

Research Report  
FOX Sports  
2023 Women's World Cup  
University of Missouri Spring 2022

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## **EXECUTIVE SUMMARY**

Through our secondary and primary research, we wanted to uncover the attitudes, beliefs and behaviors of 18-40-year-old soccer fans and their relationship to watching professional soccer. Our quantitative research aimed to assess general media and sports media consumption habits. Our qualitative research focused on the motivations and opinions of soccer consumers.

Research began with an examination of over \_\_\_\_\_ sources ranging from databases such as Mintel and Pew Research Center, to news articles, academic journals, FIFA original documents and more. Throughout this process, we sought to understand FOX Sports and FIFA as organizations and soccer fans' behaviors. Based on what we learned in our secondary research, we conducted primary research in the form of a survey and in-depth interviews. The 625 survey responses and interviews provided a clearer picture of the attitudes, beliefs and behaviors of the 18-40-year-old demographic in regards to soccer and the FIFA World Cup.

We performed 20 in-depth interviews with soccer fans that took over 20 hours. They provided a closer look at the perspectives of soccer fans, why they're fans and what motivates them to continue watching the sport. Participants valued sports for their ability to provide a sense of community and purpose. Two projective technique exercises, word association and memory recollection, led to the following key takeaways:

- Our participants view professional soccer players as role models and they want to learn more about their favorite players.
- Soccer allows fans to connect with like-minded people and creates a sense of community.
- There's a love for watching the sport at a high level, regardless of the league (fans enjoy both men's and women's soccer)
- The World Cup is ritualistic, and sports fans have specific memories and moments they relate to the sport.
- Sports fans are utilizing sports apps in a variety of ways, which opens opportunities for viewership during untraditional hours.

FOX Sports has dominated the broadcast industry for years, providing high-quality sports coverage to homes all across the nation. Its deep roots in the industry provide it with a wide array of assets and resources, as well as a reputation that gains respect and connections with peers. The FOX Sports app provides an untapped market of opportunities to appeal to younger audiences and make marketing content more interactive. Exclusive broadcasting rights to the 2023 FIFA World Cup also gives FOX an edge over competitors, who will not have access to game footage for marketing purposes.

Although FOX is well-established in the industry, there are barriers that still need to be overcome to ensure successful campaigns for the 2023 FIFA World Cup. The biggest challenges that must be tackled are time zone differences and FOX's streaming reputation. The time differences between the U.S and Australia/New Zealand will make encouraging audiences to watch games live difficult, and make pre and post-game content extremely important to the success of the campaign. Our research found that FOX ranks lower than its competitors in quality of streaming. This will need to be fixed by making streaming more accessible and high quality for our audiences. Our project will help uncover where these weaknesses are, and how FOX can improve on them.

## **SECONDARY RESEARCH**

### **Company**

Falling under the FOX Corporation umbrella, FOX Sports has been established as a well-known platform providing fans with coverage of many US-based sporting events. Founded in 1996, FOX Sports has built its brand with assets such as broadband platforms, websites, licensing relationships, digital and mobile programming among many other features and networks. Some examples of the properties owned would be FOX Sports 1, FOX Sports 2, FOX Soccer Plus, FOX Deportes, and the Big Ten Network.

The mission statement of FOX Sports reads, “We believe continuing to provide compelling news, sports, and entertainment programming across platforms will increase audience engagement and drive growth across our distribution, affiliate, and advertising relationships.” Following up, the stated vision is to increase its hold in the digital media industry, and provide audiences with rich, enjoyable content. The core values of FOX Sports are creativity, operational expertise, and a strategic mindset.

FOX Sports finds itself in the cable network and streaming business and have found steady growth recently. In 2020, FOX Sports brought in more than \$200 million in revenue, with much help from drivers like advertising on all networks, licensing, individual subscriptions from audiences, pay-per-view, and joint-business ventures. The strategy identified by the brand is to provide higher quality streaming and broadcasting than competitors and to be known as the prime spot for sports broadcasting and entertainment.

Some of the advantages that FOX Sports has over competitors would be the premium brands that run deep with followers, significant presence and relevance in major domestic markets, attractive financial profile, and leadership positions across a variety of programming platforms.

### **Category**

Since its debut in 1991, women’s soccer has established itself as an emerging category in sports. Women are on the rise with viewership when analyzing the significance of the United States’ Men’s and Women’s Soccer teams. In recent years women’s soccer has generated more revenue than men’s soccer. In 2016-2018, (US) women's games generated approximately \$50.8 million in revenue, compared to \$49.9 million for (US) men's games.

The most recent Women’s World Cup in France (2019) saw record-breaking viewership with a combined 1.12 billion viewers tuning into official broadcast coverage, as announced by FIFA. FIFA’s president declared the tournament an “unprecedented success” not just for women’s football, but also in regards to the socio-economic impact it brought. Most recently in 2020, Women’s soccer broke rating records by 300%; they were also the first U.S. professional sports

league that returned during the pandemic. The recent growth of the women's category of soccer brings great confidence for future success in viewership and engagement.

When looking at the market of soccer, the ability to watch the USWNT and women's soccer, in general, has increased in the United States since the 2019 Women's World Cup, and increased use of streaming services giving the ability to watch games anywhere, anytime. Even though the majority of media coverage and advertising is largely devoted to men's sports, the success of the USWNT has been supported by advertisers and marketers. Recognition of female athletes has taken the center-stage in numerous campaigns, and there is a positive attitude toward highlighting specific athletes and their accomplishments. With the market emerging, there is an increase in targeting younger athletes due to increased social media presence with younger audiences. Recent marketing trends promoting milestones for female sports include WNBA's "Count It" campaign, as well as Nike's "Dream Crazier" campaign which was released during the 2019 Women's World Cup.

### **Competition**

The sports broadcast and entertainment industry has never been bigger, with familiar names only improving and new options rapidly appearing. Some of the direct competitors that FOX Sports works against would be ESPN, NBC Sports, Paramount+, and the MLS just to name a few.

Considering the sport of soccer, each of these networks contains rights to numerous games. ESPN is home to top-notch leagues like the Spanish La Liga, German Bundesliga, Italian Serie A, and Major League Soccer. Additionally, NBC Sports showcases arguably the most popular league in the English Premier League, while Paramount+ will be the source for World Cup Qualifiers and UEFA matches.

On the flip side, FOX Sports should keep note of other competitors that aren't specifically cable-oriented. Bleacher Report, a website that specializes in sports and sports culture, has positioned itself as the place to gather quick news and highlights, while also allowing fans to come together through shared communities. Due to the Women's World Cup taking place during summertime, many people will be traveling and may not have the time to dedicate to the event. Also, Major League Baseball occurs during this time and will sway plenty of fans towards their sport. Streaming services have begun to be the preferred option for plenty of households. Apps like Hulu, YouTubeTV, and fuboTV have all started to offer live sports and television in addition to their wide variety of TV shows and movies offered. Illegal streaming services like Streameast would also be considered an indirect competitor to FOX Sports as well.

When looking at FOX's competitive advantage, FOX holds its advantages through its top-rated cable position, annual increases in the budget, former players and coaches as analysts who provide further insight and having sole media rights to the coverage of the International tournament, which the USWNT has had plenty of success in.

So what can we take from this? Competitors provide desirable access to content in situations where money, internet, or censorship/broadcast restrictions may otherwise prohibit a fully global audience. Additionally, FOX Sports can improve its brand by capitalizing on its content model by emphasizing accessibility, enhancing quality and service use, and showcasing features not shown through streaming platforms.

### **Consumer**

Taking a look at the consumer who will be tuning in to the World Cup, we have learned that soccer fans are new, young, and increasingly female. With roughly 314,000,000 fans worldwide, there is a near-even ratio of male to female viewers of 54/46, which has increased from the 2019 Women's World Cup viewership on Fox of 59.7% male to 40.3% female viewers. When looking at newer fans specifically, about half of American soccer fans have followed the sport for less than 10 years, with the majority of fans being under 40 years old. The average age of new arrival fans is 31 and 44% of new fans are female.

The largest group of fans are 25-34 years old, and makeup over a quarter of audience members. With the rise of streaming services, 53% of viewers are tuning in both on television and online. Almost half of viewers are college graduates with an average household income of \$80,000.

With soccer being a global sport, there are numerous types of fans that have to be reached during the World Cup while reaching new fans. When analyzing watching patterns, the majority of viewers were considered "Event Seekers", viewers who are primarily interested in the sport during major event moments like the Men's and Women's FIFA World Cup (33%). The second-highest type of viewers were "Domestic"- those who may follow the sport internationally, but are primarily interested in-home teams - MLS, other domestic leagues, and U.S. National Teams (25%).

## **PRIMARY RESEARCH METHODOLOGY**

### **Quantitative Survey**

As part of our primary research, we created a survey asking questions based on soccer viewership and digital consumption. The survey received 652 total entries from the general public. Pulling data from the 545 respondents under 40, we were able to receive responses from 43 different states. This was done in part to our research team working diligently to get the survey in front of a variety of groups. The survey was posted to Facebook Groups, Redditt forums and Mizzou campus group chats, as well as shared with family, friends, and on-campus groups. It was open for 11 days, between February 12-22, 2022 and was closed once we saw a dip in inactivity.

Add

### **Qualitative In-Depth Interviews**

The in-depth interviews *focused* on 20 participants who are between 18-40 years old, have a smartphone and use social media frequently. They are interested in soccer and sports, finding ways to connect with others over sports whether in-person or digitally. They have watched at least one professional soccer game (on television or in person) in the last 5 years. Interviews were conducted via Zoom during February 12-22, 2022.



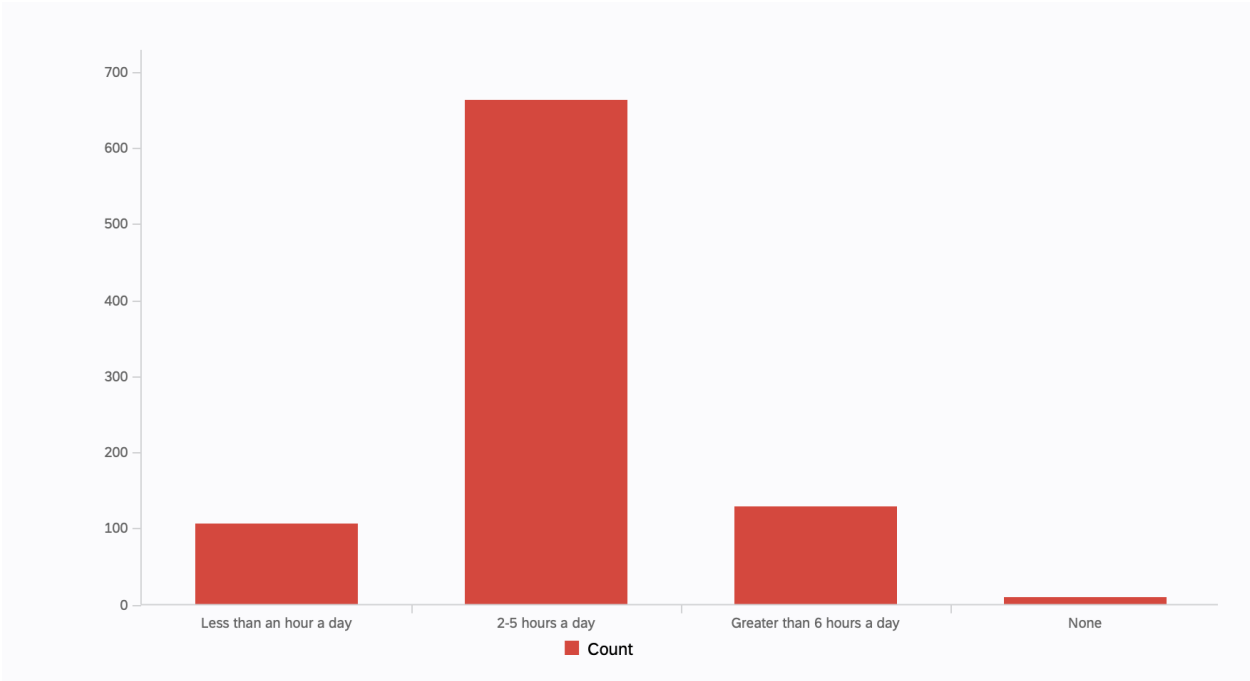
# PRIMARY RESEARCH FINDINGS

## 1. QUANTITATIVE SURVEY BREAKDOWN

### Lifestyle & Consumption Habits

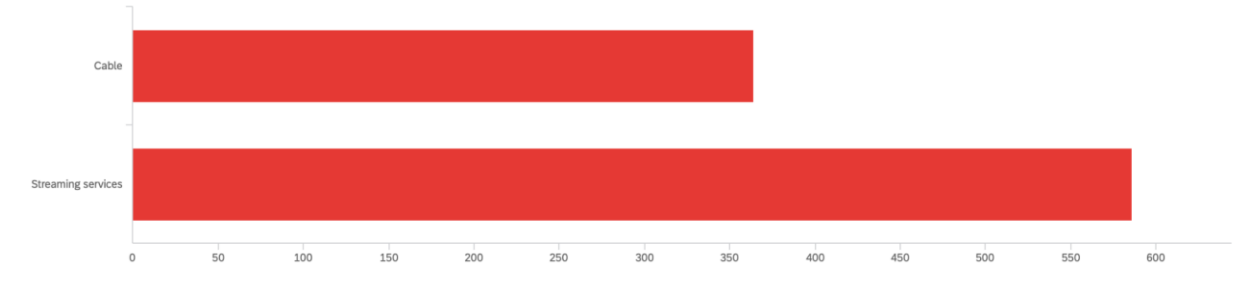
Our participants consume digital media every day

- The survey showed that our audience consumes digital media every single day, and it is important to note that no one said they did not consume digital media. When consuming media, the most popular forms within this demographic are Twitter, TikTok, Instagram, and Youtube. In terms of how they interact with others on social media, our participants said they interact mainly through liking, following, and posting content. Many of our participants utilize streaming platforms such as Netflix, HBO, or HULU, but the majority of participants get their media from others sharing it.



### How They Consume Media

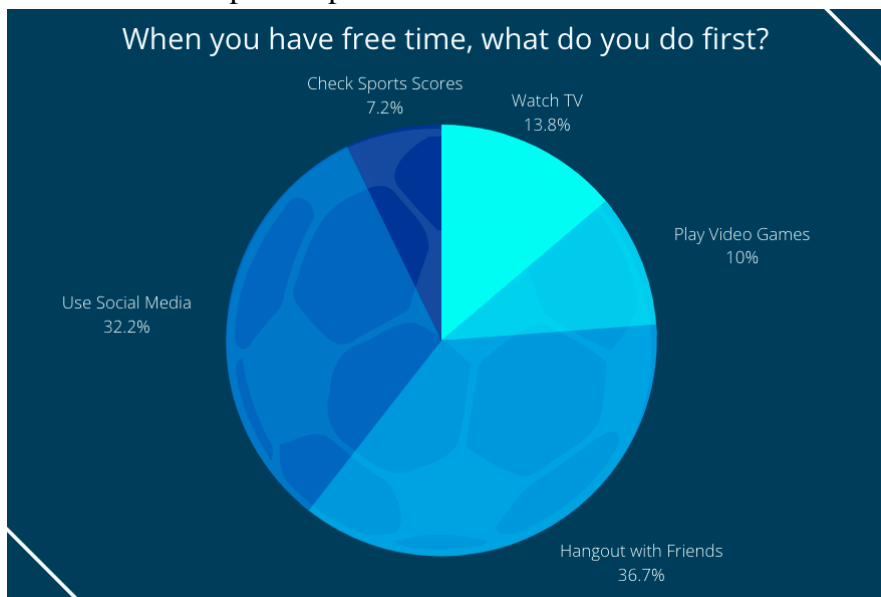
- 65% of participants prefer to watch live sports on streaming services vs. cable



- Our participants interact with teams on social media to check game schedules, view highlights, and watch entertaining content.
  - When it comes to watching live sports, 65% of participants said they prefer to watch on streaming services versus cable. They were driven to interact with professional sports teams on social media for a variety of reasons, but their top three were to check game schedules, view highlights and watch entertaining content.
  - Instagram is the most popular platform to watch and recap sports. The second leading platform is Twitter and the least used is Snapchat. When asked how long they prefer their game highlights to be, results were fairly even between the four choices. This indicates that preferences in content length are varied. To grasp the attention of a wide audience, content should vary in length ranging from less than a minute to over three minutes

### Priorities

- When asked to rank what our audience found most important, sports themselves were ranked second to last in their day-to-day routines, with family, friends and school being the three most important parts of their lives.



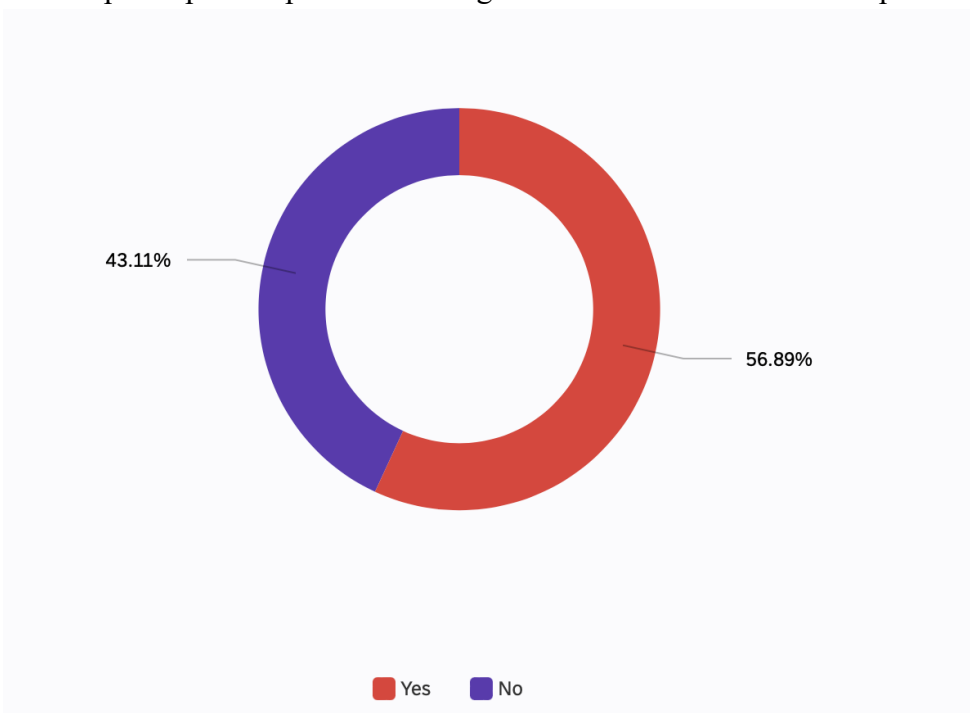
### Feeling About Soccer

- 68% of participants agree that they enjoy watching professional soccer
- 59% of participants enjoy watching men’s professional soccer and 62% enjoy watching women’s.

- In regards to soccer, 68% of our participants agree that they enjoy watching professional soccer, while 59% of participants enjoy watching men’s professional soccer and 62% enjoy watching women’s soccer.
- The evenness of these results indicates that our audience has a general love for the sport itself, regardless of the league they’re watching.
- In the past year, our audience reports being more interested in women's professional soccer than men’s. This data is promising because it shows that women’s professional soccer is still generating more interest, even though the Men’s World Cup is being played later this year.

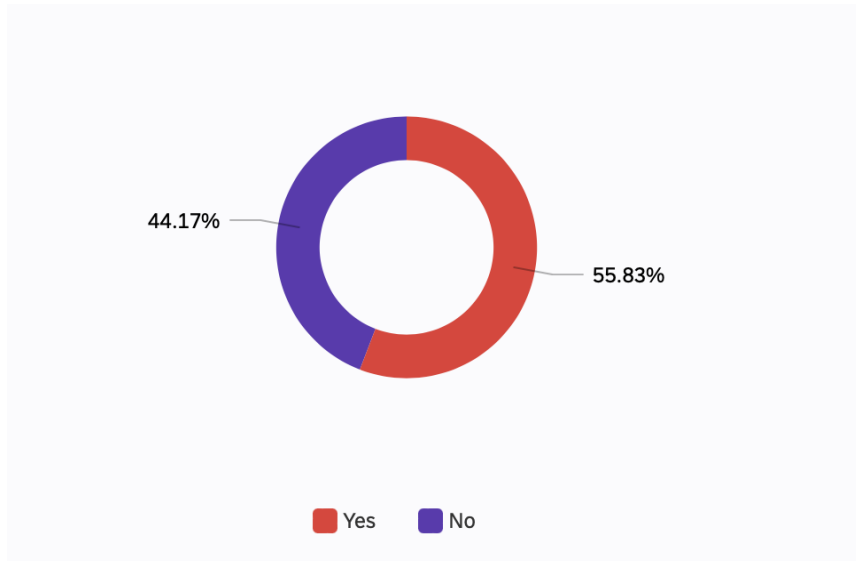
**Interest in the World Cup**

- 59% of participants reported watching the 2019 Women’s World Cup



- It is important to note that our survey did not screen out non-soccer fans, yet 57% of participants reported watching the 2019 World Cup. Of those who tuned in, 129 participants stated that they watched some of the games, and only 21 participants just tuned in for the final match. This indicates that people who are watching the World Cup are - more likely than not - to be invested in the tournament as a whole, not just the result.

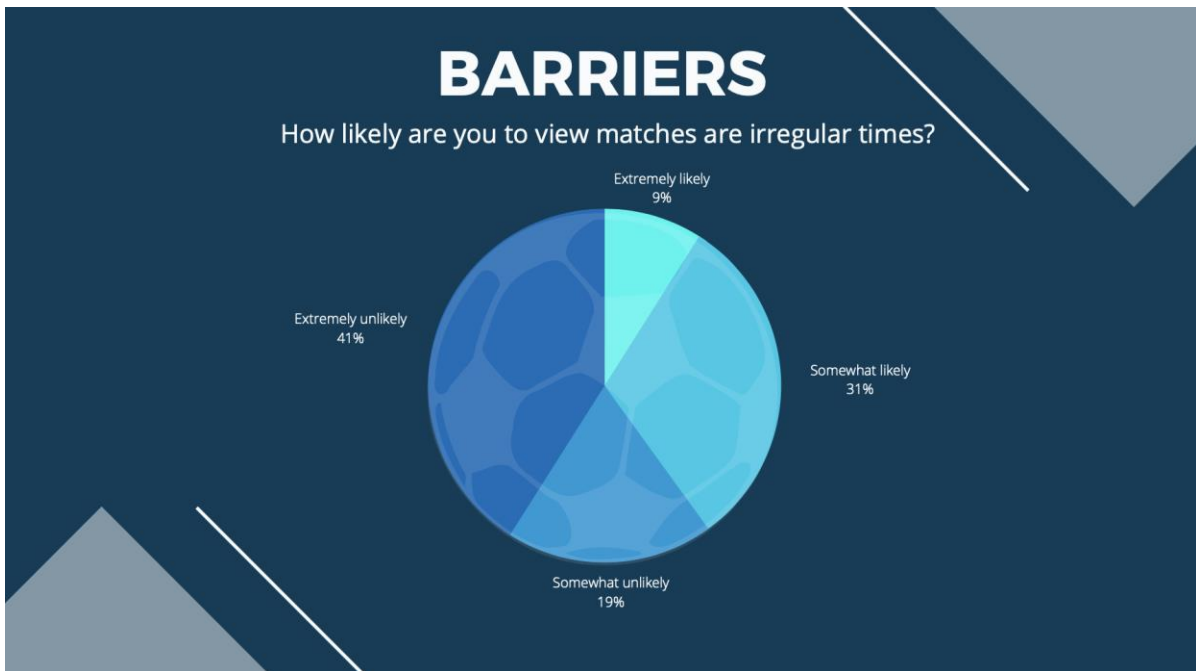
**Question: Did you watch the 2018 Men’s World Cup?**



- We asked our participants to rank what would interest them enough to watch the World Cup, and the love of the sport, seeing the sport played at a high level, and interest in the players were ranked the highest. Female empowerment was the least motivating factor.

### **Barriers**

- When asked if they would be likely to watch a soccer match during untraditional times, 42% of participants said it would be extremely unlikely. Although this is a barrier we anticipated, our in-depth interviews unveiled some motivations to tune in to these types of games.



### Interest in the World Cup

- If the USWNT is playing in the 2023 World Cup final match, 79% of participants agreed they would watch.

**Question: 'I would watch the 2023 Women's World Cup if the U.S. does not qualify'**

The success of the USWNT is not the only factor motivating people to tune in.

- As anticipated, if the USWNT is playing in the 2023 World Cup final match, 79% of participants agreed they would watch. It's important to note that our respondents represent the general American public, not just soccer fans. When asked if they would watch the 2023 Women's World Cup if the USWNT is knocked out before the final, the results were fairly equal. Forty-nine percent agreed that they would still watch the tournament, while 51% said they would not. This data indicates that the success of the USWNT is not the only factor motivating people to tune in, which lends opportunity.

#	Field	Strongly disagree		Somewhat disagree		Somewhat agree		Strongly agree	
1	I would watch the 2023 Women's World Cup if the U.S Women's National Team does not qualify.	34.89%	232	19.85%	132	31.43%	209	13.83%	92
2	I would watch the U.S. Women's National team group stage matches (early stage games in the World Cup tournament)	22.11%	147	23.61%	157	26.32%	175	27.97%	186
3	I would watch the 2023 Women's World Cup final match if the U.S does not make it past the group stage.	29.47%	196	19.40%	129	24.36%	162	26.77%	178
4	I would watch the 2023 Women's World Cup final match if the U.S. is playing.	12.93%	86	7.67%	51	31.73%	211	47.67%	317
5	I would watch the 2023 Women's World Cup if the U.S is knocked out before the final.	26.47%	176	26.17%	174	28.42%	189	18.95%	126

Overall, our survey answered important quantitative questions regarding what's important to our participants, their general media consumption habits, how they engage with sports media, opinions on the World Cup, and views on soccer in general.

## 2. QUALITATIVE IN-DEPTH INTERVIEW BREAKDOWN

Our participants view professional soccer players as role models and they want to learn more about their favorite players.

- *“I really want to get to know them as a person (USWNT). That's what I always want from athletes. I want to feel some sort of connection. I want to know the little things. I want to feel like their best friend.”*
- People want to get to know players outside of the actual sport, whether that's through following them on social media or reading up on them. The relationship these fans feel with soccer players is strong. The role model aspect comes from years of looking up to these players, especially when the players have made an impact outside of the sport as well.

Soccer allows fans to connect with like-minded people and creates a sense of community.

- *“I feel a sense of community with my fellow countrymen for enjoying soccer. It's been a huge part of my life and my family's life. It's a lot of fun, and it's an experience I also get to share with my friends.”*
- Both for players on a soccer team or soccer fans, the sport gives people a sense of community. They like to connect with others through watching, talking, and experiencing soccer together

Fans appreciate watching the sport being played at a high level, regardless of the league (fans enjoy both men's and women's soccer).

- *“These players are at the top level of the game so watching them has been a big lesson.”*
- When it comes to league preferences a participant said: “I don't have a preference, to be honest, it's just kind of an accessibility thing. I'll watch what's on and what I can get to.”
- These fans understand soccer because they've grown up around it. They enjoy watching it played at such a high level for the skill, the relatability, and the awe factor that comes with the sport.

Soccer fans look forward to The World Cup and relate specific memories and moments to the sport.

- *“The World Cup is the greatest competition for the world in soccer. I mean it's country versus country. It's always so exciting. And it also happens only once every four years, and so there's always that longing for the World Cup every single time it swings around.”*
- The World Cup creates memories. Brandi Chastain celebrating after winning the World Cup over 20 years ago is something that is still remembered today. People can say they remember where they were when in 2015 Carly Lloyd scored an insane goal from half-field in the World Cup final! These are moments people still remember years later. Soccer has an impact on people that many sports can't recreate and the World Cup only being every four years makes those memories that much more special.

Soccer fans are utilizing sports apps in a variety of ways, which creates opportunities.

- *“I can just answer all my questions right there with a simple tab. I get my score updates, my news updates, my signings updates, all of my updates in one place (talking about the ESPN app).”*
- Soccer fans want to stay in the know and stay updated. We found that soccer fans use a variety of sports apps to keep up with players, teams, and other soccer-related content. Soccer fans enjoy having their content in one consolidated place so they are not having to flip through different sports apps. And soccer fans want a unique experience. They want to see information that is specific to their interest as well as the clubs and players that they enjoy rather than soccer as a whole.

When it comes to watching matches, soccer fans face barriers that cause frustration.

- *“You're just jumping through hoops. How many streaming apps do I really need to have? Spending 70 to 80 dollars a month just to watch one sport? I think that's nonsense, really.”*
- There are now so many different streaming options that fans feel there is no true central location for soccer. There are too many avenues to watch, and it becomes confusing trying to find a single game. Paying for multiple different streaming services can be frustrating.
- *“I think I'd be motivated to watch (during untraditional hours) if it was a landmark type of game, something involving a championship. Definitely something that wasn't repeatable.”*
- Games that are played overseas are a barrier to entry for soccer fans within the US. Fans want to enjoy international play but at times it is broadcasted at a time that is different from typical US viewing hours. Although, fans may be motivated to watch during these untraditional viewing hours if it is a high-stakes game such as championship or a game that is meaningful to them.

### **3. OVERALL PRIMARY RESEARCH TAKEAWAYS?**

- Soccer brings people together and creates a sense of community. Sports fans are proud of where they're from.
  - “It made me feel proud. Seeing how much of an impact that one game could have on an entire country was really cool to see at a young age but definitely just like an overwhelming sense of pride for our country”
- The World Cup is ritualistic, and fans have specific memories and moments they relate to the sport.
  - Participants look forward to and ritualize the event of the World Cup. Watching games creates core memories for all and impacts their connection to the sport.



- Meaningful games and high-stakes competition are key for driving viewership during untraditional hours.
  - “I stayed up until midnight yesterday to watch a game. The only reason I would wake up at like 3 am or 5 am is if it's like a big game, which I did for the Olympics and yesterday.”
- Professional soccer players are role models and individual players and personalities motivate fans to engage.
  - Their personalities encourage fans to engage with them on a variety of platforms.
- Media is ingrained into how our audience consumes content, from social media to streaming services.
  - Our participants use social media every day, for hours a day. They also are utilizing streaming services more and more with the market for such services growing each year.
- Fans have a love for watching soccer at a high level regardless of the league
  - Seeing the sport played at such a high level is what keeps our participants engaged. There is interest in both women's and men's leagues and competitions.

# SWOT ANALYSIS

Combining the elements of our primary and secondary research, we came away with a SWOT analysis of the state of FOX Sports and the sports broadcast industry.

## Strengths

- FOX has exclusive rights to the 2023 World Cup, so competitors will not have access to film for highlights, broadcasts, and other promotions. This gives FOX a foot up on competitors in their ability to market content from the games.
- As social media continues to evolve, the demand for sports apps has grown. Fans want to keep up with game cancellations and schedules, betting odds, and injury updates. Access to streaming has also become crucial to a positive app experience. FOX's app includes all of these features, so they will be accessible for campaign executions.
- The FOX Sports app will have access to all games, with bonus feeds and alternate angles. This will improve user experience and increase interaction on the app.

## Weaknesses

- FIFA's reputation has recently been under fire. Audiences are dissatisfied with their handling of stadium building in Qatar, which has resulted in the deaths of local citizens. There is also lingering dissatisfaction over the handling of the equal pay lawsuit. This may lead to audiences choosing not to tune in because they do not feel comfortable supporting FIFA's choices.
- FOX has consistently ranked low on scales of preference in terms of streaming platforms. This could be a weakness as audiences will be more likely to tune into other streaming events in place of FOX's coverage of the World Cup.
- If not planned properly, the time difference of games because of international time zones will be a major weakness. This can be battled by effective strategy and promotion.

## Opportunities

- Fans want more opportunities to engage with their favorite players. This leaves room for campaign opportunities that push interaction and engagement.
- The rise in viewership and interest in women's soccer increases the potential for greater engagement.
- The rich cultures of Australia and New Zealand bring many exciting new elements to use in advertising campaigns.
- The FIFA World Cup is the most popular sporting competition of the 36 we tracked during our research.
- The US Women's soccer team is consistently successful causing American viewers to be eager to watch a team they know will win big.

## Threats

- Most of our audience will only tune into meaningful games such as the semifinal, quarterfinal, and final. This will cause group stage play will be lower in viewership.
- Fans who are solely interested in the success of the U.S team may tune out if USWNT is eliminated.
- Other sporting events, box office movies, and summer vacations may interfere with viewing numbers. The 2023 CONCACAF Gold Cup is scheduled to take place from June 26 to July 16, which will interfere with some of our target audiences.
- The Australian Government has been strict with their entry of guests based on vaccination records. Unvaccinated players, commentators, and other staff will be barred from entry. This may lead to negative press surrounding the event that FOX may need to address.
- Brands need to be careful when creating content for campaigns that support women's sports. Audiences seek authenticity of brands seeking to support the game versus using the improving coverage solely to profit off of it.
- Although FOX does not have a paywall for anyone with a cable login, the trend of cutting the cord, especially for our target groups, prevents them from having access to streams. This may cause our audiences to stream the game illegally, or simply watch something else.

## APPENDIX

### Survey

When filtering the survey, we focused on those 18-40. Additionally, we filtered out surveys that were not completed.

#### Questions

**Thank you for taking the time to take this survey. Questions will concern professional soccer viewership and your digital engagement with the sport.**

#### SCREENER

Q. How old are you?

- Under 18
- 18-25
- 26-30
- 31-35
- 36-40
- Over 40

Q. How do you identify?

- Male
- Female
- Nonbinary/third gender
- Prefer not to answer

Q. What race/ ethnicity do you identify with? \*

- *Fill with qualtrics automatic responses*

Q. Are you a sports fan?

- Use a scale, take out neutral (boot for never)

Q. What state do you currently live in?

Q. In a typical day, how much time do you spend on social media?

- Less than an hour a day
- 2-5 hours a day
- Greater than 6 hours a day
- Never

Q. How often do you watch professional sports on tv?

- Never
- Multiple times a week
- At least once a month
- Multiple times a month

### **LIFESTYLE BLOCK**

Q. What do you prioritize in your day-to-day life? (rank your top three)

- Family
- Friends
  
- School
- Working
- Sports
- Health

Q. When you have free time, what do you do first?

- Watch TV
- Play video games
- Hang out with friends
- Use social media
- Check sports scores

Q. What are your favorite sources of digital entertainment? (rank your top 5)

- Twitter
- Facebook
- Instagram
- Pinterest
- TikTok
- Snapchat
- Netflix
- Hulu
- HBO
- Sports
- Cable
- YouTube
- Spotify

### **ATTITUDES BLOCK**

Q. Please indicate your agreement/disagreement with the following statements. (Matrix Table)

- I like watching professional soccer
- I enjoy watching men's professional soccer
- I enjoy watching women's professional soccer
- My interest in men's professional soccer has increased in the last year
- My interest in women's professional soccer has increased in the last year

Q. How do you prefer to watch professional sports? Select all that apply.

- Cable
- Streaming services (including apps)

If answer "Streaming services,"

Q. Which services do you use? Select all that apply.

- ESPN+
- YouTubeTV
- StreamEast
- Sportssurge
- Hulu Live
- Twitch
- Paramount Plus
- CBS
- Direct TV Stream
- Peacock
- FuboTV
- Spectrum TV
- Other

■ Fill in the blank

Q. Please rank the following services (in terms of your personal usage).

- ESPN
- NBC Sports
- CBS Sports
- FOX Sports
- Bally Sports

Q. If you follow professional teams on social media, what drives you to interact with their account? (Rank your top 3)

- Game schedules\*
- Check scores
- View highlights
- Digital content/interaction with players
- Entertaining content

- Connect with the sport/players
- Community connection (pre or postgame commentary)
- Other:
  - Fill in the blank

Q. How do you engage with others on social media? (Rank top 3)

- Posting
- Sharing
- Commenting
- Following
- Mentioning / Tagging
- Liking
- Never

Q. What would make you interested enough to watch the Women's World Cup? (Ranking)

- The love of sport
- Seeing the sport played at a high level
- Interest in the players
- National pride
- Female empowerment

Q. How long do you prefer to watch game highlights on social media platforms?

- Less than 1 minute
- 1-2 Minutes
- 2-3 minutes
- More than 3 minutes

Q. How do you feel about Australia and New Zealand hosting the 2023 Women's World Cup for the first time?

- Extremely uninterested
- Somewhat uninterested
- Somewhat interested
- Extremely interested

Q. What about Australia and New Zealand hosting the 2023 Women's World Cup would motivate you to tune in?

- Open ended

## **LOGISTICS BLOCK**

Q. Do you follow women's professional soccer (Select all that apply)

- College
- NWSL
- FAWSL
- UEFA Women’s Championship League
- FIFA
- Other
  - Fill in the blank
- None

Q. Do you follow a specific professional women’s soccer team?

- Yes
  - If Yes, please explain why (fill in the blank)
- No

Q. Did you watch the 2019 Women’s World Cup?

- Yes
  - No
- If “Yes”...

Q. How engaged were you when watching the 2019 (Multiple choice)

- I watch all of the group stage games (game leading up to the final)
- I watch a most of the games
- I watch some of the games
- I watched one of the games
- I only watch the final

Q. Which apps do you use to watch/recap sports? (Rank top 3)

- Instagram
- Twitter
- Reddit
- YouTube
- TikTok
- Facebook
- Other
  - Fill in the blank

Q. Did you watch the 2018 men’s World Cup

- Yes/No

Q. Please indicate your agreement/disagreement with the following statements. (Matrix table)



- I would watch the 2023 Women's World Cup if the U.S Women's National Team does not qualify.
- I would watch the U.S. Women's National team group stage matches (early stage games in the World Cup tournament)
- I would watch the 2023 Women's World Cup final match if the U.S does not make it past the group stage.
- I would watch the 2023 Women's World Cup final match if the U.S. is playing.
- I would watch the 2023 Women's World Cup if the U.S is knocked out before the final.

Q. How likely are you to watch a live soccer match during an untraditional time? (ex: A live match in Australian/New Zealand at 8pm would happen at 4am Eastern Standard Time)

- Extremely unlikely
- Somewhat unlikely
- Somewhat likely
- Extremely likely

Q. When did you start watching professional soccer?

- Within the last year
- 1-5 years ago
- 6-10 years ago
- More than 10 years ago

Q. How likely would adding a zero-risk gambling platform to the Women's World Cup draw your interest in watching the games? (Zero-risk means you can only win money, not lose)

- Extremely unlikely
- Somewhat unlikely
- Somewhat likely
- Extremely likely

Q: To be entered into a drawing for one of three Amazon gift cards, please provide your full name, contact phone number and email address below so we have a way of contacting you should you win. Your information will not be shared with anyone outside this survey effort. If your name is drawn, you will receive an email from [JournalismResearch@missouri.edu](mailto:JournalismResearch@missouri.edu) (Kathy Sharp) from the University of Missouri School of Journalism with instructions on how you can claim your gift card. Check your spam/junk inbox to ensure you don't miss the email should you win.

- First and last name
- Email
- Phone number

## In-depth Interview Discussion Guide

### OBJECTIVES

<p><b>Research Objective(s)</b> - 3-4</p>	<ul style="list-style-type: none"> <li>● <i>Assess the attitudes, beliefs, and behaviors of 18-40-year-old soccer fans related to why they like to watch soccer.</i></li> <li>● <i>Uncover general knowledge of how women’s soccer is viewed</i></li> <li>● <i>What would motivate people to tune in during untypical viewing hours (What would make them go back and rewatch/catch up)?</i></li> <li>● <i>What do consumers get out of watching a sports game?</i></li> </ul>
<p><b>Participant Screener Criteria</b> - Demographics - Behavior - Consider psychographics</p>	<ul style="list-style-type: none"> <li>● <i>Age: 18-40</i></li> <li>● <i>Gender: Male or Female</i></li> <li>● <i>Has a smartphone</i></li> <li>● <i>Has social media and uses it frequently (checks at least one social media platform at least once a day)</i></li> <li>● <i>Enjoys finding ways to connect with people over sports</i></li> <li>● <i>Likes watching professional sports</i></li> <li>● <i>Played sports as a kid</i></li> </ul>
<p><b>Research Method and Rationale</b></p>	<ul style="list-style-type: none"> <li>● <i>In-depth semi-structured interviews</i></li> <li>● <i>Conducted virtually via Zoom</i></li> </ul> <p>The in-depth interviews will last approximately 35-45 minutes. Holding interviews for this length of time will ensure sufficient completion of the interview guide. Each member of the team will conduct one interview, resulting in six total. Once an interview is complete, the interviewer will generate a transcript. The researchers will create codes that will be evaluated and organized around common themes that will be shared in the report.</p> <p>In-depth interviews provide a confidential, one-on-one setting that allows interviewees to go deeper on their unique perspective. A semi-structured discussion guide that allows the researchers to probe and gain insight on predetermined topics, but will also allow for the flexibility to deviate if necessary. The questions are listed in an order that seems like a natural flow of thought from</p>

	<p>topic to topic. The questions are not meant to be exhaustive, but to be prompts that will motivate or inspire the interviewee throughout the discussion.</p>
<p><b>Projective Techniques</b>  <b>(Note: Two are required)</b></p> <p><a href="http://Mustard-research.com">Mustard-research.com</a>  <a href="#">blog top 10 projective techniques</a></p>	<ul style="list-style-type: none"> <li>● <i>Word association (What comes to your mind when I say...)</i> <ul style="list-style-type: none"> <li>○ <i>Soccer, World Cup, sports, community,</i></li> <li>○ <i>Photos</i></li> </ul> </li> <li>● <i>Walk us through the last professional sports game you watched or went to</i></li> </ul>

## BEGIN RECORDING

### INTRODUCTION

My name is \_\_\_\_\_, thank you for speaking with me today. For the next 30-40 minutes we will be talking about soccer. Your perspective is valid and there are no wrong things to say. Feel free to ask questions or stop me at any time throughout our discussion. Your participation is confidential. Your name will not be shared in my report. I will be recording for note taking purposes only. Doing so will allow me to focus more on our conversation. Do you have any questions before we begin?

### ROLE OF SPORTS IN THEIR LIVES

- *What sport or sports did you participate in growing up?*
  - *Probe for: Why did you choose that sport?*
  - *Probe for: What did that sport mean to you?*
- *How are sports a part of your life now?*
  - *Probe for: longitude of commitment, loyalty, what keeps them loyal to their sport?*
  - *Listen for: watching games, tailgating, esports games, who they follow on social media, what social media apps they use to follow sports*

- *What is your favorite sport to watch?*
  - *Probe for: Why?*
- *What is your relationship to soccer?*
  - *Listen for: descriptive terms and what excites them about the sport*
- *How do you connect with others over sports?*
  - *Listen for: a social activity*
- *Do you connect with others online over sports?*
  - *If yes, how so?*
  - *Listen for: online community, reddit page, social media accounts, in-person event*

**Themes to listen for:** emotional aspects, strong or weak connection with sports

## ENGAGEMENT PREFERENCES

- *How engaged are you when watching live sports?*
  - *Probe for: Are you attentive and actively listening/watching? Do you do other activities while the sport is on?*
- *Do you follow a specific sports team?*
  - *Probe for: How did this particular team become the one you follow?*
- *Do you check game scores?*
  - *Probe for: Where do you go to check scores? What apps, websites or resources do you use to gather this information?*
- *What keeps you invested in sports?*
  - *Listen for: community, emotional connection, incentives, comradery*
- *What would motivate you to watch a game that occurred early in the day or late at night?*
  - *Probe for: if you wouldn't, how would you consume highlights/game summaries?*

**Themes to listen for:**

## JOURNEY TO A FULFILLING SPORTS EXPERIENCE

- *Walk me through the most memorable or last soccer game you watched.*
  - *Probe for: What impressed you the most?*
  - *Probe for: How did you feel?*
  - *Probe for: What was the atmosphere like?*
  - *Probe for: Why do you remember this game?*

**Themes to listen for:**

## SOURCES OF INFLUENCE AND INSPIRATION

- *What is the first team that comes to mind when you think of professional soccer?*
  - *Listen for: U.S. women's soccer team, any competitors*
  - *Probe for: Why is that the first team that comes to your mind?*
    - *Are there any others? Which ones?*
- *Did you grow up watching professional soccer?*
  - *Probe for: Who influenced your opinion?*
- *What does the average person who watches women's soccer look like?*
  - *Probe for: How are they like you? How are they different from you?*
  - *Probe for: What else are they interested in?*
- *What other factors, besides the game itself, motivate you to watch a women's soccer match?*
  - *Probe for: Is it the love of the sport?*
  - *Probe for: Is it seeing a sport played at a high level?*
  - *Probe for: Is there a 'girl power' aspect?*
  - *Probe for: Are you interested in the players as people/like their stories?*
  - *Probe for: Is there a nationalism aspect?*

**Themes to listen for:** *Family/what they grew up with, role of friends/coworkers, etc.*

## FIFA KNOWLEDGE, PERCEPTIONS & USAGE

- PROJECTIVE TECHNIQUE: What words or feelings come to mind when I say FIFA?
  - Why?
  - What are your perceptions of FIFA?
  - Listen for: Soccer, The World Cup, competition
- What words or feelings come to mind when I say FIFA Women's World Cup?
  - Why?
- Have you ever watched a Women's World Cup game?
  - Probe for (if not): Why have you never watched a game?
  - What was your experience with watching the game?
  - Listen for: specific players & teams
- How do you watch FIFA friendlies and tournaments?
  - Would you watch it for any other type of occasion besides the World Cup?
- How has your opinion on professional soccer changed over time since your childhood?
  - If it's changed multiple times, please describe all the changes.
- What platform do you watch FIFA games on?
- Where do you go to get highlights and updates for FIFA games? (if this applies to you)
- How is the Women's World Cup different from other professional sports final games?

**Themes to listen for:** competitors,

## BARRIERS TO WATCHING SOCCER

- Does anything frustrate you about watching live soccer matches?
  - Probe for: Why does this frustrate you?
  - Probe for: Do you have any ideas about how this issue could be solved?
- Does anything prevent you from watching soccer?
  - Listen for: work, school, family obligations, hobbies, knowing game schedules
- How do you find out about when soccer matches are played?
- What would motivate you to watch more soccer?
- What would motivate you to download an app?
  - Probe for: What do you like in an app?
  - Probe for: If you could use a sports app for soccer, what would you want to do with it?

- *Probe for: Video clarity, Ease of use, Real-time updates/scores, Intriguing stories/news, Cost efficiency/free service*
- *Have you used a sports app in the past?*
  - *If so, what app was it?*
  - *Probe for: What did you use the app for?*
  - *Probe for: What did you like about the app? What did you dislike?*
- *If you watch professional sports in the summer, what sports do you watch?*
  - *Soccer, baseball, etc.*
- *What keeps you busy the most in the summer?*
  - *Work, school, etc.*

## **EXPLORE VIEWS OF WOMEN'S SOCCER**

Note: Explain the brand and what makes it special. Make sure you have stimuli for this (pull website copy, photos, etc.) that you can read to them/share your screen. Introduce the various services the brand offers.

Explore their reactions, listening for points of confusion, positives and negatives. Address each one separately to understand if, and how things resonate.

- *What word comes to mind when you think of women's sports?*
  - *Probe for: What do you like about women's sports?*
- *Do you watch women's sports?*
  - *If so, what sports? What makes you want to watch one sport over another?*
  - *If not, why?*
- *Play this ad: [Stream 2019 FIFA Women's World Cup France™ on FOX and FS1 on your Roku devices](#) (PROJECTIVE TECHNIQUE)*
  - *What do you think the message behind this advertisement is?*
  - *How did this ad make you feel?*
  - *Did this ad make you want to watch the Women's World Cup more, less or no change?*
  - *How do you think female athletes are portrayed in advertising?*
    - *Do you think the depictions you've seen of female athletes in advertising are accurate? How so?*
- *FIFA recently announced that the Women's World Cup (2019) set a new viewership record, with a combined 1.12 billion viewers tuning into official broadcast coverage. In contrast, game 4 of the WNBA championship only accrued 417,000 total viewers.*

- *What do you believe makes women's soccer more popular than other women's sports?*
- *Can you name any past or present professional women's soccer players.?*
  - *If so, who comes to mind? Why?*
- *What national team do you support? Why?*
  - *If USWNT, do you support any other teams?*
- *Do you prefer to watch the women's league over the men's league or vice versa?*
  - *If you prefer to watch one over the other, why is that?*
  - *If you don't have a preference, why is that?*

**Themes to listen for:**

**Close**

Okay, that's about it, but before we wrap up our discussion, is there anything else you wanted to share that we didn't get a chance to address? Do you have any questions? I know how busy you are, so thank you for taking the time to talk to me today. Your perspective has been extremely helpful. Have a great rest of the week/weekend.

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