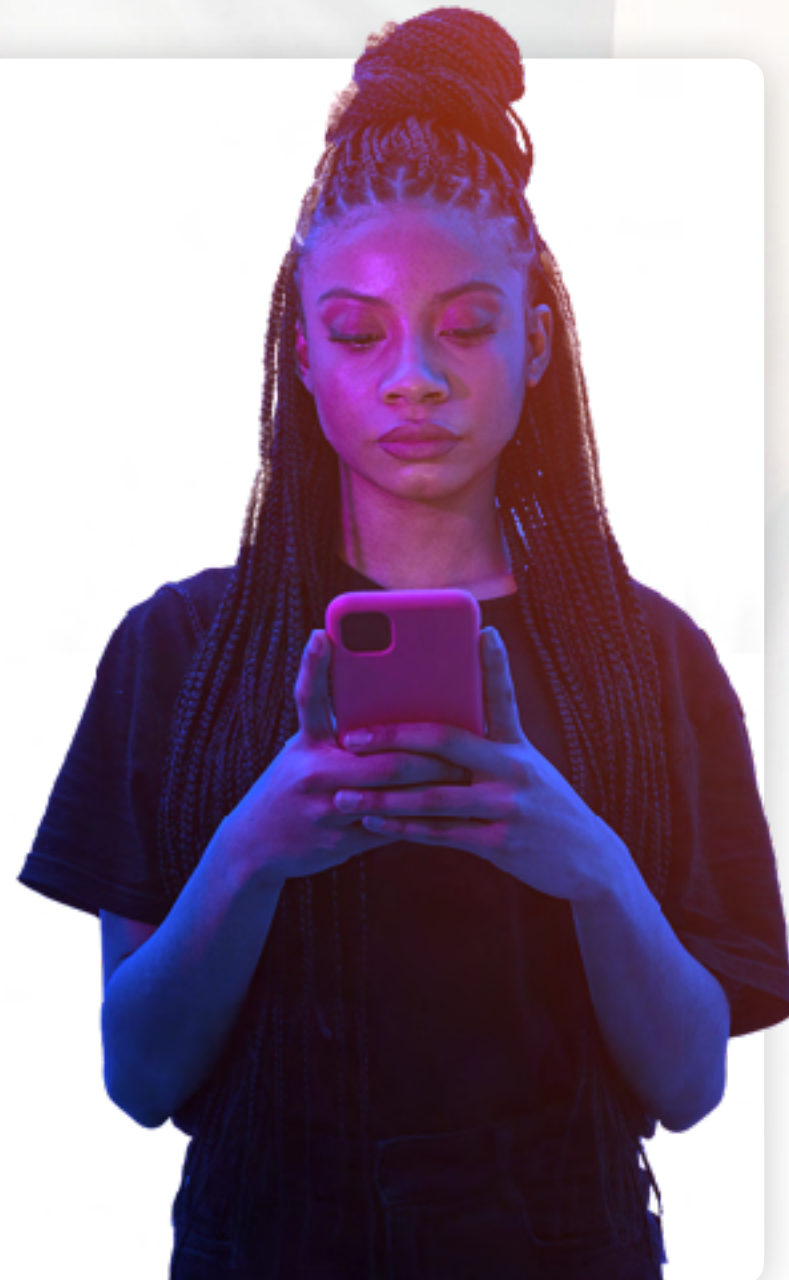
(116 index vs. gen pop)



30%

Early Adopters

(107 index vs. gen pop)



Female sports fans are more likely to have purchased **sports merchandise**

in past 6 months, with 38% having done so

(vs. 35% of male fans) (GWI)

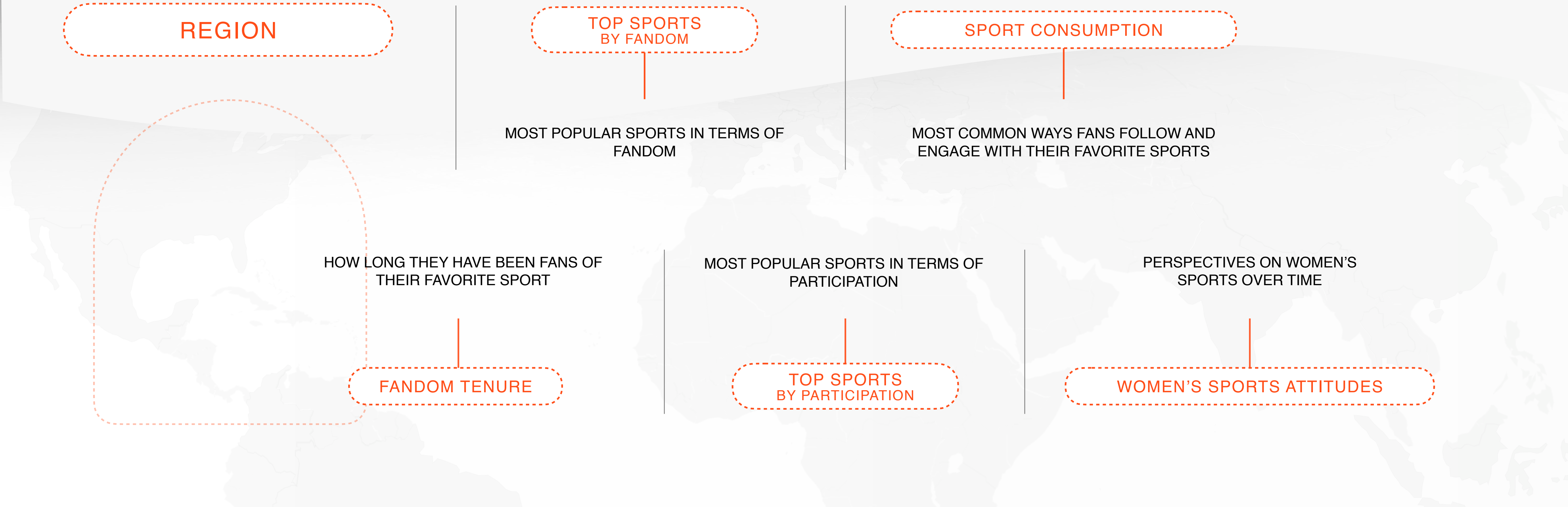


38%



06

Diverse Passions: Regional Variations in Female Fan Preferences



Regional Variations in Female Fan Preferences

Female sports fan preferences differ widely across regions, influenced by cultural factors, local sports popularity, and media access, underscoring the need for tailored strategies to **engage these diverse audiences**.

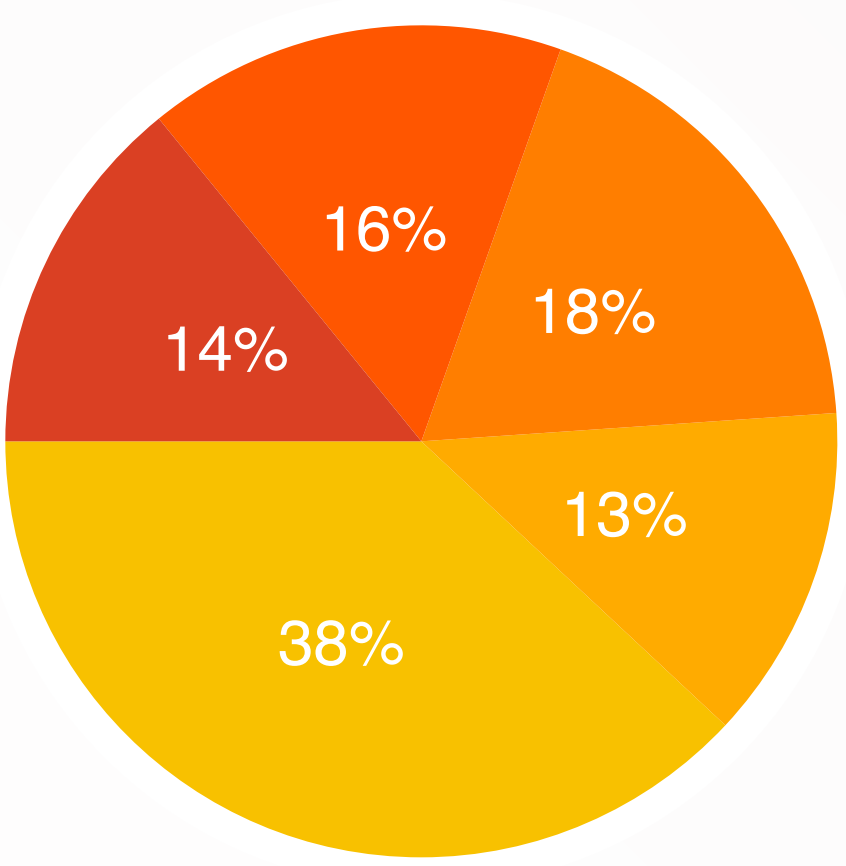
LATIN AMERICA

Latin American women are passionate and increasingly engaged in sports, with soccer leading as the most popular sport both in fandom and participation. Notably, 61% of females express growing interest in women's sports over the past year and 73% desire more brand involvement, signaling a pivotal opportunity for brands to connect with women's sports properties in this region.



- IN THE LAST 12 MONTHS
- 1-2 YEARS AGO
- 3-5 YEARS AGO
- 6-10 YEARS AGO
- 10+ YEARS AGO

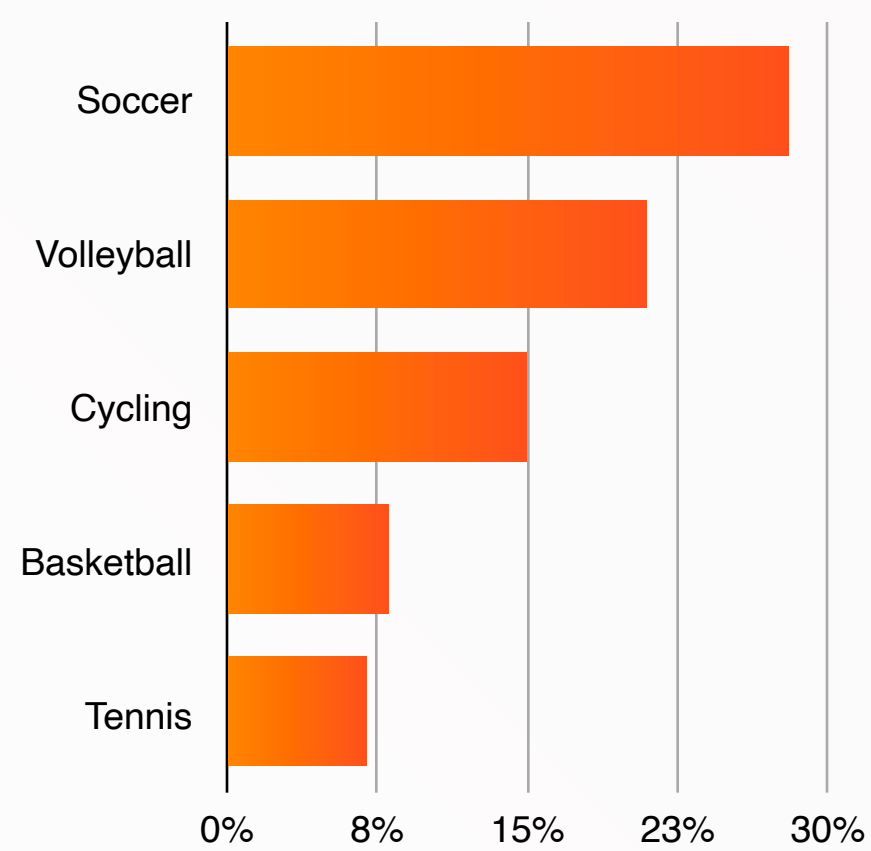
FANDOM TENURE



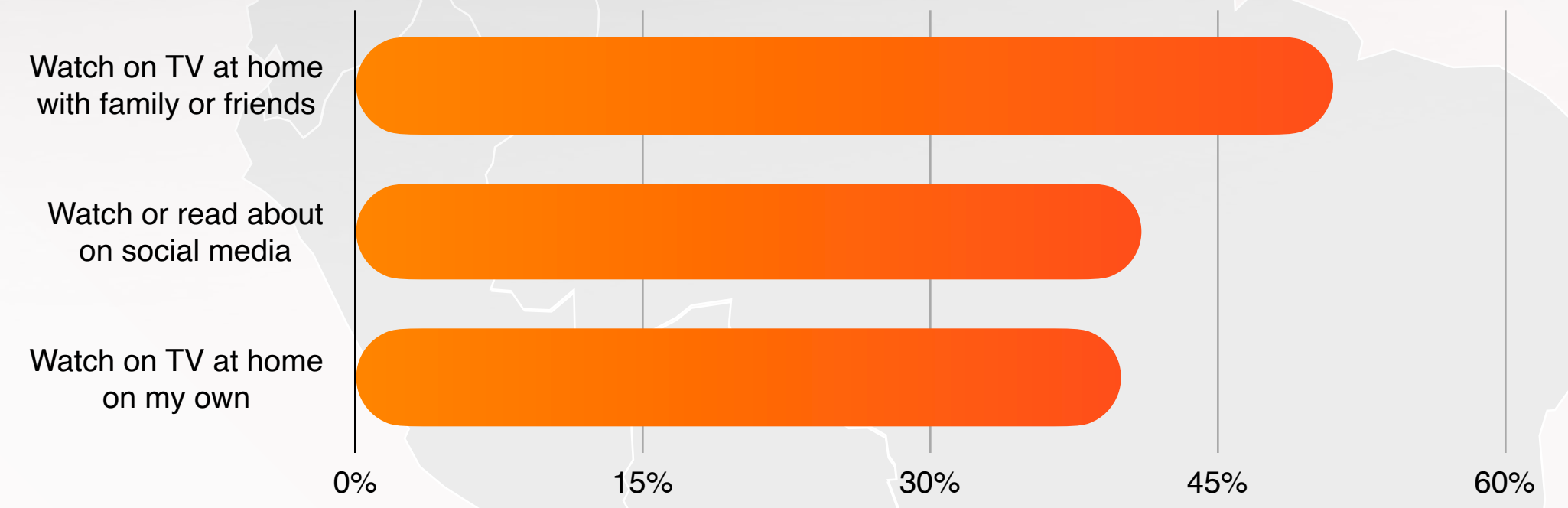
TOP SPORTS BY AVID FANDOM

- Soccer/football 44%
- Volleyball 34%
- Motor racing 25%
- Basketball 24%
- Tennis 21%

TOP SPORTS BY PARTICIPATION



SPORT CONSUMPTION



WOMEN'S SPORTS ATTITUDES



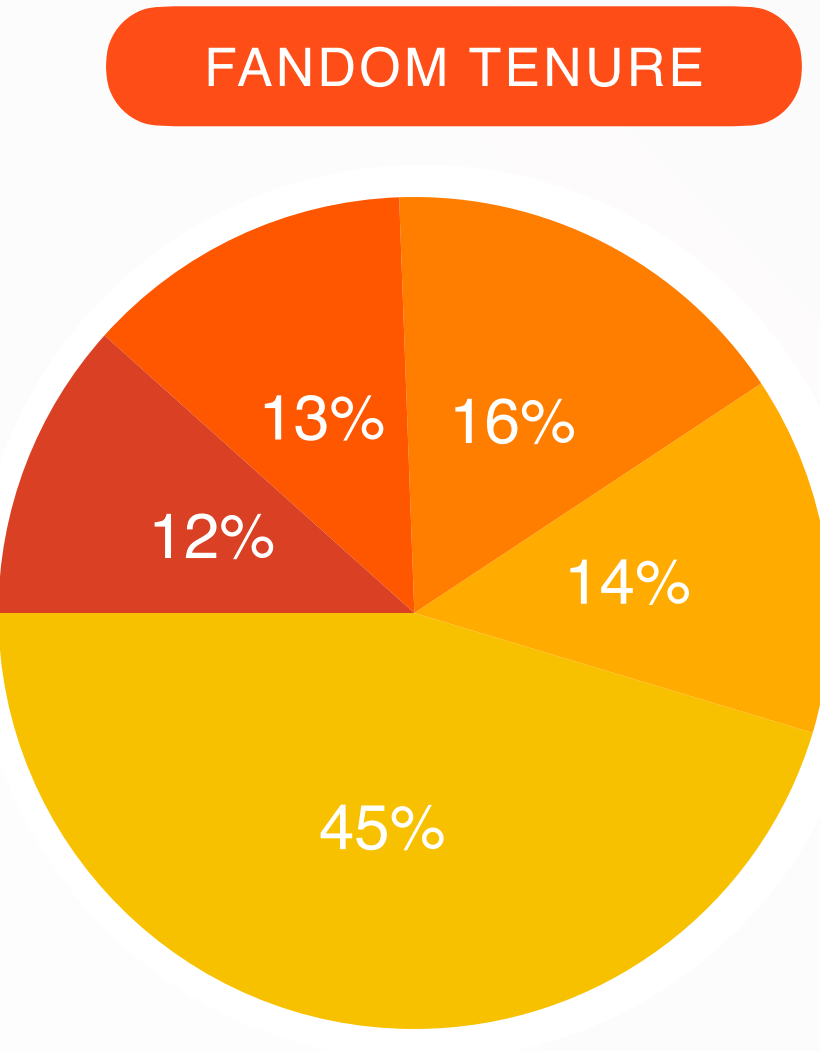
Source: Wasserman Global Sports Panel (2023), GWI (2023).

NORTH AMERICA

North American women show one of the higher levels of long-term fandom, with 45% being fans for more than 10 years. These female fans are passionate about traditional sports with American football leading in fandom, followed closely by basketball and soccer in both fandom and participation.



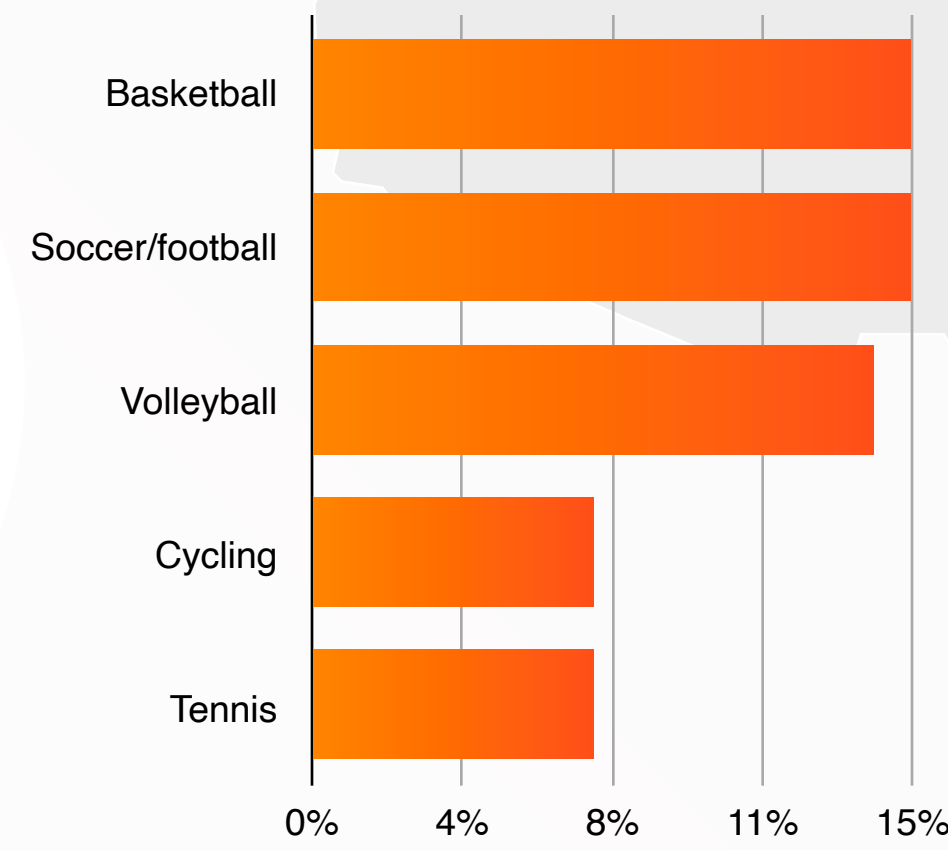
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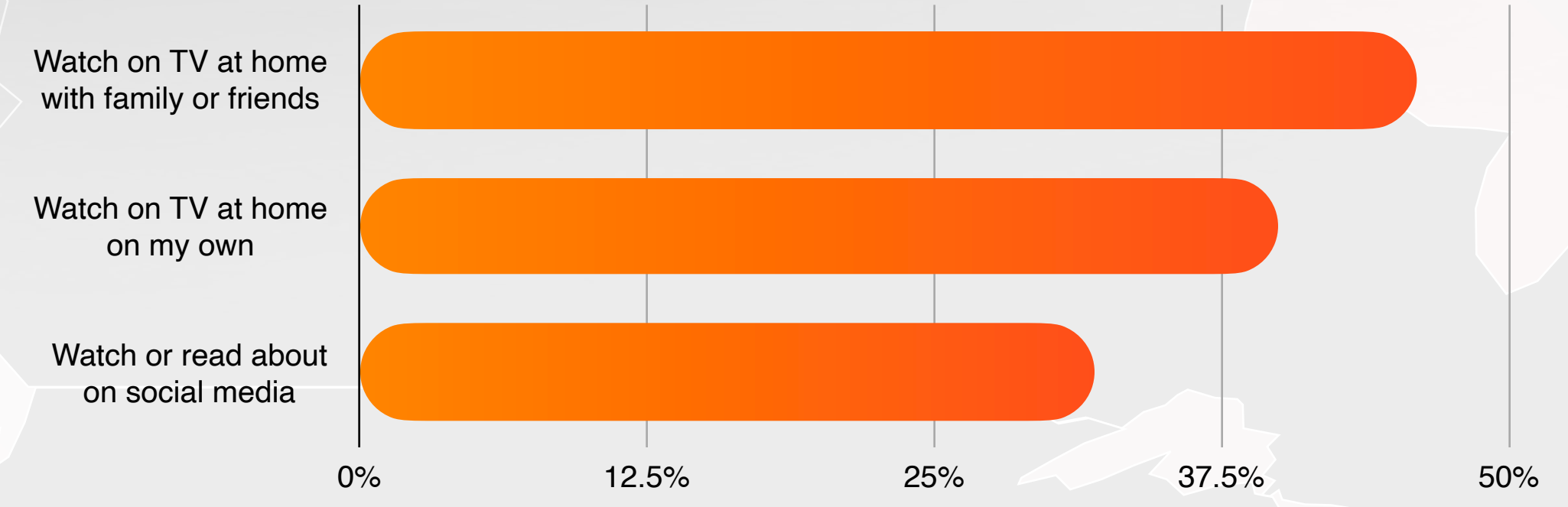
TOP SPORTS BY AVID FANDOM

- American football 26%
- Basketball 20%
- Soccer 19%
- Baseball 17%
- Motor racing 16%

TOP SPORTS BY PARTICIPATION



SPORT CONSUMPTION



WOMEN'S SPORTS ATTITUDES



Source: Wasserman Global Sports Panel (2023), GWI (2023).

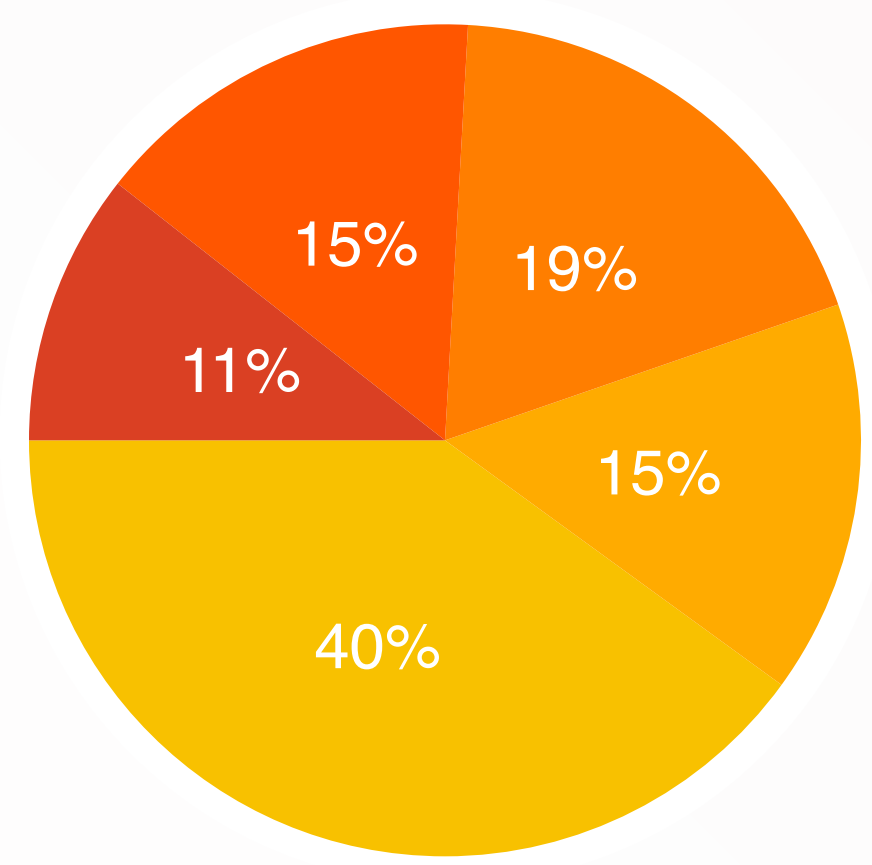
EUROPE

European female sports fans display a balanced engagement across various sports, with no single sport overwhelmingly dominating fandom. This diversified interest, led by soccer (24%), tennis (18%), and volleyball (17%), sets Europe apart from other regions where one or two sports dominate.



- IN THE LAST 12 MONTHS
- 1-2 YEARS AGO
- 3-5 YEARS AGO
- 6-10 YEARS AGO
- 10+ YEARS AGO

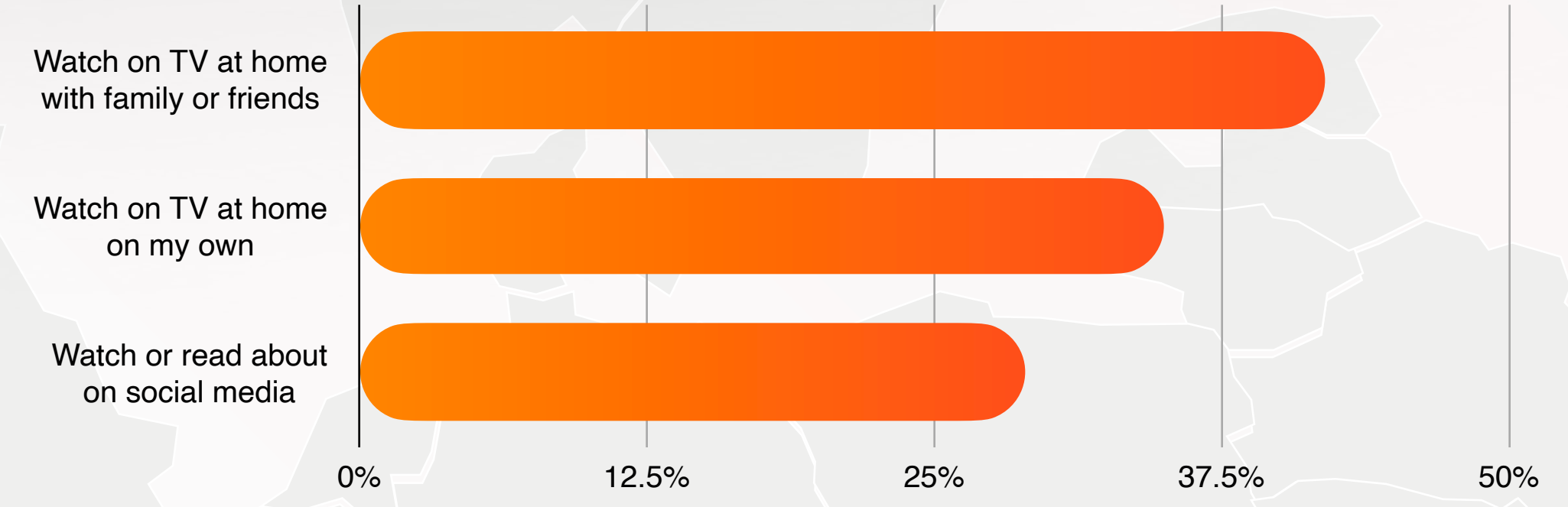
FANDOM TENURE



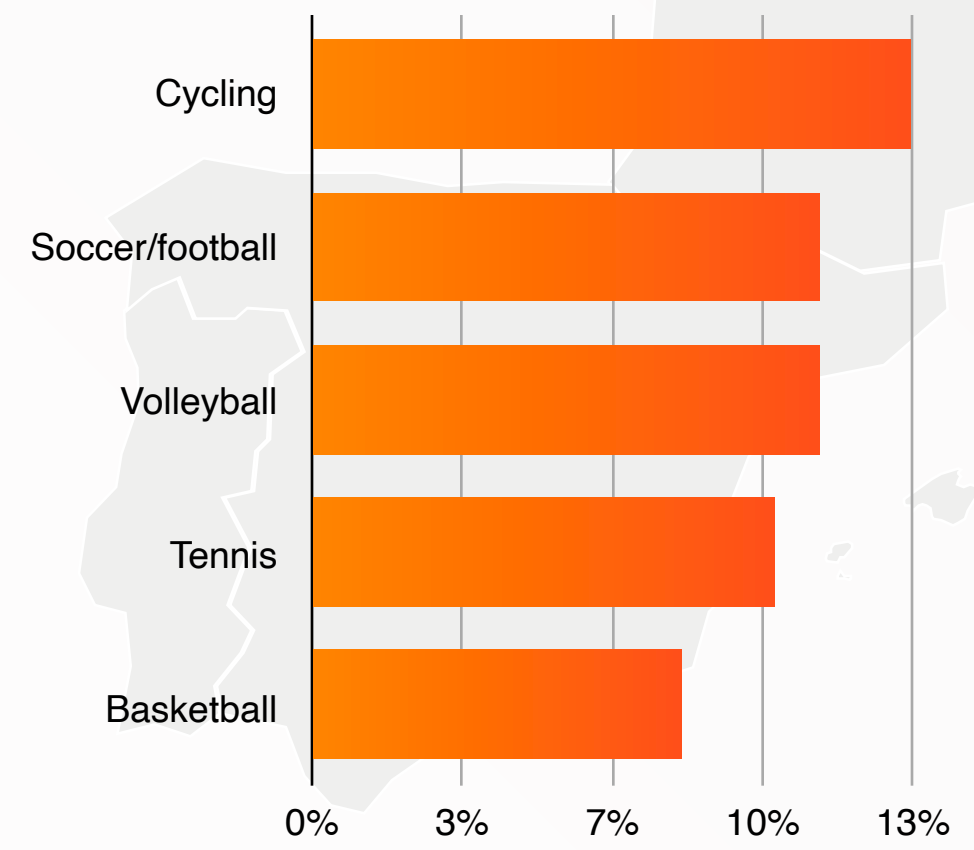
TOP SPORTS BY AVID FANDOM

- Soccer/football 24%
- Tennis 18%
- Volleyball 17%
- Motor racing 16%
- Basketball 15%

SPORT CONSUMPTION



TOP SPORTS BY PARTICIPATION



WOMEN'S SPORTS ATTITUDES



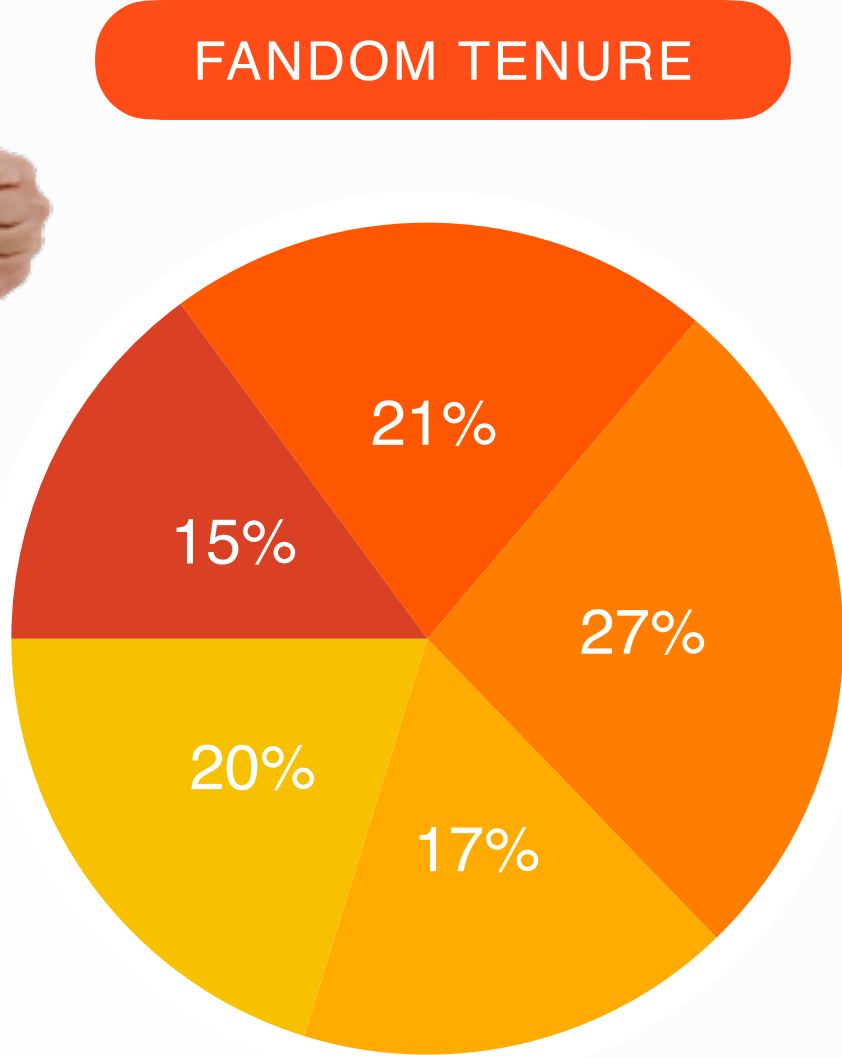
Source: Wasserman Global Sports Panel (2023), GWI (2023).

ASIA

Asian women are deeply engaged in a diverse range of sports, with badminton leading both in fandom and participation. The region shows a strong appetite for digital engagement, with e-sports ranking high among top fan favorites. Notably, 64% of women report an increased interest in women's sports over the past year, and 71% desire more brand involvement in this space, which is higher than most geographic regions.



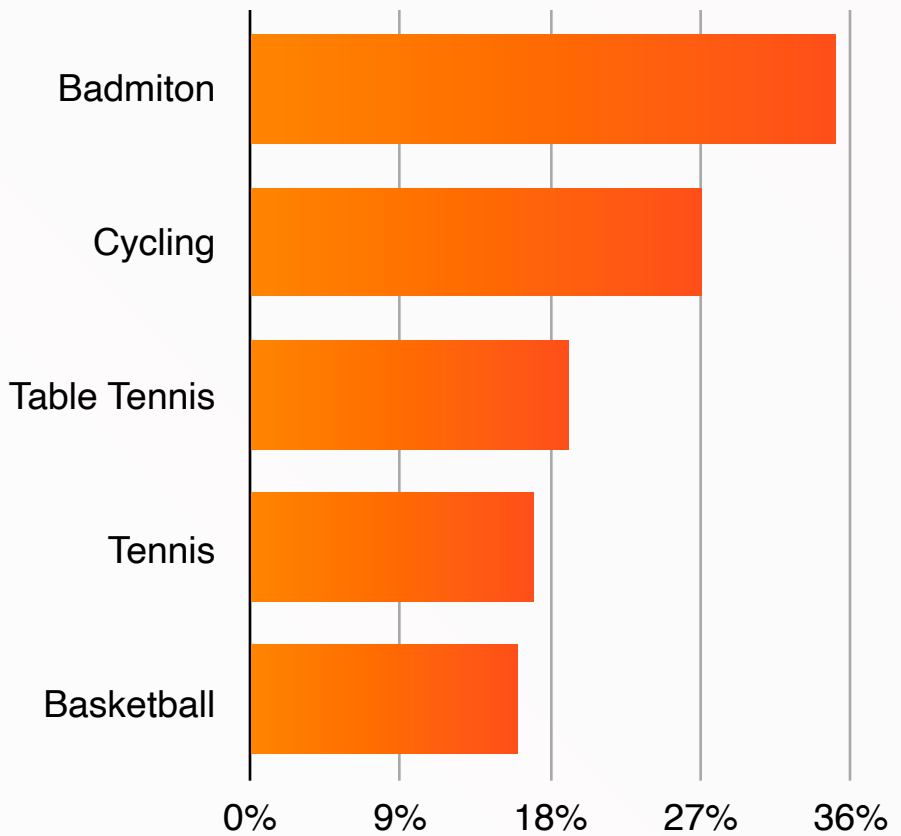
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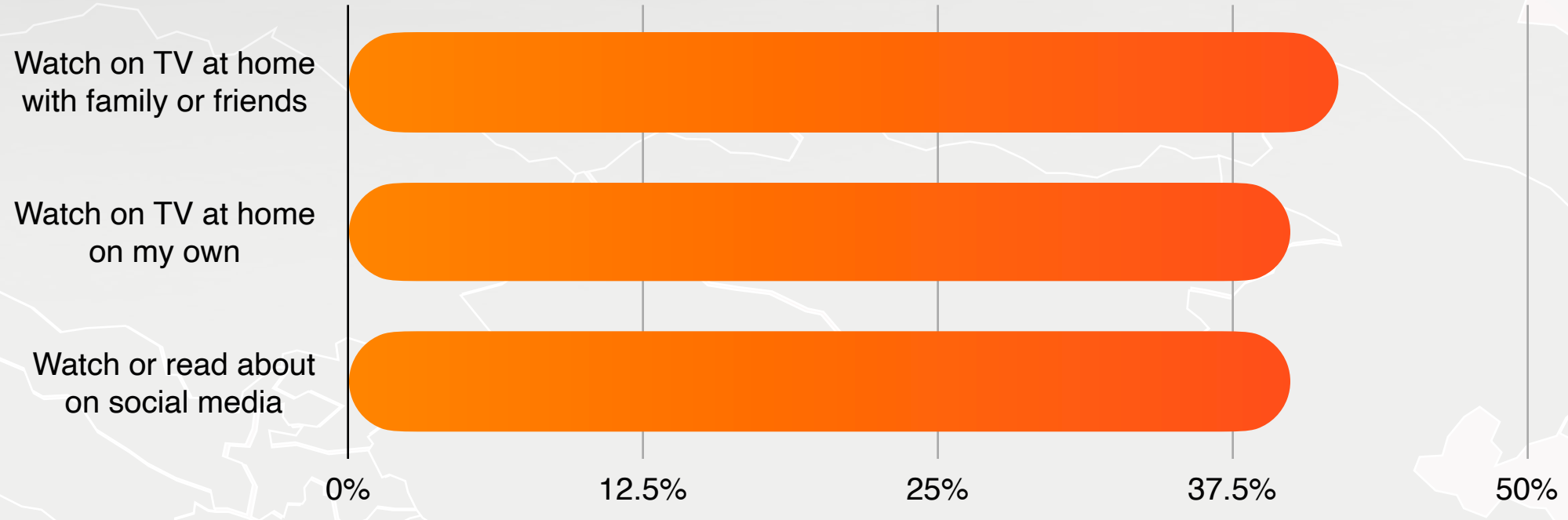
TOP SPORTS BY AVID FANDOM

- Badminton **34%**
- Basketball **28%**
- Motor racing **25%**
- E-sports **27%**
- Tennis **26%**

TOP SPORTS BY PARTICIPATION



SPORT CONSUMPTION



WOMEN'S SPORTS ATTITUDES



OCEANIA

In the Oceanic region, female sports fandom is driven by a distinct mix of rugby league (21%) and more globally popular sports like soccer and tennis. Interestingly, Oceania has one of the highest levels of sport fandom tenure, with 49% of women being engaged fans for more than 10 years, indicating a strong, long-term dedication.

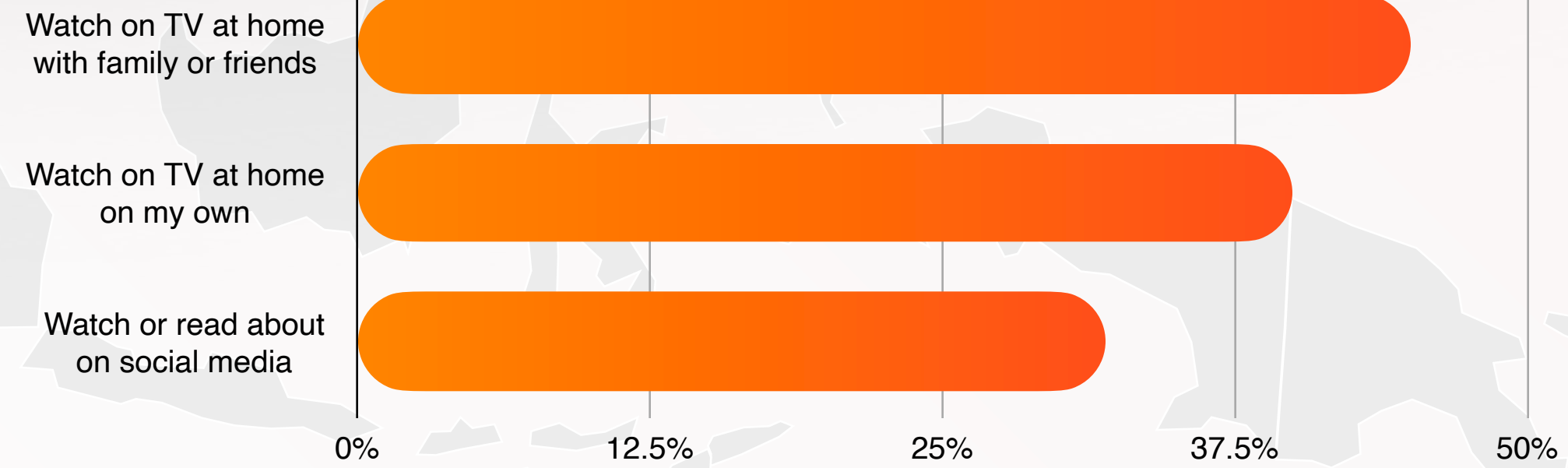


- IN THE LAST 12 MONTHS
- 1-2 YEARS AGO
- 3-5 YEARS AGO
- 6-10 YEARS AGO
- 10+ YEARS AGO

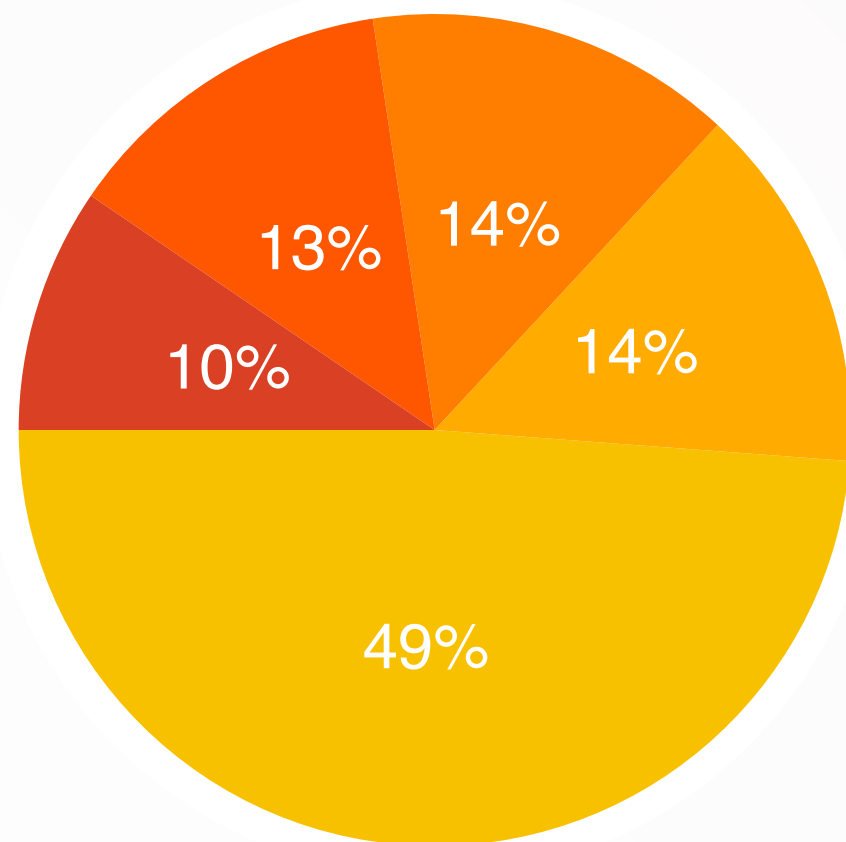
TOP SPORTS BY AVID FANDOM

- Soccer/football 16%
- Tennis 15%
- Motor racing 14%
- Cricket 13%
- Rugby league 21%

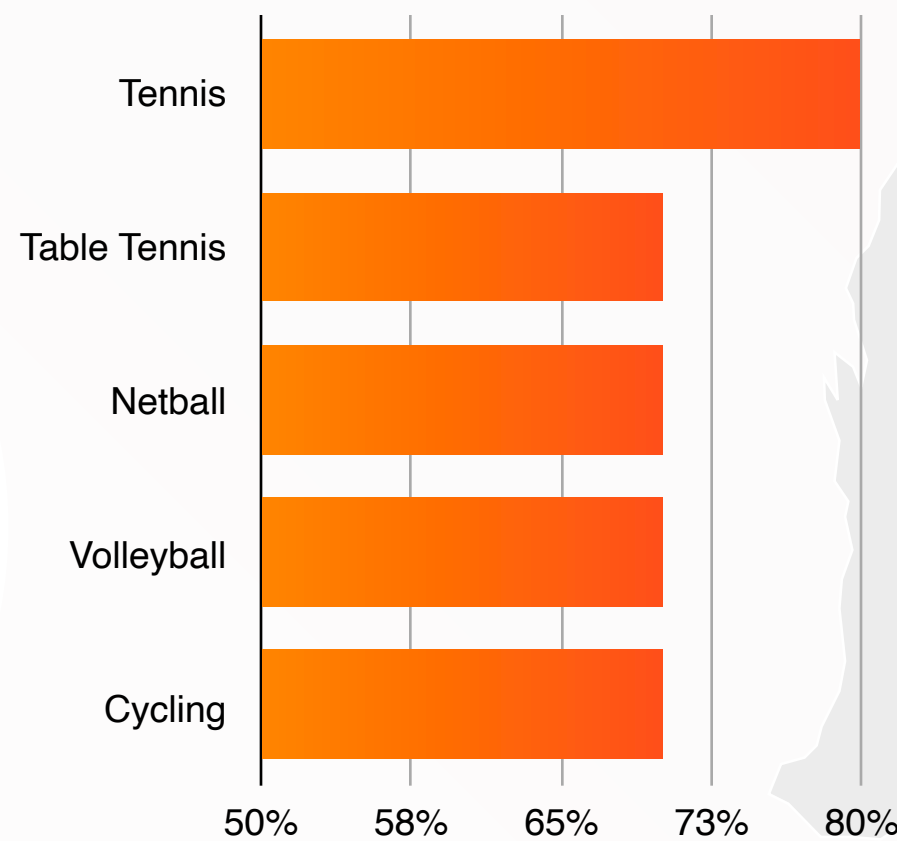
SPORT CONSUMPTION



FANDOM TENURE



TOP SPORTS BY PARTICIPATION



WOMEN'S SPORTS ATTITUDES

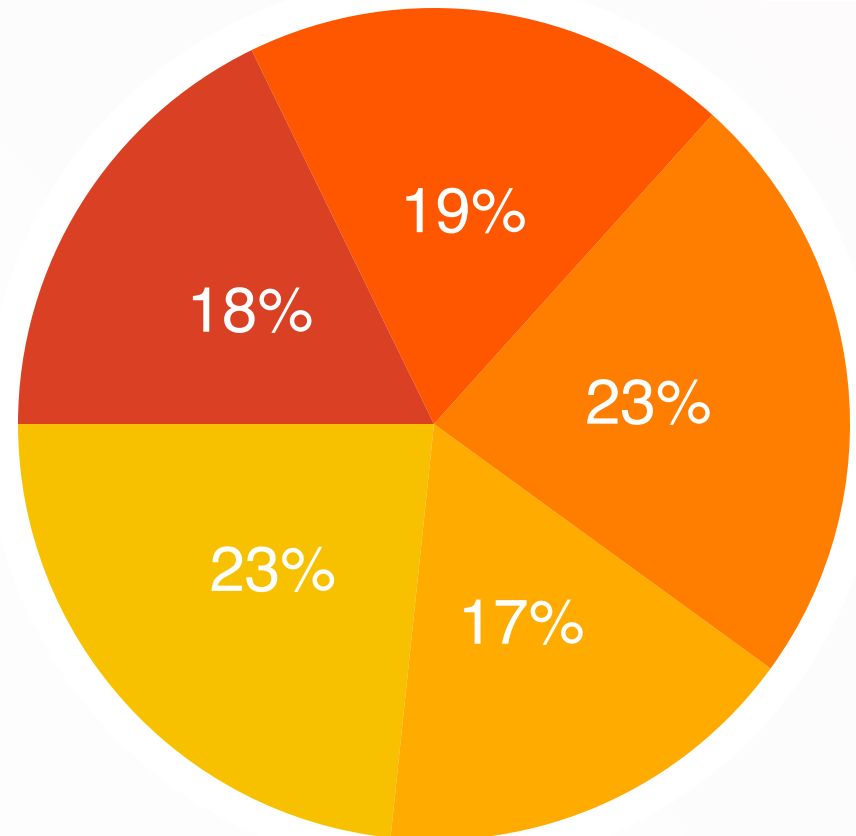


MIDDLE EAST

Middle Eastern female fans tend to have a shorter fandom tenure, with 60% becoming engaged in the last five years, highlighting a rapidly growing and emerging market for sports. Additionally, with 59% of women reporting increased interest in women's sports over the past year and 63% wanting more brand involvement, the Middle East offers a unique opportunity to invest in and grow the women's sports landscape.



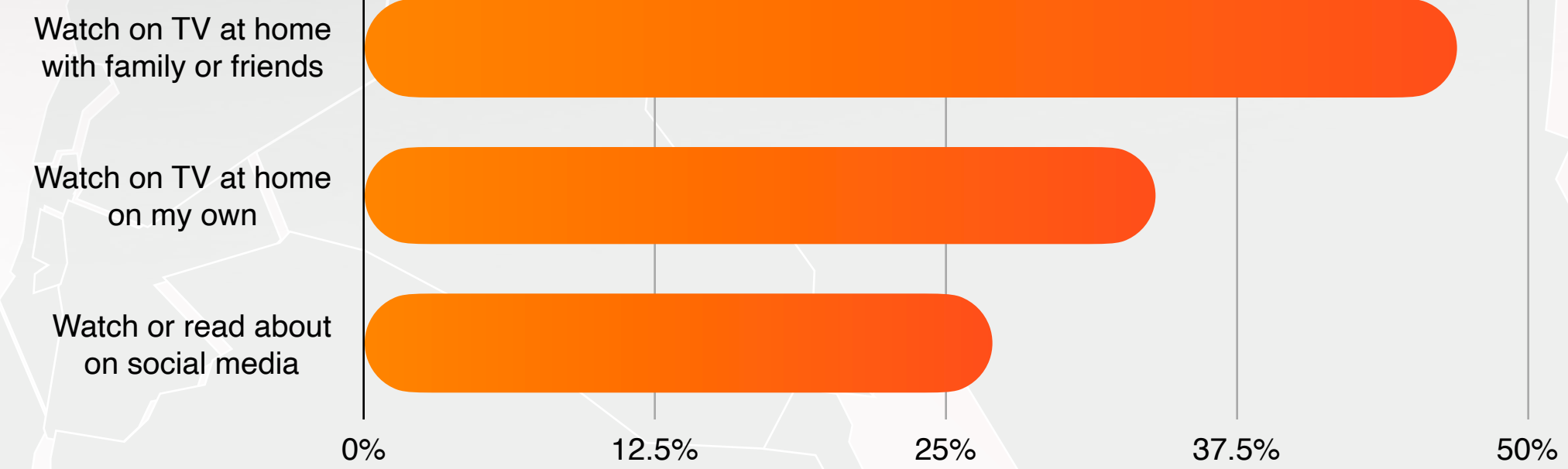
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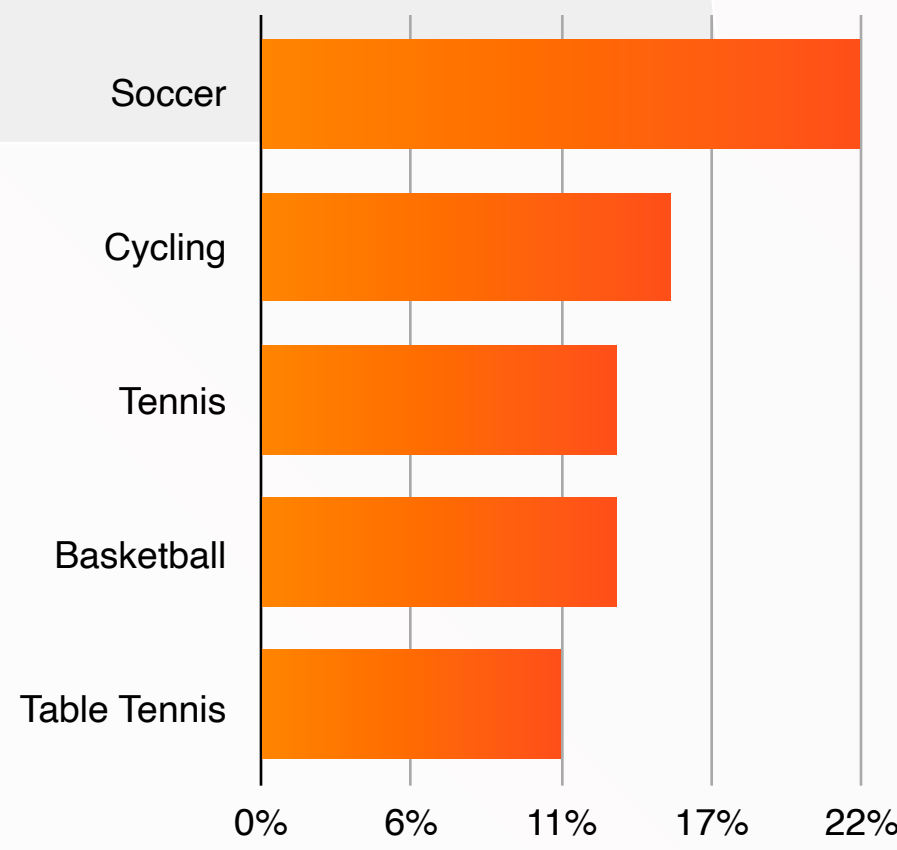
TOP SPORTS BY AVID FANDOM

- Soccer/football **43%**
- Motor racing **28%**
- E-sports **27%**
- Horse racing **27%**
- Equestrian (excluding horse racing) **27%**

SPORT CONSUMPTION



TOP SPORTS BY PARTICIPATION



WOMEN'S SPORTS ATTITUDES



Source: Wasserman Global Sports Panel (2023), GWI (2023).

Is Your Strategy Ready for the Rise of Global Female Fans of Sport?

A Vast and Growing Market

Nearly 684 million women globally identify as sports fans, challenging the outdated perception of sports as a male-dominated space. With half of these women developing their fandom in the last five years, the surge of young females embracing sport marks a pivotal shift. This rapidly expanding group represents untapped economic potential, poised to drive future growth in sports consumption, sponsorship, and engagement. Brands and rights holders should craft messaging that acknowledges this recent surge, focusing on narratives of empowerment, inclusivity, and community to resonate with these newer, younger fans.

Generational and Regional Nuances

Female sports fans are not a monolithic group; they are diverse in their motivations, engagement levels, and cultural perspectives. Younger females are more likely to be avid fans than older generations, and fandom differs significantly across regions. A deeper understanding of these nuanced audience segments is critical for brands and leagues to create targeted, effective strategies that resonate with different generational and regional profiles. Tailoring engagement tactics to specific cultural values and regional interests—whether through localized content, regional ambassadors, or culturally relevant campaigns—will help brands forge deeper connections with these varied fan groups.

Holistic Passion Beyond the Game

Female sports fans redefine what it means to engage with sports. For many, sports fandom extends beyond the action on the field to encompass broader lifestyle, cultural, and social connections. They support brands that align with their values and reward those that champion the causes they care about. To unlock this audience's economic potential, the industry must embrace a more holistic approach to engagement, recognizing their multifaceted interests and the broader cultural impact of sports in their lives. If brands and rights holders do it right—from messaging, to content, to experiences—they can unlock a loyal group of fans who not only engage deeply with sport but also become powerful brand advocates, driving cultural movements and reshaping the future of sports fandom. The question is - who will stand up to the challenge?

Female fans often display a multifaceted, integrated approach to sports fandom.

They are not only interested in the games but also in how these sports align with their values and purposes. They tend to support socially responsible causes, care about the environment, and prefer to engage with brands that back social causes. Moreover, women are more likely to experience sports in diverse ways and pay closer attention to the brands and properties sponsoring their favorite sports. Their economic clout is a powerful driver for brands to create more meaningful and responsible partnerships that reflect the values of this influential demographic.

Given these dynamics, it begs the question: Why aren't more marketing strategies tailored to this influential and growing demographic? As the face of fandom continues to change, there's a compelling case for brands and rights holders to recognize and actively engage with women sports fans, who are proving to be both passionate and pivotal within the global sports community. Their significant economic influence, combined with their expanding presence in sports fandom, make them a critical audience for any brand looking to establish a robust foothold in today's competitive market.



Thank You.

ABOUT THE COLLECTIVE®

The Collective® is Wasserman's women-focused, global impact and advisory business that exists to drive rationale to invest in women. We aim to raise the visibility and drive inclusion of women in sports, entertainment and culture by providing unique insights, strategies and ideas. For more information, please visit www.wearethecollective.com.

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