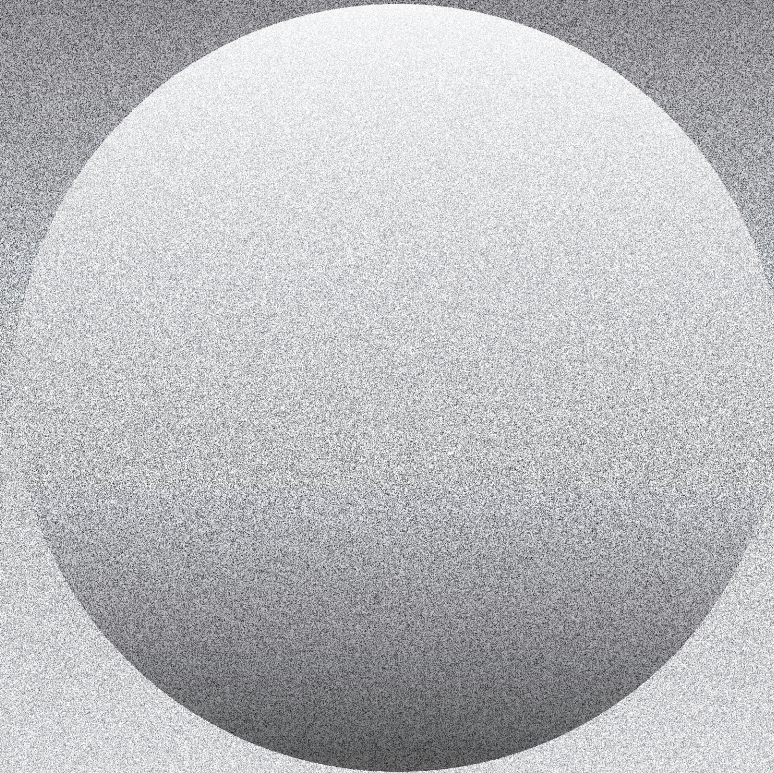





A Guide to

Culture in Chaos

the projects*



The speed of culture is moving faster than our sun.



4	Starting Points
6	Paradigm Shifts
17	Industry Projections
28	Final Provocation
29	Credentials

M
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RESEARCH

Articles, Op-Eds,
History, Theory, Data

OBSERVATION

Culture, Media, Memes,
Anecdotes, Attitudes

INSIGHT

The—Why—
Behind—The—What

The world used to operate on the assumption that the busier you are, the more important



are.



The 2010s was the fastest decade on record. Startups boomed, social media platforms took root, and just a few years after the financial crisis, if you weren't busy, you weren't living. Grind culture had bloomed; busy-ness was flashy and optical. Social media allowed us to share (and brag about) how many weekly flights we took, daily happy hours we double booked ourselves to, and our exhausting weekend schedules. Countless brands recognized this trend and took advantage of it all the way to the bank. Of course, WeWork rode **#hustleculture** all the way to a peak valuation of \$47 billion.¹

Then 2020 happened. Australia burned, it felt like WWII was imminent, and then Covid-19 hit. Amid all this chaos, the rat race was paused, and many of us have used that idle time for reflection and introspection: revisiting life goals, revising old habits, renewing relationships, and embracing “**slow living**”—whether by choice or by consequence. Personal progress, at your own pace and on your own terms, has become the new paradigm. To be conspicuously busy today is to show you are behind the times.

Welcome to culture in chaos.

PARADIGM SHIFTS

Optimization → Integration

Work-Life Balance → Work-Life Boundaries

Self-care → Self-aware

Cancel Culture → Counsel Culture

Spectacle → Strategic

WHERE WE WERE

Optimization

Instant gratification

Efficiency as currency

Always available,
always on

Striving
for perfection

Work harder,
buy more

Success-oriented

Going out

WHERE WE'RE MOVING

Integration

Self-reflection

Values in action

Space
for silence

Progress
over productivity

Appreciate
what you have

Skills-oriented

Going within

From **Work-Life Balance**
to **Work-Life Boundaries**



Work-life balance
was a myth, anyway.

¯_(\ツ)_/¯

As work and life have collapsed into the same space (namely, our living rooms), personalized boundaries are the new balance. Individuals have adopted new rituals to divide work

and play, screen time and “me” time, and have prioritized **personal autonomy** over professional acceleration. (And this isn’t changing back anytime soon: A survey of hiring managers by the global freelancing platform Upwork found that one-fifth of the workforce could be entirely remote after the pandemic.)²



With more idle time, urban dwellers continue to adopt a “**new domesticity**”: soothing-but-useful, analog activities like pickling, knitting, baking from scratch, family crafts, and avocado

dye. There was an 80% increase in google searches for ‘DIY’ as compared to last year, proving that people are hungry for these kinds of hands-on activities.³ These subtle acts of creativity not only provide a means to cope, but offer a feeling of self-sufficiency in times of scarcity.



BEFORE

6 am

Wake up, hit snooze. Repeat three times.

7 am

Drive to gym, half-listen to The Daily sped up to 1.5x (Annoying, but efficient).

8:30 am

Shower at the gym and straight to the office.

9 am

First meeting of the day, ate a granola bar on the way in the door, was meh.

1 pm

How is it 1 pm?

4 pm

Last meeting of the day just wrapped, try to get some work done.

6 pm

Starving. Order Caviar so that it arrives at home the same time you do.

7 pm

Pat self on back for amazing Caviar skills, eat dinner scrolling Instagram.

8 pm

Prep for early meetings in AM while half-watching Netflix.

11 pm

Finally get in bed, need to be up by 6am tomorrow.

12 am

Must stop scrolling Instagram. Time to sleep.

NOW

6 am

Wake up to the sun rising, go back to sleep until 7am.

9 am

First call of the day, still in PJs from waist down.

11 am

Three hours devoted to deep work or cold emails at the kitchen table.

5 pm

Wrap last meeting of the day, get lost in Tik Tok before it's banned.

9 pm

Put on a true crime doc to remind yourself it could be worse!

12 am

In bed doomscrolling, don't need to be up until 10am tomorrow.

7:30 am

Make pour over coffee at home, read the news. Consider organizing bookshelves by color.

8:30 am

Tell yourself to stop reading the news, take the dog for a quick walk with your partner.

10 am

Cook breakfast and do dishes. Search for puzzles on Amazon.

2 pm

Lunchtime and call Mom (or college ex if you're single).

4 pm

What is time?

7 pm

Dinner with your partner. Set candles for a mood change.

8 pm

Force yourself out of post-dinner Twitter binge and draw a bath.

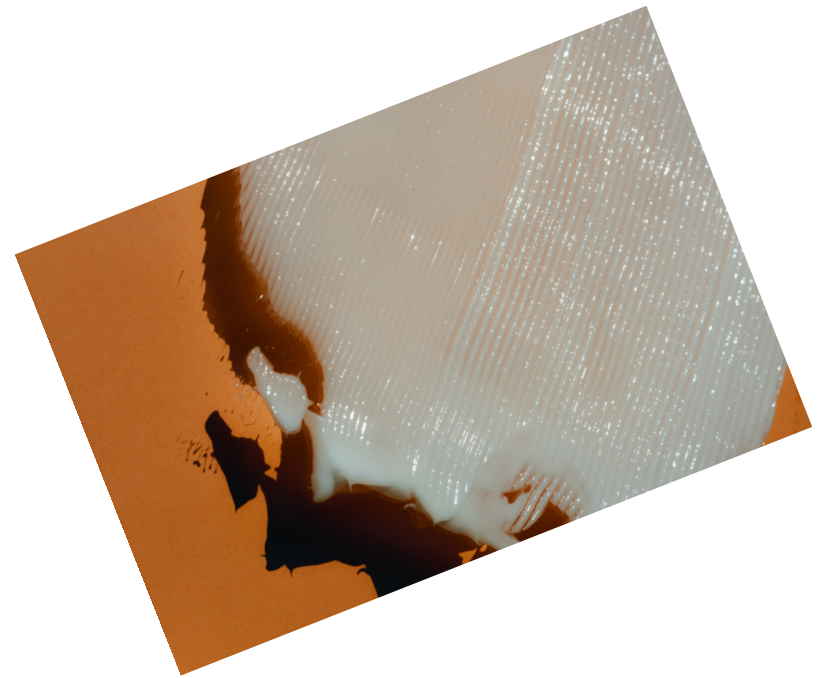
TAKEAWAY

Now that we've developed new routines, our adherence to it, or ignorance of it is a direct product of our moods. As daily life blends into one huge screen-fest, brands must innovate to offer healthy boundaries and rituals for their customers to appreciate.

NOTE: Eliminate alone time and productivity if you have kids.

From
Self-Care
to
Self-Aware

If 2019 was the year of the sheet mask,
2020 is the year of the face mask.



Over the years, the phenomenon of self-care has morphed into **self-discipline** for the 2%: committing to ten-step skincare routines, juicing celery to maximize energy, food-restricting our way into “well-being”, and purchasing vagina candles. Even if you didn’t subscribe to Goop, the notion of self-care at least nudged the rest of us into putting our phones down, staying present, and getting more sleep. Although seemingly beneficial, the end goal of our self-care rituals was ultimately part of a vicious cycle: to become more high-functioning and productive. Like its cousin ‘work-life balance’, the self-care movement was inseparably tied to our own **personal optimization**, often disguised in zen packaging.

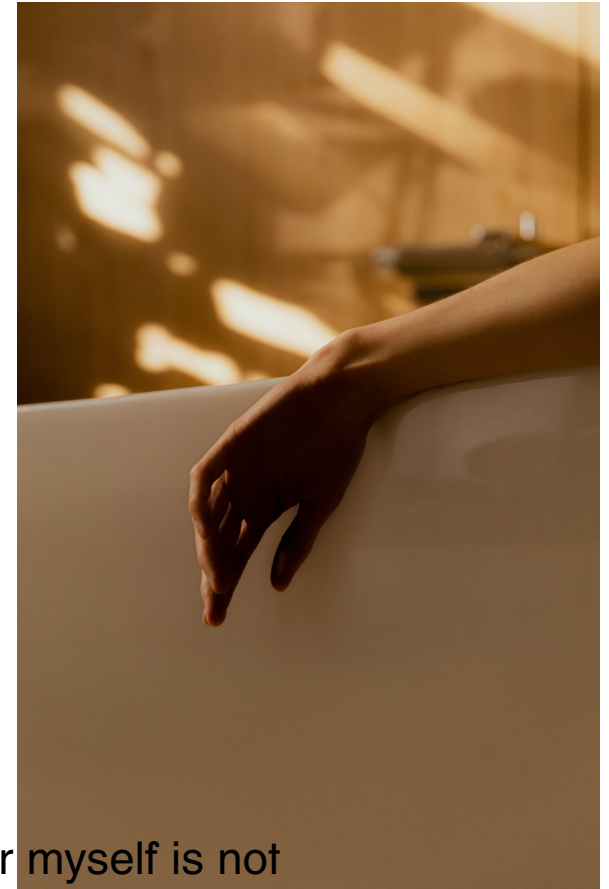


With anxiety at an all-time high, self-care is returning to its essential purpose: doing what you need to do to be okay. Covid and civil unrest broadened our aperture to include genuine concern for the wellness of those most at-risk to the virus and social injustice. In moments of grief, crisis or trauma, people have realized they need each other to survive and thrive, and that self-care in its highest form is a community strategy.

Black feminist and poet, Audre Lorde said it beautifully,

“Caring for myself is not self-indulgence. It is self-preservation, and that is an act of political warfare.”

TAKEAWAY: Self-care and care for the community have become interconnected. Businesses should acknowledge and support the micro-communities their consumers belong to. Pride and Black History Month are not enough.



From Cancel Culture

to
Counsel Culture

Cancel culture isn't working.

In theory, 'cancelling' is supposed to hold people accountable for problematic behavior. In practice, this rarely happens. Catalyzed by movements like Sharon Chuter's Pull Up For Change, Aurora James' Fifteen Percent Pledge and The Black in Fashion Council, we're witnessing an evolution towards counsel culture, where people are creating space for forgiveness, normalizing change of mind, and enacting new paradigms.

Individuals are seeing themselves, public figures, and brands as human, capable of mistake and atonement. This is so much so, that even the call-out queens themselves, @dietprada, were called out.⁴ The crux of counsel culture is responding to mistakes not for optics, but to recognize and repair harm caused. Brands that show compassion, prioritizing pain over privilege, will be leaders in a time where truth creates trust.

TAKEAWAY: With consumers smart to virtue-signalling, gone are the days of cutting corners or spinning facts. Corporations big and small are expected to rebuild trust through genuine empathy backed by timely action.

COMPANY VS. BRAND

Traditionally we've thought of these things as separate. We've approached growing our companies separately from growing our brands.

Company

A system of measurable decisions:

- Supply chain
- Company culture
- Employee diversity
- Carbon footprint
- Shareholders

Brand

A collection of intangible concepts:

- Emotion
- Image
- Stories
- Desires
- Truths

A brand is the public face of a company, and what is a company but a group of people? The way a product or service is perceived is no longer separate from the way the company that produced it operates. In an age of accountability, a company and brand must move in lockstep. There's no way around this.





A beautiful content
strategy

does
not hide an
ugly company truth.

From
Spectacle
to
Strategic

Our relationship to consumption, celebrity, and society is changing.

In *The Society of the Spectacle*, a 1967 work of philosophy, critical theorist Guy Debord describes the influence of ads on social life as, “the decline of *being* into *having*, and *having* into merely *appearing*.” If he were to see us pre-pandemic, Debord would no doubt find the rise of social media as his *Black Mirror* finale, considering much of our waking time was devoted to documenting our every moment, spilling our feelings on Facebook, and buying the latest gadget. In order to keep up, consumption became status and culture felt like homework.



As the events of 2020 stacked up, we started to unsubscribe from mass culture and societal expectations. Without the pressure to be “seen” and the future in flux, those who need to or can afford to are cutting the cord to make their own calculated life decisions: exiting big cities, taking gap years, moving in with family, and opting for a nomadic existence. Social distancing requires us all to be more strategic with our futures.

TAKEAWAY: With celebrities fading and leadership waning, we are learning to rely on ourselves. Brands—and who they associate with—need to come from a place of credibility. Influence now is smart and truthful.



SUMMARY

NEW MINDSET	MEANING	BRAND APPLICATION
Integration	Values + Actions	Champion progress, not perfection
Work-Life Boundaries	Intention + Rituals	Add value, not annoyance
Self-Aware	Self + Community	Be thoughtful, not transactional
Counsel Culture	Expectations + Reality	Normalize evolution, not ego
Strategic	Instincts + Lifestyle	Offer inspiration, not aspiration

(You might want to screenshot this.)

If humans are evolving, how are industries?

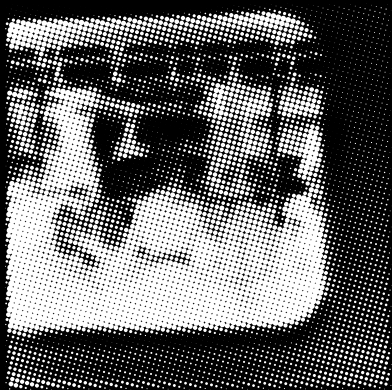
What follows is our take on the future of

TECH.

FASHION

RETAIL

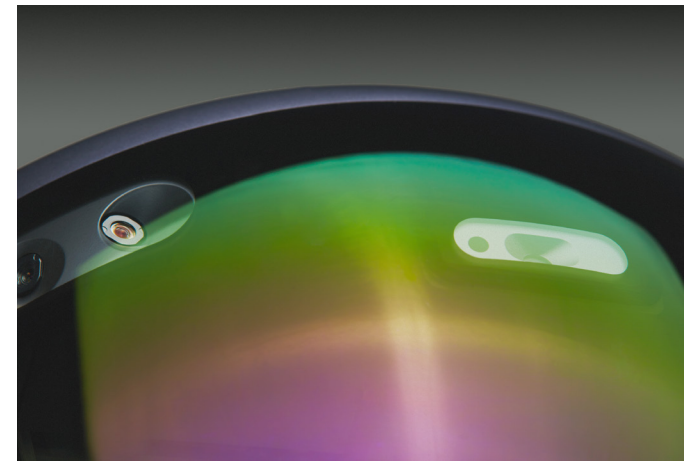
TRAVEL



Screen time is inevitable

Covid-19 has accelerated the growth of the tech industry, and with it, our love-hate relationship to technology. Record numbers of Americans are working from home, which was made possible only by the very recent and massive adoption of cloud-based enterprise systems across all industries. These same technologies allowed us to lessen interruption in the educational system, with more than a billion students learning remotely across the world during the lockdowns, as well as in the healthcare system, with the democratization of remote medical consultations. Reliable internet is more essential than ever.

Screen time has a new value as it becomes the primary way we connect with the friends and family we can't see in person. We all witnessed the dramatic growth in video conferencing by way of weddings, funerals, and cybersex. Zoom grew so ubiquitous that its stock is up nearly 250% this year.⁵ And, while we can't date as we're used to, Tinder and Hinge have seen huge spikes in users during coronavirus lockdowns (and now people are FaceTiming each other before meeting in person).⁶



QUARANTINE SCHEDULE

[Sleep]

Small screen

Medium screen

Medium screen

Medium screen

Small screen

Medium screen

Medium screen

Medium screen

Big screen

Big screen

Big screen

Small screen

[Sleep]



In our new world, it turns out that screen time is unavoidable. As much as we gripe about misinformation, addiction, filter bubbling, cybercrime and Zoom fatigue, tech allows us to continue to work, learn, socialize, get medical care, and to shop for virtually anything. Our smartphones are portals to an outside world and serve as our only tools for human connection and life admin. Any attempt at reversing our reliance on technology is impractical and unlikely.

Beyond the screen, a growing desire for automatization and digitization of goods, services and interpersonal interactions in an increasingly “contact-free” world suggests a bright future for “the **Internet of Things**” (IoT). Broadly defined as physical objects with Internet connectivity (things like networked light bulbs, baby monitors, smart cars, Fitbits and Nest thermostats) the Internet of Things turns physical information into useful, digital data. And in the medical industry, IoT is saving lives, allowing public health workers and doctors to monitor patients under quarantine, even using robots to deliver drugs without risking contact.⁷

In 2018, IoT was made up of of 23 billion connected devices. By 2025, this number could jump to 75 billion.⁸

PROJECTION

While screen time is inevitable, balance will be critical. With that, the future of tech will depend on connectivity and humanization. Our homes and cities will be smarter, using data, AI, 5G, and cloud computing to simplify our lives in ways that will become intuitive and almost imperceptible. Mark Weiser, Chief Technologist at Xerox PARC in the 1990s, articulated a powerful vision for technology when he said, “The most profound technologies are those that disappear. They weave themselves into the fabric of everyday life until they are indistinguishable from it.”

FASHION

The fashion industry doesn't choose trends; world events do. Take the French Revolution. With a changing of the old regime, we saw the exit of over-the-top, aristocratic style associated with the opulent ruling class. After World Wars I and II, fashion went in the opposite direction despite extreme deprivation: Coco Chanel created couture using foraged fabrics

and Dior ushered in the hourglass shape with long skirts and corset waists—all ultra-feminine styles that wartime didn't allow for.⁹

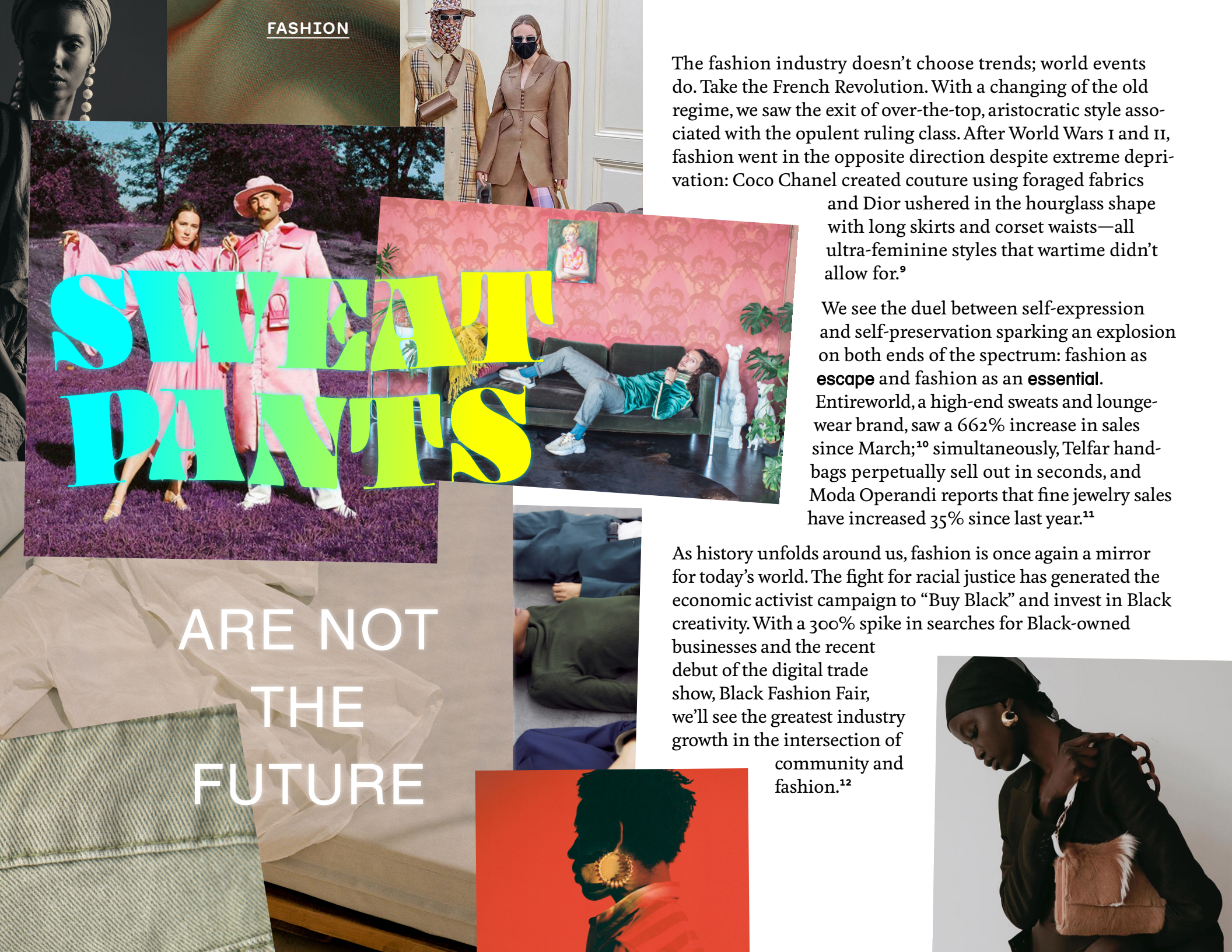
We see the duel between self-expression and self-preservation sparking an explosion on both ends of the spectrum: fashion as **escape** and fashion as an **essential**.

Entireworld, a high-end sweats and lounge-wear brand, saw a 662% increase in sales since March;¹⁰ simultaneously, Telfar handbags perpetually sell out in seconds, and Moda Operandi reports that fine jewelry sales have increased 35% since last year.¹¹

As history unfolds around us, fashion is once again a mirror for today's world. The fight for racial justice has generated the economic activist campaign to "Buy Black" and invest in Black creativity. With a 300% spike in searches for Black-owned businesses and the recent debut of the digital trade show, Black Fashion Fair, we'll see the greatest industry growth in the intersection of community and fashion.¹²

SWEAT
PANTS

ARE NOT
THE
FUTURE



Resale sites are booming since Covid-19. Depop has welcomed high-fashion brands to their site to sell archival overstock, while TheRealReal has seen a 27% rise in new consigners.¹³ As traditional retail sites seem to disappear left and right, other forms of shopping within a more circular economy will become more primary shopping sources.



Consumer concern over a brand's environmental impact is growing exponentially, with no sign of slowing down. Over a third of responders in a Boston Consulting Group survey reported they'd switched brands for environmental reasons.¹⁴ Less wasteful models of production, such as offering **pre-order** (cutting excess inventory), are contributing to the re-design of the fashion industry.



PROJECTION

The future of luxury will be centered around craftsmanship, where made-to-last pieces of timeless quality feel like secure investments for consumers. This approach favors a philosophy of collecting rather than accumulating, spurring interest in archival fashion and covetable vintage. By buying less, shopping resale, and prioritizing a brand's values, consumers are ushering in the era of an aesthetic of ethics.

FASHION MOVEMENTS: PRESENT & NEAR FUTURE



Athleisure



DIY



Secondhand luxury



Charity tees



Recycled materials



The Telfar shopping bag



Renaissance street style



Supply chain transparency

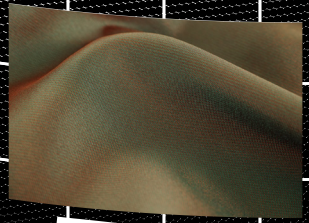
Compostable packaging



Black-owned



Couples Fashion



Antibacterial fabrics



Capsule wardrobes



Cottagecore

ESSENTIAL

EXPRESSIVE

RETAIL

RETAIL

=

COMMUNITY
+
RELATIONSHIPS

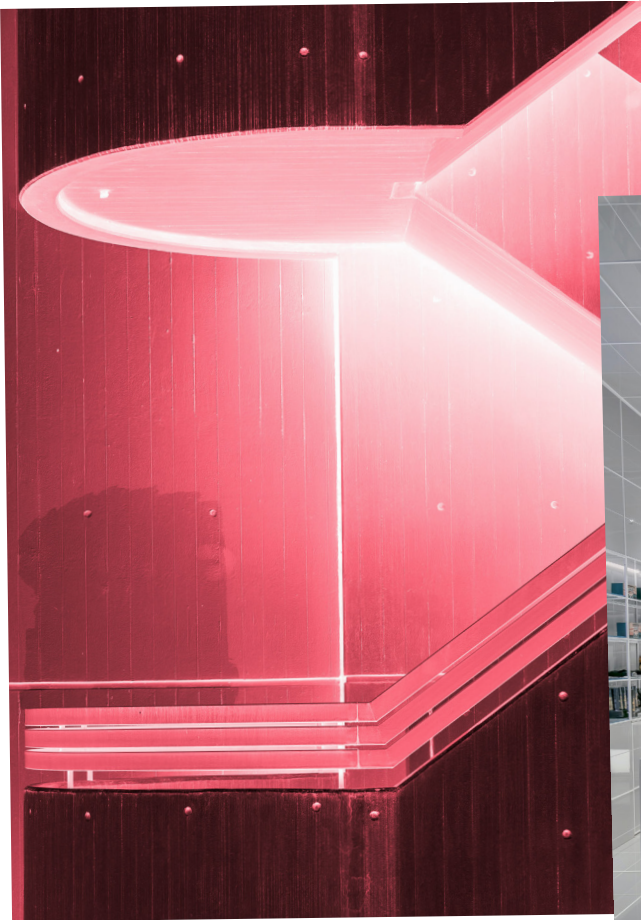
In 2019, Americans spent \$602 billion on online shopping. They also spent \$3.1 trillion in traditional retail stores. So while ecomm has continued to grow at exponential rates, last year it was still just a small slice (14.9%) of the pie.¹⁵ In the first half of 2020, it has jumped to 18% due to the pandemic keeping people out of physical stores.¹⁶ But that doesn't spell doom for physical retail. It just means that physical retail needs to evolve to meet the new habits of consumers in a post-pandemic world... but what does that mean?

Covid-19 has forced many physical retail locations to become takeout or pickup windows (walk-by, drive-through, bike-up) while the space inside has become offices. Businesses already with a stake in public space (Apple stores, brasseries, taco trucks) will excel. Community space will be prioritized over architectural appeal (experiential). Everyone prefers an outdoor farmers market over a grocery store. As limited customers are allowed inside, we're seeing the retail experience be **streamlined** and spaced out. Attractive features of outdoor retail will be brought indoors. All staff will concierge to facilitate faster transactions, limited interactions, and provide a **personalized** experience.



Pandemic lockdown has also created extreme stir-craziness in the average consumer. In our new world, we need to escape our homes. We need to get outside every so often. While we won't be able to enjoy experiential retail in groups anymore, the need for immersive shopping experiences hasn't gone away. It just needs to be geared toward the individual.

RETAIL



RETAIL = COMMUNITY + RELATIONSHIPS

PROJECTION

The future of retail has two poles: the community space and the experience. But they both have one thing in common—an emphasis on personal relationships between customer and shopkeeper. In many ways, the future of retail looks a lot like it's old-timey past. Ye Olde Experiential Retail Shoppe.

REDUCING MILES,
INCREASING CONTROL

In 2019, 1.4 billion people travelled internationally.¹⁷ Tourism made up 10 percent of global GDP in 2019 and was worth almost \$9 trillion.¹⁸ Now, US air traffic is down 95%, hotels are at 29% occupancy, and an estimated 100 million people in the travel industry are out of work.¹⁹

Covid-19 turned traveling on its head. International is out; situations you can fully control are in. In 2020, the summer vacation has become the summer staycation. Instead of flying to resorts, we're taking road trips, going camping, and staying in local Airbnbs.

In fact, lockdown seemed like it spelled doom for Airbnb in early spring—they laid off almost two thousand people and delayed their IPO. But now they're on track to do more business in 2020 than 2019. From May to June, more people booked more nights through Airbnb in the US than they did in the same period last year, and 60% of those bookings were for trips within 300 miles of the person's home.²⁰ Airbnb's resurgence has been local.



So why is this the summer of staycations, slow and self-sufficient travel? One word: **anxiety**.

In our globalized world, travel is what enabled the spread of the virus. We now all have major travel anxiety. As a result, the present and future of travel looks a lot different than it used to.

“Travel is synonymous with vacations—and that’s fine, but somehow I don’t see vacationers as the model for post-pandemic travel,” says travel writer Rolf Potts. “A constant source of travel headlines in recent years has been tourist overcrowding in places such as Venice and Bali, and I doubt the desire to go to so-called hot spots or top-ten-list destinations will drive the next wave of travel.” Perhaps that’s why 46 million Americans plan to take an RV trip in the next 12 months, according to research by the RV Industry Association.²¹

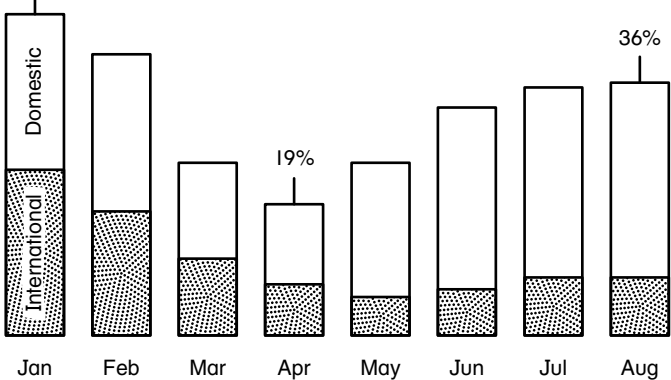
PROJECTION
 The future of travel prioritizes customer safety over all else. Global travel won't return to what it was until travelers can have confidence in the whole system. Travel companies, going forward, simply must offer more choice and control. The new travel economy is autonomy.

TRAVEL

REDUCING MILES, INCREASING CONTROL



46% of Americans traveled



Statistics based on Skift Research September 2020 Travel & Adara Hotel Bookings Surveys



The future of travel is...



All about flexibility

Near-term uncertainty means customers expect the option to easily modify or cancel their plans. There is no brand loyalty in travel anymore. Customers want to be able to have trust and confidence in their plans. In today's world, that means they need the flexibility to change them.

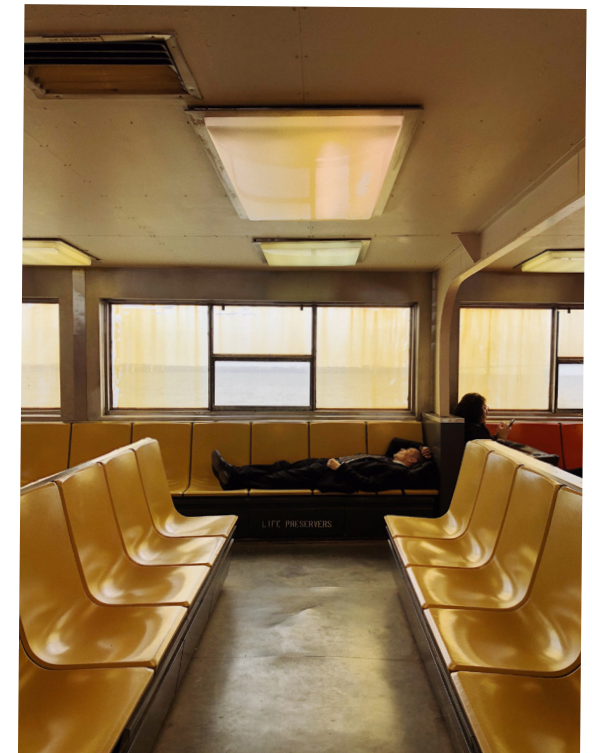
Bubble-centric

Private travel experiences are on the rise. The new luxury in travel is having more control over spaces and situations. How will we afford private travel? Just like the early days of choosing our 'pods' to socialize with, we will split the costs and logistics of private travel with close friends and family. Less bucket list travel, more bubble travel.

FINAL PROVOCATION

With culture in a continual state of chaos, brands must be brutal in answering, “Am I Valuable?”²² This sobering question brings a humility that keeps businesses innovating both in tangible and emotional ways.

Your brand, product, service, and marketing should help co-create a world your audience wants to live in. As a customer and human, don't settle for less.



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Why does it matter? Why will they care? And most importantly, why the hell not?

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