

knit

Dairy Attitudes

Prepared for Dairy MAX | July 2023

Baseline Research for Level Unlocked / Esports Campaign

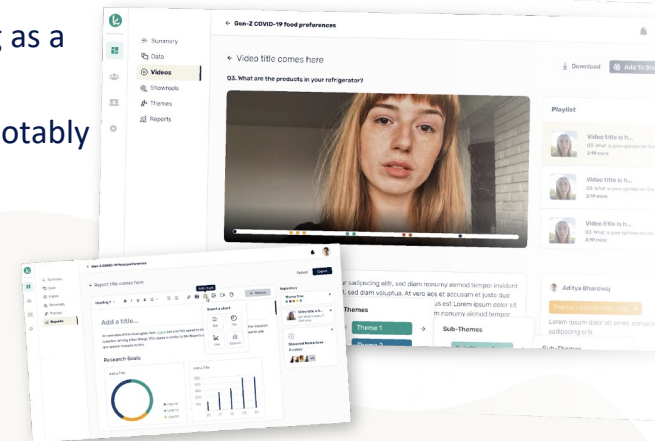



Business & Research Objectives

Dairy MAX would like to get a read on usage and attitudes of dairy, among key audience segments, to establish a benchmark for their Level Unlocked / Esports campaign

Through this study, Dairy MAX will establish benchmarks to understand if campaigns are positively affecting:

- Dairy sentiment, how do consumers feel about dairy in relation to other plant-based alternatives?
- Usage occasions – how and where is dairy consumed, and is it broadening as a result of the campaign?
- Athletes and esports followers – how do these segments perceive dairy, notably chocolate milk as a recovery drink?





Respondent Demographics

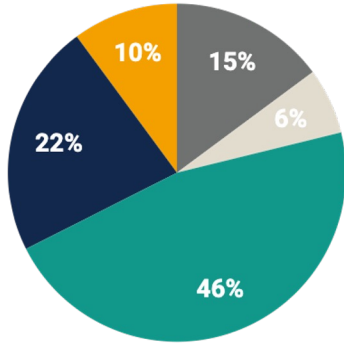
Respondent Demographics

Total Sample Size: N = 1,535 and 134 Voice of Consumer Videos

Audience Cut

Audience Breakdown

● Athlete ● Coach ● Esports Fan ● Gen Pop
● Parent of Gen Z Athlete

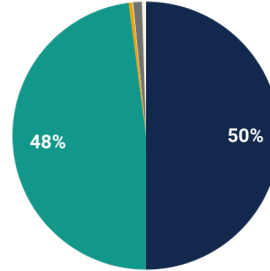


Audience Breakdown

15%	Athletes	(N=228)
6%	Coaches of Athletes	(N=97)
46%	Gen Z esports Enthusiasts	(N=712)
22%	Gen Pop	(N=343)
10%	Parent of Gen Z Athlete	(N=155)

Gender

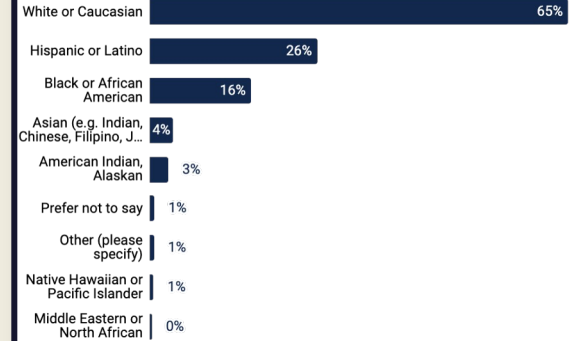
● Man ● Woman ● Trans male/trans man
● Trans female/trans woman ● Genderqueer/gender non-conforming
● Other (please specify) ● Prefer not to say



Gender Breakdown

50%	Man	(N=768)
48%	Woman	(N=735)
1%	Genderqueer/ non-conforming	(N=16)
0%	Trans male/trans man	(N=7)
0%	Prefer not to say	(N=6)
0%	Trans female/trans woman	(N=1)
0%	Other (please specify)	(N=2)

Race/Ethnicity



(Select All That Apply)

65%	White or Caucasian	(N=993)
16%	Black or African-American	(N=241)
26%	Hispanic	(N=398)
4%	Asian	(N=55)
3%	American Indian/Alask. Native	(N=44)
1%	Prefer not to say	(N=11)
1%	Native Hawaiian or Pac. Islander	(N=9)
0%	Middle Eastern or North African	(N=5)
1%	Other (please specify)	(N=10)

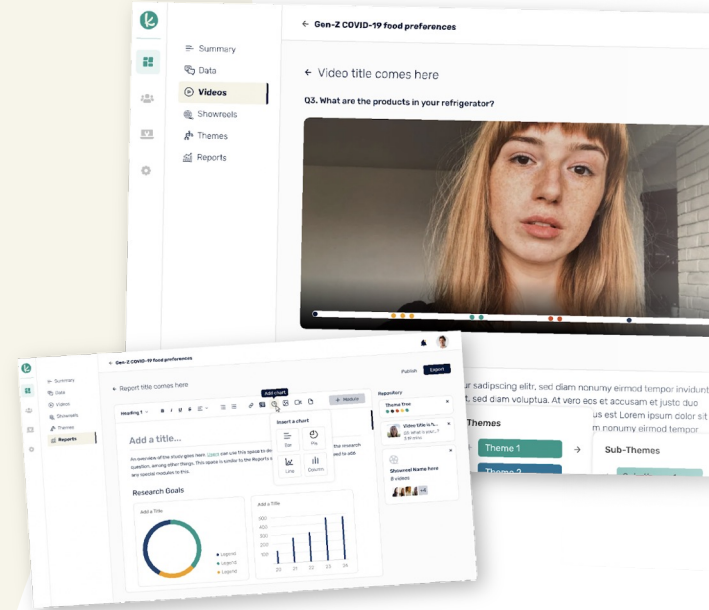
100% of respondents are in the US

Terminating Question

100%

of respondents consume at least one type of dairy.

Respondents who **do not consume any type of dairy** were excluded from this report.



Q: How often do you or other members of your household consume each of the following dairy products? Note: Please keep in mind that dairy items like milk and yogurt can be used in other food products like smoothies/shakes, and butter used for baking & cooking.

Audience Data Cuts

For the purpose of this report, the audience breakdowns are defined as...

Athletes

are defined as respondents who participate in athletics. (N = 228)

Coaches of Athletes

are defined as respondents who are 18+ and coached athletes. (N = 97)

Gen Z Esports Enthusiasts

are defined as respondents who are ages 18-26 and are esports fans. (N = 712)

Parents of Gen Z Athlete

are defined as respondents who are parents of Gen Z athletes. (N = 155)

Gen Pop

constitutes the remaining respondents. (N = 343)



A large, stylized, light teal letter 'K' is positioned on the left side of the slide, partially overlapping a dark teal circular shape. The background is a solid teal color.

General Dairy Usage & Perceptions

Dairy Perceptions

Perceptions around dairy are mixed, roughly half perceive dairy to be nutritious but an indulgence while 1 in 3 have stronger attitudes about the category, citing that it is both nutritious and crucial to one's diet.

Notably, **16%** of Gamers considered dairy products an **indulgence**.

Perceptions of Dairy Products

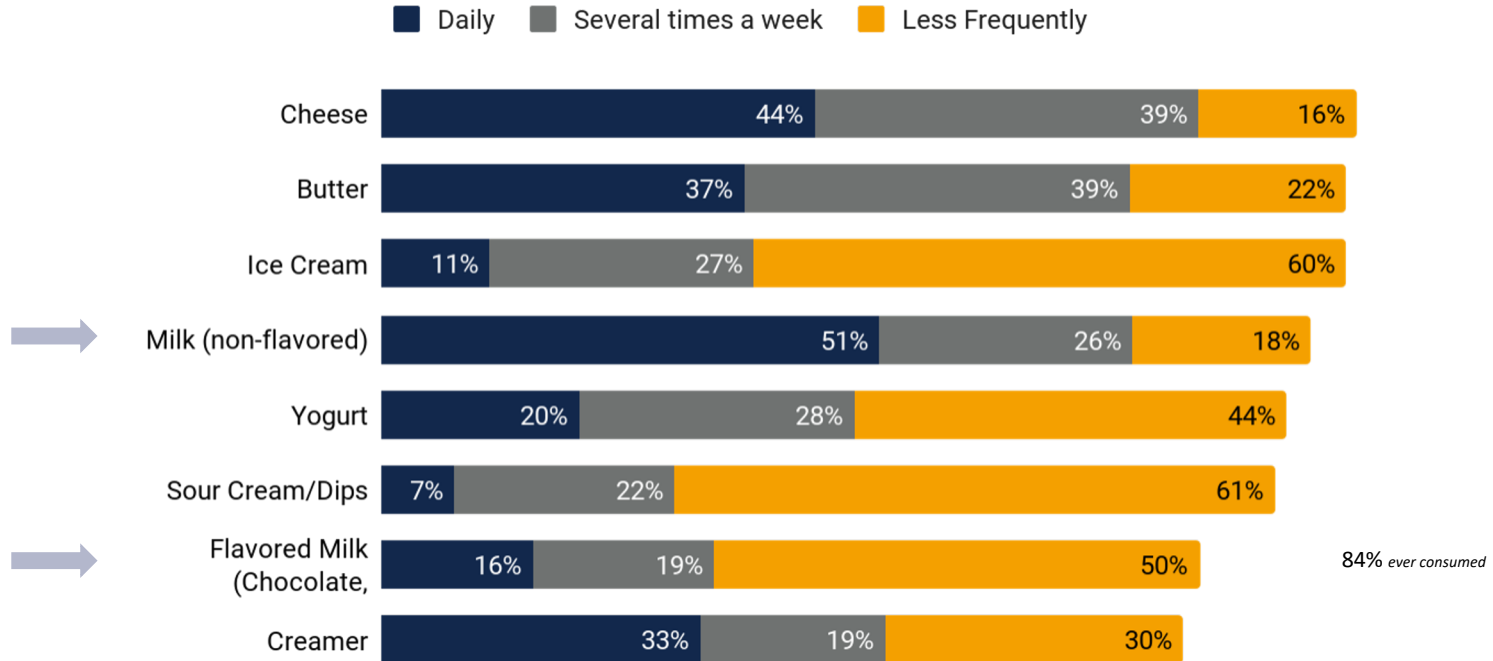
■ A nutritious and crucial part of diet ■ A little bit of both ■ An indulgence that makes me happy



Dairy Product Usage

Non-flavored milk is the most frequently consumed dairy product, though cheese is the most commonly consumed product overall (i.e. more have had it). Around 1 in 3 respondents consume flavored milk weekly.

Household Consumption of Dairy Products

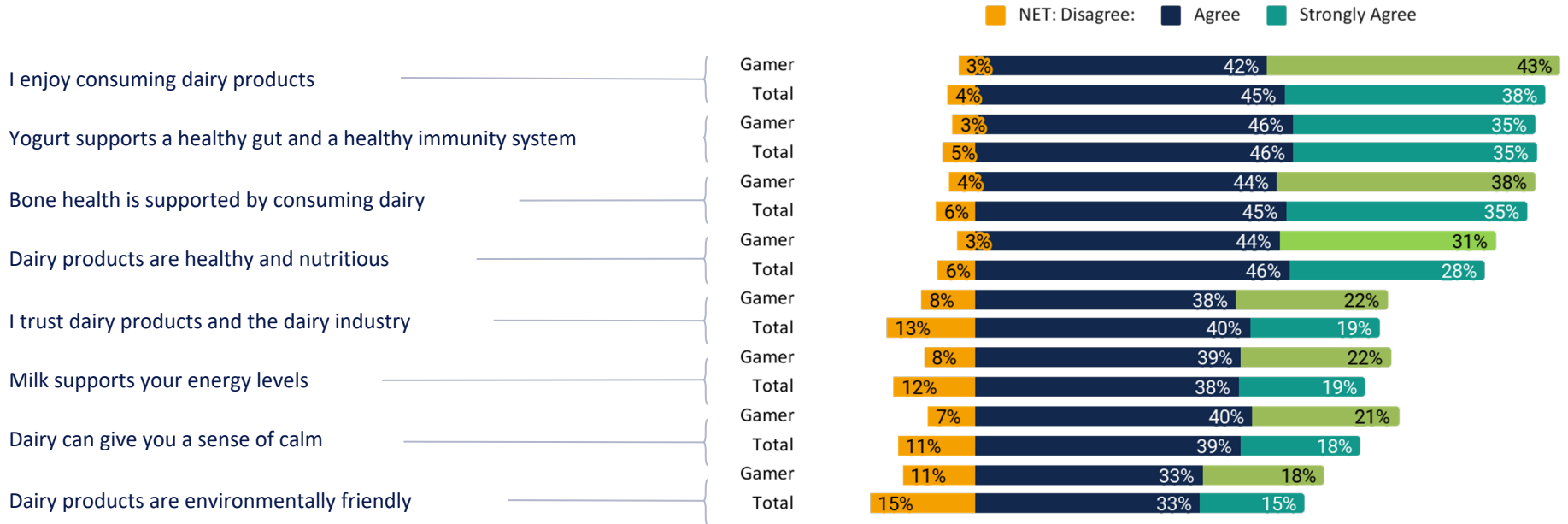


Q7: How often do you or other members of your household consume each of the following dairy products? Note: Please keep in mind that dairy items like milk and yogurt can be used in other food products like smoothies/shakes, and butter used for baking & cooking. Base: Total Dairy Consumers (n=1535).

Dairy Attitudes

Among category consumers, 83% agree that dairy is an enjoyable product, and most recognize the bone and gut health benefits that dairy provides. However, while most respondents trust the dairy industry, agreement is lower, as are perceptions of sustainability.

Attitudes Towards Dairy Products



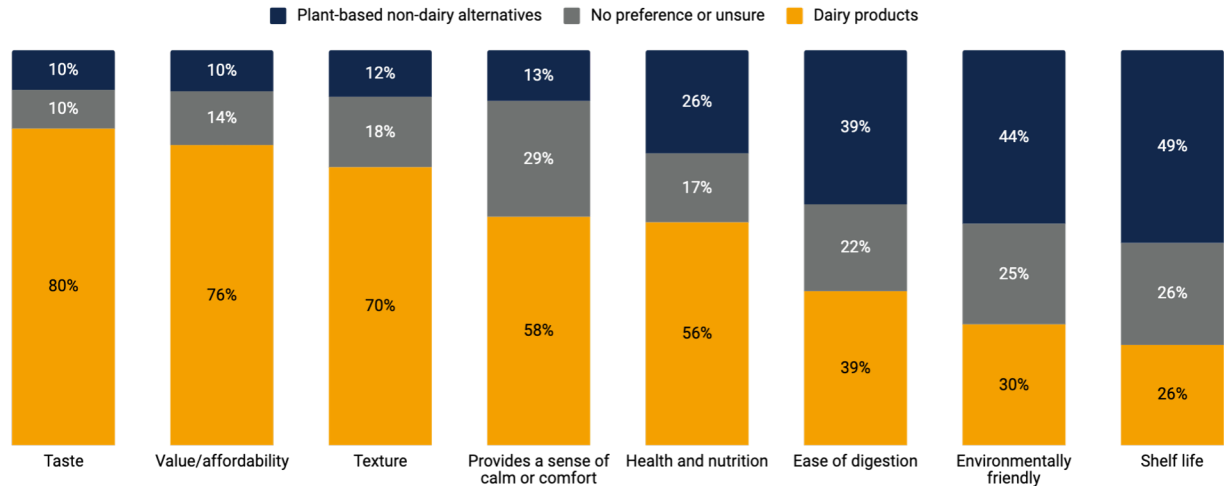
Dairy Associations

Among dairy consumers, dairy is found to better deliver on 5 of the 8 attributes queried; plant-based non-dairy alternatives win on 2: sustainability and shelf-life. Perceptions are split on the ease of digestion.

42% of Gamers think Dairy products better deliver *Ease of digestion* in comparison to Plant-based alternatives.

61% of Gamers think Dairy Products are better at *Providing a sense of calm or comfort* in comparison to Plant-based alternatives.

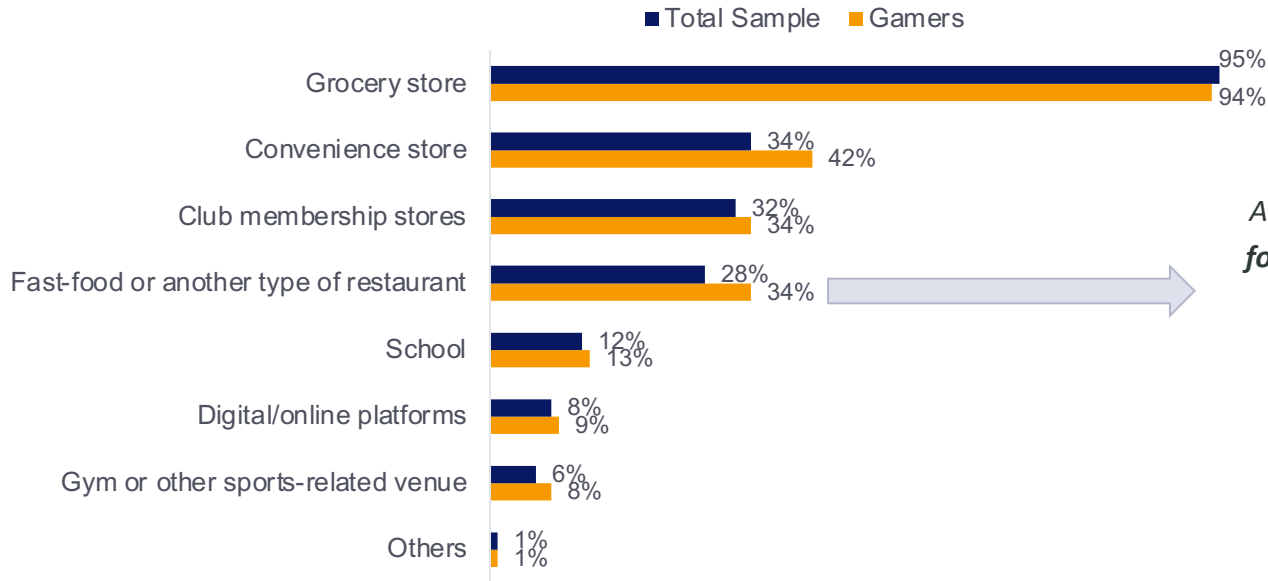
Benefits of Dairy vs. Plant-Based Substitutes – % Selected



Dairy Purchasing

Dairy is most commonly purchased at the grocery store but, on average, buyers are purchasing at 2 different locations. Around 1 in 3 purchase dairy when eating out, namely at locations serving ice cream, such as fast food restaurants.

Where Dairy is Typically Purchased – % Selected



Among those ordering out, **fast food establishments** were most commonly mentioned, for example McDonald's, Dairy Queen, or Braum's.

Avg. #: 2.2



Base: Total Dairy Consumers (n=1535)

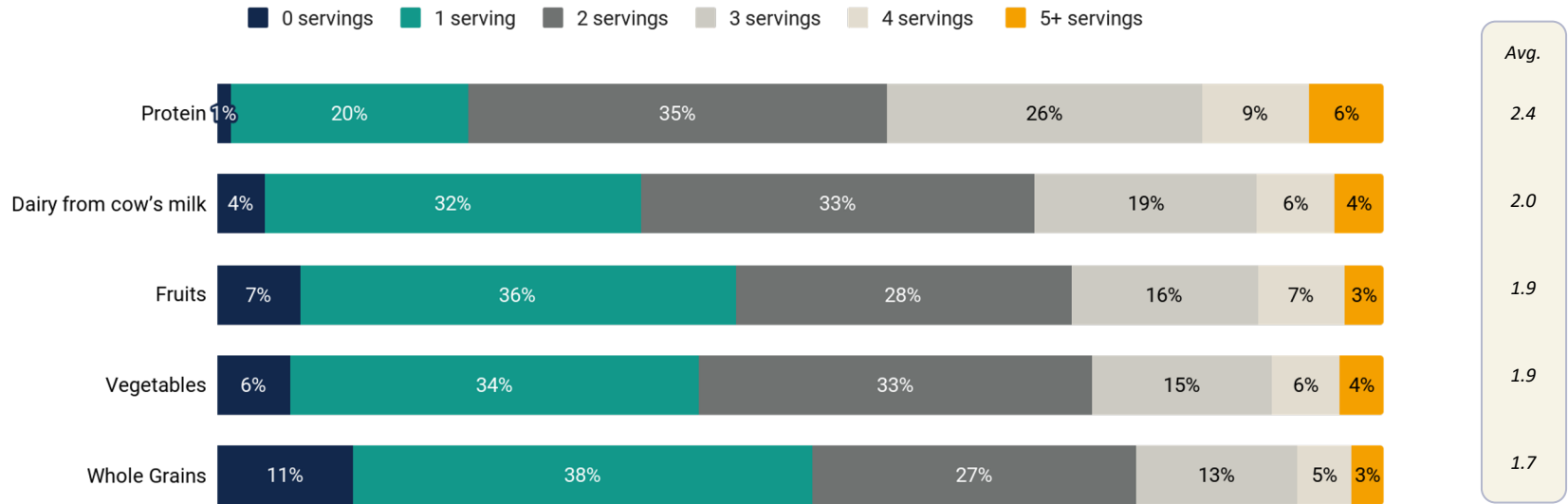
Q16: Where do you typically purchase dairy products?

Q17: Which dine-in restaurants or fast-food eateries do you purchase dairy products at?

Depth of Dairy Involvement

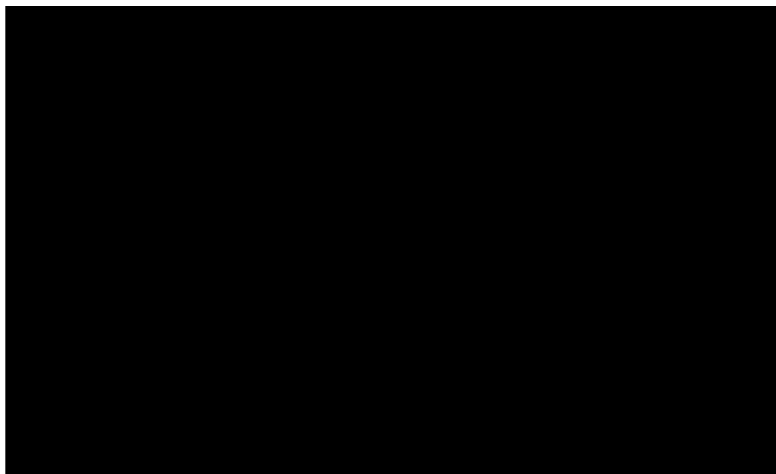
On average, category consumers consume around 2 servings of dairy per day, which is common across other food categories. Notably, 32% of Gamers have at least 3 servings of dairy per day compared to 29% of the Total sample.

Average # of Daily Servings by Food Type



Benefits of Dairy - From a CEO

- If category buyers were to act as a dairy company CEO, they'd want to **communicate** that the **product(s) sold are healthy** and are comprised of healthy, **nutritious**, and **safe** ingredients.
- **Versatility** is another theme, both in regards to having **lighter dairy options** (e.g. lactose-free), but also in terms of communicating the **various uses of dairy** throughout the day.
- Another major theme is **sustainability** - both in terms of animal treatment and production's impact.
- Overall, buyers want more, or better, **transparency** into the ingredients, product line (various product types), and operation (how the product is made).



A large, stylized, light teal letter 'K' is positioned on the left side of the slide, partially overlapping a darker teal circular shape. The background is a solid, medium teal color.

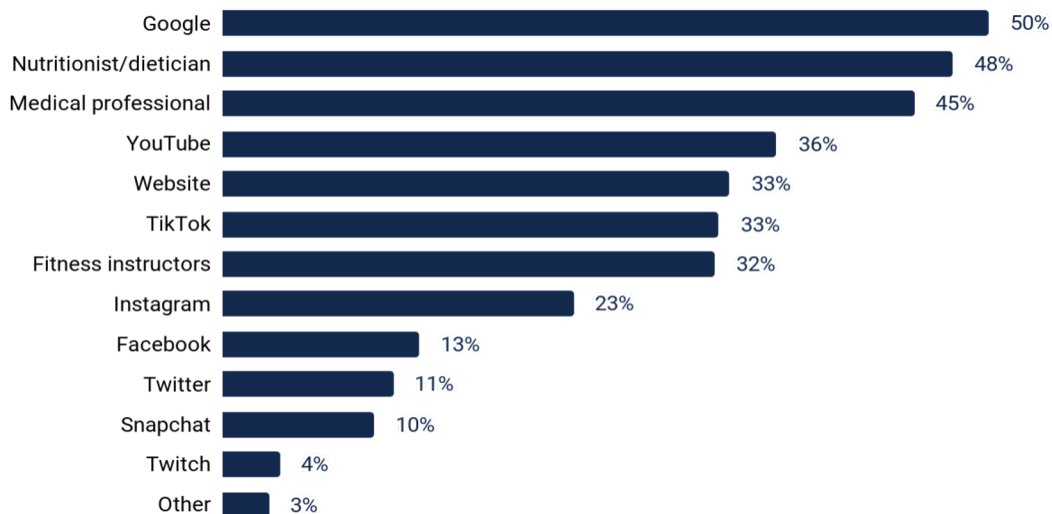
Audience Deep-Dive: Gen Z Esports Enthusiasts

Gen Z Esports: Nutritional Sources

On average, Gen Z Esports Enthusiasts get their nutritional information from around 3 sources. Seeking professional advice is most common, followed by social media, then web searches (Google).

Preferred Sources of Nutritional Information

Among Gen Z Esports Enthusiasts



65%

Net: Professional*

57%

Net: Social Media

Avg. #: 3.4



Base: Gen Z esports Enthusiasts (n=712)

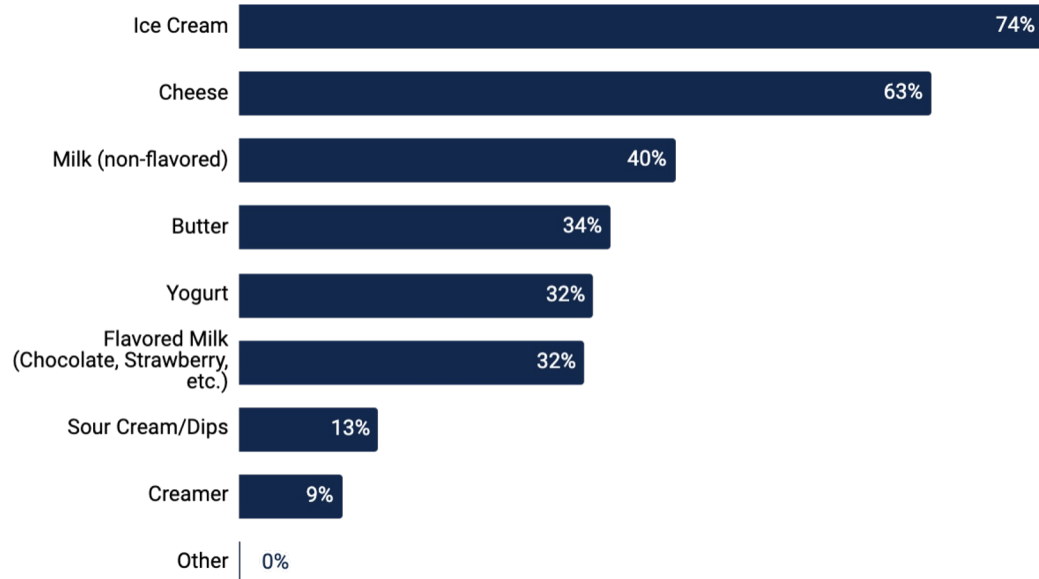
Q22: From which platform(s) do you prefer to receive nutrition information? Select all that apply. *Net professional includes nutritionist, medical professional, and fitness instructor

Gen Z Esports: Favorite Dairy Items

Ice cream and cheese are favorite dairy items among Gen Z Esports fans; only 1 in 3 cite flavored milk as a top 3 favorite, which ranks lower overall.

Favorite Dairy Items – % Selected (Top 3)

Among Gen Z Esports Enthusiasts



Base: Gen Z esports Enthusiasts (n=712)

Q19: Which of the following are your 3 favorite dairy products? Select up to 3.

Gen Z Esports: Dairy Usage Occasions

The top usage occasion for milk (both flavored and unflavored), yogurt, and creamer is **breakfast**.

While non-flavored milk is more commonly consumed at breakfast, close to **2 in 3** also **consume flavored milk at breakfast**.

Overall, **flavored milk is more versatile**, with many consuming throughout the day, up until dinner, and then again as a late night snack.

Though only 17% of Gen Z esports fans consume **flavored milk** after a workout, it's among the **top post-workout dairy** products, topped only by yogurt.

Dairy Usage Occasions by Product

	Milk (non-flavored)	Flavored Milk	Cheese	Yogurt	Ice Cream	Butter	Creamer	Sour Cream/Dips
<i>Base: (Selected as top 3 favorite dairy item)</i>	<i>(n=285)</i>	<i>(n=225)</i>	<i>(n=452)</i>	<i>(n=231)</i>	<i>(n=525)</i>	<i>(n=242)</i>	<i>(n=67)</i>	<i>(n=91)</i>
<i>Sorted by daypart</i>	%	%	%	%	%	%	%	%
Breakfast	86	62	45	68	3	68	90	10
Mid-morning snack	22	32	23	42	6	12	27	12
Lunch	25	32	82	28	8	61	10	54
Mid-afternoon snack	23	32	41	42	36	14	16	44
Dinner	30	24	78	12	26	78	4	63
Late night snack	38	40	32	29	83	12	6	40
After a workout	14	17	10	20	5	5	3	4



Gen Z Esports: Modes of Consuming

MILK

- Drinking it straight from a glass
- Mixing it with cereal
- Enjoying it with cookies
- With breakfast
- In protein shakes and smoothies
- With ice cream
- Incorporating it into meals
- With a straw

CHEESE

- On sandwiches and burgers
- With crackers
- Melted on foods like pizza, nachos
- In Mexican cuisine generally
- As a topping or ingredient
- On its own or paired with other charcuterie type items
- With dip or as a dip (fondue)

YOGURT

- Eating by itself
- With toppings like granola, fruits
- In smoothies for creaminess
- For breakfast item or with cereal
- As a dessert or frozen yogurt
- As a substitute for sour cream
- As a dip
- For gut health

ICE CREAM

- Enjoy it plain
- With toppings
- With cookies
- In a cone or bowl
- Blended (e.g. milkshakes)
- As a treat or indulgence
- On hot days
- As a comfort food

BUTTER

- Spread it, on toast, bread, etc.
- In cooking or baking
- Incorporating it into meals
- Melting (on seafood)
- As a topping (on popcorn, pancakes)
- Substitute for oil in cooking when trying to provide better flavor

OTHERS

Creamer: Creamer is often mentioned as a popular choice to enhance the flavor, sweetness, and creaminess of coffee

Sour cream/dips: on tacos, nachos, baked potatoes; as a dip for chips, crackers, or vegetables; on foods like quesadillas



Base: Gen Z esports Enthusiasts (n=713)

Q20: Tell us more about your favorite dairy items you just selected. How do you like to eat/drink each? OPEN-ENDED RESPONSE

A large, stylized letter 'K' logo in a darker teal color, partially visible on the left side of the slide. The 'K' is composed of thick, rounded strokes.

Audience Deep-Dive: Athletes & Coaches

Athletes: Post-Workout Recovery Drink Usage

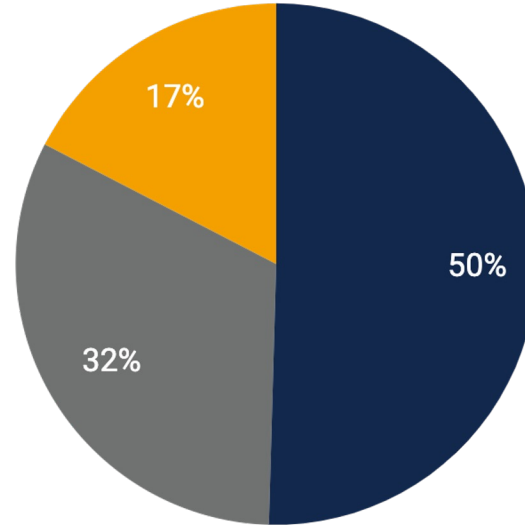
Virtually all athletes drink post-workout recovery beverages, and the majority consume them quite frequently.

Post-Workout Recovery Beverage Consumption

98%

of athletes drink post-workout recovery beverages.

- After every workout, game, or practice session
- A few times per week
- Once a week or less frequently



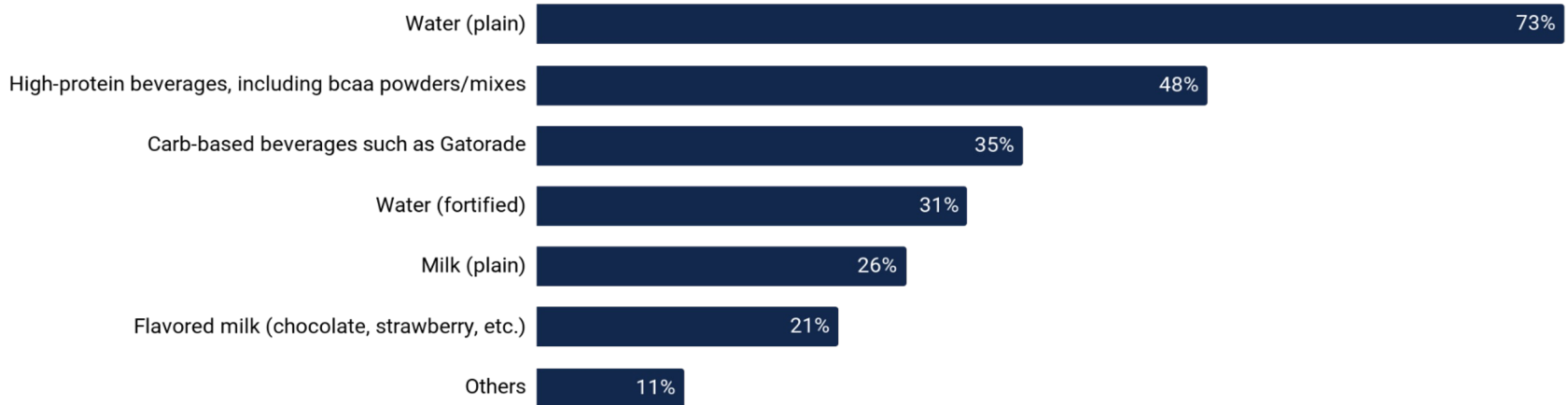
Q24: Which post-workout recovery beverages do you consume? Select all that apply. Base: Athletes (n=228)

Q25: How frequently do you consume post-workout recovery beverages? Base: Athletes Consuming Post-Workout Recovery Beverages (n=224)

Athletes: Post-Workout Recovery Drinks

On average, athletes consume 2 to 3 different forms of post-workout recovery drinks, of which, plain water is the most common; flavored milk ranks last - only around 1 in 5 currently consume it as a recovery drink.

Types of Post-Workout Recovery Beverages Consumed



Avg. #: 2.5



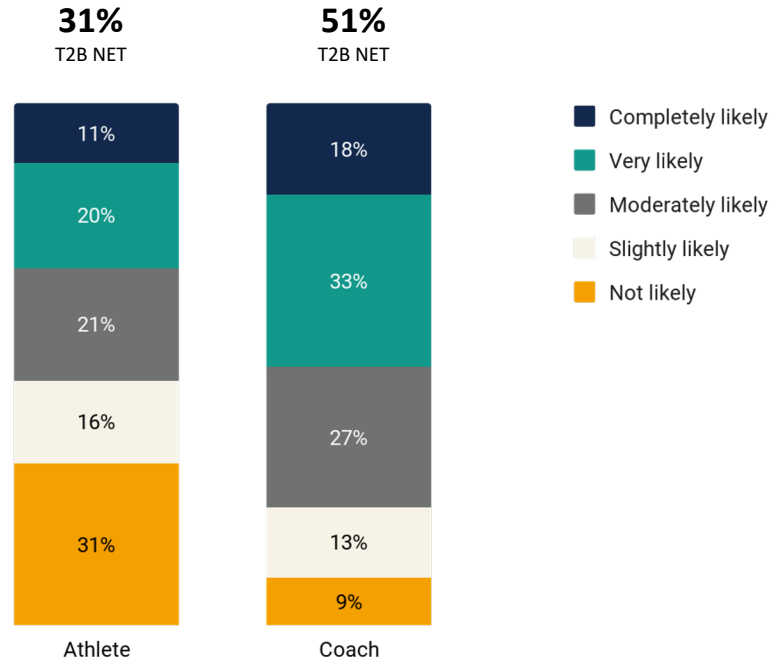
Base: Athletes (n=228)

Q24: Which post-workout recovery beverages do you consume? Select all that apply.

Chocolate Milk Post-Workout Usage

Coaches are more likely than athletes to consider providing or using flavored (chocolate) milk as a recovery beverage.

Likelihood to Use or Provide Chocolate Milk as a Post-Recovery Beverage



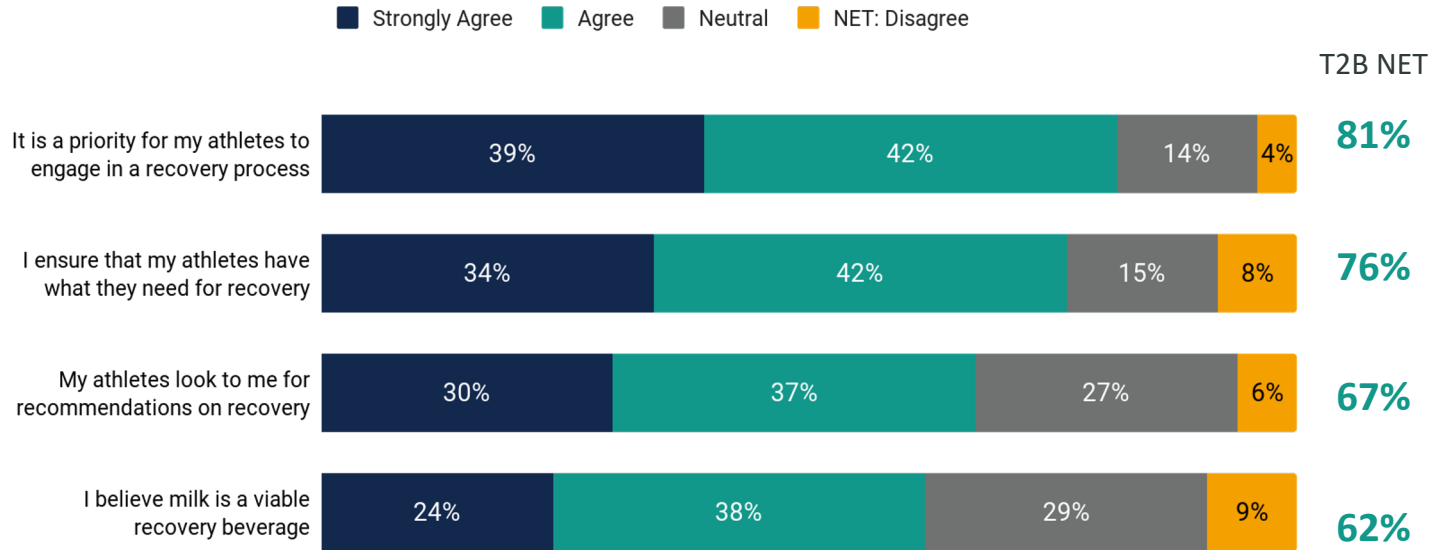
Q26: How likely are you to consider chocolate milk as a post-workout recovery beverage? Base: Athletes (n=228)

Q31: Given a budget, how likely would you be to provide chocolate milk as a post-workout recovery beverage to your athletes? Base: Coaches (n=97)

Recovery Attitudes among Coaches

Although only 50% of coaches were willing to provide chocolate milk as a recovery beverage, 62% agreed that it was a viable recovery option and almost all agreed that recovery for athletes is important. Additionally, 67% of coaches agreed that their athletes would seek them out as a resource for recommendations on recovery, indicating that coaches may be a key channel for advocating the benefits of flavored milk as a recovery beverage.

Attitudes Towards Recovery Practices & Beverages



Base: Coaches (n=97)

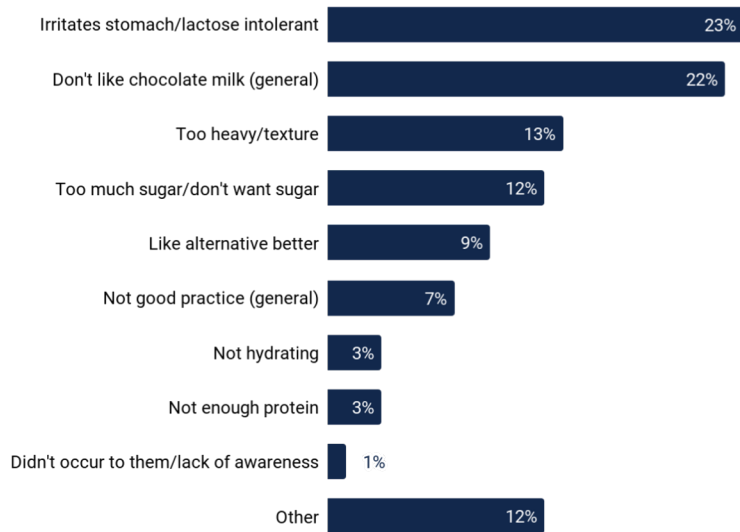
Q30: Regarding the post-workout/practice/competition recovery process, what is your level of agreement with the following:

Barriers to Chocolate Milk Post-Workout

Among athletes and coaches not open to chocolate milk as a post-workout recovery beverage, **digestive issues** were the top mentions, though having too much sugar, texture, and preference for other beverages were also key themes.

Barriers to Consuming Chocolate Milk Post-Workout - % Mentioned Unaided

Among Athletes



Among Coaches*

Among the few coaches not open to Chocolate Milk, as a recovery beverage, digestive issues, sugar, and hydration were mentioned...

*"Because **dairy is hard on the stomach** while exercising..."*

*"I would recommend something with **less sugar**."*

*"**Water is the best in my opinion.**
To stay hydrated."*



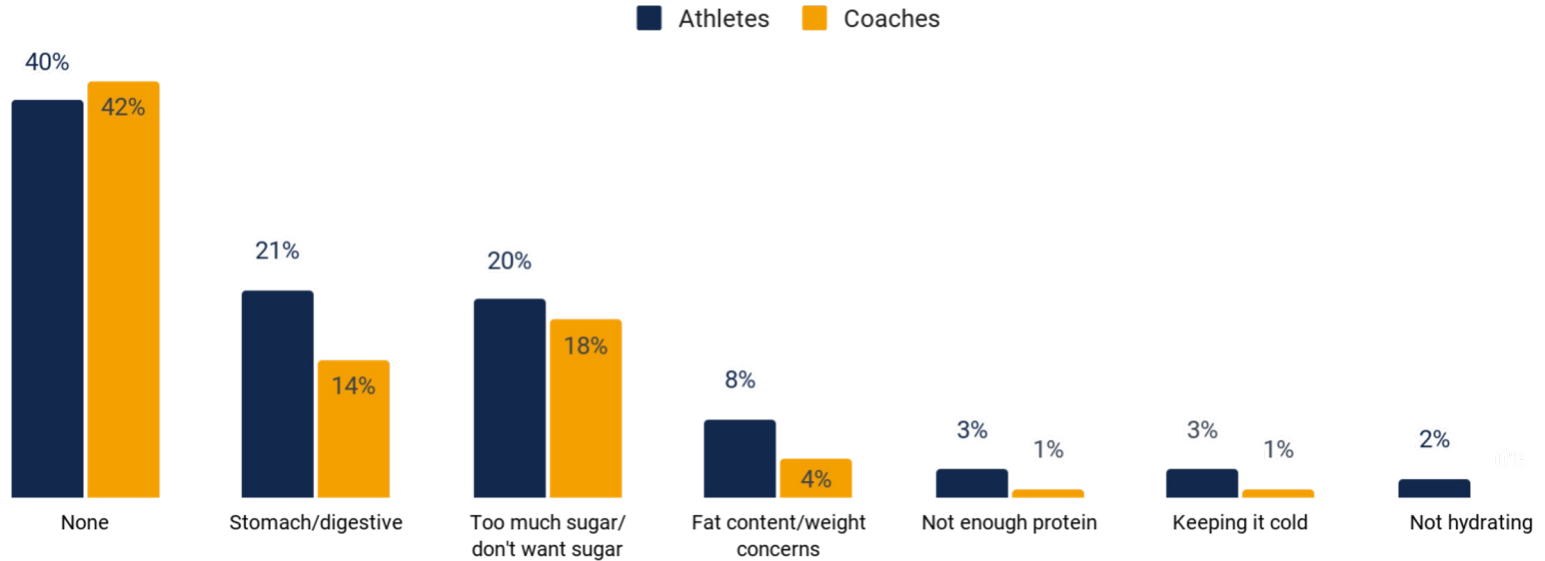
Q27. Why are you NOT likely to consider chocolate milk as a post-workout recovery beverage? OPEN-ENDED RESPONSE. Base: Athletes Who Wouldn't Consider Chocolate Milk (n=69)

Q32. Why are you NOT likely to consider providing chocolate milk to your athletes as a post-workout recovery beverage? OPEN-ENDED RESPONSE. Base: Coaches Who Wouldn't Consider (n8)* - small base

Chocolate Milk Post-Workout Concerns

Concerns among those open to consuming / offering chocolate milk post-workout mirror barriers among those not open: digestive issues and sugar content. Unsurprisingly, many athletes and coaches who are willing to consume / offer do not have any concerns about chocolate milk as a recovery beverage.

Concerns About Using Chocolate Milk as Post-Workout Drink - % Mentioned Unaided



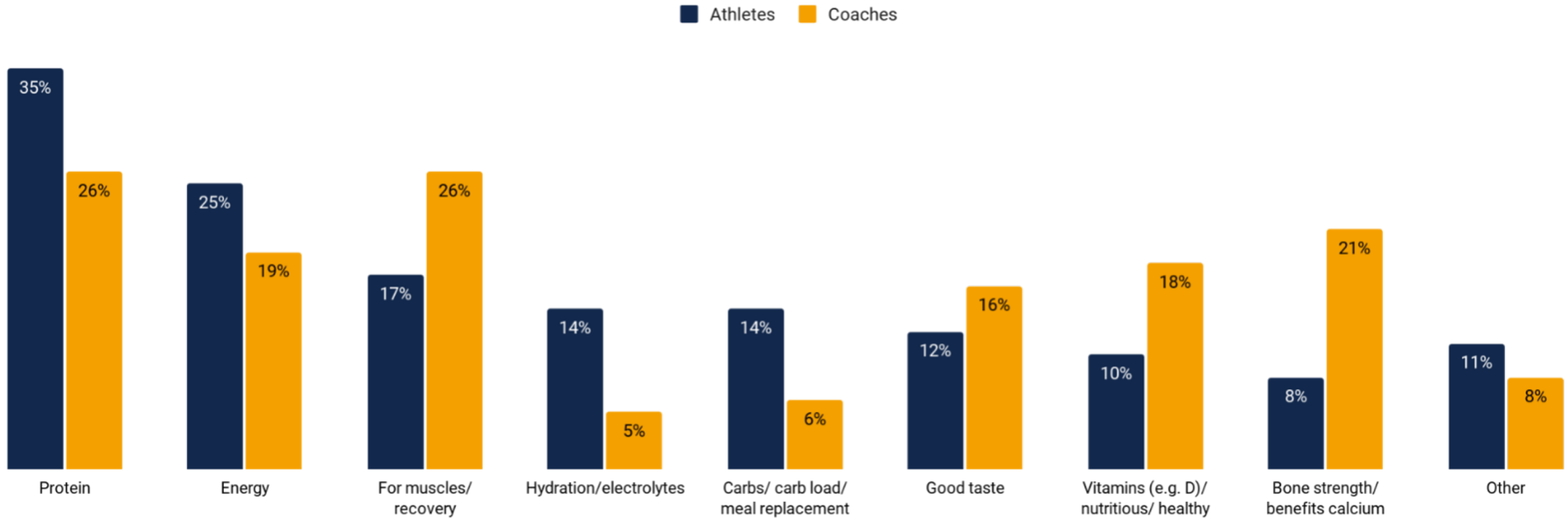
Q29. What concerns do you have, if any, about using chocolate milk as a post-workout recovery beverage? OPEN-ENDED RESPONSE. Base: Athletes Open to Chocolate Milk (n=155)

Q34. What concerns do you have, if any, about using chocolate milk as a post-workout recovery beverage? OPEN-ENDED RESPONSE. Base: Coaches Open to Chocolate Milk (n=85)

Benefits of Chocolate Milk Post-Workout

Protein, energy, and muscle recovery are top cited benefits of consuming chocolate milk post-workout among both athletes and coaches. Coaches are more likely than athletes to recognize the muscle and bone benefits.

Expected Chocolate Milk Post-Workout Recovery Benefits - % Mentioned Unaided



Q28. What benefits would you expect from chocolate milk as a post-workout recovery beverage? OPEN-ENDED RESPONSE. Base: Athletes Open to Chocolate Milk (n=155)

Q33. What benefits would you expect from chocolate milk as a post-workout recovery beverage? OPEN-ENDED RESPONSE. Base: Coaches Open to Chocolate Milk (n=85)

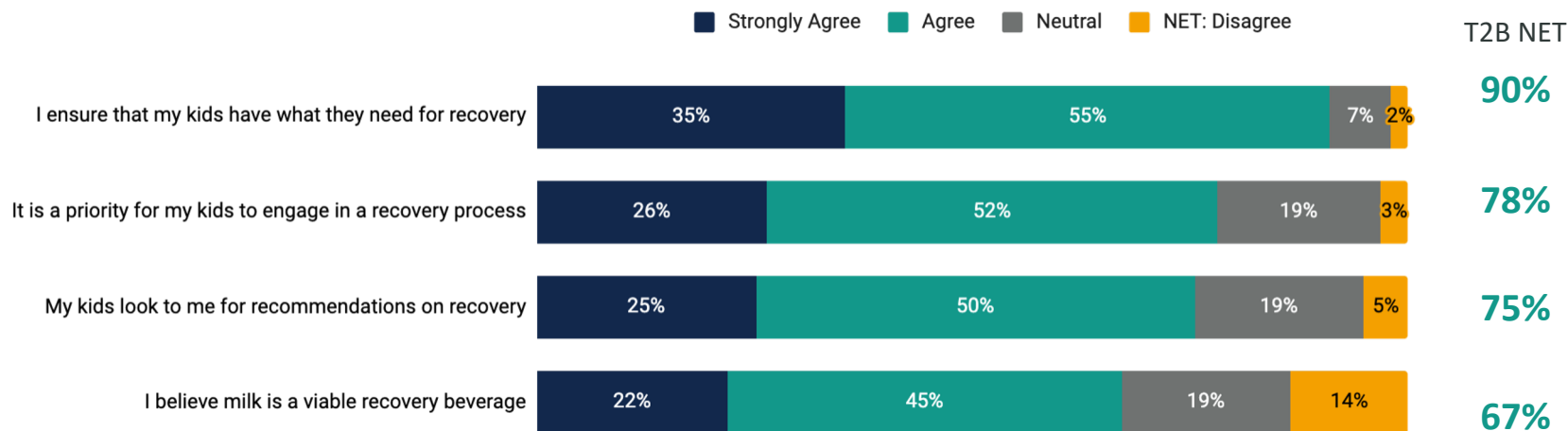
A large, stylized, light teal letter 'K' is positioned on the left side of the slide, partially overlapping a dark teal circular shape. The background is a solid teal color.

Audience Deep-Dive: Parents of Gen Z Athletes

Gen Z Parents: Recovery Attitudes

Among Parents of Gen Z athletes, the majority agree that post-workout recovery is important, and 7 in 10 believe milk (in general) is a viable recovery beverage.

Attitudes Towards Recovery Practices & Beverages



Base: Parents of Gen Z Athletes (n=155)

Q35: Regarding the post-workout/practice/competition recovery process, what is your level of agreement with the following:

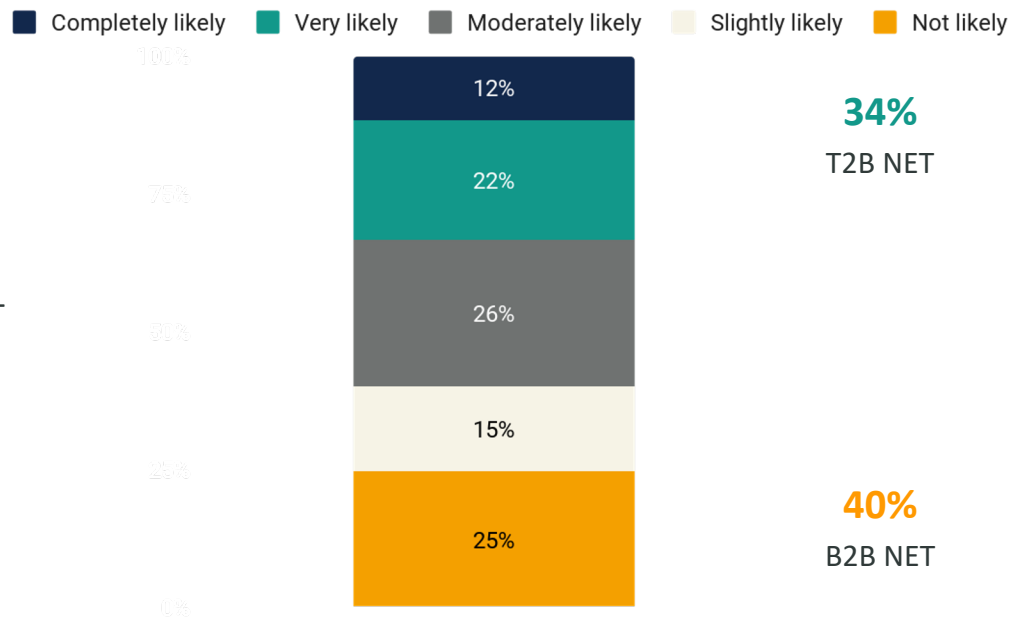
Gen Z Parents: Post-Workout Recovery Drinks

All parents of Gen Z athletes say their kids consumes post-workout recovery beverages. However, likelihood to consider chocolate milk as an option is divided.

Post-Workout Recovery Beverage Consumption & Likelihood to Consider Chocolate Milk

100%

of parents cite their kid (athlete) drinks post-workout recovery beverages.



Base: Parents of Gen Z Athletes (n=155)

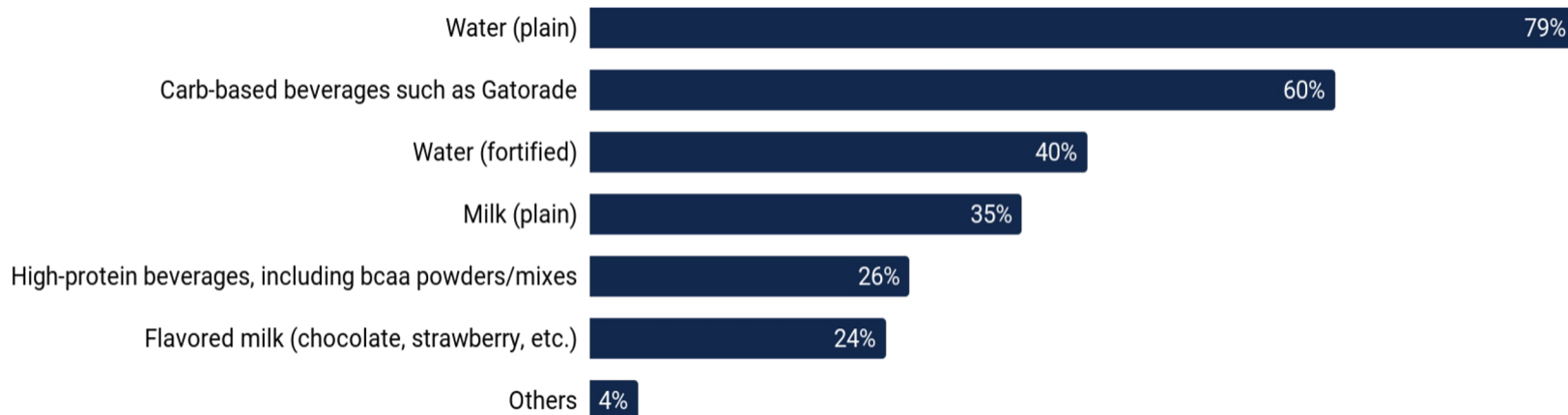
Q36: Which beverages do your children consume after participating in athletics? Select all that apply.

Q38: How likely are you to consider chocolate milk as a post-workout recovery beverage for your children who participate in athletics?

Gen Z Parents: Post-Workout Recovery Drinks

Of post-workout recovery beverages, parents cite their children's top selection as water and the least selected beverage as flavored milk.

Types of Post-Workout Recovery Beverages Kids Consume - % Selected among Parents

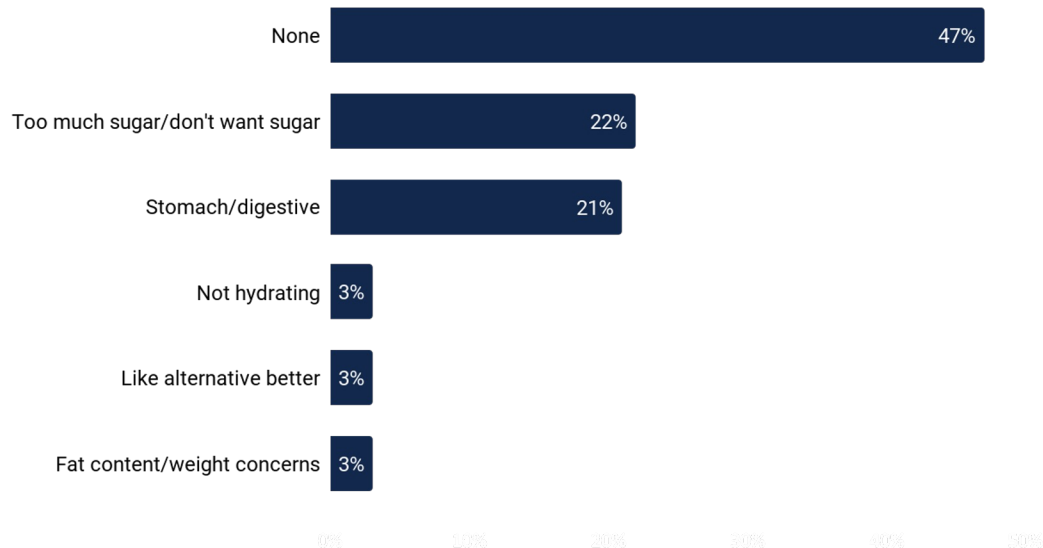


Gen Z Parents: Chocolate Milk Barriers

Among parents, sugar content and digestive issues are the top barriers to providing chocolate milk to Gen Z athletes. Though as previously seen, most parents are open to chocolate milk during post-workout recovery.

Barriers & Concerns to Giving Chocolate Milk Post-Workout - % Mentioned Unaided

Among Parents Open to Chocolate Milk for Kids



Among Parents Not Open to Chocolate Milk

Among the few Gen Z Parents not open to Chocolate Milk, as a recovery beverage for their kids, digestive issues and sugar were mentions:

*"Amount of **sugar content** in the product."*

*"I feel it **would make them sick.**"*

*"It's **too heavy.**"*

*"It's **too thick** after a strenuous activity. They want **something simpler, like water or Propel/Gatorade**"*



Q41. Do you have any concerns about providing chocolate milk as a post-workout recovery beverage? OPEN-ENDED RESPONSE. Base: Parents of Gen Z Athletes Open to Chocolate Milk (n=117)

Q39. Why are you NOT likely to consider chocolate milk as a post-workout recovery beverage for your children? OPEN-ENDED RESPONSE. Base: Parents of Gen Z Athletes Not Open to Chocolate Milk (n=37)

Gen Z Parents: Chocolate Milk Purchasing

Among those who do purchase chocolate milk for their kids, purchase frequency is heavy - 46% purchase on a weekly basis and 41% purchase a few times per month.

Frequency of Purchasing Chocolate Milk for Children

■ Every week ■ A few times per month ■ Once per month ■ Less frequently



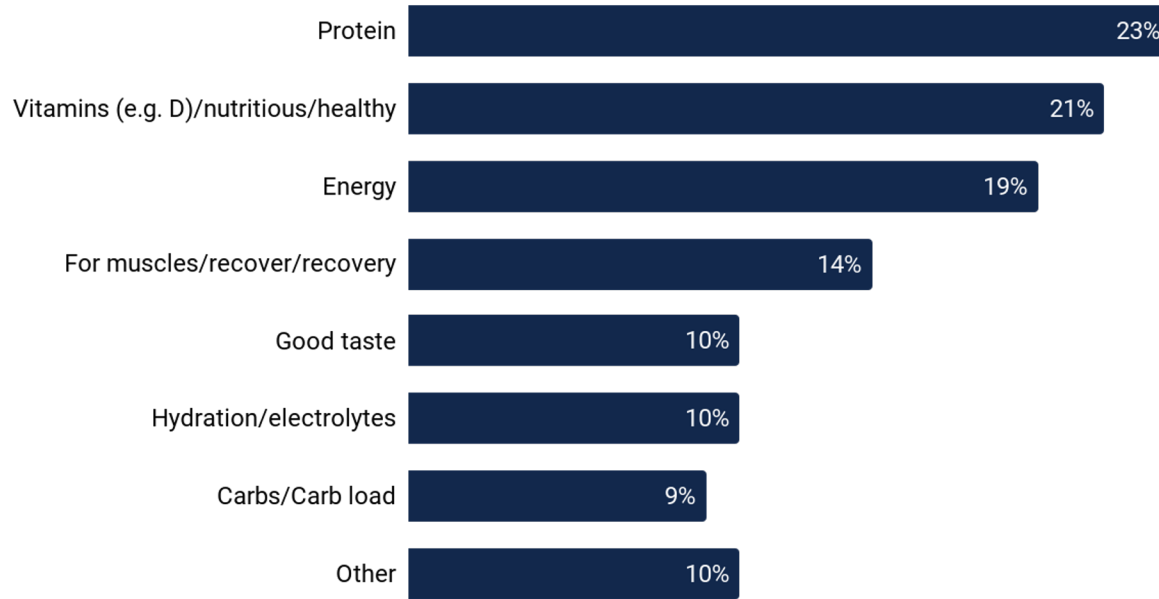
Base: Parents of Gen Z Athletes Who Purchase Chocolate Milk as a Recovery Beverage (n=37)

Q37: How frequently do you purchase chocolate milk for your children?

Gen Z Parents: Benefits of Chocolate Milk

Parents of Gen Z perceive protein to be the top benefit of chocolate milk as a post-workout beverage. Secondary perceived benefits include vitamin replenishment, energy, and muscle recovery.

Expected Chocolate Milk Post-Workout Recovery Benefits - % Mentioned Unaided



Base: Parents of Gen Z Athletes Open to Providing Chocolate Milk (n=117)

Q40. What benefits would you expect by providing chocolate milk as a post-workout recovery beverage to your children? OPEN-ENDED RESPONSE

Influencer Strategies



Influencer Strategies

- Outside of talking about product benefits, such as health, nutrition, and taste, the **top strategy mentioned was to show how dairy products can be used** and how they fit in with one's day-to-day life.
 - For instance, beyond simply providing recipes, show how to create the recipe, how to best consume the recipe, and show the after effects / benefits of consumption (e.g. energy).
 - Possible usage occasions to highlight: with cereal, cookies, and in protein shakes.
- Another strategy to consider, specifically targeted to **Gen Z, is use of humor** or “wacky” content. Notably, flavor variety appeals to this generation, and may help drive more Gen Z influencers to pick up the product and talk about it.
- Other mentions were use of celebrities, apparel (t-shirts), challenges, and promotions (BOGO/deals).

knit

Influencer Strategies

Imagine you're an influencer. How would you influence your followers to consume dairy and what tactics would you use?



A large, stylized letter 'K' logo in a darker teal color, positioned on the left side of the slide. The 'K' is composed of thick, rounded strokes and is partially enclosed by a dark teal circle.

Key Takeaways

Key Takeaways

Dairy Perceptions

Overall, **perceptions of dairy are positive** among category consumers.

The vast majority of respondents enjoy consuming dairy and more consumers find **dairy better delivers on taste, texture, value, and health benefits** when compared to plant-based dairy substitutes.

Flavored Milk Landscape

Of all dairy products, respondents consume non-flavored milk and cheese most frequently, with most respondents consuming at least several times a week.

86% of respondents have consumed flavored milk in general. Of those respondents, **few are consuming flavored milk frequently.**

Perception of Flavored Milk Post-Workout

Nearly all athletes drink post-workout recovery beverages, but fewer would consider chocolate milk (around 1 in 3).

Among athletes surveyed, around 20-25% consume flavored milk post-workout, small compared to alternatives like water and other non-dairy beverages. However, this is still a sizable proportion among a broad group of consumers.

Benefits of Chocolate Milk Post-Workout

Notably, **coaches are more likely to consider chocolate milk post-workout,** and they're more likely to recognize certain benefits like muscle recovery and bone strength.

Other perceived benefits (among athletes and coaches) are protein and energy boosting effects.



Key Takeaways

Barriers to Chocolate Milk Post-Workout

Qualitatively, **respondents reference awareness and availability as barriers to chocolate milk** as a recovery beverage (i.e. not having it readily available after a workout, not shelf stable, etc.)

Digestive or **perceived digestive issues are also common barriers, as well as preferences for other beverages, and not liking the added sugar** in chocolate milk.

Gen Z's Source of Nutritional Information

Gen Z (Esports fans) are going to multiple sources (3-4) to get nutritional information.

While Google/search is top ranked individually, **consulting with a professional such as a medical professional, nutritionist, or fitness instructor is most common overall.**

In addition, **2 in 3 coaches say their athletes look to them for recovery recommendations.**

What Consumers Want to Know

Naturally, social media is a key area to reach younger consumers – **over half of Gen Z Esports fans look to social media for nutritional information.**

Transparency in the dairy industry is highly important to consumers – not only in regards to ingredients but also in production and processing.

Respondents also value sustainability in the dairy industry, indicating if appointed CEO of a dairy company, they would ensure ethical animal treatment and sustainable production.

How to Influence

Respondents note that the most effective influencer tactic would be to show consumers how dairy products fit into their everyday lives.

From recipe creation, preparation, consumption, and post-consumption benefits, **consumers want real-life demonstrations on product use-cases.**



Looking Ahead: What's Next?

- **Opportunity to build awareness, trust, and consideration** through social media and influencer campaigns that show consumers how to use dairy in a variety of fun and engaging ways in their everyday lives.
- **Opportunity to highlight chocolate milk as a post-workout recovery beverage to fill knowledge gaps** amongst athletes, parents of athletes, and Gen Z esports fans. While few respondents consider chocolate milk to be a recovery option, some groups would be open to it in the future; thus, indicating the need to further raise awareness about this specific use-case for flavored milk.
- **Opportunity to consider using professionals in the medical or fitness/nutrition space to vocalize use-cases** as younger generations are looking to them for advice. In addition, leveraging coaches and sports pros in omnichannel marketing to build trust amongst the younger generation, particularly when it comes to chocolate milk as a post-workout beverage.
- **Opportunity to provide additional product education around the benefits and misconceptions around dairy.** Given the split perceptions around dairy in terms of digestion / digestive health, additional information and discussion amongst current category buyers may ease barriers to dairy consumption.
- **Opportunity for future studies to explore the emotional effect and mood elevation which comes from consuming dairy.** For instance, why is it calming to some? How does it tie to childhood? How does it connect and bring families, or teams (athletes and coaches) together?



Thank You



Appendix



Research Methodology

Type of Research

Custom, quick-turn quantitative and qualitative research

Level of Confidence

The total population size is 198,000,000. The total sample size was $N = 1535$, giving us a 95% Confidence Level with a 2.5% margin of error.

Process: Study Design, Data Collection, and Analysis

1. The client shared the research objectives with Knit.
2. The study was designed in collaboration with the client and Knit.
3. Knit programmed the study into Qualtrics and connected it to Knit's real-time dashboard.
4. The survey was fielded within Knit's partnerships with third-party panel providers, enabling access to approx 8.4M respondents across the US. The survey was fielded by distributing an online anonymous survey link to respondents. Every complete, qualified survey resulted in an appropriate incentive to the respondent.
5. Knit compiled a comprehensive report by analyzing and synthesizing a combination of quantitative and qualitative findings.

Timing

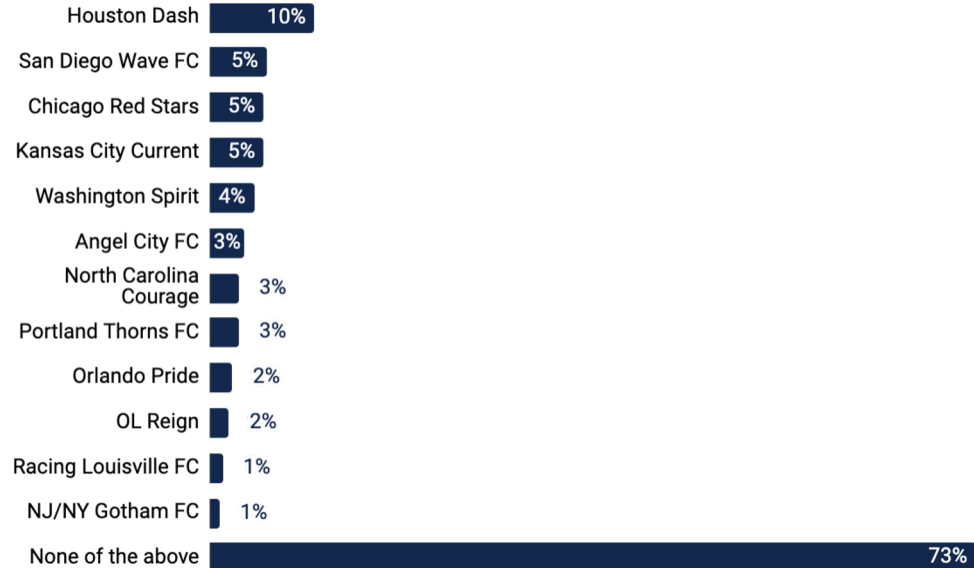
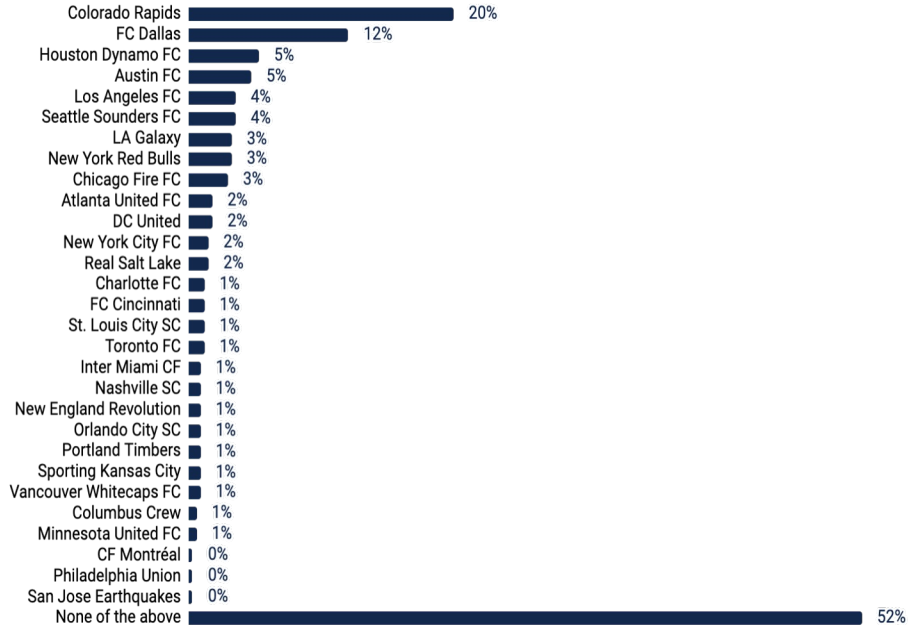
The entire process was conducted from March 31 through June 16, 2023.

The Methodology

An online survey used a combination of quantitative and qualitative questions to collect feedback from a panel using a method that is PC, mobile, and tablet-friendly.



Q11 & Q12



Q11: Which of the following MLS teams are you a fan of?

N = 333

Q12: Which of the following National Women's Soccer League teams are you a fan of?

N = 333