



# **SETTING THE PACE**

FIFA Benchmarking Report Women's Football



# **President's foreword**

All over the world, girls and women are getting passionately involved in the game, both on and off the pitch, using the sport to break down barriers, and this is exactly where FIFA is leading the way by accelerating the growth of women's football.

To boost further growth, and in line with our vision to make football truly global, we have set out a dedicated strategy focusing on four key areas aimed at reforming competitions, increasing the commercial value, modernising development programmes and enhancing professionalisation. Our goal is to bring the women's game into the mainstream, for girls and women globally – both on and off the pitch.

As we strongly commit to maintaining the momentum and accelerating development between every edition of the FIFA Women's World Cup™, it is our role to contribute towards strengthening national club competitions for the continuous development of the women's game. With club football strongly gaining in popularity across many stakeholders, there is a need for everyone to gain a deeper understanding of the women's game at club level.

Clubs are the foundation of our game, and by creating specific tools that paint a picture of the women's club landscape, we aim to increase the data available on women's football and support decision-making processes. With this in mind, we are proud to publish the second edition of the FIFA

FIFA now wishes to further build upon the solid basis laid through the first edition of the report and to continue monitoring the growth of the women's game. The document provides a comprehensive and in-depth analysis of the women's football landscape at both league and club level through the participation of 30 elite leagues and 294 clubs. This edition, as in last year's, ensuring that opportunities in football exist assesses the reality of the game across key areas: sporting, governance, financial landscape, fan engagement and players.

> I truly hope that, by presenting emerging challenges and opportunities, this report can support many stakeholders in guiding future decisions within our beloved game. It is only by working together and consolidating our efforts that we can continue to strengthen women's football and amplify the benefits of football for

Yours in football,

Gianni Infantino **FIFA President** 



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# **Executive summary**

The second edition of the FIFA Benchmarking Report: Women's Football provides further insights into the factors that drive success in leagues and at clubs. It highlights different regulatory environments, approaches to broadcast rights and sponsorship negotiations and the varied levels of professionalisation seen across the sport, with the aim of providing practical solutions for the game's stakeholders to learn from one another. Whilst we acknowledge that women's football is continuing to experience significant growth, in terms of commercial value, exposure and popularity, we hope that this report will help those achievements spread further and wider.

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#### Setting the pace

Throughout 2022, FIFA and the Deloitte Sports Business Group have been engaging hundreds of stakeholders from across the women's game, to comprehensively map out the landscape of women's football. The findings of this report are categorised into five sections:

Sporting	
Governance	
Financial landscape	
Fan engagement	
Players	

In recent years, we have seen a number of structural changes to leagues across the globe, with new competition formats implemented page in some divisions and an expansion of the number of teams in others. An expansion typically reflects the increased number of competitive teams in each country and delivers

an increased geographical spread of teams – expanding the catchment area from which to entice existing or new fans of the sport.



73% of leagues had a midseason break in the 2021/22 (or 2022) season which can be important for player welfare.

provide much-needed time to recuperate from mentally and physically demanding seasons. They also give clubs the opportunity to reflect on campaigns to date and generate time to help new players acclimatise.



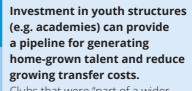
Teams that had won the league in the last three years had several common characteristics, including having:

- a written strategy for women's football (78% for those that had won the league in the last three seasons v. 65% for those that had not);
- players that earnt a higher gross average salary (USD 16,000 v. USD 13,000); and
- a greater number of sponsors with a value given to the women's football team (8 v. 6.2).

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Clubs that were "part of a wider football club" that includes an affiliated men's team (with the same or a different name, but part of the same legal entity) were much more likely to have an academy that included girls (80%) compared to those that were stand-alone (67%).

Having a written strategy can establish a clear vision, direction and goals for a club - helping to achieve their potential, and ultimately assist the collective growth of the women's game. Most leagues (90%) had a written strategy compared to 79% in last year's report, showing a continued commitment to helping shape and develop the women's game. The average revenue of a club with a written strategy is USD 395,000, compared to USD 343,000 without.



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leagues that have cup competitions also present 02 an opportunity for additional commercial inventory to be sold (e.g. title sponsorship). n the 2021/22 (or 2022) season 80% of leagues had a cup competition, with cup competitions running for an

## page 10

average of 156 days.

## 03 page 12 Mid-season breaks often

#### There were a number of characteristics that were more prominent in standalone clubs than affiliated clubs. These include having:

- a higher number of average sponsors (17 for stand-alone clubs v. six for affiliated clubs); and
- higher revenue (USD 395,000 v. USD 343,000) in the 2020/21 (or 2021) season. However, there tended to be a lower:
- proportion of players that were
- professional (66% v. 71%); and
- number of full-time equivalent (FTE) staff
- (five v. seven).

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### There is significant commercial potential in the women's game and unlocking this will provide funds to further invest and develop the sport both on and off the pitch.

As well as being key to future financial growth, commercial revenue is the largest selfgenerated revenue source for most women's clubs, accounting for 56% of revenue.



The number of leagues with a title sponsor has grown, with 77% of leagues having a title sponsor, compared with 66% of leagues in the previous edition of this report. The industry composition of title sponsors is similar to the industry composition of sponsors at club level with financial services being the largest industry.



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Unlike many professional men's leagues, broadcast revenue is not the key driver of revenue in the women's game, with the sport still in a development phase with regard to its broadcast offerings.

The majority of leagues (57%) indicate that they negotiate for women's football only, with the second most common method of negotiation being with other competitions including the men's league.

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growth, with all key revenue lines for clubs in aggregate (and at 34 league level) experiencing

> growth. 7% of clubs generated more than USD 1m of revenue from matchday, broadcast, commercial and prize money sources.

This year, there are

encouraging signs of

Clubs recorded year-on-year commercial revenue growth of 33% - indicating the continued and growing interest from commercial sponsors in women's football.

61% of the clubs in the top quartile of commercial revenue generators negotiate their main sponsor for the women's team only, compared with only 30% for other clubs.

The average attendance in 16 regular stadiums (i.e. full capacity available) in 2020/21 (or 2021) was almost 1,000, page with the highest average 44 attendance for an individual club being 20,000.

> The average "maximum match attendance" (i.e. the largest attendance noted by a club in a given season) across the clubs was almost 2,400.

In total, only 35% of all clubs offered a season ticket featuring the women's team. whilst 25% of all clubs offered a season ticket for the women's team only. Those that offered tickets for the women's team only were able to extract higher prices (average of USD 13 per match ticket) than

those bundling it with another club programme (USD 12.20).

The method of broadcast 18 rights negotiation varied between leagues. Those that negotiated the broadcast page rights for the women's 47 football league only tended to be much greater in value

for domestic deals than those that did not (USD 415,000 v. USD 242,000 p.a.) in 2020/21 (or 2021).

However, the duration of the arrangements was on average the same (3.2 years).

#### The average social media following of football clubs on "traditional platforms" is 787,000 (Facebook: 587,000, Twitter: 162,000 and Instagram: 187,000). page

Far fewer clubs used TikTok, but those that did tended to have a greater average following on the platform (483,000) than on some of the traditional platforms. Clubs also had a significant average presence on YouTube (631,000, although fewer clubs used this platform).

#### Merchandising is a way clubs can engage fan bases, and there has been significant growth across all sales platforms compared to last year's report.

Over half of clubs sold women's cuts of merchandise online, and over a third sold men's cuts online (18% previously). On average, the clubs that did not sell merchandise on matchday generated significantly less commercial revenue (USD 116,000 in 2020/21 or 2021) than those that did (USD 311,000).



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The majority of clubs (77%) have teams in which more than half are professional, whereas 23% of clubs have mainly amateur players. At league level, this results in 19 leagues having more than half of the clubs mainly made up of professionals and six mostly

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Clubs that had mostly professional players generally trained for longer (ten hours per week on the pitch and five hours off the pitch, e.g. in the gym) than those with a majority of amateur players (nine hours on the pitch, three hours off it).

Coupled with greater access to facilities, this appears to impact the overall performance of clubs, as those with a majority of professional players had a higher average finishing position in the last three years (4<sup>th</sup>) compared to those with a majority of amateur players (6<sup>th</sup>).



Player wages continue to be the most significant cost for clubs overall.

Player costs as a proportion of a club's total cost base ranged from 35% to 45% (with an average of 41%) in 2020/21 (or 2021).



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International transfer fees in professional women's football hit a new record of USD 2.1m in 2021, an increase of 73% on 2020.

Despite this growth, it should be noted that the five largest transfers paid in 2021 accounted for almost 60% of total spending, and only 4.4% of professional transfers involved the payment of a fee.

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Having player representation can be a positive force in improving player welfare.

Where leagues have player representation (27, 90%), almost half have minimum salary requirements compared to a third for those without. The power of collective bargaining is clear, with leagues that have such agreements (six, 20%) all having minimum salary requirements, compared to only a third for those without.

73% of leagues have regulations limiting the number of foreign players allowed per club, whilst 37% of leagues have home-grown player quotas. These regulations attempt to ensure that domestic players do not have their development opportunities restricted by an influx of foreign talent. However, having foreign talent gives domestic players the opportunity to compete against international players outside of national team matches, often raising the standard of the league.



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The average number of players who have a written contract and receive a salary is 20 across all clubs. However, there is significant disparity across clubs and leagues.

Of those who receive a salary, the average number of players who have football as their primary source of income was 17, again with significant disparity between clubs and league averages.



# Introduction and methodology

Women's football is continuing to grow and the sport is enjoying the greatest level of global interest in its history. FIFA is aiming to build on this momentum as it looks to deliver the biggest and most engaging FIFA Women's World Cup<sup>™</sup> in Australia and New Zealand in 2023. Here, we expect records to be broken once again, as we stand on the shoulders of the stakeholders from across the game who have worked tirelessly to promote women's football over many decades.

The recent 2022 CAF Women's Africa Cup of everywhere have the opportunity to pursue Nations (WAFCON) achieved an attendance of around 50,000 for the final between hosts Morocco and South Africa, and record attendances continue to be broken at major stadiums around the world, with over 91,000 attendees at the Camp Nou to witness the UEFA Champions League guarter-final between El Clásico rivals and over 87,000 fans at the UEFA Women's EURO final between England and Germany. This surge of interest is increasingly giving leading players the opportunity to become household names but also to transcend sport, using their platforms for good.

The level of funding in the game also continues to increase, as owners and investors continue to recognise the value and further financial growth potential of the sport (particularly in terms of matchday, broadcast and commercial revenue generation) and, in turn, the value of their assets. Nonetheless, it should be acknowledged that the game is currently in a loss-making state and requires sustained investment to improve the levels of sporting infrastructure (e.g. stadiums and training facilities, first-team and medical staff) and non-tangible assets (e.g. knowledgeable administrative and operational staff, online marketing campaigns, upskilling, education, etc.) required to facilitate further growth.

The need for the game to further professionalise is crucial for the sport to continue its development and reach its full potential in both financial and societal terms, ensuring that girls and women

a career in the game. The commitments required to have a career in the game – as a player, coach, referee or administrator must be recognised and it must be financially viable, to ensure that talent is not lost to other careers, and to reward the sacrifices that many girls and women make.

There is also a duty of care owed by clubs and leagues to players competing at all tiers in the footballing pyramid. At grassroots level, it is important to grow the game, to provide equal opportunities and to ensure that participation takes place in a diverse and inclusive ecosystem. Throughout careers, player welfare should remain a priority for the game's stakeholders, and there is a moral obligation to support players as they transition away from competing and look to enter post-playing careers, whether inside or outside the sports industry.

Underpinning these aims is the need for robust governance structures. Good governance is critical to the functioning of any successful organisation and it is vital to achieve its vision and strategic objectives, as well as to ensure that legal and ethical standards are maintained for all stakeholders. These structures may include robust regulations, for example, with respect to minimum player wages, safeguarding and welfare and those pertaining to the financial sustainability of clubs and leagues. It also includes ensuring appropriate levels of reporting and accountability, promoting transparency and increasing the likelihood that funds are generated and invested correctly. If good governance is achieved, there is a greater chance of success on and off the pitch.

We consulted an array of stakeholders many of whom have truly inspiring stories - that have supported the development of the women's game, helping to elevate it to new levels, break down social barriers and bring our sport to a wider audience. This report contains case studies from:

- Sociedade Esportiva Palmeiras;
- Brighton & Hove Albion;
- FIFA+ (FIFA's video-streaming platform);
- Liga MX Femenil;
- Women's Empowerment (WE) Professional Football League; and
- Orreco Female Health Platform.

To provide a thorough and comprehensive analysis of the elite women's football landscape at national level in this second edition, we again surveyed 30 top-tier women's football leagues\* and their member clubs in respect of the 2019/20 (or 2020) and 2020/21 (or 2021) seasons, asking questions on a range of topics.

\*Note: please refer to the methodology for information on how the 30 leagues were selected.

The analysis of t following section	his data is divided into the ns:	<ul> <li>Florence Nakiwala k of the Federation or Associations (FUFA)</li> </ul>	
Sporting	Analysis of competition, coaching and youth structures that contribute to increased on-pitch performance	<ul> <li>Chan Yuen Ting, a g FIFA's inaugural Coa Programme (and m edition), and now a Football Association</li> </ul>	
Governance	Governance characteristics including structure, resourcing and commercial arrangements of leagues and their member clubs	<ul> <li>Rebekah Stott, who to continue compet women's game.</li> </ul>	
		As in the previous edition	
Financial landscape	Analysis of the revenue generated and costs incurred by clubs and leagues	we had significant inte leagues and their mer were contacted to cor provide us with the re achieved an exception rate, and in total:	
Fan engagement	Levels of fan engagement on matchdays and via broadcasting, social media and merchandising	<ul> <li>all 30 leagues response</li> <li>82% (294) of clubs</li> </ul>	
		Throughout the report,	
Players	Analysis of welfare, regulations, contracts, wages and other player- related factors	made to a percentage of the percentage of the of that specific question, a percentage of all clubs the survey. Similarly, wh	
our sport; the ad	profiles "trailblazers" within tors in the game that can ole models or inspiring	a percentage of leagues percentage of leagues that specific question, a percentage of all 30 lea	

 Edina Alves Batista, the first-ever woman to referee a game at a senior men's FIFA tournament;

individuals. In this report, we profile the

stories of:

akiwala Kiyingi, Vice-President ration of Uganda Football

Ting, a graduate of gural Coach Mentorship sociation's Women's Super

tott, who overcame cancer e competing at the top of the

ous edition of this report, ant interaction with eir member clubs, who I to complete the survey to the required data. We again ceptionally positive response

ies responded; and

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report, when reference is centage of clubs, it refers to of the clubs that answered lestion, as opposed to the all clubs that completed nilarly, when referencing leagues, it refers to the eagues that answered lestion, as opposed to a all 30 leagues.

Data is only shown for clubs as part of a league if more than half of the clubs in the league answered. For any instances in which fewer than half of the clubs in a league responded, the data has been excluded. Whilst some data from clubs has (and mentor for the second therefore been removed when analysing Id now a coach in the Chinese responses from clubs across a league (i.e. if less than half of the clubs in a league responded), it has been included in the analysis of all clubs (e.g. average revenue) of all clubs.

> For the purposes of comparison, financial data has been converted into USD using the average exchange rate for calendar years 2020 and 2021.

A detailed methodology, including a list of participating leagues, clubs and other stakeholders, is included in the "Basis of preparation" section of this report.

FIFA would again like to sincerely thank all the stakeholders that were involved in the compilation of this report, including the the 30 leagues / member associations and their member clubs that contributed to this process by either taking part in a consultation, completing an online survey or providing additional information to confirm the accuracy of reporting. The cooperation of each stakeholder has been critical to the successful completion of this report, and we are delighted to share the results with you. We hope it will in turn provide valuable information for those stakeholders to navigate the quickly evolving landscape of the women's game.

# Sporting

The return of live football after the disruptions caused by COVID-19 was a welcome relief for fans around the world, and many of the on-pitch campaigns that took place over the course of 2021 and 2022 lived up to expectations. Chelsea won the English Women's Super League on the final day of the season, Incheon Hyundai Steel continued their dominance of Korea Republic's WK League by securing their ninth consecutive title, and South Africa's Mamelodi Sundowns won the inaugural CAF Women's Champions League, which became the premium women's club competition on the African continent.

This section is designed to provide leagues and clubs with insight into how they can become more successful from a sporting perspective.

There were a number of structural changes to leagues across the globe, with new competition formats implemented in Norway and New Zealand, and an expansion (or announcement of a planned expansion) of the number of teams competing in Colombia, China PR, Hungary, Italy and the USA. This expansion reflects an increase in the number of competitive teams in each country and delivers an increased geographical spread of teams – expanding the catchment area from which to entice existing or new fans of the sport.

Changes took place at club level too, with the much-anticipated launch of Angel City, and the founding of Wellington Phoenix, who compete in the newly rebranded Australian league (rather than in their native New Zealand, where clubs in the restructured league are yet to professionalise).

This section provides a summary of the different characteristics of leagues in women's football and analyses the factors that underpin successful on-pitch performance of clubs, which can include:

- expenditure on players and player-wage costs;
- the academy structure;

- the licensing of coaches;
- number of hours trained (on and offpitch e.g. in the gym); and
- facilities to which clubs have access.

There may also be less immediately clear links to on-pitch performance, for example, whether the club has a specific department dedicated to the women's team operations and how many full-time equivalent (FTE) staff there are, how closely it reports to the overall club CEO, and whether it has a written strategy for women's football.

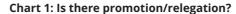
#### League characteristics

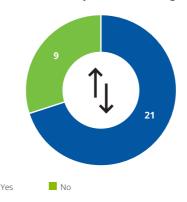
There are many characteristics to consider with the creation and ongoing administration of leagues. The length of a season is an important factor in determining a league's commercial attractiveness, with the duration, number of teams and matches played all factoring into the appeal of a league to sponsors when weighing up the opportunities for brand eminence and activation.

Leagues that have cup competitions also present an opportunity for additional commercial inventory to be sold (e.g. title sponsorship). In the 2021/22 (or 2022) season, 80% of leagues had a cup competition, running for an average of 156 days (ranging from seven to 280 days) and consisting of an average of 40 matches (ranging from six to 105).



A number of leagues took the opportunity to sell the sponsorship rights to cup competitions, as evidenced by Coppa Italia Socios.com in Italy, the FA Women's Continental Tyres League Cup in England and the AXA Women's Cup Final in Switzerland. There is also the opportunity for leagues to use the eminence of cup competitions to highlight important issues, such as the New Zealand Football Foundation Kate Sheppard Cup (which was rebranded to celebrate 125 years of women in New Zealand having the right to vote).





Note: average number promoted: two (ranging between one and six). Average number relegated: two (ranging between one and four).

Base: 30. Source: FIFA; Deloitte analysis.

The majority of leagues (70%) operate a system of promotion and relegation, whilst 30% operate a closed league system. For both competition formats, we observed that broadcast partners are willing to commit to longer periods in terms of broadcast arrangements. The benefits of longer broadcast arrangements include the ability to create deeper partnerships, which may be used to increase the exposure of the league (e.g. through long-term promotional campaigns), and a greater sharing of resources and expertise to aid league development. However, shorter arrangements allow leagues to react to changing market conditions and reduce the likelihood that rights values are fixed at a below-market rate. These are important factors that leagues should consider in their go-to-market strategy.





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Average length of season in days.



In the 2021/22 (or 2022) season, 80% of leagues had a cup competition, running for an average of 156 days (ranging from seven to 280 days) and consisting of an average of 40 matches (ranging from six to 105).



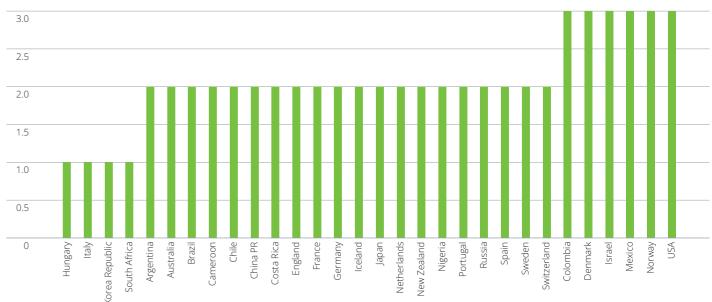
#### Seasons

League campaigns most commonly start in March or August and tend to end in either May or June. The dates of a league's operation are important for the global calendar, and a collaborative approach is required to ensure that this is optimised and beneficial for as many stakeholders (governing bodies, member associations, leagues, clubs and players) as possible.

It is positive to see that 73% of leagues had a mid-season break, which is important for player welfare, providing often muchneeded time to recuperate from mentally and physically demanding seasons. It gives clubs the opportunity to reflect on the campaigns to date and provides time to help new players acclimatise.

Furthermore, 90% of leagues stated that they ceased matches for international windows and almost all clubs (96%) noted that club activity continued during such windows.

#### Chart 2: Number of teams to win the league in the last three seasons



#### Sporting competitiveness

The interest in a league can often be linked to its competitiveness, and one measure of this is how many teams have won it in recent years. Of the leagues included in this report, in only 13% had one team won it in the last three seasons. The majority (67%) saw two teams win the league over this period, whilst 20% saw a different winner in each year.

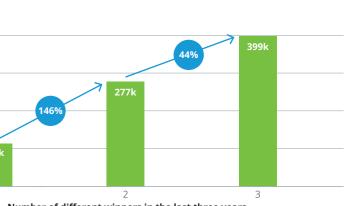
There is evidence showing a relationship between sporting competitiveness and a league's social media following. The leagues that had one dominant team over the last three years had an average following of almost 114,000, increasing to 277,000 for leagues with two winners, and 399,000 for those with three winners.

### Chart 3: Average social media following v. number of different winners of league in the past three years

Social media follow	ving
500,000	
400,000	
300,000	
200,000	
100,000	114
0	1

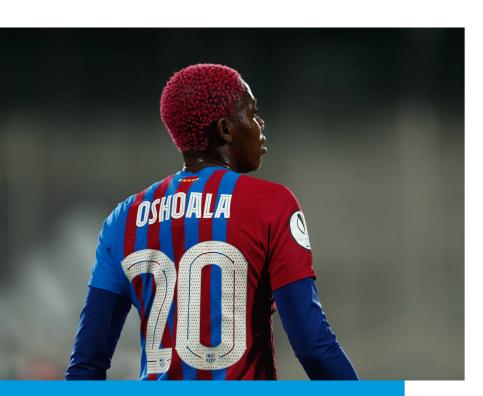
Note: total social media following of the league across Facebook, Twitter and Instagram, for those leagues that provided information.

Base: 30. Source: FIFA; Deloitte analysis.





Base: 27. Source: FIFA; Deloitte analysis.



There was a greater prevalence of successful clubs having a written strategy for women's football (which may have helped contribute to this success) - with successful clubs more likely to have a main sponsor for the women's team only (rather than, for example, having the same sponsor as an affiliated men's team) and a greater number of sponsors with a value given to the women's football team (again, rather than being bundled into a men's team sponsorship deal).

#### Chart 4: Correlation between a league's commercial revenue and no. of teams to win the league in the last three years



Note: includes commercial revenue for those leagues that provided information

Base: 22. Source: FIFA; Deloitte analysis.

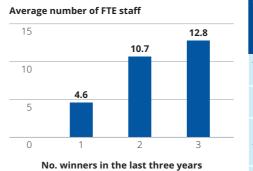
There is also some correlation (correlation co-efficient of 0.39) between the commercial revenue generated by a league and the number of winners in the last three years.

The leagues that had a greater number of winners in the last three seasons also had a greater number of paid FTE staff with a fullor part-time remit for women's football.

It is expected that the number of individuals involved in the operations of women's football will continue to grow and provide increased opportunities to those looking to forge careers within the sports industry.

At club level, teams that had won the league in the last three years had several common characteristics. It is unsurprising that more successful clubs trained for longer in the gym and off the pitch, on average paid higher salaries to players, and had a greater number of sponsors attached to the women's team.

#### Chart 5: Number of teams to win the league in the last three years vs. average number of FTE staff in the league



Base: 22. Source: FIFA; Deloitte analysi:

Clubs that had a written strategy were more likely to have a main sponsor for the women's team only (rather than, for example, having the same sponsor as an affiliated men's team) and a greater number of sponsors with a value given to the women's football team (again, rather than being bundled into a men's team sponsorship deal).

This is a trend that is expected to become more prevalent across the industry, as women's teams increasingly seek to quantify their commercial value. We expect that inventory related to the women's team will increasingly be sold separately (where it may previously have been bundled with the assets of affiliated men's club) and that the values extracted from partners will increase, as a result of the increased exposure and interest in the women's game, and as brands increasingly recognise the benefits of partnering with a women's football club.

compared to those that had not

Characteristic	Won the league in the last three years	Did not win the league in the last three years
Training hours: gym and off pitch	4.5	3.9
Had a written strategy for women's football	78%	65%
No. of players with written contract with the club	23.8	21.2
No. of players with written contract with and that receive a salary	21.8	19.3
No. of players that have football as the primary source of income	18.2	16.7
Average gross annual salary of an individual player	USD 16,000	USD 13,000
Average highest gross annual salary of an individual player	USD 44,000	USD 33,000
Broadcast matches on own platform*	68%	61%
Had a main sponsor for the women's team only	42%	38%
No. of sponsors attached to top women's team	10.5	9.2
No. of sponsors with value given to the women's football team	8	6.2

\*Note: for example social media platform, club website, club mobile app, etc.

## Table 1: Characteristics of teams that had won the league in the last three years

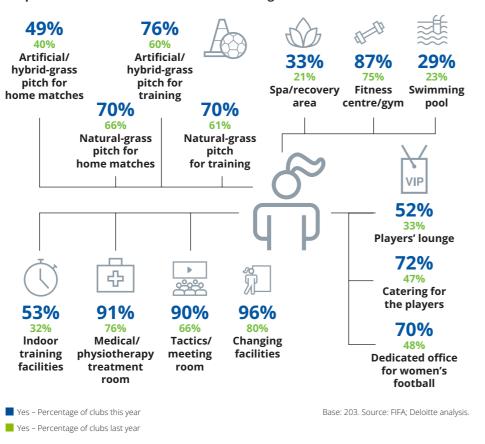
### Access to facilities

Clubs have access to a varying degree of facilities with the aims of improving sporting performance, building strength and conditioning, and aiding recovery. For those providing information in both years, by far the most common sites that clubs had access to were changing facilities (96%), a medical/physiotherapy treatment room (91%), a tactics/meeting room (90%), and a fitness centre (87%). Less than half of the clubs had access to artificial/hybridgrass pitch for home matches (49%), a spa/ recovery area (33%) and swimming pool (29%).

It was positive to see that, when compared to the previous edition of this report, every single facility that was included in the survey in both years was more prevalent within the clubs' infrastructure, showing the increased investment in the women's game.

On the whole, clubs that were "part of a wider football club" had greater access to facilities than those that were "standalone" (including the stand-alone clubs that might have an agreement with another club), indicating the synergies that can be achieved when sharing facilities. The facilities that were significantly more prevalent (i.e. where the differential was greater than 10 percentage points) included a natural-grass pitch for training (75% for clubs that were part of a wider football club v. 56% for those that were stand-alone), a natural-grass pitch for home matches (74% v. 57%), a spa/recovery area (38% v. 23%), fitness centre (87% v. 75%), a swimming pool (31% v. 19%) and indoor training facilities (53% v. 43%).

#### Proportion of clubs with access to the following facilities



## Table 2: Facilities accessible by clubs that won the league in the last three years v. those that did not

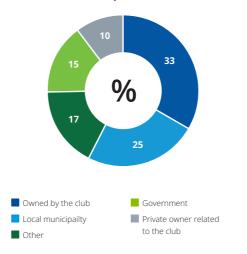
Facilities	Won league	Did not win league	Difference
Spa/recovery area	45%	30%	15%
Dedicated office for women's football	77%	64%	13%
Indoor training facilities	56%	49%	7%
Players' lounge	53%	46%	7%

Base: 288. Source: FIFA; Deloitte analysis.

Note: the above table shows facilities where there was a greater than 5% differential between the teams that had won the league in the last three years and those that had not. Additionally, clubs that had won the league in the last three years generally had access to more facilities (9.7 of the 14 total types of facilities listed) than those that did not (nine). The greatest differential was with spa/recovery areas and a dedicated office for women's football.

One third of the facilities accessible to women's teams were owned by the women's club and it was positive to see that a further 40% were owned by the local municipality or government (which shows a clear acknowledgment of the importance of sport in many aspects of society). Only 17% were owned by 'other' individuals not related to the club or government entity (e.g. rented from another football club, school/university or private individuals not related to the club), and it is expected that an increasing number of facilities will be owned by clubs over time, allowing players to train in dedicated high performance centres (rather than public facilities).

#### Chart 6: Ownership of club facilities



Base: 294. Source: FIFA; Deloitte analysis.

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It was positive to see that, when compared to the previous edition of this report, every single facility that was included in the survey in both years was more prevalent within the clubs' infrastructure, showing the increased investment in the women's game.

#### **Youth structures**

Investment in academies and other youth structures can provide a pipeline for generating home-grown talent, therefore reducing the transfer costs incurred by clubs in the women's game. Overall, 84% of clubs had a youth academy (up from 83% in the previous year, for clubs that were present in both editions of the report), and it was positive to see that 76% of all clubs had a youth academy that included girls (compared to 71% previously).

Whilst the average number of girls in the academy was 82, the median number of girls in the youth structure of clubs was 60, showing that (as was also the case in last year's report) the average is skewed by a minority of clubs with significantly larger youth structures.

It was interesting to note that clubs that were "part of a wider football club" were much more likely to have an academy of some sort (90%) compared to stand-alone clubs (67%) and were also more likely to have one that included girls (80% v. 67%). In seven leagues, all of the participating teams had youth academies that included girls. Perhaps surprisingly, there was no correlation between the prevalence of girls in the academy system and the nationalteam ranking co-efficient, suggesting that a prevalence of youth teams in a league does not necessarily translate to international success (which is perhaps a factor of the increased globalisation of the game, and the increased prevalence of players being developed internationally).

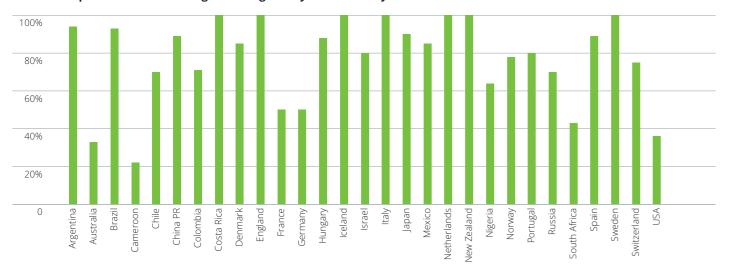
## Table 3: Youth academies at clubs that are part of a wider football club v. those that are stand-alone

Youth academy	Part of a wider football club	Stand-alone
Yes, girls and boys	67%	15%
Yes, only girls	12%	51%
Total proportion of clubs with academies that include girls	80%*	67%*
Yes, only boys	10%	N/A
Total proportion of clubs with academies	90%	67%*

## 82 werage number of girls in club academies.

\*Note: figures may not sum due to rounding. Base of wider football clubs: 212. Base of stand-alone football clubs: 82

#### Chart 7: Proportion of clubs in leagues with girls in youth academy



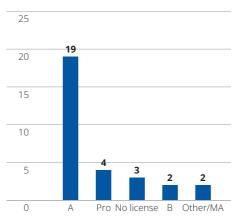
# Head coaches – gender and licence requirements

Across the globe, there are many leagues that mandate the level of licence that the head coach must hold. Coaches were typically required to hold a Pro or A Licence (as seen in 77% of leagues), although there were instances of leagues where there were no licence requirements (10% of leagues).

There is a direct correlation between onpitch success and the level of licence that the head coach is required to hold. 42% of teams that had won the league in the last three years had head coaches that held a Pro Licence. This is compared to 34% for all other clubs who had not had the same level of on-pitch success. Whilst clearly some of these clubs may have won the league in the last three years with a different head coach to the one presently in place, it shows the ability of these 'successful clubs' to attract top talent.

Additionally, the teams coached by individuals who hold a Pro Licence generally attracted a greater number of sponsors for the women's team.

## Chart 8: Type of licence the head coach is required to hold by league



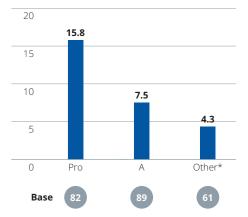
Base: 30. Source: FIFA; Deloitte analysis.

The benefits of a higher level of licence (which may generally be indicative of greater on-pitch performance) were also seen in the broadcast and commercial revenue generated by clubs – with those with a Pro Licence generating greater revenue across both streams than those with other licences (suggesting the greater on-pitch performance can lead to greater deal values being negotiated). This suggests that improved on-pitch performance can lead to increased interest from broadcasters and sponsors and, therefore, greater financial rewards for clubs (football's virtuous circle)."

Base: 287. Source: FIFA; Deloitte analysis



#### Chart 9: Number of sponsors



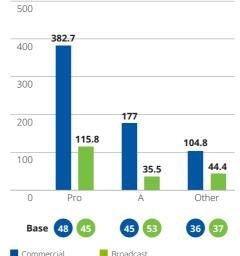
\*Note: includes data for clubs whose head coach holds a B or C Licence or other/MA licence.

Source: FIFA; Deloitte analysis.



For the clubs that provided data, approximately one quarter (26%) of head coaches across all leagues were women, with South Africa (57%), Korea Republic (57%) and England (56%) having more than half of the teams coached by females.

The Coach Education Scholarship programme is one of eight Women's Football development programmes launched by FIFA. It is designed to increase the number of qualified female coaches working in the game. Through this programme, FIFA offers scholarships to talented female coaches and/or players looking to move into the next phase of their footballing career, by providing education at a venue of their choosing. Chart 10: Commercial and broadcast revenue generated by clubs in 2020/21 (or 2021), by license type of their head coach (000s)



Source: FIFA; Deloitte analysis.

Mexico Russia USA Russia Russ

Base: 294. Source: FIFA; Deloitte analysis.

## **Edina Alves Batista**

The women's game is full of trailblazers with inspirational stories. These are women who were "the first" and opened doors for many young girls who will follow in their footsteps. One of these is Edina Alves Batista from Brazil, the first woman to officiate a match at a senior men's FIFA tournament.

As a young girl, Batista loved playing football, but it was her first experience as a match official in 1999 as a 19-year-old that would spark the flame for her true passion. When her father's friend invited her to help out in an amateur game as an assistant referee, even at such a young age she knew that she had found her calling.

"I instantly fell in love with the adrenaline involved in officiating a football match. I knew at that moment officiating was my life," Batista said.

Batista's passion for refereeing is matched only by her work ethic, which was personified by her relentless work as a teenager in a nursery filling bags of soil, so that she could earn enough money to cover the costs of her refereeing qualifications. In addition to her tough work at the nursery and her commitment to becoming a qualified referee, she was also studying to become a physical education teacher.

Despite being urged by many to pursue another career path and being constantly told that refereeing was not for women, Batista persevered and was offered the chance to officiate school and amateur matches in Paraná state in 2001.

With Batista's refereeing career on an upward trajectory, her willpower was set to face its biggest test yet – when she was tragically involved in a serious car accident in 2008. On the road to recovery, football became her driving force to get back on her feet and miraculously, she was back refereeing within three months.

"I almost died," she said. "I was in intensive care for four days. Football inspired me to get through it. All I could think about was refereeing a game."

#### Chart 11: Gender of head coach per league

### TRAILBLAZER



"I was in intensive care for four days. Football inspired me to get through it. All I could think about was refereeing a game."

After years of hard work and a transition from assistant referee to a referee at the age of 34, Batista made headlines five years later, in 2019, by becoming the first female in 14 years to referee a men's top-flight game in Brazil, and soon after found herself officiating at the FIFA Women's World Cup™ in France.

Most recently in 2021, Batista (alongside fellow female match officials Neuza Back and Mariana De Almeida) made history yet again, breaking down another barrier for female match officials by becoming the first woman to take charge of a match at a senior men's FIFA tournament (the FIFA Club World Cup<sup>™</sup>).

With trailblazers like Batista working in football, more girls and women can aspire not only to a career as a referee, but also as players, coaches, administrators or wherever their passion takes them.

## **CASE STUDY**

## Sociedade Esportiva Palmeiras

Women's football in South America is growing steadily and, within the region, Brazil is one of the countries when it comes to clubs and their domestic competition. This case at Sociedade Esportiva Palmeiras (Palmeiras), which together with the Brazilian Football Association (CBF) and their local federation, have been strengthening and propelling women's football forward.

At Palmeiras, women's football is "run as a company", with a management structure that reports directly to the President and the board. Since November 2021, Leila Pereira has been the club's first female President, and she sits alongside two female Vice-Presidents on the board. This structure is representative of the message that the club wants to send to girls and women who are either working in, or are looking to be involved with, the football industry both on and off the pitch.

#### 2019: the new rise

In 2019, Palmeiras relaunched their women's football division, participating in the second tier of Brazilian football. The initial objective was clear: gain promotion and restructure the operational management to lay the foundations for sustainable growth. After careful planning, the club made an initial investment and found a strategic location: the municipality of Vinhedo. This was to optimise logistics for players to travel from around São Paulo, secured and retained four sponsors that whilst also being close to an airport for domestic and international travel.

Initial investments included training pitches and equipment, qualified coaching and training staff, a medical team, and at the forefront of professionalisation nutritionists, all of which were exclusively for their women's football team. All the players signed contracts with the club and four **study showcases the work being done** sponsors were found for the new projects.

> That same year, the FIFA Women's World Cup in France was a sign of what was to come: record audiences in Brazil, raising awareness and generating greater interest from brands to get involved with the women's game.

#### 2020: embracing the challenge

With a new structure in place and promotion secured to the first division (Brasileirão Feminino Neoenergia), the objective was clear: stay in the top flight and be as competitive as possible. The club went to market to recruit more players to increase the quality of the squad, and hard work behind the scenes resulted in Palmeiras reaching the league's semi-finals.

The club and Puma signed an agreement that added significant value to the project, as well as providing sporting and training kits. Additionally, 23 players were given the opportunity to sign individual endorsements with the brand, covering sport and lifestyle garments, sending the positive message that visibility and sponsorship opportunities for female athletes were out there. The results and perception were very positive, and the club recorded high sales figures in Brazil. Alongside the brand, the club committed their support to Palmeira's longterm project.

#### 2021: stepping up

The club structure was now established, and the objective was to secure qualification for the Copa Libertadores de América Femenina. At management level, the target was to keep building a high-value product able to attract further investment to consolidate Palmeiras as a powerhouse brand in women's football.

To enhance fan engagement, Palmeiras decided to open their main stadium - the Allianz Park – and host several matches to showcase their women's team. The club's reputation continued to grow, and players now wanted to come and play for the club, attracted by the well-developed infrastructure, high standards and being 100% professional.

In 2021, Palmeiras reached the final of the national league and secured their place at the Copa Libertadores de América Femenina. Commercial growth came on the back of sporting success: new sponsors meant the division was now at break-even financially and was self-sufficient. There was, however, the desire to grow even further.

#### 2022: consolidation

Palmeiras started 2022 knowing what they are able to achieve, and their objectives are challenging: win the national league and the Copa Libertadores de América Femenina.

Having secured new sponsors, a milestone has been achieved: the women's football division is now profitable, with a surplus that will be reinvested in the women's game.



# BRASILEIRÃO FEMININO NEOENER

While the question in 2019 when relaunching the project was how to become sustainable, it is now about how to reinvest and continue growing. Given its sporting and management ambitions, the club wants to recruit and retain top talent.

#### 2023 and beyond

The club's hopes for 2023 are that it will again make a profit, with player transfers likely to become a new revenue stream. Looking at their future plans with women's football, Palmeiras intends to develop a longterm vision and concrete strategic initiatives covering the three years from 2023.

Once a permanent youth competition is in place, the club will look to develop youth teams, create a professional academy and establish a pathway for players to the first team. They also wish to continue to be profitable, create new revenue streams while keeping an efficient structure - never losing sight of their sporting objective: to win trophies at national and international level.

That same year, the FIFA Women's World Cup™ in France was a sign of what was to come: record audiences in Brazil, raising awareness and generating greater interest from brands to get involved with the women's game.







Leila Pereira (President) and Alberto Simão (Women's Football Manager).

# Governance

Having responsible and well-developed governance structures and practices is one of the most important factors in ensuring that women's football is in the best possible position to fulfil its potential, achieving both financial and non-financial success that is significant and sustainable. Whilst a club's approach to governance must be robust, it must also afford a degree of flexibility and be adaptable, to allow clubs to react to situations accordingly (e.g. the often fast-paced nature of the transfer market).

FIFA is supporting member associations and As highlighted in last year's report, clubs to ensure they have the appropriate resources and support to develop effective governance structures. For example, in April 2022, FIFA published its first-ever club licensing guide for women's football, a practical tool that assists member associations in implementing club licensing for their women's football competitions.

Encouragingly, there are other continental examples of efforts to improve overall governance of the women's game. In early 2022, the UEFA Executive Committee approved dedicated UEFA club licensing regulations for the UEFA Women's Champions League - the first fully independent regulations for the tournament following the introduction of licensing in 2019.

Historically, governance of women's football has emulated the men's structures and has not been specifically tailored to address the particular challenges and opportunities in the women's game. The key focus should be on developing governance structures that are fit for purpose and allow clubs and leagues to exploit the full potential of women's football.

women's football is less constrained by legacy structures than other developed sports. This provides a unique opportunity to introduce innovation and creative governance structures. An example of this is the New Zealand National League, the top tier of women's football in the country, which went through a restructure in 2021, developing a league and governance structure that is different to the men's league and structure.

Given the extensive reach of men's football across the globe, it is not surprising that 72% of clubs indicated that they were affiliated clubs, with the remaining 28% being stand-alone. There is no empirical evidence to suggest that either structure is necessarily better to develop women's football, but clubs should ensure that the potential benefits of each structure are maximised.

Finally, there appears to be positive progress in terms of the number of leagues that have a written strategy, 90% compared to 79% in last year's report, showing a continued commitment to helping shape and develop the women's game.

Clubs with a written strategy for women's football



Leagues with a written strategy for women's football



### Structure – clubs

The characteristics identified in the survey suggest that neither structure is necessarily superior, with no material differences observed in key areas other than the percentage of clubs with an academy - with 90% of affiliated clubs having one compared to 68% of stand-alone clubs. This may be due to affiliated club's men's teams already having established structures for academy operations – reinforced by the fact that 83% of affiliated clubs stated that they receive benefits from the men's football structure (by sharing facilities, staff, etc.).

#### Characteristics of stand-alone v. affiliated clubs





Average vsb 395k revenue S USD 343k

67% % of clubs with an academy

Average number of 11 first-team players with 8 one year at the club's academy



Average number of players at academy

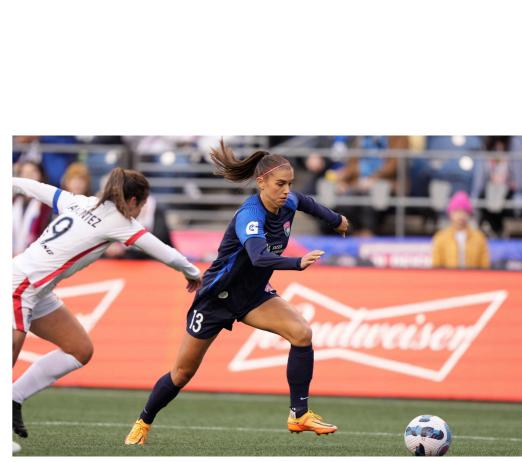
% of professional 66% players 71%



FTE staff

Stand-alone clubs

Affiliated clubs

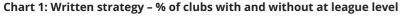


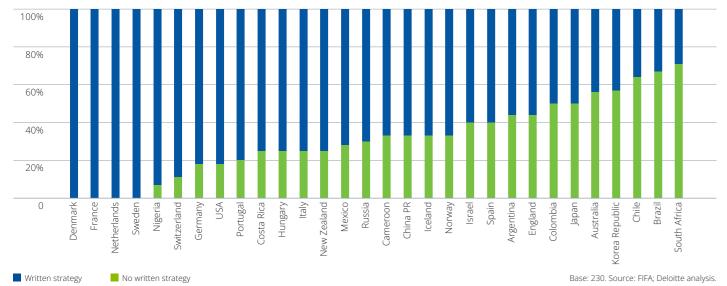
Of affiliated clubs, 68% stated that a specific department was in charge of all the activities around the women's football team, for which support from other departments within the club was provided. 15% of affiliated clubs noted that there was a specific department in charge of all the activities around the women's football team that did not receive support from other departments within the club. Only 17% stated that responsibilities around the women's football team were spread across the relevant departments within the club.

Of the clubs that provided responses in this year's edition and the last, around 70% have a written strategy. The existence of a written strategy can establish a clear vision. direction, and goals for a club, ensuring that individual clubs can achieve their potential, which will ultimately bolster the collective growth of the women's game.

There are indicators of the benefits of having a written strategy, including:

- of clubs that provided financial information and had an average revenue greater than USD 1m in 2020/21 (or 2021), 73% had a written strategy compared with 68% for those with a revenue less than USD 1m;
- the average revenue of a club with a written strategy is USD 0.4m, compared to USD 0.3m without;
- clubs with a written strategy have an average of 11 sponsors compared to six for those without;
- clubs with a written strategy achieved a higher average finishing position in the last three years (4<sup>th</sup> v. 6<sup>th</sup>); and
- clubs with a written strategy have more facilities available to them (nine) compared to those without (eight).

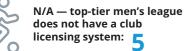




#### **Structure – league**

Who runs the league?





of standards and has the potential to improve the competitive balance of leagues; leagues that have a better competitive narrative are often more attractive to commercial sponsors and broadcasters (for example, of those in receipt of broadcast revenue, 90% of leagues have a club licensing system, compared to 45% for those that do not). Of leagues with only one winner in the last three years (suggesting a lower level of competition) - 75% do not have club licensing, compared with only 25% with two winners and 33% for three winners.

Club licensing can create a minimum level

The long-term success and prosperity of women's football is dependent on establishing and maintaining sustainable finances. The introduction of financial regulations that moderate or limit spending can help to achieve this, but whilst there are examples of league or confederation financial controls for clubs and leagues, wholesale regulation in women's football is still in its relative infancy.

Table 1: The salary regulations of leagues

	Salary cap	Regulations for maximum salary	
Yes	17%	13%	47%
No	83%	87%	53%

Base: 30. Source: FIFA: Deloitte analysis

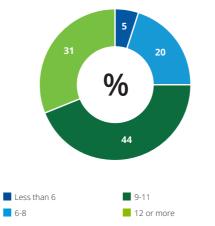
It is encouraging to see that almost half of leagues (47%) have minimum salary requirements for players, indicating positive development around the overall professionalisation of the women's game. Wages, however, remain relatively low. Leagues with salary caps (17%) or regulations for maximum salary (13%) are clearly in the minority, but the implementation of such regulations should be dependent on what league organisers think is the best course of action for

the development of the league. Whilst salary caps have the potential to improve competitiveness in dominant leagues and promote financial sustainability, restricting investment in the best playing talent could also result in the league not developing technically and commercially.

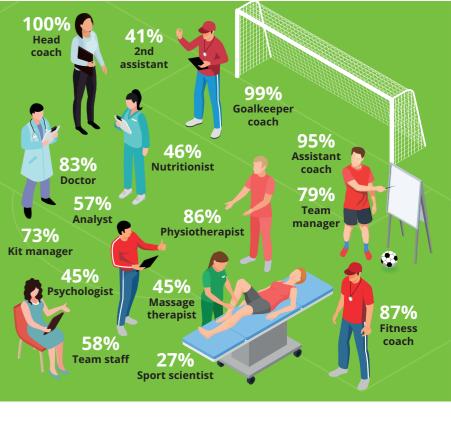
#### **Resourcing – clubs**

The technical development of the women's game has shown promising growth in the past few years, and this development continues to be aided by FIFA. The game's international governing body is committed to supporting all those working in women's football, and its Technical Study Group continues to analyse how the game is progressing.

#### Chart 2: Number of members of technical and multidisciplinary team staff per club (%)



Base: 294. Source: FIFA; Deloitte analysis.



There have been positive developments in the number of technical and multidisciplinary team staff at club level, reflecting the increasing professionalisation of the game. Of the clubs that provided information for both editions of this report, the average number of technical and multidisciplinary team staff has increased from eight to ten.

The survey responses suggest that having a greater number of technical and multidisciplinary team staff can translate to on-pitch success, with 29% of clubs with 12 or more technical and multidisciplinary positions having won the league in the last three years, compared with 19% of those that have less than 12.

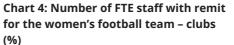
### Chart 3: Technical and multidisciplinary team staff roles (%)

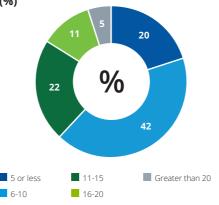
At aggregate league level, there is a disparity in the number of technical and multidisciplinary positions - with the USA and Nigeria having the highest indicated average value of 13 staff, compared with Korea Republic and New Zealand, where clubs indicated that the average was six.

Excluding team staff, the technical and multidisciplinary position groups that grew the most year-on-year were nutritionists and psychologists - another positive indicator of the continued professionalisation of technical and multidisciplinary team staff at club level in the women's game. Another positive noted was that the number of clubs indicating they employed analysts has increased yearon-year by almost a third.



Utilising data can assist the development of players on the pitch – which ultimately can lead to greater results off pitch, with better playing talent being a more attractive draw for fans and commercial partners (football's virtuous circle).







Using data can assist the development of players on the pitch – which can ultimately lead to better results off the pitch, with better playing talent being a more attractive draw for fans and commercial partners (football's virtuous circle).

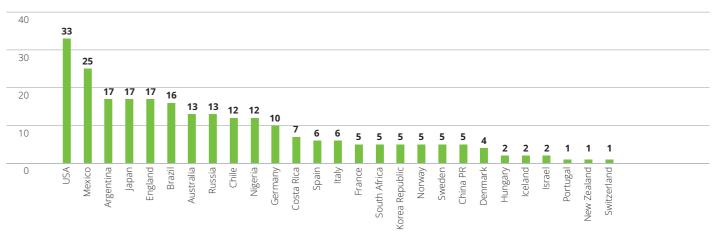
Having an appropriate level of operational and on-pitch staff is key to developing the women's game. The average club had six FTEs, with 57% being full-time paid dedicated staff, 33% part-time staff and 10% unpaid.

#### **Resourcing – league**

On average, leagues have nine FTEs dedicated solely to women's football, but the average is skewed by two leagues that have more than double the average number of FTEs (USA (33) and Mexico (25)) - excluding these, the average is eight.

In aggregate, almost half of FTEs are full-time paid staff (43%), over half are part-time paid staff (56%), and only a small percentage (1%) are volunteers.

#### Chart 5: Number of FTEs with remit to work with the women's football league (full-time and part-time)



#### **Commercial – clubs**

There is significant commercial potential in the women's game. Not only is it at an early stage in its life cycle (representing a relatively low financial entry point compared to other major sports), it is also an opportunity for brands to engage girls and women – a huge audience that is seeking inspiring female role models. By unlocking this potential, the sport can access increased funds to further invest and develop the women's game both on and off the pitch.

As well as being key to future financial growth, commercial revenue is the largest self-generated revenue source for most women's clubs, accounting for 56% of their revenue in 2020/21 (or 2021).

Investment in marketing and activation can result in a virtuous circle of commercial growth. This is notable from this year's survey, which shows that clubs spending more than USD 0.1m on marketing and activation generated an average of USD 1.1m in commercial revenue, compared to USD 0.1m for clubs spending less than USD 0.1m.

The overall club average number of sponsors is nine. However, as noted in last year's report, this average is distorted by a small number of clubs with significant values, with a median noted of four.

At aggregate league level, there also appears to be disparity between the number of sponsors – with 19 leagues having clubs averaging less than ten sponsors, compared to six leagues achieving average clubs sponsors greater than ten (with all, in fact, having more than 20 sponsors). Of leagues with less than ten sponsors, the average is four, with the average for those leagues having more than ten being 35.

for both this and last year's report, there has been an overall increase in the total number of sponsors, with a growth rate of 3%. This growth potentially highlights improved commercialisation and attracting of sponsors at club level despite enduring a global pandemic and an uncertain global economy.

Base: 27. Source: FIFA; Deloitte analysis

Among the clubs that provided information

When it comes to sponsorship negotiation, most clubs negotiate their main sponsor for the women's team only. For kit sponsor negotiations, most clubs negotiate as part of another club programme deal (i.e. men's football team), with 41% having a specific value given to the women's team, and 19% without a specific value given to the women's team.

### **Commercial – league**

Encouragingly, the total and average number of sponsors at league level has increased from last year's edition, with total sponsors of 107 (previously 82) and an average 3.6 sponsors per league (previously 2.9). This increase in the total and average number of sponsors resulted in a 24% increase in average commercial revenue from leagues that provided financial information.

## **CASE STUDY**

## **Brighton & Hove Albion**



One of the first and most crucial steps to growing the women's game is taking the time to devise a strategy that outlines the organisation's plan to accelerate growth. FIFA had the privilege of hearing from Brighton & Hove Albion on how the club built its strategy.

The club's women's football strategy was developed to support the vision established side to ensure an effective international by the board – to be a top-four team in the Barclays Women's Super League.

With the aim of delivering a strategy that would fulfil the club's women's football ambitions, it first established a strategy development team. After the selection process, a group of seven was selected, consisting of staff from different areas of the club, such as technical, medical, marketing and operations, to ensure that there was a holistic approach with input from across the club.

By bringing the differing skill sets of the strategy development team to the table, the group completed a comprehensive internal analysis, as well as a benchmarking exercise which looked externally to other clubs from which they could learn. This process identified the best external stakeholders to consult with. Following this process, the key strategic pillars were established, unpinned by five key enablers.

After aligning on the direction internally, the club commenced its external consultation process. This consisted of stakeholders, including The Football Association, Crawley Town (hosts of the club's Barclays Women's Super League home games), the County Football Association, commercial partners, fans and external consultants.

#### The journey to professionalisation

The club recognised that it does not have as significant a global brand as others, and therefore a smart recruitment strategy was key. On the men's side, success was found in the extensive use of football data, which could be applied to the women's recruitment strategy. It was clear that a big advantage was the ability to draw on the men's team's resources and expertise (e.g. sports psychologists, physiotherapists, football staff and facilities), and the integration of women and girls within the club's new training base was a positive step to ensure that the female players at the club had access to world-class facilities.

The club is also committed to giving local talent a chance, which is seen in the club's creation of development centres on the outskirts of the club's catchment area for both boys and girls.

#### Player well-being is a central pillar of the strategy

The club's player-centric approach to women's football is evidenced by "player well-being" being a pillar within the strategy, and a player care manager supporting players with offpitch endeavours. This pillar focuses on initiatives such as assisting players to transition post-playing career, by providing opportunities at the club and encouraging dual careers.

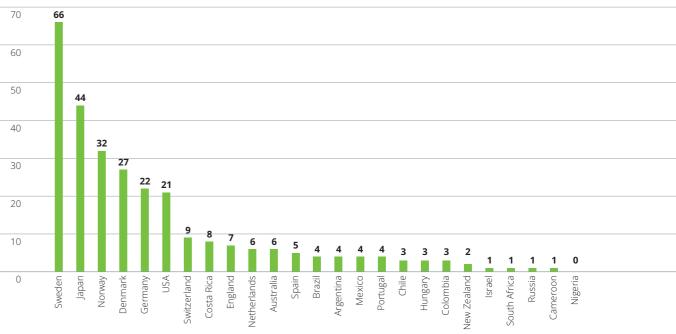
At U-21 level, the importance of education is balanced with football, and players at the club are encouraged to study a course of their choice at any educational institution. Players at all levels are offered regular opportunities to take courses offered by partners (such as FIFPRO).

#### The staff behind the scenes

The club has 27 staff dedicated to women's football, with the majority working in football operations. There are, however, professionals who specialise in legal, communications, marketing, commercial, finance and human resource functions. Additionally, there are a number of shared resources that are used by both the men's and women's football teams.

The club's key advice to those undertaking their own strategy development is to ensure that middle and senior management are brought in to the project from the beginning, as this will increase the chances of success for the strategy over time and ensure more contributions from all stakeholders.

#### Chart 6: Average number of sponsors - club



by club (%)

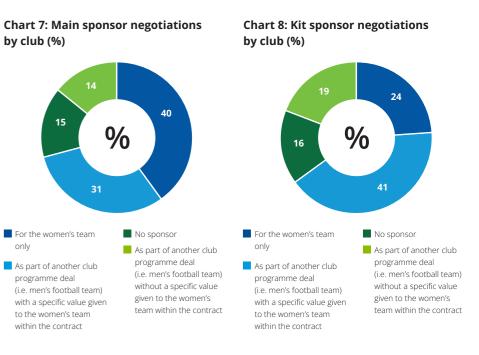
Interestingly, there is a strong correlation (correlation co-efficient of 0.7) between the number of sponsors at league level and the number of sponsors from club responders, suggesting that where a league's constituent clubs are attractive to commercial partners, leagues also stand to benefit.

#### Leagues with title sponsor





Base: 219. Source: FIFA; Deloitte analysis.



Base: 294. Source: FIFA: Deloitte analysis.

Base: 294. Source: FIFA: Deloitte analysis

#### Industry of title sponsors

The number of leagues with a title sponsor has also seen growth, with 77% of leagues having a title sponsor in 2020/21 (or 2021), compared with 66% in the previous edition of the report. The industry composition of title sponsors is similar to the industry composition of sponsors at club level, with financial services being the largest industry.

The increase in title sponsorship coupled with the overall growth in sponsors at a league level indicates the growing commercial interest in women's football.

Unlike many professional men's leagues, broadcast revenue is not the key driver of revenue, with women's football still in a development phase with regard to its broadcast offerings. The majority of leagues (57%) indicate that they negotiate for women's football only, with the second most common method of negotiation being with other competitions, including the men's league.

The highest average broadcast revenue was achieved by leagues stating that they negotiated their deal for the women's league only, with an average of USD 693,000 in 2020/21 (or 2021), followed by with other competitions including the men's football league, with an average of USD 93,000.

## Chart 9: Total and average number of

125

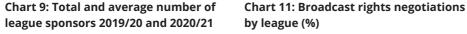
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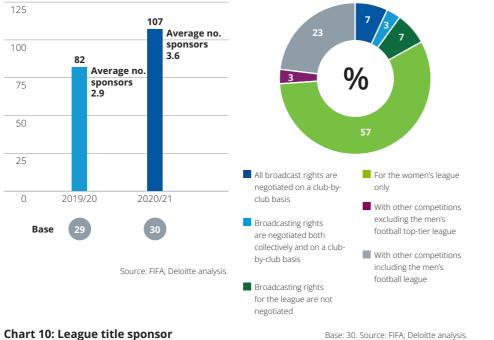
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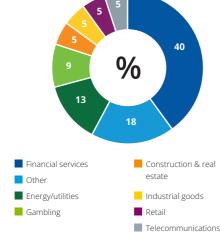
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- industry (%)



Base: 22. Source: FIFA; Deloitte analysis.

## **Florence Nakiwala Kiyingi**

We often read women's football success stories about the traditional giants of the game, but in many member associations around the world, there are countless examples of passionate people who have dedicated their lives to growing the game. In Uganda, that person is Florence Nakiwala Kiyingi, the first female Vice-President of the Federation of Uganda Football Association (FUFA).

Although the women's football league in Uganda does not feature in this report, there are encouraging signs to suggest that one day it might meet its aspirations of becoming one of the top leagues in Africa. Having worked closely with FIFA on a robust women's football club licensing programme, which takes into account the top two women's football leagues in Uganda, women's football is one of FUFA's top priorities.

Behind the scenes, Florence Nakiwala Kiyingi has been working hard to grow the women's game since her appointment as the first female Vice-President of FUFA in 2017. Despite the stature of such a position, the former Minister of State for Youth and Children Affairs in the Cabinet of Uganda holds a much more important title: "My greatest achievement is that I am a mother of five," she said.

As a mother working in football administration, Kiyingi knew which the hurdles awaited her. Even after earning the votes required to secure her position as Vice-President and with the support of FIFA, the successful businesswoman was constantly told that: "you will not perform as well as a man". This did not, however, deter her passion to use football as a tool for gender parity in Uganda.

One of Kiyingi's big focuses since joining FUFA has been the implementation of club licensing in women's football as a way to raise standards in the women's game, train football administrators, promote financial control systems and build a wealth of data for benchmarking within the Ugandan football ecosystem.

"We want to the learn from the giants," Kiyingi said. "Club licensing is the alpha and omega of football administration and this is an area where FIFA has been a great help to FUFA."

After a long period of remote work between planning, women's football in Uganda FIFA and FUFA during the COVID-19 pandemic, delegates from FIFA finally had the opportunity to travel to Uganda in May 2022 to host a club licensing workshop with the clubs from the top two divisions of women's football, where there are now more than 5,000 girls playing football.

Thanks to years of hard work and dedication from people such as Kiyingi, the results in Uganda can even be seen at national-team level where the Crested Cranes gualified for the 2022 CAF Women's Africa Cup of Nations, their first appearance at the continental championship since

The future for women's football in Uganda is bright, highlighted by FUFA's five-year development plan with a "hat-trick" of goals dedicated to the growth of women's

"I see women's football as a key pillar in achieving FUFA's vision, which is to be the best footballing nation in Africa," Kiyingi said. "There is a desire to develop women's football to a point where the men's and women's game are seen as equal."

### TRAILBLAZER



"In order to be successful, we need to increase the fan base, increase government support and energise sponsors to get behind women's football. Without off pitch cannot reach its goal."

With Kiyingi breaking the glass ceiling for many women in Africa who aspire to work in football, the esteemed politician says it's important that we continue to create more opportunities for women to work in football. She credits FIFA's Secretary General as a key role model.

"Federations should also look to support aspirational women – with quotas for a number of women on executive committees," Kiyingi said. "Combining these opportunities with women who can show they can do whatever they put their mind to will help develop both the men's and women's games. You also have to show them that they can and provide opportunities for them to improve their capabilities.

I was inspired to get into my position after seeing the first female Secretary General at FIFA – Fatma Samba Diouf Samoura. I want to continue to push myself to develop personally and commit to providing growth in women's football not just in Uganda, but act as inspiration for growth on the entire continent of Africa," she said.

# **Financial landscape**

The financial growth of women's football is imperative in order to continue attracting investment in the game and to sustain and accelerate the development of the sport. This year, there are encouraging signs of growth, with all key revenue lines for clubs in aggregate and at a league level experiencing growth. Costs also increased, indicating a greater level of investment.

Nonetheless, there is a significant amount of growth that can still be achieved through unlocking further opportunities in the women's game.

Of the clubs that provided full financial information for 2020/21 (or 2021), only 7% of clubs generated more than USD 1m of revenue from matchday, broadcast, commercial and prize money sources, rising to 11% of clubs when including "other" revenue. Of those that provided a response, 51% indicated they received a subsidy of some sort.

The different revenue and cost categories used for our analysis for leagues and clubs are as follows:

- · Club revenue includes matchday, broadcast,<sup>1</sup> commercial, prize money, and other revenue streams.
- League revenue includes broadcast,<sup>2</sup> sponsorship, and other revenue streams.
- · Club costs include player wages, technical and multidisciplinary team staff, administrative staff, matchday operations, marketing and other costs.
- League costs include staffing, sponsorship activation, broadcast production, marketing and other costs.

Note 1: this may include central distributions from the league in cases where broadcast rights are collectively sold by the league.

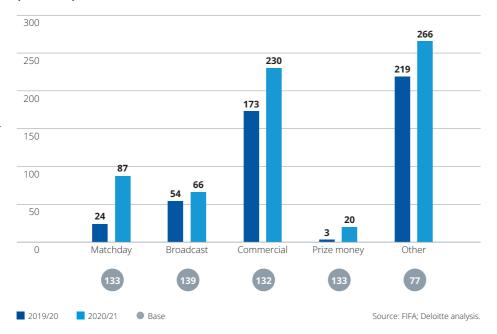
Note 2: a proportion of league broadcast revenue may be distributed to clubs. As such, combined club and league revenue do not equal the total revenue of the women's game collectively

The growth in revenue in this year's edition is promising and shows the game is moving in the right direction financially. Despite the revenue-generating capabilities of women's football still being in its relative infancy compared to the men's game and other professional sports, it is in a unique position whereby it can leverage the experience of its male peers in order to maximise revenue generation and allow unique and innovative ways of generating revenue growth.

The average matchday revenue generated by clubs increased by over 260% between 2019/20 (or 2020) and 2020/21 (or 2021) - with clubs seeing the continued return of fans following the restrictions imposed on many clubs during the COVID-19 pandemic. Matchday revenue represents 21% of total revenue on average (excluding other income)

#### **Revenue – clubs**

Chart 1: Club - key revenue splits year-on-year - average 2019/20 and 2020/21 (USD 000s)



#### Chart 2: Club - Key revenue sources per average revenue group - excluding other revenue (%)

Within the top quartile

of commercial revenue

generators (those that

generate over USD

0.2m) - 61% negotiate

their main sponsor and

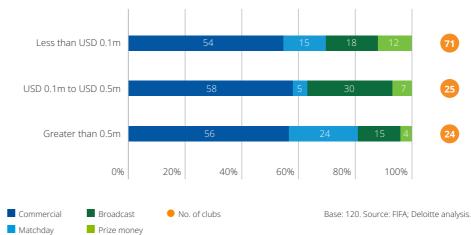
kit sponsor for the

women's team only,

compared with only

30% for lower revenue-

generating clubs.



Of the highest matchday revenue generating clubs (defined as being greater than USD 0.1m), 72% offered a season ticket for women's football team matches in 2020/21 (or 2021), compared with only 28% for lower revenue-generating clubs. Offering season tickets can help clubs develop loyalty within their fan base and can provide a stable revenue stream.

The broadcast revenue generated by clubs increased 22% year-on-year to USD 66,000, with revenue being driven by central league broadcast deals, as well as revenue generated from club-based platforms. There is room for growth at club level, with 63% of clubs not broadcasting any league games on their own platform. However, it should be noted that some clubs may be prohibited from doing so owing to a central league broadcast deal.

Having matches broadcast on any platform, even without receiving revenue for it initially, offers the opportunity to grow the fan base and following of women's football, which, in turn, can increase the attractiveness of the game to commercial sponsors and broadcasters. For clubs

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with broadcast revenue over USD 0.1m in 2020/21 (or 2021), their average social media following across all platforms was 30% higher than those that generated less than USD 0.1m.

The key revenue driver for most clubs is commercial revenue, providing an average of 56% of total revenue (excluding other revenue). Of the clubs providing information, there was year-on-year growth of 33% – indicating the continued and growing interest from commercial sponsors wishing to be associated with the growth of women's football.

Attracting, retaining, and growing commercial revenue will be the key element in ensuring there is sufficient investment in the continued growth of the women's game. Clubs are clearly making progress in this area and should continue to work collectively and with their respective leagues to ensure that women's football is attractive to a greater number of partners across many industries, and that true commercial value is attained.

37% of leagues indicated that they distributed prize money, with an average of USD 0.2m per league in 2020/21 (or 2021). Prize money is not a significant percentage of most clubs' revenue, but the offering of significant merit-based prize money (once leagues have developed further commercially) could incentivise club owners to invest more significantly in order to improve their teams' on-pitch.

A proportion of clubs stated they received other revenue in the year from a variety of sources, including subsidies and owner funding. There is a significant disparity in other revenue generated, with five clubs earning over USD 1m and 72 clubs receiving less than this.

#### **Revenue – league**

As noted with clubs, the key revenue driver for leagues is commercial revenue, which accounted for over half (54%) of total revenue (matchday, broadcast, commercial and other) for those providing financial information.

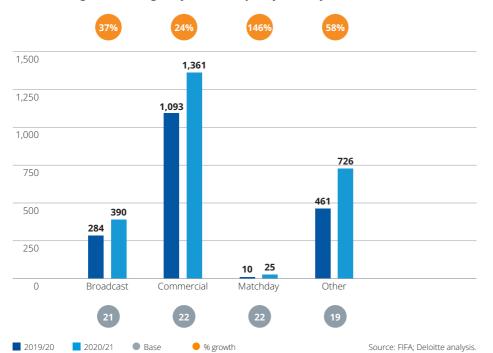
However, there is a significant disparity in commercial revenue generated across leagues, with 14 leagues generating less than USD 1m, and four leagues generating more than USD 4m.

Leagues generating greater amounts of commercial revenue have more resources to invest in their leagues – again demonstrating the virtuous circle of increased revenue generation and reinvestment. For example, leagues generating more than USD 2m have, on average, 14 FTE staff (paid full-time, paid part-time and unpaid) compared with seven for those with less than USD 2m.

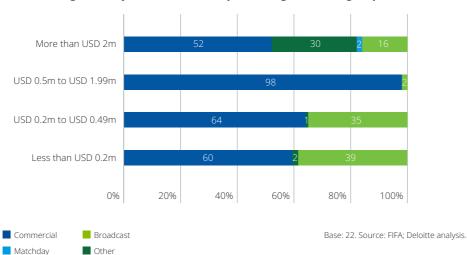
Interestingly, leagues with three separate winners in the last three years averaged USD 2.9m of commercial revenue, compared with USD 1m for leagues with two winners and USD 0.4m for one winner, perhaps highlighting the importance of having competitive leagues which can be more attractive to commercial sponsors.

Other revenue consists mainly of members fees and fines – with this year's average influenced by two leagues in excess of USD 3m. The average excluding these two leagues was less than USD 50,000.

#### Chart 3: Leagues – Average key revenue splits year-on-year (USD 000s)



#### Chart 4: Leagues – key revenue sources per average revenue group (%)





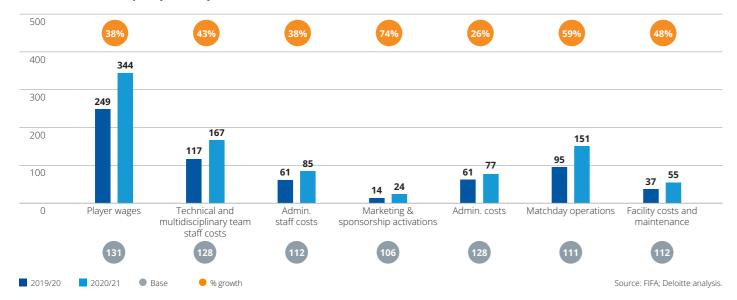
Of the leagues that provided information, ten indicated that they were in receipt of broadcast revenue in 2020/21 (or 2021), compared to nine in 2019/20 (or 2020). Of those in receipt of broadcast revenue, 90% of leagues have a club licensing system, compared to 45% for leagues that do not, suggesting club licensing and the professionalism it can establish may deliver a more attractive value proposition for broadcast partners.

Some leagues do have broadcast deals, but many attract minimal to no fee. Despite this, and similarly to club level, the broadcasting of matches can build the exposure and fan base of the league, which, in turn, is more attractive to commercial sponsors – aiming eventually to build a viewership large enough to command a broadcast fee (an approach that been seen extensively across many sports over time). Matchday revenue (generated from ticket sales, corporate hospitality and food & beverages) at league level is limited (and in some cases, tickets may be given away for free in order to encourage attendance). However, with the positive trajectory of attendances at club level, leagues should consider ways that they can maximise the opportunity.

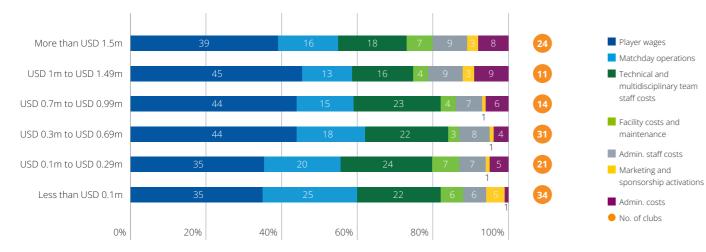


Of those in receipt of broadcast revenue, 90% of leagues have a club licensing system, compared to 45% for leagues that do not, suggesting club licensing and the professionalism it can establish may deliver a more attractive value proposition for broadcast partners.

#### Chart 5: Club costs splits year-on-year (USD 000s)



#### Chart 6: Club cost source per average cost group (%)



Base: 135. Source: FIFA; Deloitte analysis.

#### Costs – clubs

As well as noting revenue growth, the costs incurred by clubs have also seen year-on-year growth. Although an element of this increase is likely to be inflationary pressure, the overall growth does represent continuing investment in women's football.

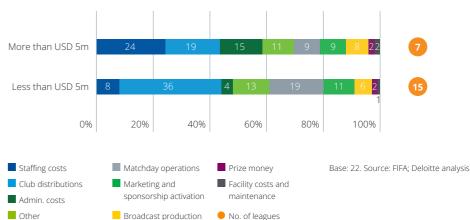
In aggregate, there is significant variation in the total costs incurred by clubs, with 18% of clubs that provided financial information having costs in excess of USD 1.5m, whilst 25% of clubs had costs less than USD 0.1m.

Player wages (41%) continue to be the most significant cost for clubs overall, with player wages as a percentage of total cost not varying significantly between higher and lower cost-incurring clubs (ranging from 35% of total costs to 45%).

Many academic studies have been conducted on the correlation between player wages and on-pitch performance and there is no universal consensus about whether there is a positive correlation. Many of the studies cite a number of factors that contribute to on-pitch success. However, the average gross salary of clubs that had won the league in the last three years was USD 16,000 in 2020/21 (or 2021), compared with USD 13,000 for those clubs that had not, suggesting a possible positive correlation across women's football at present.

Technical and multidisciplinary team staff costs have grown 43% year-on-year. Interestingly, affiliated clubs had average technical and multidisciplinary team staff costs of USD 172,000, compared to USD 158,000 for stand-alone clubs.

### Chart 7: League - cost source per average cost group (%)



The significant growth experienced in expenditure on matchday operations (59%) and facility costs and maintenance (48%) are likely to have been influenced by the return of fans after restrictions placed on clubs during the COVID-19 pandemic were lifted.

Investing in the overall matchday experience can ensure that visiting the stadium on matchday is a positive experience, improving the likelihood of attracting and retaining fans. The data suggests there is a positive correlation (correlation co-efficient of 0.6) between the amount spent on facility costs and the overall attendances achieved by a club.

Marketing and sponsorship activation (74%) growth year-on-year is an encouraging sign for the women's game, with spending seeking to drive and sustain commercial interest in the game.



The clubs that spent over USD 0.1m had an average of 1.1m social media followers (on Facebook, Twitter and Instagram), compared with 544,000 for those that spent less than USD 0.1m.

#### **Costs – league**

#### **Characteristics of higher cost leagues**



On aggregate, leagues noted cost growth across all key areas in the 2020/21 or 2021 season. As with clubs, this cost growth could be indicative of the overall investment leagues are making to facilitate growth in the women's game in their respective countries. It is expected that continued

investment is key to driving the sustained

growth of the game.

Although, on average, leagues incurred costs of USD 4.6m, this is heavily skewed by three leagues with costs in excess of USD 10m. Excluding these three leagues, average league costs are USD 2.2m, highlighting the present disparity across the top leagues in the women's game.

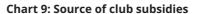
Staff costs continue to be the key cost driver at league level, accounting for 22% of overall total costs. With concerted efforts to grow the game, attracting and retaining

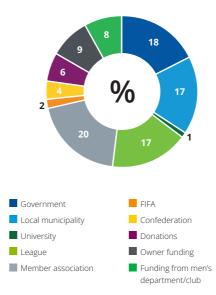
the best administrative talent will become increasingly competitive and will likely result in greater remuneration for talented individuals moving forward.

As noted in the governance section of this report, financial regulations are an important tool at a league's disposal to create a balance between investment in developing the game to maintain its growth trajectory, and overall financial sustainability.

#### **Subsidies**

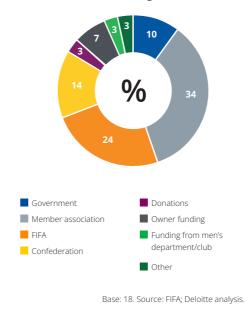
There have been positive developments in the commercialisation and financial growth of the women's game, but the majority of clubs and leagues are still receiving financial subsidies. Of the clubs that responded to the survey question, 51% indicated that they had received some form of subsidy





Base: 101. Source: FIFA; Deloitte analysis.

#### Chart 10: Source of league subsidies



in the year, and the figure was 60% for leagues. As noted in Chart 10, there are a number of different types and sources of league subsidies.

It is not unusual for any business to require funding when they are in their relative infancy and developing the business side of women's football is no different. The provision of subsidies continues to highlight the financial commitment of several stakeholders during this phase of development in professional women's football.

Women's football has come a long way in recent years and has seen exciting developments from investments made to date. The long-term goal is to create a virtuous circle whereby investment develops the game financially to a point where women's football becomes financially selfsufficient.

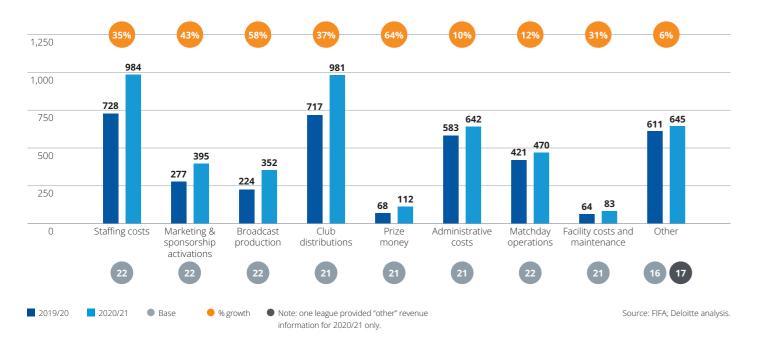
### **Player transfers**

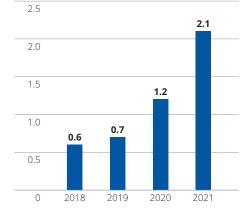
International transfer fees in women's professional football hit a new record in 2021 of USD 2.1m, an increase of 73% on 2020, with a compound annual growth rate (CAGR) of 52% since 2018.

Although this continued growth indicates the continued maturing of the women's game, it should be noted that the five largest transfers paid in 2021 accounted for almost 60% of the total spending, and only 4.4% of professional transfers involved the payment of a fee (which has increased from 3.5% in 2020).

As clubs continue to develop commercially and financially, it is anticipated that the guantum and value of player transfers will continue to increase, with an everdeveloping competitive market to acquire on-pitch playing talent.

#### Chart 8: League costs summary - 2019/20 and 2020/21 (USD 000s)

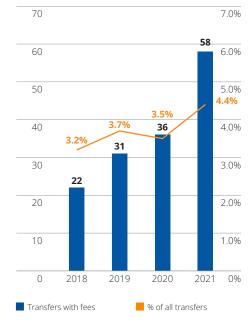




#### Chart 11: Transfer fee by year (USDm)

Source: FIFA Global Transfer Report 2021; Deloitte analysis.

#### Chart 12: Number and share of transfers with fees by year



Source: FIFA Global Transfer Report 2021; Deloitte analysis.



## **Chan Yuen Ting**

Chan Yuen Ting is nothing if not a trailblazer. In 2015, she became the first woman to coach a top-tier men's team in a professional championship, before having another first the following year by leading the team to the national league title. Then in 2017, she became the first woman to coach a men's side in a continental club competition, namely the AFC Champions League.

Currently in charge of Jiangsu and a mentee turned mentor in the FIFA Coach Mentorship Programme, Chan Yuen Ting provided an insight into her coaching

#### At the age of just 27, you became the first female coach to win a national first division championship with a men's team. Does the role of pioneer suit you?

Honestly, my appointment as coach of Eastern in 2015 came as a big surprise to me. It was a dream that came true when I was least expecting it. I made a conscious effort not to let it go to my head in those early days, and I think I managed to maintain a degree of humility with respect to the appointment. I was still learning and was a long way from considering myself a good coach. Everything was a challenge, and so thoughts of a league title were not even on my radar. In the end, we went on to win it, but I have to admit that, even to this day, I have moments when I wonder if I dreamt it all (laughs).

#### Many considered you a heroine for what you achieved...

I read here and there descriptions of what I did as a "miracle" or "heroic feat", but I don't see it that way at all. I was just very fortunate to be entrusted with coaching a high-quality team. Of course, it was unheard lot. Seeing her coaching at the FIFA Women's of for a female coach to win such a trophy with a men's side, but my role in that title success was secondary. It is the players who are on the front line, so the credit goes to them first and foremost.

#### That title success must have been the proudest moment of your bourgeoning career?

Unquestionably. I often think back to that season and what I went through. Although I don't like to blow my own trumpet, that title success generated a lot of media attention, and I've been told that I may have been an inspiration to other women. And that's perhaps what I find most touching. That said, I'm still a young coach, so I hope my crowning achievement is still to come!

#### Did your life change much after that title?

Yes, because it gave me the opportunity to then participate in the AFC Champions League. Were it not for that tournament, I'd never have gained the maturity I did. Going up against the continent's finest was an incomparable experience, despite not being but that's far from the case in some parts particularly successful for us. I learned a lot from those heavy defeats, even if they really sapped my morale at the time. I think I had to go through that. It puts you back in your place – that of a small-time coach with work still to do. Most of all, though, it motivates you to go even further.

### You said you may have inspired other women, but who inspired you?

Corinne [Diacre] is a female coach who's inspired me enormously. We first came together through the FIFA Coach Mentorship Programme. She's taught me a World Cup 2019<sup>™</sup> was very impressive. She did a great job, even if fortune didn't favor France in the end. That just further fuelled my already-fervent goal of participating in a FIFA World Cup.

#### What memories do you have of the FIFA Coach Mentorship Programme?

It was a really nice experience for me. I had the opportunity to spend a week in Clairefontaine, and it was extremely informative in terms of infrastructure and training. I could see first-hand what was involved in managing a top international team. I'll never forget that week. As for Corinne, we've kept in touch and regularly send each other messages. She always gives such good advice and is the perfect

### Like you, Corinne Diacre has also coached a men's team (Clermont), but it's still an opportunity very few women are afforded...

I'm lucky enough to come from Hong Kong, where both sexes are on an equal footing, of Asia. In many countries on my continent, women still don't have the same rights as men. It's very difficult to break with these traditions. Historically, football is a men's sport. However, I have the impression it's more balanced elsewhere, especially in Europe, where women's football has developed enormously in recent years.



Because of that, I expect we'll see more women taking charge of men's teams there. At the last Women's World Cup, seven of eight quarter-finalists were European. The women's game there has the wind in its sails.

#### Do you prefer coaching men or women and what's the difference?

In terms of enjoyment, it's the same. As I see it, a good coach should have the ability to adapt, regardless of the gender, age or experience of their players. Those considerations should not be an impediment. However, how you approach the task is inevitably different. At Eastern, I was managing professional, experienced men, so I wasn't going to be coaching them on how to take corners. Above all, my role there was to create a team and a strategy based on the intrinsic qualities of each of the players at my disposal.

#### How do you see your career in five years' time?

You can never tell. A coach's life is full of uncertainty as it is dictated by results. Just like every coach, I'm ambitious, so I hope to be able to work at an even higher level. In any case, I'd like it to be away from Hong Kong, as foreign experiences are excellent for development.

I have been experiencing some new challenges and amazing moments in the Chinese Women's Super League which has provided me with a great platform to work with elite players. There is no doubt that as an Asian coach we have to work harder and harder to catch up with some of the more established women's football regions. I will do everything that I can to raise the level of women's football in Asia and look forward to more opportunities to learn from what is happening in Europe as we saw during the success of the most



"As I see it, a good coach should have the ability to adapt, regardless of the gender, age or experience of their players."

# Fan engagement

The 2021/22 season was a record-breaking year for women's football attendance. Internationally, a reported 500,000 tickets were sold for the UEFA Women's EURO 2022 in England, more than double that of the 2017 tournament in the Netherlands. At league level, the USA's National Women's Soccer League achieved a maximum match attendance of over 27,000 in 2022 and Chile's Campeonato Femenino de Primera División Caja Los Andes sold 12,000 tickets for its final in 2021. The future looks equally positive, with upcoming major events, notably next year's FIFA Women's World Cup Australia & New Zealand 2023, providing increased exposure and giving the game's stakeholders a greater platform to increase engagement with fans.

This section focuses on fan engagement via matchdays, broadcasting (the media through which fans consume football content) and the use of social media and merchandising purchases.

#### Matchday attendance

For many leagues and clubs, the 2019/20 (or 2020) and 2020/21 (or 2021) seasons were significantly disrupted by COVID-19, be it through the postponement or cancellation of matches, or government restrictions requiring matches to be played behind closed doors or with a reduced capacity crowd.

Considering matches played by clubs in their regular stadiums, teams played on average ten matches in front of full capacity crowds in 2020/21 (or 2021), six with a restricted capacity and six behind closed doors. The remainder were played elsewhere (e.g. in a stadium that usually hosts men's matches).

For the clubs that provided information, the average attendance in regular stadiums (i.e. full capacity available) in 2020/21 (or 2021) was almost 1,000, with the highest average attendance for an individual club being 20,000. The average maximum match attendance (i.e. the largest attendance noted by a club in a given season) across the clubs was almost 2,400, with the

highest maximum match attendance for an individual club being 52,000.

The best-attended league was in the USA, with an average attendance across its clubs (playing in full capacity, regular stadiums) of over 5,400 in 2021 (and a highest average maximum attendance of almost 12,000, a ratio of 2.2). Four other leagues had average attendances of over 1,000 (Mexico, Nigeria, Australia and Colombia) whilst a total of nine leagues had average maximum match attendances in excess of 1,000. Matches in New Zealand had the greatest disparity between average attendances and average maximum attendances (4.1).

Over a quarter of clubs (27%) played matches in a stadium that was not their regular home during the 2020/21 or 2021 season. Whilst fewer matches were played in these stadiums (an average of 2.4 over a season), they tended to have an average attendance of over 2,900 and an average maximum attendance of almost 7,100, highlighting the positive impact (from an engagement and financial perspective) that these matches have on clubs.

Two clubs achieved attendances of over 30,000 in their regular stadiums during the 2020/21 or 2021 season, with those being Monterrey and Tigres in Mexico. Others achieved maximum match attendances of over 30,000 in other stadiums. Interestingly, all of these were affiliated to major men's clubs, showing the benefits of affiliation and the ability to promote the women's game to a larger audience. These include Feyenoord (50,000) and PSV (35,000) in the Netherlands, Athletic Club (over 48,000) in Spain, Paris Saint-Germain (40,000) in France, and Juventus (40,000) in Italy.

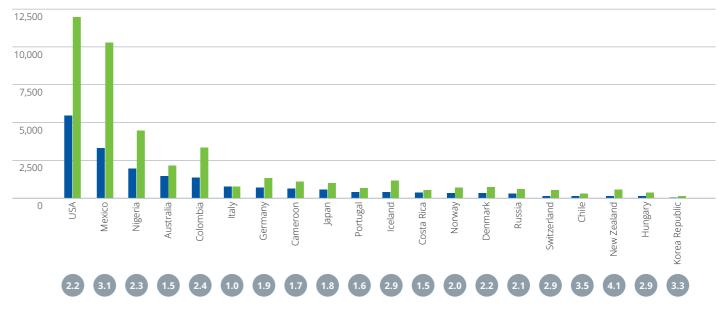
Additionally, clubs that had greater average attendances in their main stadium, with full capacity crowds in attendance, generally generated greater matchday revenue, attracted a greater number of sponsors, could charge greater amounts for tickets, and had a greater broadcast audience per match.

#### **Ticket prices**

In total, only 35% of all clubs offered a season ticket featuring the women's team, with 25% offering a season ticket for the women's team only and 10% offering a combined ticket for the women's team and another club programme (e.g. men's team). Those offering tickets for the women's team only were able to extract higher prices (average of USD 14 per match ticket) than those bundling it with another club programme (USD 12.20).

Clubs that offered a season ticket to the women's team only attracted significantly higher average attendances than those

Chart 1: Average match attendance and average maximum match attendance of clubs playing in regular, full capacity stadiums per league (and the ratio between the two) in 2020/21 or 2021



Average match Average maximum attendance match attendance

 Ratio between average attendance and average maximum attendance

#### Table 1: Characteristics of clubs with average attendances of 1,000 or over v. others

Factors of attendance	Below 1,000	1,000 or higher
Matchday revenue (2020/21 or 2021)	18,398	223,292
Cost of adult matchday ticket	USD 7	USD 8
Cost of concessions*	USD 3	USD 4
Broadcast audience per match	23,931	30,558

\*Note: concessions include children, students, etc.

that did not and were able to achieve significantly greater maximum attendances. Interestingly, season tickets sold alongside other club programmes appeared to be less successful in generating large crowds.

Clubs in the USA on average charged the highest amount for adult match tickets (USD 29.50), followed by England (USD 24.66), Japan (USD 20.66) and Iceland (USD 15.27).

## Negotiation of broadcast rights

There are many considerations that rights holders must take into account when formulating the approach to the broadcast market. There is often a trade-off between maximising exposure (generally achieved on free-to-air (FTA) platforms) and financial return (which may result in matches being broadcast behind a paywall). The approach

Base: 199. Source: FIFA: Deloitte analysis

may be influenced by where a sport is in its life cycle, with new leagues and products often prioritising growing fan bases before looking to convert a larger viewership into financial return via negotiations with broadcasters (and other partners).

It is also important to consider the packaging of broadcast rights, and whether there may be a greater return from bundling the rights to properties together or selling individually. Across women's football, by far the most common method was to negotiate rights for the women's football league only, with over half (57%) of leagues opting for this approach (as noted in the Governance section of this report). This was followed by bundling rights with other competitions, including the men's league, which was seen in almost a quarter (23%) of leagues.

The way rights were negotiated by leagues (for the women's football league only v. with other competitions including the men's football league) saw no difference in the length of domestic broadcast arrangements (both 3.2 years). Those that were negotiated for the women's football league only, however, tended to be much greater in value (by a factor of 2.3, using the per annum value).

Across many major established sports, the broadcast rights generated by a league are directly or indirectly distributed to the competing clubs. This may be done through a variety of mechanisms, and may be based on sporting merit (e.g. prize money) or other factors (e.g. historic success, size of fan base and other metrics that increase the interest in, and therefore audience of, the league).

Nine leagues distributed revenue to clubs (with five sharing it equally and four using a formula). Three distributed it via other means (e.g. indirectly by paying club expenses, through the league providing additional earning opportunities to clubs as part of the broadcasting deal, and through clubs having their own negotiations with television stations).

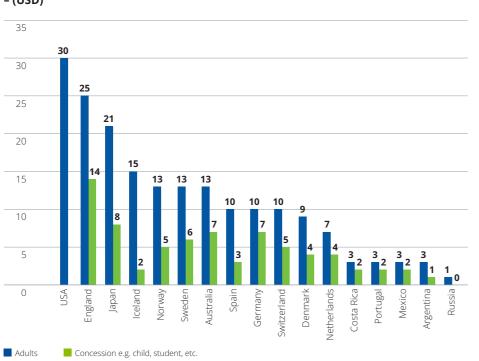
However, a significant proportion of leagues (60%) did not provide clubs with any broadcast revenue (either by design or by virtue of the league not generating broadcast revenue). We expect these numbers to reduce over the coming years, as leagues at an early stage in their life cycle continue to mature and explore new broadcast opportunities.

Table 2: Key characteristics of clubs with differing approaches to season-ticket sales

Availability of season tickets	% of clubs	Average cost of adult match ticket (USD)	Average cost of concession* match ticket (USD)	Average attendance**	Average maximum attendance**
Women's team only	25%	13	6.8	2,023	5,241
Women's team and another club programme combined (i.e. men's team)	10% d	12.2	4.8	532	1,491
No season ticket offered	65%	n/a	n/a	684	1,611

\*Note: concessions include children, students, etc. \*\*Note: at full capacity stadiums.

Note: less than 50% of clubs in the USA provided concession-ticket prices.



Base: 150. Source: FIFA; Deloitte analysis.

#### Chart 2: Average cost of match tickets (adults, concessions e.g. child, student, etc.) - (USD)

Table 3: Characteristics of leagues with different approaches to negotiating broadcast rights for the women's football league

Domestic broadcast negotiation	Length of F arrangement (years)	
For the women's football league of	0.2	415,000
With other competitions (including the m football league)	3.2 en's	242,000

#### **Domestic and international** broadcast rights

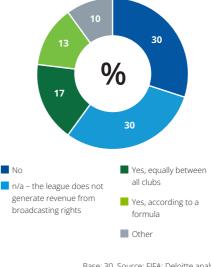
83% of leagues had a domestic broadcast arrangement in place, with the average length being three years (ranging from one year to eight years), and the average annual value paid by domestic broadcasters was over USD 322,000 per annum across all leagues, although there was a significant disparity between leagues.

Ten leagues stated that they had international broadcast partners, with the average number being 3.4 (ranging from one to eight). The arrangements lasted for an average of 2.4 years (ranging between one and three years). The provision of financial information regarding these partnerships was unfortunately limited.

Broadcast rights in the women's game continue to grow, though these remain minimal in comparison to the men's game. It should be noted that rights values in most major sports took many years to grow and the overall trend is encouraging. It was positive to see that the Israeli Women's Premier League secured their first paid

domestic broadcast deal in 2021/22, and we expect the leagues without domestic broadcast partners to obtain them in the coming years. Additionally, the rights fee growth experienced in the Barclays Women's Super League (which completed the first year of a three-year deal with BBC and Sky in 2021/22), and increased exposure thanks to the availability of content on both free-to-air and pay-TV platforms, significantly contributed to the increased interest in the domestic market. Similarly, elsewhere in Europe, the Swedish OBOS Damallsvenskan signed a five-year deal with NENT Group (ViaPlay) in 2022, with two matches to be shown on FTA platforms and the remainder on pay-per-view, with matches also broadcast in an increased number of countries internationally. The game's stakeholders will no doubt look with interest at what happens when the negotiations for the next rights cycles in these leagues come around.

#### Chart 3: Are revenues generated from broadcasting distributed to clubs?



Ten leagues stated that they had international broadcast partners, with the average number being 3.4 (ranging from one to eight). The arrangements lasted for an average of 2.4 years (ranging between one and three years).

Base: 30. Source: FIFA; Deloitte analysis.

#### **Broadcasting platforms**

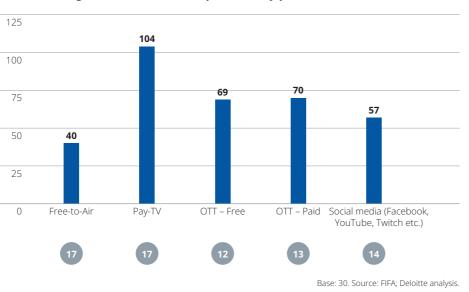
There are many ways in which live sports content can be broadcast, and there are ever innovative solutions that are challenging traditional platforms. All leagues broadcast matches in some format over the course of 2021 and 2022.

For those that provided information, it was found that matches were mostly produced for pay-TV platforms (with an average of 104 matches produced per league). This was followed by over-thetop (OTT) platforms (free and paid) and social media, which perhaps surprisingly surpassed free-to-air platforms in terms of the number produced. This may present the women's game with an opportunity to connect with a younger audience – a key target demographic for sports properties who are increasingly consuming content on these platforms.

This profile was similarly reflective of the number of matches that were broadcast domestically on each platform (i.e. pay-TV was most common, followed by OTT-paid and OTT-free, and then social media etc.), however, the profile was notably different for international broadcasts, where on average paid-OTT platforms had the highest number of matches produced for broadcast per league (albeit they were only present in eight leagues).

For the leagues that provided information, there was a significant disparity in the average audiences between countries. The three leagues with by far the most viewers (exact data has not been disclosed to protect confidentiality) had a different broadcast profile, with viewers in South Africa and China PR almost wholly (both 98%) consuming content via TV (FTA or pay-TV), whereas Brazilian viewers favoured social media (which accounted for 60% of total viewership) and OTT platforms (free

#### Chart 4: Average number of matches produced by platform



and paid representing 31% of viewers). For leagues with a lower level of viewership, the vast majority of audiences still consumed football via TV, with notable exceptions in England (53% on TV, 42% on OTT platforms, 5% on social media platforms) and Russia (44% on TV, 38% on social media platforms and 17% on OTT platforms).

The three leagues with the lowest viewing figures primarily provided content via social media (each having between 71-100% of its audience from these platforms), suggesting it may be an easier and more accessible set-up for fledgling leagues to adopt upon inception.

#### **Club platforms**

When analysing data from individual clubs, over one third (37%) broadcast league matches on their own platforms (e.g. social media, club website, club mobile apps, etc.). This ranged from a high of 75% in Costa Rica to a number of countries in which no clubs broadcast on their own platforms. This represents a potential new revenue stream for clubs, which can generate fees directly from fans and indirectly through advertising opportunities that are associated with these platforms). This may be an upward trend if, as predicted, content consumers continue to transition away from linear TV to OTT and other platforms. However, the opportunity to generate revenue from club-owned platforms may be restricted, particularly if the league has a central broadcast deal.

## **CASE STUDY**

## FIFA+

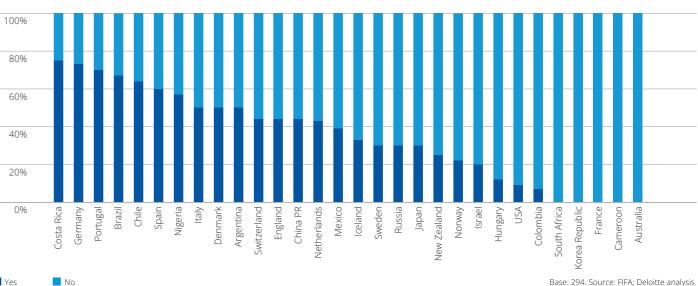
The sporting industry continues its rapid digitalisation to engage fans like never before, and in April 2022 FIFA launched its new world-class digital platform created to connect football fans across the globe more deeply with the game they love, for free.

In order to make football truly global, FIFA+ provides access to live football matches from every corner of the globe. It also includes interactive games, news, tournament information and groundbreaking storytelling, with a section dedicated to the women's game.

One of the key pillars in the FIFA's Women's Football Strategy is to communicate and commercialise the women's game, whilst broadening the exposure and ultimately accelerating the growth of women's football. To bring fans closer than ever before, FIFA+ provides unrivalled access to the women's game, through documentaries, talk shows, stories from grassroots to national teams and footballing heroes, past and present, from more than 40 countries and localised into 11 languages.

The range of FIFA+ originals includes titles such as: *Icons*, a five part 26-minute docuseries showcasing five of the biggest icons in women's football: Wendie Renard, Lucy Bronze, Asisat Oshoala, Carli Lloyd and Sam Kerr. FIFA+ is also producing a behind-the-scenes docuseries, entitled All Roads Lead Down Under that will offer fans never-before-seen access to several women's national teams on their road to qualifying for the FIFA Women's World Cup in 2023

In addition to exclusive documentaries, by the end of 2022, FIFA+ will be streaming the equivalent of 11,000 live women's football matches per year from 100 member associations across all six confederations. Earlier this year, FIFA+ also live-streamed the draws of both the FIFA U-17 and U-20 Women's World Cups. Whilst the platform is looking to significantly increase the number of live-streamed games globally, it already covers multiple women's leagues across different territories such as Brazil, the USA, Bhutan, Thailand and Mongolia. When it comes to FIFA tournaments, FIFA+ is also the new home for every FIFA Women's World Cup and a one-stop shop for



#### Chart 5: Did the club broadcast matches on its own platforms?



archived content, where football fans can watch every moment, from all the previous editions of the FIFA Women's World Cup thanks to a rich archive of match replays, highlights and best goals from the history of the tournament

"FIFA+ represents the next step in our vision to make football truly global and inclusive, and it underpins FIFA's core mission of expanding and developing football globally," said FIFA President Gianni Infantino. "This project represents a cultural shift in the way different types of football fans want to connect with and explore the global game and has been a fundamental part of my Vision 2020-2023. It will accelerate the democratisation of football and we are delighted to share it with fans."

The women's football section of FIFA+ will continue to grow and evolve, providing fresh, globally relevant and localised content – all free – providing the perfect platform for FIFA to take the women's game to the next level.

#### Social media

Social media can be an important tool for clubs to engage with their fan bases. It provides a less formal channel to communicate important messages and stories and provide a deeper connection than that which may be forged via a club website or press release, where messages are often delivered with a more corporate tone.

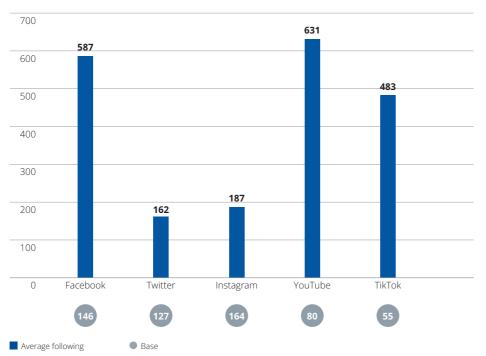
The average social media following of football clubs on "traditional platforms" was 787,000 (Facebook: 587,000, Twitter: 162,000, and Instagram: 187,000). Far fewer clubs used TikTok, but those that did tended to have a greater average following on the platform (483,000) than on some of the traditional ones. Clubs also had a significant average presence on YouTube (631,000, although fewer clubs used this platform).

It was also more common for accounts on "traditional platforms" to be run for the women's team only, but YouTube and TikTok were most commonly operated jointly with a men's team (which may be driving the greater number of followers).

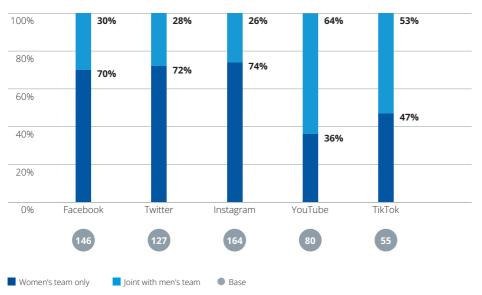
Additionally, those accounts that were shared with the men's team had vastly greater numbers of followers, highlighting the elevated level of exposure that clubs can gain through affiliation with a men's team (and the ability to tap into an often longer-established fan base).

However, perhaps surprisingly, there was no correlation between social media following and revenue (albeit this may be as a result of the pandemic and the ability to generate revenue in line with what may typically be expected in a year not impacted by COVID-19), or social media following and on-pitch success.

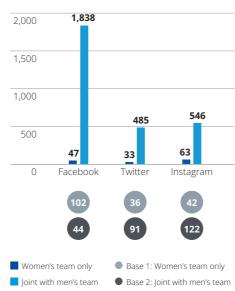
#### Chart 6: Average club following on social media platforms (000s)



#### Chart 7: Type of social media account



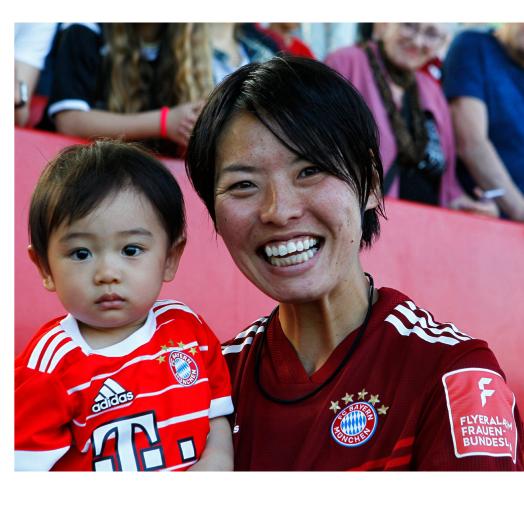
#### **Chart 8: Average followers considering** account type (000s)



#### Merchandising

Merchandising is another significant way in which clubs can engage their fan bases, and there has been significant growth across all sales platforms when compared to the last year's report. Over half of the clubs sold women's cuts of merchandise online (up from 41% in the previous year), and over a third sold men's cuts online (18% previously). A similar proportion sold them in women's cuts in physical club stores (32% v. 30% previously) and at stands on matchdays (31% v. 30% previously), with slightly fewer selling men's merchandise. By far the lowest method of selling merchandise was through other retail stores, although the proportion that sold men's and women's cuts has grown marginally since the previous year, this is expected to increase over time, as demand – and the reach of the game - continues to grow.

On average, the clubs that did not sell merchandise on matchdays generated significantly less commercial revenue (USD 116,000 in 2020/21 or 2021) than those that did (USD 311,000).



## Chart 9: Merchandise sales platforms (%)

Online – women's cuts

n/a – the club does not sell

Online – men's cuts

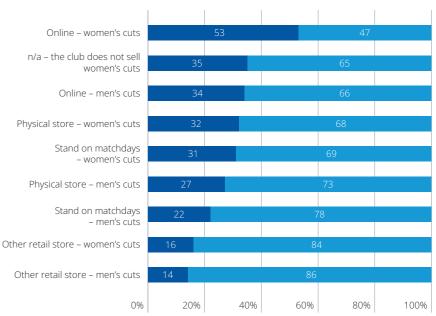
Physical store – women's cuts

Stand on matchdays - women's cuts

Physical store – men's cuts

Stand on matchdays

Other retail store – men's cuts



Base: 294. Source: FIFA; Deloitte analysis.

## Liga MX Femenil

When it comes to passion for football, there are few countries in the world that can match Mexico. It should therefore come as no surprise that in just five seasons, the Liga MX Femenil has become one of the most followed women's football leagues in the world.

The objective is explained simply by the Head of the Liga MX Femenil, Mariana Gutiérrez Bernárdez: "We aim to be a sustainable league. The strategy is outlined together for the wider success of the in the short, medium and long term. We are sure that with what has been sown, among all stakeholders, including clubs, broadcasters, brands, players, leaders and fans, this league will become one of the best in the world," Gutiérrez said.

Since launching in 2016, the league has experienced exponential growth. Its popularity became clear to the world in 2018 when the final between Monterrey and Tigres attracted a crowd of 51,211, a then-world record attendance at a women's club-football match. In terms of awareness of the league, this was not a one-off event, and the league now boasts over one million social media followers.

Year on year, the interest in Mexico's top-tier of women's football continues to increase. This can largely be attributed to a hybrid broadcast strategy, which ensures that matches are available via multiple broadcasters on free-to-air TV, pay-TV and OTT offerings, as well as a streaming presence for selected matches on Facebook. In order to sustain the buzz off the pitch, it is crucial that the product on the pitch is matched, and key initiatives have been implemented to empower teams to perform to the best of their ability. clubs to sign Mexican players.

Featuring 18 teams, the league is contested by the same clubs as the men's league (*Liga MX*), which is a strategy to allow the women's and men's teams to share facilities, services, expertise and resources. This collaboration is not limited to the men's and women's teams of the same clubs, but it also extends to strategic partnerships with the Mexican national teams.

Although they are rivals on the pitch, outside of the 90 minutes, clubs work league. This is demonstrated by their innovative solution, whereby teams contribute to a platform which provides access to a number of data services related to scouting and high performance. The league centralises this data and provides access to all of its women's and men's teams, as well as the Mexican national teams. This transparent and collaborative approach to improve the quality of football addresses topics such as "effective playing time" (i.e. how much time the ball is in play per match) – a metric that has increased by, on average, four minutes per match in just three years, therefore improving the viewing experience.

The league's forward-thinking approach to capturing and utilising data is enhanced by the fact that 17 of the 18 teams play at the same stadium as the men's team, providing access to a range of optical tracking systems installed within the venues.

As fan interest in the league continues to grow, players from around the globe have also set their sights on the Liga MX Femenil. This has not always been the case, as league regulations previously focused on fostering Mexican talent and only allowed



When the league started in 2017, the regulations also stipulated that each club could only sign two players over the age of 23. These regulations have since been replaced by a condition that clubs must now provide a minimum number of minutes for U-20 players per season and have allowed club to sign two non-Mexican players, enabling two of the biggest signings in the league's history.

In January 2022, Tigres secured the signing of US-born starlet Mia Fishel, who won the Golden Ball with the USA at the 2020 U-20 Concacaf Championship, with an amazing 13 goals. After becoming the fifth overall pick in the 2021 National Women's Super League (NWSL) college draft, Fishel chose to launch her professional football career in Mexico. Most recently in June 2022, it was Pachuca that made headlines by signing Spanish national team legend Jenni Hermoso from FC Barcelona. The Spaniard was named the UEFA Champions League Forward of the Season during FC Barcelona's 2020/21 UEFA Champions League-winning campaign.

The final played between Monterrey and **Tigres attracted a crowd** of 51,211, a then-world record attendance at a women's club-football match.

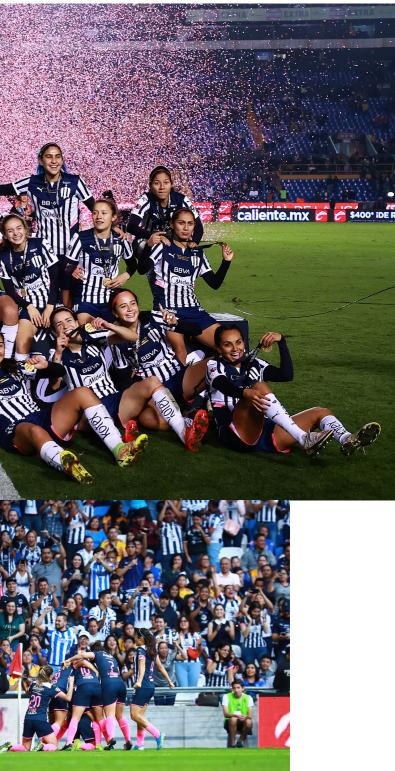
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As the Liga MX Femenil continues to grow, the objective is to fully professionalise. With a reported 34 million Mexicans taking an interest in the top tier of women's football in Mexico, the future is promising.





#### **FAN ENGAGEMENT**



# **Players**

Players are the lifeblood of the game; thrilling millions of fans with their on-pitch exploits and inspiring significant commercial growth as leading brands compete to align with this new genre of sporting superstars. The enhanced exposure of the women's game has given leading figures in the sport an important platform as role models, inspiring the next generation of girls who are likely to play in a more developed and professionalised environment than their predecessors.

This section gives an overview of typical characteristics of club squads, indicators of player standards, an overview of player contracts and remuneration, as well as outlining regulations that exist at league level that might support the overall development of player welfare and remuneration. It also includes profiles of role models within our sport, detailing how they have achieved great things to pave the way for others or inspire individuals to overcome adversity. Similarly to last year's edition, squad sizes vary significantly between leagues, with the Nigerian league having the largest average (33) and the Israeli league the smallest (18) – with the overall average squad size being 25 players.

Based on the FIFA Regulations on the Status and Transfer of Players, a player is considered professional if they have a written contract with a club and are paid more for their footballing activity than the expenses they effectively incur. At club level, the majority of clubs (77%) have half or more professional players, meaning 23% have mainly amateur players. At league level, this means that more than half of the teams in 19 leagues have mainly professionals and only six have mostly amateur players. Notably, the Italian *Divisione Calcio Femminile* reported a greater proportion of amateur than professional players, although the league will be professionalised from 2022/23 and this proportion will, therefore, reverse significantly in future editions of this report. Selected characteristics - majority professional players v. majority amateur players 10 Average on-pitch training hours per week Average gym training 5



Mostly professional

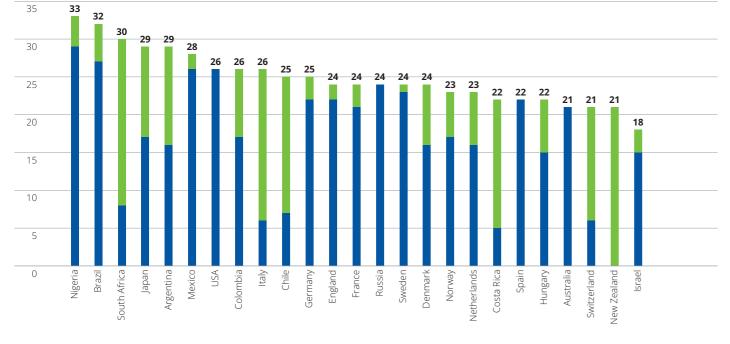
# 30 16 (53%) 25 20 15 14 (47%) 10 5

Regulations

Minimum salary Regulations on number Minimum number Salary cap regulations of foreign players of domestic players

Yes No

0



#### Chart 1: Average number of players per squad - professional and amateur

Professional Amateur

Base: 225. Source: FIFA; Deloitte analysis.

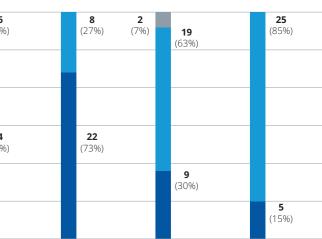
Teams who have a majority of professional players appear to train more than those with majority of amateurs, with an average of ten hours spent doing on-pitch training compared to nine, and an average of five hours gym training compared to an average of three hours – although this still reflects commendable dedication by amateur players. Coupled with greater access to facilities, this appears to impact the overall performance of clubs, with clubs with a majority of professional players having a higher average finishing position in the last three years (4<sup>th</sup>) compared to those with a

majority of amateur players (6<sup>th</sup>).

Mostly amateur

# Table 1: Leagues with/without player representation

Leagues	Proportion (%)	Proportion with minimum player wage
With player representation	90%	48%
Without player representation	10%	33%



### Chart 2: Summary of league-level regulations

n/a – did not answer

Base: 30. Source: FIFA; Deloitte analysis.

## Table 2: Leagues with collective bargaining agreements (CBA)

Leagues	Proportion (%)	Proportion with minimum player wage
With CBA	20%	100%
Without CBA	80%	33%

## **Black Women's Player Collective**

The Black Women's Player Collective is a not-for-profit organisation in the USA's National Women's Soccer League aimed at maximising and developing opportunities for black girls in sport and beyond. They state that their aim is "to elevate the image, value and representation of black women as athletes and leaders across industries".

from adidas, which committed to providing the collective with the support it needs to create a community that uplifts and supports the next generation of young black girls in sport.

An example of a project developed motivate them. by the group is the Mini Pitch Initiative, where in 2020 they

joined with several other organisations (Black Players for Change, US Soccer Foundation, Musco Lighting and adidas) to construct 12 mini-pitches in cities across the USA by 2021 providing safe spaces for the next generation of players to play and develop.

Another positive initiative developed by the group is the The collective has received support Voice in Sport platform – which offers access to psychologists and nutritionists, educational content, and mentorship to help girls and women in sport. This programme is designed to inspire girls by connecting them with professionals that can educate and League-level regulations can be used to encourage or discourage certain behaviours by clubs in their respective leagues, with league administrators looking to provide the best environment for growth. Of the leagues surveyed, 73% have regulations limiting the number of foreign players allowed per club. These regulations are often implemented with a view to ensuring that domestic players do not have their development opportunities restricted by an influx of foreign talent. A counter point to this is that having foreign talent gives domestic players the opportunity to compete against international players outside of national team matches, raising the standard of the league.

The motivation for domestic player quotas (present in 30% of leagues) is similar to regulations on foreign players, ensuring that domestic talent has sufficient opportunity to develop and grow.

As noted in the governance section of this report, salary caps limit the amounts that clubs can pay their players in wages (noted in five leagues surveyed), often aimed at increasing the competitive balance of leagues and encouraging financial sustainability

Having player representation can be a positive force in improving player conditions and welfare. For example, where leagues have player representation (90%), almost half have minimum salary requirements compared to a third for those without. The power of collective bargaining is also clear, with leagues that have collective bargaining agreements (20%) all having minimum salary requirements, compared to only a third for those without.

## Chart 3: Average number of players per squad that have a written contract and receive a salary

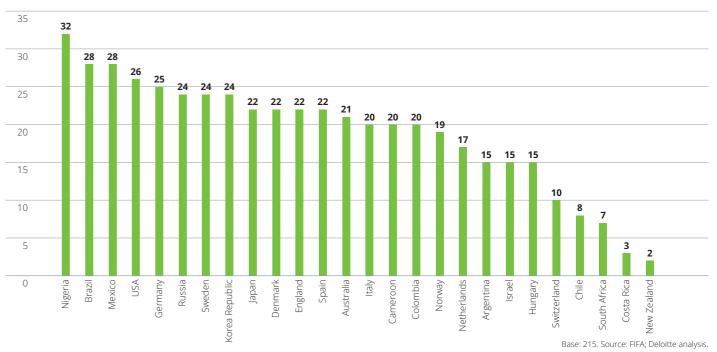
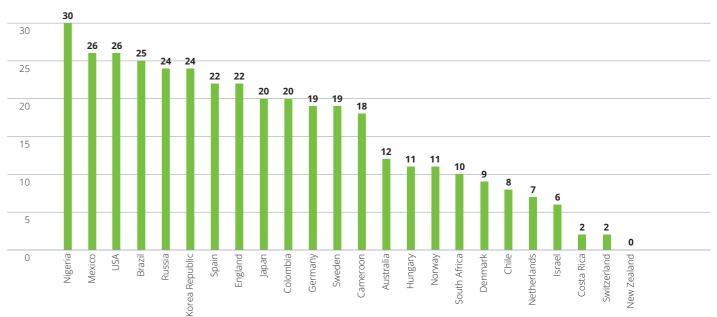


Chart 4: Average number of players per squad with football as their primary source of income



Base: 183. Source: FIFA; Deloitte analysis.

## CASE STUDY

## Women's Empowerment (WE) League

To understand just how powerful football is regarded as a driver for social change, you simply need to look at the title of Japan's newly launched women's professional division: the Women's Empowerment League, or WE League for short.

As 2011 FIFA Women's World Cup™ champions, Japan is a country with a rich history in women's football. A decade later, in September 2021, the WE League - Japan's first fully professional women's football division – was born, which marked a the WE League administered to live by new era in the women's game.

Women's club football is not new to Japan. There has been a top women's league since 1989, known as the Nadeshiko League, which has now become the country's second-tier competition.

On the pitch, the WE League aims to become one of the strongest women's football leagues in the world. It is, however, their initiatives off the pitch that perhaps make the WE League such a compelling case study.

The WE League's mission is to promote an inclusive society, filled with diverse dreams and ways of living, where individuals can shine thanks to the power of women's football. It also has lofty ambitions to become a driving force for gender-equality in Japan.

The increasing professionalisation of the women's game in the USA and Europe, combined with a lack of women in senior leadership positions in Japan, laid bare an issue that needed to be addressed. In order impact, such as capacity building and to tackle this gap and promote the wider message of gender equality, it became clear that a new women's football league could facilitate change.

The WE League operates on the mantra that it will encourage girls in Japan to realise their dreams of becoming a professional footballer, while becoming a symbol of a gender equitable society and promoting a world where everyone is valued as individuals. By showing the world that women can have a career within football, the beautiful game became a perfect catalyst for wider societal movements.

Alongside the professionalisation of clubs, there are several innovative decisions that its title as the "Women's Empowerment League", such as:

- at least 50% of its staff members must be female (by the third season of the competition);
- at least one female staff member must be involved in the club's executive-level decision-making process;
- there must be at least one female coach in both the top team and the academy team's coaching staff;
- clubs must have an "Empowerment Officer": and
- the availability of nursing and childcare facilities within the club's home stadium.

Additionally, the league intentionally launched with an odd number of teams (11), to ensure that one team would not be competing each game week. During the two weeks per season that a team does not play, the club's Empowerment Officer must run activities that have a positive societal educational activities.



The inaugural season of Japan's game-changing WE League ended in May 2022 and saw INAC Kobe Leonessa win it. The trophy that the team proudly lifted as champions is a metaphor of the league's bold vision: "The trophy was inspired by the concept of the glass ceiling, which refers to the various barriers experienced by women in society. It is made from glass that we ourselves shattered with a football. Furthermore, the trophy is made by women from the Sugahara Kogei Shioushi using glass recycling technology."

Although Japan is a country with a rich women's football history (highlighted by its record as the only nation to have won all three FIFA Women's World Cup trophies, i.e. those at senior, U-20 and U-17 level), the launch of the WE League will ensure that the Nadeshiko continue to be one of Asia's top teams, constantly challenging the best sides on the world stage for many years to come.

### **Players contracts and standards**

The average number of players that have a written contract and receive a salary is 20 across all clubs. However, there is significant disparity across clubs and leagues, with Nigeria having an average of 32 compared to New Zealand with an average of two. Of those in receipt of a salary, the average number of players who have football as their primary source of income was 17, again with significant disparity between clubs and league averages. It should be noted that although football may be a player's primary source of income, they may still need to supplement it from other sources.

Analysis of certain characteristics of the most successful clubs (defined as having won their respective league in the last three years) suggests that they have more players with written contracts and receiving a salary, highlighting a positive relationship between the number of players with contracts and receiving a salary based on on-pitch performances. These clubs also had a greater number of players whose primary source of income is football and offered a greater number of facilities to its players.

The majority of clubs indicated that the average contract length of a first-team player was between one and a half and two years. A 2017 FIFPRO Global Employment Report found that the average length of contract was around one year. The short nature of these contracts shows how precarious being a professional footballer can be, and highlights the need for players to develop skills that allow them to succeed following their playing career with appropriate support from their clubs and other stakeholders.



## clubs\* v. others

No. of players with a written contract and receiving a salary

No. of players whose primary income is football

Average number of facilities available to players

\*Note: successful clubs are defined as those that have won the league in the last three years

### Table 3: Characteristics of successful

ccessful clubs*	Others
22	19
18	17
10	9

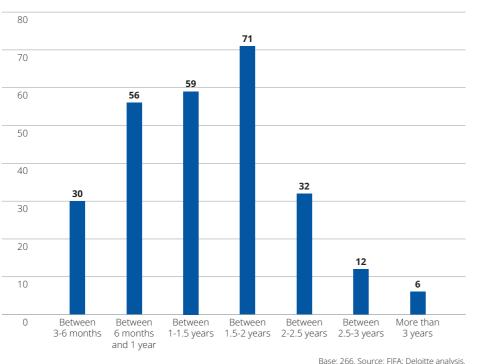
In addition to receiving remuneration from their club, some players receive subsidies from their member association, with seven indicating they provide these.

In terms of financial remuneration, the average salary of paid players (at clubs that provided information) was USD 14,000. There is a disparity on average amounts paid, with the median amount being USD 7,000 (although the varying economic conditions prevalent in country's surveyed should also be taken into consideration). For clubs where players had an average salary of over USD 20,000, the average highest finishing position in the last three years was 4<sup>th</sup> (compared with 5<sup>th</sup> for those paying less) however, it is likely that there will be leagues with overall higher costs and the correlation between player remuneration and on-pitch performance cannot be accurately deduced.

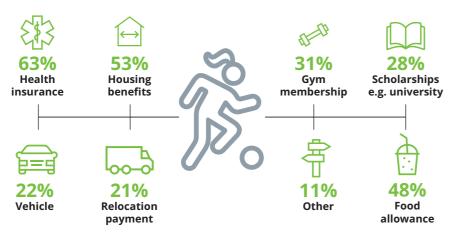
As well as financial benefits, many clubs offer non-financial benefits to its players. The most common benefit offerings by clubs are health insurance (63%), followed by housing benefits (53%), and food allowance (48%). Of clubs surveyed in both years, other than health insurance, all other benefit offerings have seen a slight decrease.

In addition to receiving remuneration from their club, some players receive subsidies from their member association, with seven indicating they provide these. Interestingly, the average FIFA ranking for the seven member associations that provide subsidies to its national team players is 13, compared to an average of 26 for those who do not.

Chart 5: Average contract length of a player in the first team



#### Chart 6: Proportion of clubs that provide players with non-financial benefits



Base: 275. Source: FIFA; Deloitte analysis.

## **Rebekah Stott**

For much of the world, isolation was a defining feature of the COVID-19 pandemic. Rebekah Stott experienced something different altogether.

The New Zealand international has more reason than most, of course, to lament 2021 as the worst of her life. After all, besides those global struggles with lockdowns, closed borders and the outlawing of personal contact, in March 2021 Stott found herself in a gruelling individual battle with cancer after being diagnosed with Hodgkin's lymphoma.

Yet amid the long, draining months of chemotherapy, Stott found that she was fighting – and winning – her battle with the support of huge and ever-expanding global family. The result was that, far from feeling alone or isolated, the defender became immersed in the warmth of countless wellwishers.

"It was so good to see. Amazing really," Stott reflected. "I didn't know that many people even knew about me and I really didn't expect my story to have that much of an impact. But it was so cool that so many people came out to support me and backed me to get back to full health. It helped a lot. I'm still pretty amazed by it all."

Stott's fight, and subsequent recovery, also served as a rallying point for the FIFA Women's World Cup 2023™ co-hosts. Stott, who moved to Australia as a child and represented the country at youth level, personifies the bonds that unite the Matildas, the Football Ferns and their respective countries. That was certainly reflected in the outpouring of affection from both sides of the Tasman Sea when she was first diagnosed, and the warmth with which she was welcomed back – first to club football, then the national team.

"I definitely felt that," Stott told FIFA. "I moved to the Sunshine Coast in Australia when I was 11 and have such strong links and friendships in both.

"One of my best friends, Steph Catley, is in the Matildas, and I'm close to a few of the other players. This 2023 World Cup is really meaningful to me in that respect. Once game time comes around, those friendships go out of the window of course and the rivalry is fierce and competitive! [laughs] But it's cool to have those bonds and I've definitely had amazing support from the football community in both Australia and New Zealand."

In February 2022, less than one year after starting her battle with cancer, Stott stepped back onto the pitch for the New Zealand national team to face Iceland at the SheBelieves Cup, an emotional occasion for all. "That Iceland game was pretty special," Stott admitted. "Just to be back in that environment with the girls, stepping back on the field with that shirt on, made me realise how much I'd missed that feeling. I've and thriving career she had been enjoying played football since I was four years old and it's always been part of my life. To not to be able to do that while I went through the chemo was hard. But it has made me appreciate it all the more. Stepping out on the grass again, even just for training, has been so nice. It's been like coming home."

There was another heart-warming reminder of that closeness in May 2022, when Stott accepted Australia's Aivi Luik's invitation to perform an on-field head-shaving following a friendly match between these rivals. It was part of Luik's fundraising effort following a recent cancer diagnosis for her younger brother, and Stott – who has inspired thousands through her @BeatItByStotty website and Instagram account – was delighted to lend a hand.

"Me and Aivi grew up in Queensland, played together and we're good friends," she said. "The fact that I could help her with that shave and raise some money to fight brain cancer, and support her brother, meant a lot to me. And, again, to see the support in the football community again was just incredible."

### TRAILBLAZER



In July 2022, Stott celebrated another key milestone by signing a two-year deal with her former club Brighton & Hove Albion which marked her return to England's FA

But while Stott is eager to reclaim the life prior to her diagnosis, she doesn't plan on consigning her experiences with cancer to the past. Her positive outlook throughout and efforts, in raising funds and awareness, inspired many who were enduring similar ordeals. Having been touched by their stories, she has no intentions of leaving them behind

"Those moments, when you see those messages from people, are so special," she said. "I can't tell you how rewarding they are for me. It's just amazing."

"There have been tough times for me, and there still are tough times. If I could wipe what happened to me over the last year, I probably would. But as soon as I was dealt those cards, I looked to stay positive and I can say now that a lot of good things came from it all. I can definitely find the positives."

"What I've been through will always be a part of me and I'll definitely look to keep up my Instagram page dedicated to helping people going through the same experiences. I want to stay in that area and help raise awareness for as long as I can."

## **CASE STUDY**

## **Orreco/female health**

Female athletes are fundamentally different from their male counterparts. While perhaps obvious, these fundamental differences - from physiology to psychology - have been misunderstood for decades, minimised or abjectly ignored, the result of systemic bias in research and sport.

#### No more.

Led by the pioneering work of Dr Georgie Bruinvels and Orreco, the paradigm in female football is beginning to shift. Grounded in leading female-specific research, Orreco is empowering athletes and coaches alike with the knowledge and tools to manage health and maximize performance at all levels of the game.

#### Orreco: global leaders in bioanalytics

Based in Galway, Ireland, Orreco is a sports science and data analytics company that provides athletes and their coaches with comprehensive solutions to manage load and accelerate recovery, optimising performance and maximising value for both player and team.

Founded by Drs Brian Moore and Andy Hodgson, Orreco is a global leader in applied research in elite athletics. In 2015, Dr Bruinvels, herself a keen endurance athlete, joined with Orreco to spearhead research in what she had personally experienced as an unacceptable gap in scientific understanding on the unique needs of female athletes. In this novel work, Dr Bruinvels and her team at Orreco have unlocked breakthrough insights on female health and sport performance and have turned those insights into the development of FitrWoman - the world's first female health app built for athletes.



Dr Georgie Bruinvels

#### Female athlete health and performance in football

While Dr Bruinvels and Orreco have made progress in their trailblazing efforts in recent years, and indeed a shift in the conversation on female athlete health is taking place alongside accompanying (and long overdue) measures to address widespread inequity in women's sport, we have a long way to go. Male-centric coaching and performance management frameworks are routinely applied to female footballers across the globe. Widespread cultural norms present additional barriers to progress, as important topics, from menstruation and breast health to pre- and postpartum, are shrouded in unnecessary social taboo. The result: a systemic gap in awareness and knowledge on female health and sport performance with the athletes themselves bearing the burden, suffering debilitating menstrual symptoms, the possibility of elevated injury risk, potential long term adverse health outcomes – and ultimately prevented from realising their full athletic potential.

Orreco's work with forward-thinking professional female footballers and clubs reveals that, even at the highest level of the game, there is much work to do: 73% of athletes report having never had a

discussion about menstrual health in a sporting context; two-thirds cite feeling their performance is negatively affected by their menstrual cycle.

e 2 Tips

Coach Messa Your Coach Massar

Furthermore, in youth and recreational football, research confirms a precipitous drop in participation among females as they age, particularly at puberty when many athletes confront a lack of information and

misconceptions on their ability to play when menstruating.

#### FIFA and Orreco collaborating to change the game

Knowledge is power. At the core of many challenges facing female footballers today is simply a lack of understanding on the basics of female health.

With a shared mission to educate and empower athletes, trainers, and coaches at all levels, FIFA and Orreco are collaborating to advance research and support players' development and holistic well-being.

As a start, FIFA is working with Dr Bruinvels and other experts to present a series of workshops with each of the six confederations and their respective member associations. These intensive seminars address key health and performance issues head-on and foster productive discussions on the state of women's football. With a forum to share experiences and best practices from thought leaders around the world, we



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are breaking down barriers and promoting a necessary shift in mindset: it's not taboo, it's opportunity – unrealised potential in our game.

# 또 cmd option

FIFA is further investing in research to progress scientific understanding on female health and performance in football. In collaboration with Western Sydney University in Australia, a landmark study is underway to characterise the female menstrual cycle and its impact in a football setting. The first in a series of initiatives, this

validate methods to monitor menstrual status and improve overall player health and performance.

From this foundation of research and applied experience, FIFA and Orreco are exploring ways to disseminate this information to the practitioners of our game. far beyond the confines of the pitch. Sport In this way the coaches, players, technicians, parents, and all those interested in expanding their knowledge on female health and female athletes will have the opportunity to access research, information and practical tools to support them.

## The path forward – football and beyond

FIFA is dedicated to elevating and expanding the game for female footballers. Collaborating with Orreco and a network of global leaders, we are investing in research and building programmes to educate and empower players and coaches, from grassroots leagues to national federations, on the fundamentals of female health and sport performance.

## Tips from Dr Bruinvels: what can you do right now?

#### For athletes:

Start with education. Learn about your body and how it works, particularly in a sporting context. We have compiled a number of helpful resources on our website, www.fitrwoman.com. As a female athlete, there are so many ways you can help yourself, but first you need to understand how your natural physiology works.

Track your cycle. If you are of reproductive age, begin tracking your cycle – whether it is your menstrual cycle or hormonal contraceptive cycle, everyone has an individual response to the hormonal changes, so start collecting data to learn about your own.

**Be proactive.** There are many ways in which you can work with your cycle to improve your readiness for exercise and reduce the negative impact menstrual symptoms may be having on your performance. Put your data to work: identify trends and prepare yourself to perform during every phase. Unleash your inner superpower



important work will serve to enhance and

What makes female athletes different should not lead to them being avoided or marginalised, but celebrated. This difference should be harnessed to maximise the joy and untapped potential in our game.

Yet, the opportunity in front of us extends plays a leading role in shaping international culture and with it comes the responsibility to effect positive change. As the world's game, football has the reach and influence to elevate social consciousness and drive progress on female health and wellness for women and girls everywhere.

While it starts with fearless leaders like Dr Bruinvels, to make the lasting, systemic change we need – in football and beyond – takes all of us. It is time to change the narrative on female health and performance. It is time we move our game forward. It is time we move our global community forward.

It is time.

#### For coaches:

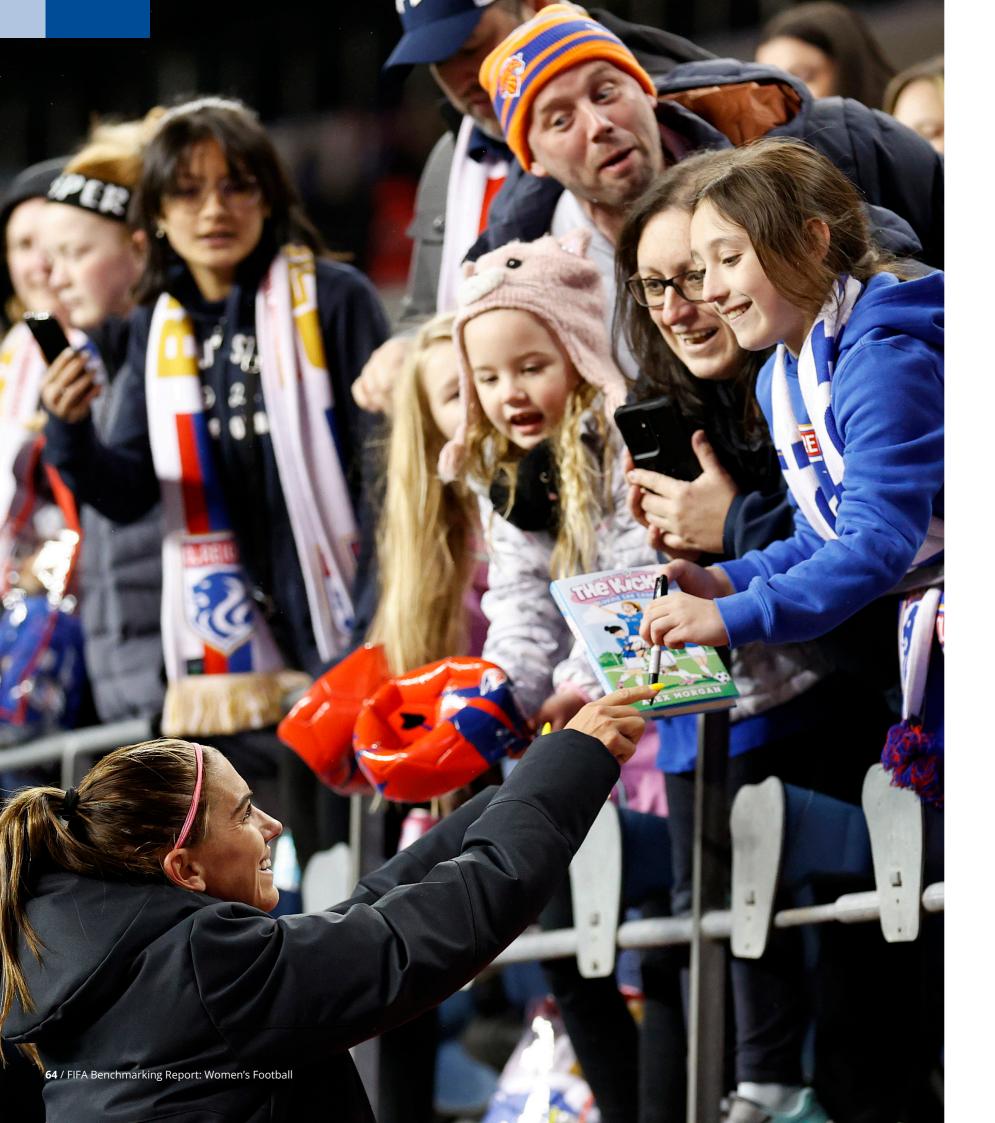
Join the movement. Be a positive force for change and lead by example. Harness the power of female health and performance frameworks to elevate your team to realize their full potential.

Promote education. Arm yourself with knowledge and set the tone for the rest of your staff and players. Signpost your team to available resources. FitrWoman's website and female athlete <u>seminars</u> are a good place to start.

Have the conversation. Take the first step to open communication with your players and staff, demonstrating the importance of

and your commitment to female health. Cultivate a culture of trust and respect where female players are able to discuss their health in a safe, empowering environment.

Unlock the power of data. If your players are of reproductive age, encourage them to begin tracking their cycles. Building on a culture of trust and respect, discuss with your athletes whether they are comfortable sharing their data with you to inform training and recovery strategies and help them to maximise their performance during every phase, every cycle.



# The industry expert's view

It is testament to the industry's work so far that women's football is now one of the fastest-growing sports in the world, with records for sponsorship deals, matchday attendances and audience figures now being smashed on a seemingly annual basis.

The impact that this is having on communities across the globe cannot be overstated, with every news report on the growth of women's football adding another foothold in the progression of gender equality in sport, not to mention across wider society.

Commercially, however, there is still much value to be eked out. In celebrating the growth of women's football, it is also important to underline the commercial returns still being made. The women's game remains in a loss-making state and requires sustained investment both on and off the pitch to facilitate further development.

The upshot of this is that by working together with FIFA, our analysis demonstrates the clear-cut commercial opportunities that will come with professionalising the women's game. This report highlights the financial value to be generated by initiatives such as establishing written strategies, hiring technical and multidisciplinary team staff and developing season ticket offerings.

Further investment in developing these channels will create a virtuous circle for clubs, generating more income to invest in offerings that will attract new sponsors and fans, solidify lifelong loyalty and inspire the next generation of incredible female footballers.

There is evident commitment from stakeholders across the world to professionalise women's football. Now is the time for clubs to concentrate on investing for future growth and to work towards becoming financially self-sufficient in the long term. In turn, this will improve inclusion across the industry and draw more women in to lead men's and women's teams on and off the pitch.

We look forward to continuing to work with clubs, leagues, governing bodies and investors to develop women's football, elevating the profiles of its players and providing a platform for growth.

We would like to thank FIFA for its efforts in supporting women's football stakeholders and for the trust placed in our team. We would also like to thank the many hundreds of stakeholders who have provided input for the creation of this edition of the report. Your cooperation has again been invaluable, and we hope that you find the results useful in facilitating further growth in your organisation and building financial sustainability in the long term.

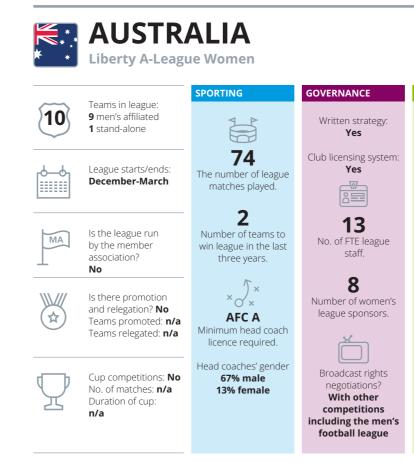
#### **Deloitte Sports Business Group**



# League snapshots

The following section provides an overview of the key characteristics of leagues around the globe.

۲	ARGEN Campeonato Fe		
21	Teams in league: <b>21</b> men's affiliated <b>0</b> stand-alone	SPORTING 210	GOVERNANCE Written strategy: Yes Club licensing system:
ф_ф 	League starts/ends: February-October	The number of league matches played.	Yes
MA	Is the league run by the member association? Yes	Number of teams to win league in the last three years.	No. of FTE league staff.
	Is there promotion and relegation? <b>Yes</b> Teams promoted: <b>2</b> Teams relegated: <b>3</b>	× × × CONMEBOL Pro Minimum head coach licence required.	Number of women's league sponsors.
Ţ	Cup competitions: <b>Yes</b> No. of matches: <b>31</b> Duration of cup: <b>June-October</b>	Head coaches' gender 88% male 12% female	Broadcast rights negotiations? For the women's football league only



#### **LEAGUE SNAPSHOT**



#### FINANCIAL

Did the league provide any financial support to clubs as a direct result of COVID-19? **No** 

Did the league receive any subsidies (i.e. grants from government) that did not relate to COVID-19? **Yes** 



Proportion of clubs to receive player transfer income.

FAN ENGAGEMENT

Was the league broadcast in any form (TV, OTT, social media, other platforms)? **Yes** 

**790k** Total followers on social media used by league.



Average cost of adults (and concession, e.g. children, students, etc.) match ticket.

**89%** 

Proportion of clubs to sell merchandise for the women's team.

#### PLAYERS

Is there a players association/union that represents women?

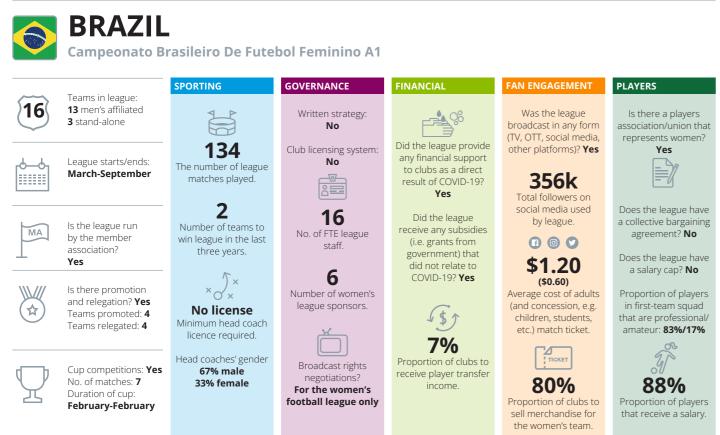


Does the league have a collective bargaining agreement? **Yes** 

Does the league have a salary cap? **Yes** 

Proportion of players in first-team squad that are professional/ amateur: **98%/2%** 







\\\///

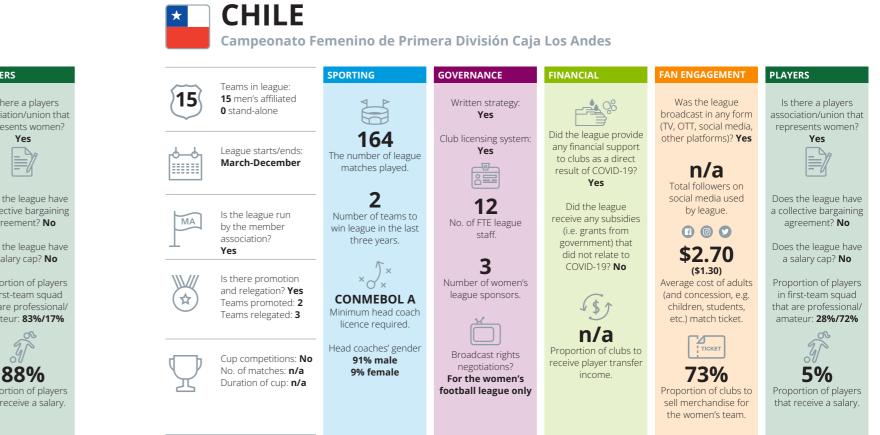
\$



FINANCIAL

AN ENGAGEMENT

PLAYERS



**CHINA PR Chinese Football Association Women's Super League** SPORTING GOVERNANCE Teams in league: 10 3 men's affiliated 7 stand-alone Written strategy Yes

91

League starts/ends:

April-November

Cup competitions: Yes

No. of matches: 45

Duration of cup:

July-August

Yes

MA

\\\///

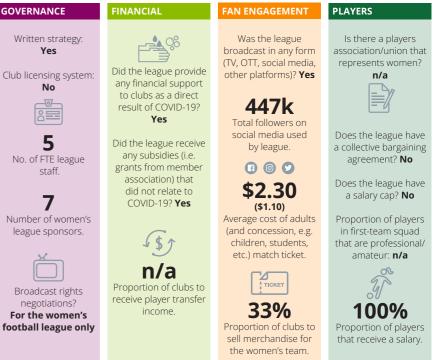
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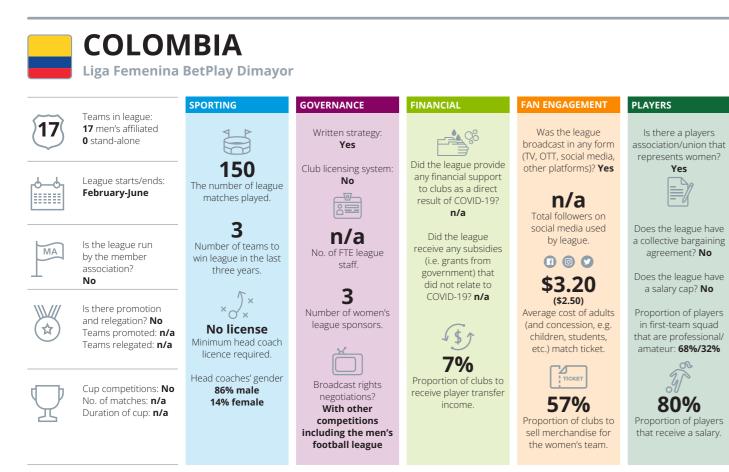
No The number of league matches played. Is the league run 2 by the member 5 association? Number of teams to No. of FTE league win league in the last staff. three years. Is there promotion 7 and relegation? Yes\*  $^{\prime}$  × Teams promoted:1.5 ×ơ× Number of women's Teams relegated: 1.5 league sponsors. AFC A Minimum head coach "Note: the last place team in the Chinese Women's Super League (first division) will automatically be relegated, and first place team in the Chinese Women's League 1 (secon division) will automatically be promoted. However, the se to-last team in the Chinese Women's Super League and t licence required. second-place team in the Chinese Women's League and the part in a play-off. The winner of the play-off will compete in th Chinese Women's Super League in the following season. Head coaches' gender Broadcast rights 78% male

22% female

negotiations? For the women's football league only

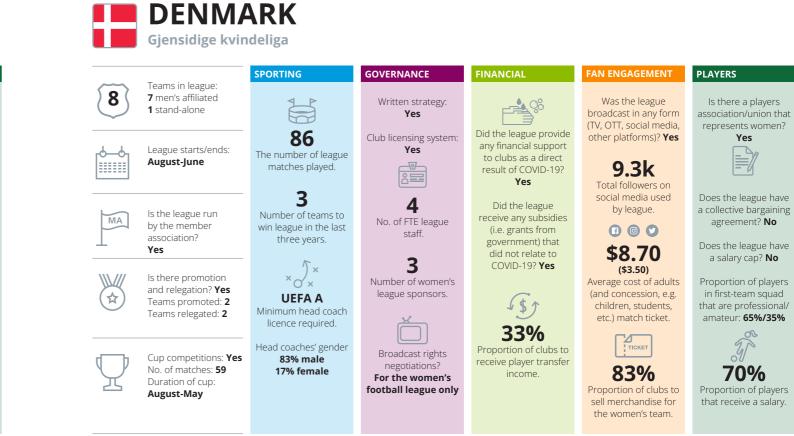
#### LEAGUE SNAPSHOT

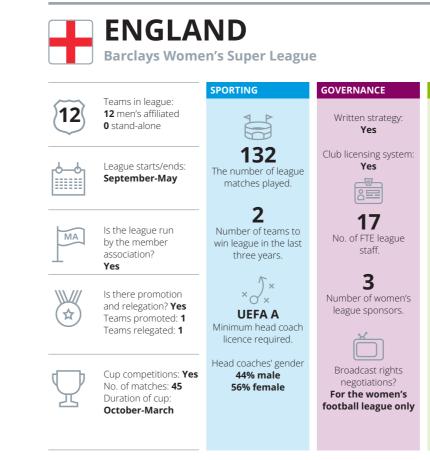




## **COSTA RICA** Unión Femenina de Fútbol Uniffut

SPORTING GOVERNANCE FINANCIAL AN ENGAGEMENT PLAYERS Teams in league: 8 5 men's affiliated Was the league Written strategy Is there a players 3 stand-alone Yes broadcast in any form association/union that (TV, OTT, social media, represents women? Did the league provide 154 Club licensing system: other platforms)? Yes No any financial support League starts/ends: No The number of league to clubs as a direct March-December matches played. 47k result of COVID-19? Yes Total followers on 2 social media used Does the league have 7 Did the league by league. a collective bargaining Is the league run Number of teams to MA receive any subsidies agreement? No No. of FTE league win league in the last by the member 600 (i.e. grants from staff. association? three years. government) that Does the league have \$3.20 No did not relate to a salary cap? No 3 COVID-19? Yes ') × (\$1.80) \\\/// Is there promotion ×ď× Number of women's Average cost of adults Proportion of players and relegation? Yes (and concession, e.g. in first-team squad league sponsors \$ Concacaf A Teams promoted: 1 1\$1 children, students, that are professional/ Minimum head coach Teams relegated: 1 etc.) match ticket. amateur: 21%/79% licence required. 13% -Head coaches' gender Proportion of clubs to Broadcast rights Cup competitions: Yes 88% male receive player transfer negotiations? No. of matches: 62 12% female 100% n/a income. All broadcast rights Duration of cup: are negotiated on a Proportion of clubs to Proportion of players January-July club-by-club basis sell merchandise for that receive a salary. the women's team.





#### **LEAGUE SNAPSHOT**

#### FINANCIAL

Did the league provide any financial support to clubs as a direct result of COVID-19? Yes

Did the league receive any subsidies (i.e. grants from government) that did not relate to COVID-19? **Yes** 



Proportion of clubs to receive player transfer income. FAN ENGAGEMENT

Was the league broadcast in any form (TV, OTT, social media, other platforms)? **Yes** 

#### 574k Total followers on social media used by league.



(and concession, e.g. children, students, etc.) match ticket.



Proportion of clubs to sell merchandise for the women's team.

#### PLAYERS

Is there a players association/union that represents women?

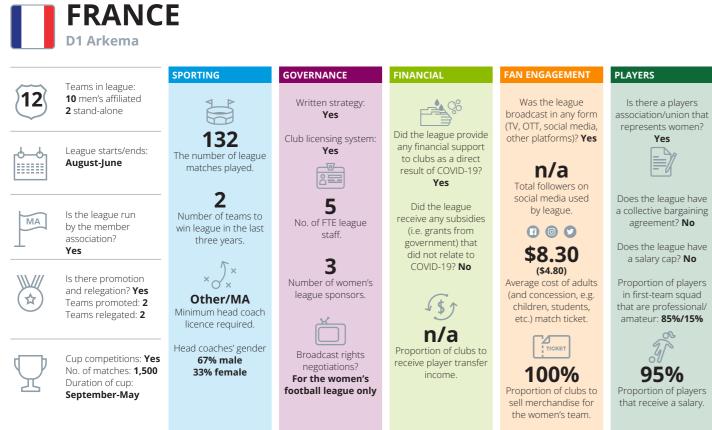


Does the league have a collective bargaining agreement? **No** 

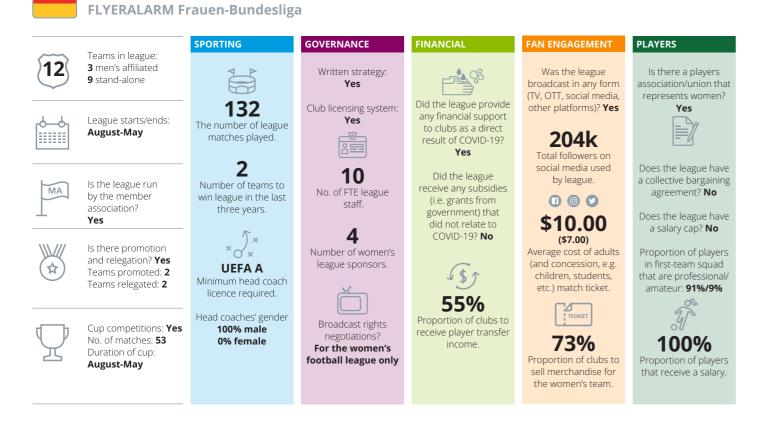
Does the league have a salary cap? **Yes** 

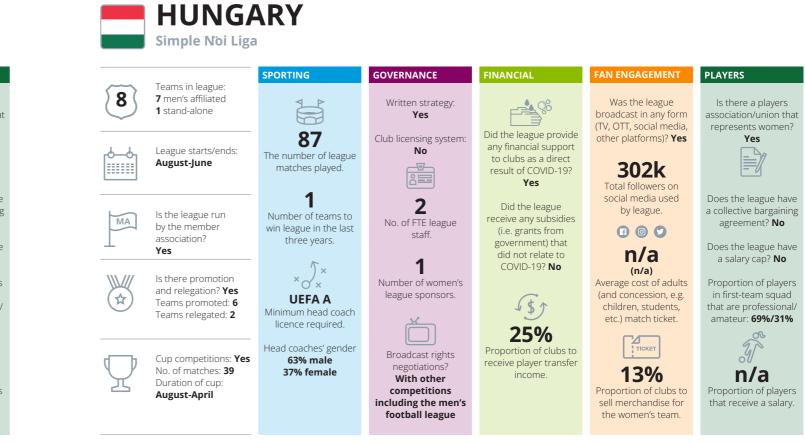
Proportion of players in first-team squad that are professional/ amateur: **90%/10%** 





# GERMANY





	Besta Deildin	SPORTING	GOVERNANCE
10	Teams in league: <b>10</b> men's affiliated <b>0</b> stand-alone		Written strate
ф_ф 	League starts/ends: April-October	90 The number of league matches played.	Club licensing sy: Yes
MA	Is the league run by the member association? Yes	2 Number of teams to win league in the last three years.	2 No. of FTE leag staff.
	Is there promotion and relegation? <b>Yes</b> Teams promoted: <b>2</b> Teams relegated: <b>2</b>	× × × UEFA A Minimum head coach licence required.	5 Number of wom league sponso
Ţ	Cup competitions: Yes No. of matches: <b>31</b> Duration of cup: April-August	Head coaches' gender 100% male 0% female	Broadcast right negotiations With other competition including the n football leage

#### **LEAGUE SNAPSHOT**

#### FINANCIAL

Did the league provide any financial support to clubs as a direct result of COVID-19? **No** 

Did the league receive any subsidies (i.e. grants from government) that did not relate to COVID-19? **No** 

> <u>ر</u> 67%

Proportion of clubs to receive player transfer income.

#### FAN ENGAGEMENT

Was the league broadcast in any form (TV, OTT, social media, other platforms)? **Yes** 

#### **n/a** Total followers on social media used by league.



children, students, etc.) match ticket.



**100%** Proportion of clubs to sell merchandise for the women's team.

#### PLAYERS

Is there a players association/union that represents women?



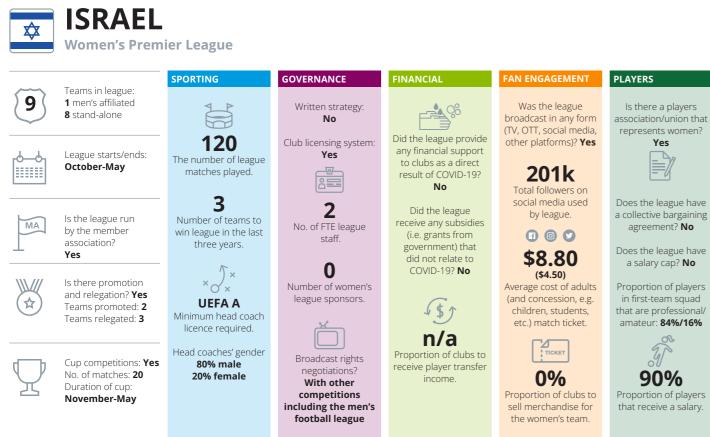
Does the league have a collective bargaining agreement? **No** 

Does the league have a salary cap? **No** 

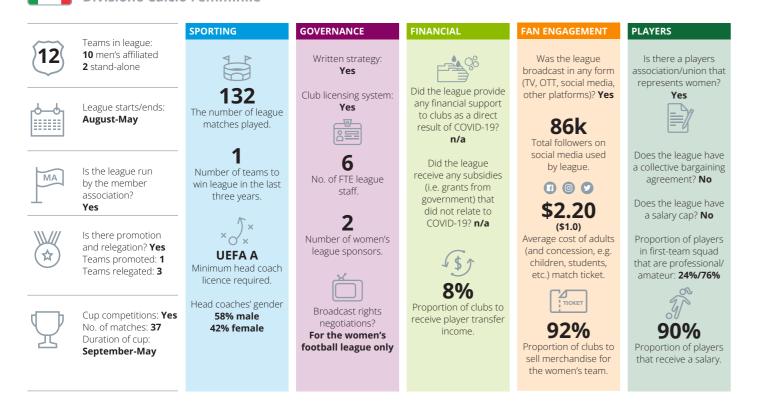
Proportion of players in first-team squad that are professional/ amateur: **n/a** 



Proportion of players that receive a salary.



## **Divisione Calcio Femminile**





**KOREA REPUBLIC** Hyundai-Steel 2022 WK League SPORTING GOVERNANCE Teams in league: 8 **2** men's affiliated Written strategy 6 stand-alone Yes 87 Club licensing system: League starts/ends: No The number of league April-November matches played. 1 5 Is the league run Number of teams to MA No. of FTE league by the member win league in the last staff. association? three years. No 4 /) × \\\\_// Is there promotion ×ơ× Number of women's and relegation? No league sponsors. ☆ AFC A Teams promoted: **n/a** Minimum head coach Teams relegated: **n/a** licence required. Head coaches' gender Broadcast rights Cup competitions: Yes 43% male negotiations? No. of matches: 11 57% female Broadcasting rights Duration of cup: for the league are July-August not negotiated

#### LEAGUE SNAPSHOT

Did the league provide any financial support to clubs as a direct result of COVID-19? No Did the league

receive any subsidies (i.e. grants from government) that did not relate to COVID-19? Yes

> 1\$5 n/a

Proportion of clubs to receive player transfer income.

#### FAN ENGAGEMENT

Was the league broadcast in any form (TV, OTT, social media, other platforms)? Yes

**9**k Total followers on social media used by league.





Average cost of adults (and concession, e.g. children, students, etc.) match ticket.

> 14%

Proportion of clubs to sell merchandise for the women's team.

#### PLAYERS

Is there a players association/union that represents women?



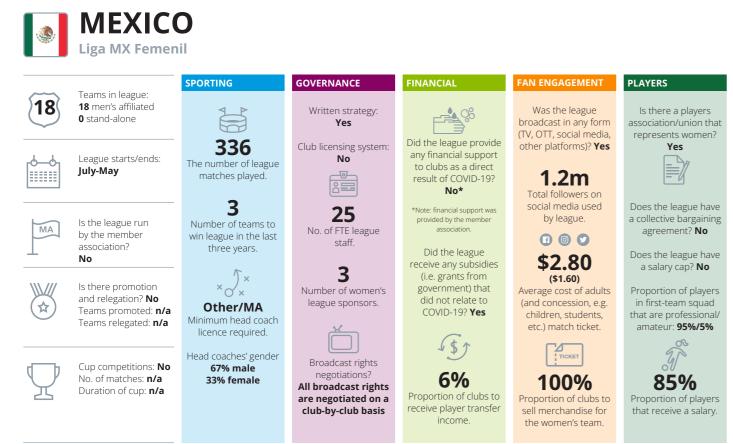
Does the league have a collective bargaining agreement? No

Does the league have a salary cap? Yes

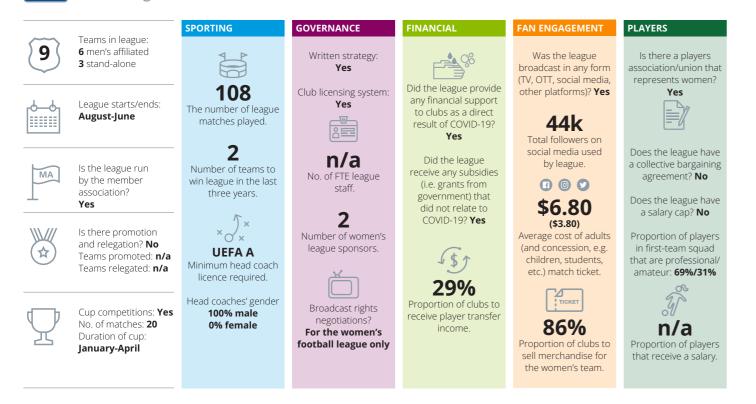
Proportion of players in first-team squad that are professional/ amateur: **n/a** 



#### **LEAGUE SNAPSHOT**





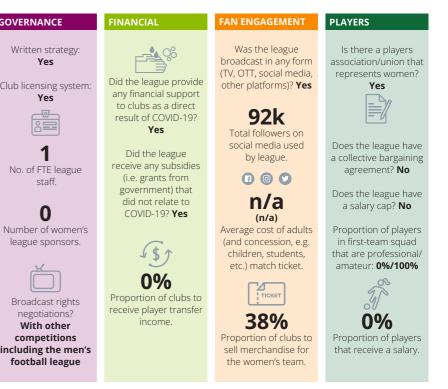


#### **NEW ZEALAND National League Championship** GOVERNANCE SPORTING Teams in league: 8 4 men's affiliated Written strategy: 4 stand-alone Yes 113 Club licensing system: League starts/ends: Yes The number of league September-matches played. December 2 1 Is the league run Number of teams to MA No. of FTE league by the member win league in the last staff association? three years. Yes 0 /)~× \\\/// Is there promotion ×ơ× Number of women's and relegation? No league sponsors. ☆ OFC B Teams promoted: n/a Minimum head coach Teams relegated: n/a licence required. Head coaches' gender Broadcast rights Cup competitions: Yes 75% male negotiations? No. of matches: 56 25% female With other Duration of cup: competitions

April-September

NIGERIA Nigeria Women Football League SPORTING GOVERNANCE Teams in league: 14 12 men's affiliated Written strategy 2 stand-alone Yes **99** Club licensing system: League starts/ends: Yes The number of league December-May matches played. 2 12 Is the league run Number of teams to MA No. of FTE league by the member win league in the last staff. association? three years. Yes 1 /) × \\\\_// Is there promotion ×ơ× Number of women's and relegation? Yes league sponsors. \$ CAF A Teams promoted: 2 Minimum head coach Teams relegated: 2 licence required. Head coaches' gender Broadcast rights Cup competitions: Yes 79% male negotiations? No. of matches: 15 21% female Broadcasting rights Duration of cup: are negotiated both April-April collectively and on a club-by-club basis

#### LEAGUE SNAPSHOT





receive any subsidies (i.e. grants from government) that did not relate to COVID-19? Yes



receive player transfer income.

#### FAN ENGAGEMENT

Was the league broadcast in any form (TV, OTT, social media, other platforms)? Yes

12k Total followers on social media used by league.





(and concession, e.g. children, students, etc.) match ticket.



Proportion of clubs to sell merchandise for the women's team.

#### PLAYERS

Is there a players association/union that represents women?



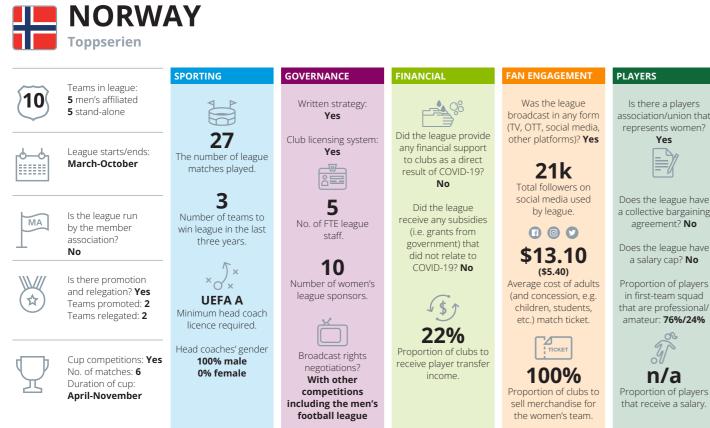
Does the league have a collective bargaining agreement? Yes

Does the league have a salary cap? Yes

Proportion of players in first-team squad that are professional/ amateur: 89%/11%

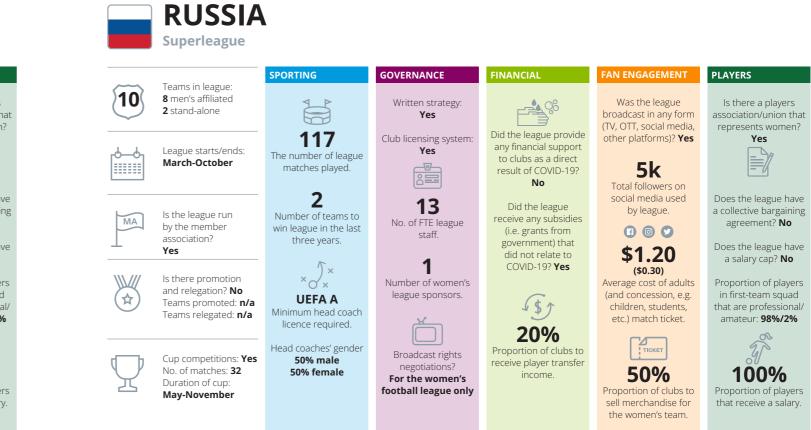


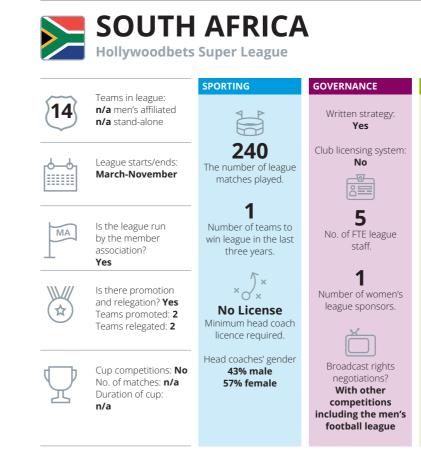
#### **LEAGUE SNAPSHOT**





		SPORTING	GOVERNANCE	FINANCIAL	FAN ENGAGEMENT	PLAYERS
) <b>16(</b> 7 m	ams in league: nen's affiliated tand-alone		Written strategy: <b>Yes</b>		Was the league broadcast in any form (TV, OTT, social media,	Is there a players association/union that represents women?
	ague starts/ends: ptember-June	<b>181</b> The number of league matches played.	Club licensing system: Yes	Did the league provide any financial support to clubs as a direct result of COVID-19? Yes	other platforms)? Yes 333k Total followers on	Yes
by t	he league run the member sociation? <b>s</b>	<b>2</b> Number of teams to win league in the last three years.	<b>1</b> No. of FTE league staff.	Did the league receive any subsidies (i.e. grants from government) that did not relate to	social media used by league. (f) (iii) \$3.00	Does the league have a collective bargaining agreement? <b>No</b> Does the league have a salary cap? <b>No</b>
and Tea	here promotion d relegation? <b>Yes</b> ams promoted: <b>1</b> ams relegated: <b>1</b>	× × <b>UEFA A</b> Minimum head coach licence required.	2 Number of women's league sponsors.	COVID-19? n/a	(\$1.60) Average cost of adults (and concession, e.g. children, students, etc.) match ticket.	Proportion of players in first-team squad that are professional/ amateur: <b>n/a</b>
No.	p competitions: <b>Yes</b> . of matches: <b>85</b> ration of cup: <b>tober-May</b>	Head coaches' gender 80% male 20% female	Broadcast rights negotiations? Broadcasting rights for the league are not negotiated	<b>n/a</b> Proportion of clubs to receive player transfer income.	60% Proportion of clubs to sell merchandise for the women's team.	<b>n/a</b> Proportion of players that receive a salary.





#### **LEAGUE SNAPSHOT**

#### FINANCIAL

Did the league provide any financial support to clubs as a direct result of COVID-19? **No** Did the league

i.e. grants from government) that did not relate to COVID-19? **n/a** 



Proportion of clubs to receive player transfer income.

#### FAN ENGAGEMENT

Was the league broadcast in any form (TV, OTT, social media, other platforms)? **Yes** 

#### 58k Total followers on social media used by league.



Average cost of adults (and concession, e.g. children, students, etc.) match ticket.



Proportion of clubs to sell merchandise for the women's team.

#### PLAYERS

Is there a players association/union that represents women?



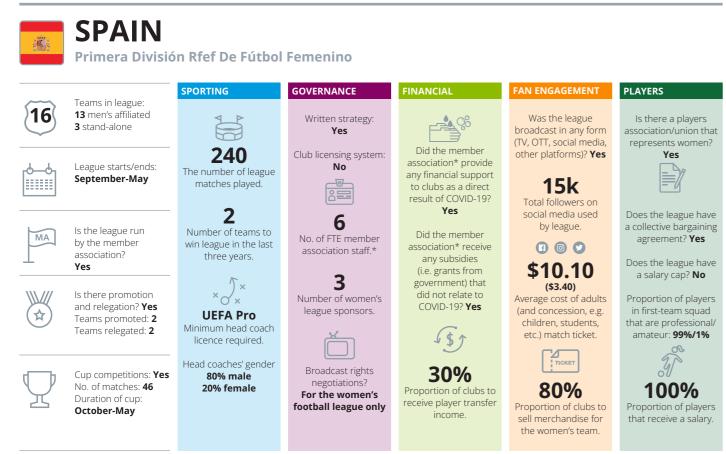
Does the league have a collective bargaining agreement? **No** 

Does the league have a salary cap? **No** 

Proportion of players in first-team squad that are professional/ amateur: **28%/72%** 



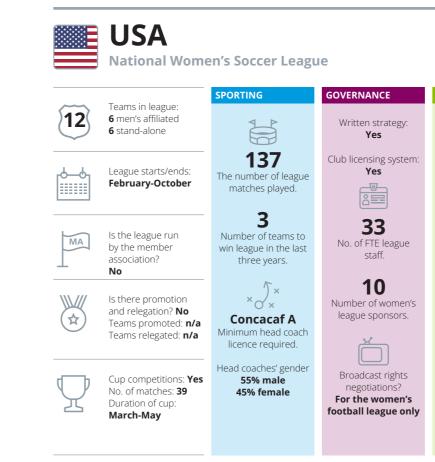
that receive a salary.



\*Note: the league is not an entity, it is a competition organised by the member association

~	Teams in league:	SPORTING	GOVERNANCE	FINANCIAL	FAN ENGAGEMENT	PLAYERS
12	<ul><li>5 men's affiliated</li><li>7 stand-alone</li></ul>		Written strategy: <b>Yes</b>		Was the league broadcast in any form (TV, OTT, social media,	Is there a players association/union that represents women?
	League starts/ends: <b>April-November</b>	<b>132</b> The number of league matches played.	Club licensing system: Yes	Did the league provide any financial support to clubs as a direct result of COVID-19? <b>No</b>	other platforms)? Yes 25k Total followers on	Yes
MA	ls the league run by the member association? <b>Yes</b>	<b>2</b> Number of teams to win league in the last three years.	5 No. of FTE league staff.	Did the league receive any subsidies (i.e. grants from government) that did not relate to	social media used by league. f) (©) \$12.70	Does the league have a collective bargaining agreement? <b>Yes</b> Does the league have a salary cap? <b>No</b>
	Is there promotion and relegation? <b>Yes</b> Teams promoted: <b>3</b> Teams relegated: <b>1</b>	<b>UEFA Pro</b> Minimum head coach licence required.	8 Number of women's league sponsors.	COVID-19? Yes	(\$6.00) Average cost of adults (and concession, e.g. children, students, etc.) match ticket.	Proportion of players in first-team squad that are professional/ amateur: <b>94%/6%</b>
$\overline{\mathcal{L}}$	Cup competitions: <b>Yes</b> No. of matches: <b>6</b> Duration of cup: <b>March-May</b>	Head coaches' gender 70% male 30% female	Broadcast rights negotiations? For the women's football league only	Proportion of clubs to receive player transfer income.	100% Proportion of clubs to sell merchandise for	100% Proportion of players that receive a salary.

#### **SWITZERLAND** AXA Women's Super League SPORTING GOVERNANCE Teams in league: 10 4 men's affiliated Written strategy: 6 stand-alone Yes 119 Club licensing system: League starts/ends: Yes The number of league August-June matches played. 2 1 Is the league run Number of teams to MA No. of FTE league by the member win league in the last staff association? three years. Yes 1 /) × \\\/// Is there promotion ×ơ× Number of women's and relegation? Yes league sponsors. [☆] **UEFA A** Teams promoted: 2 Minimum head coach Teams relegated: 2 licence required. Head coaches' gender Broadcast rights Cup competitions: Yes 67% male negotiations? No. of matches: 61 33% female For the women's Duration of cup: football league only September-April



#### **LEAGUE SNAPSHOT**



#### FINANCIAL

Did the league provide any financial support to clubs as a direct result of COVID-19? **No** 

Did the league receive any subsidies (i.e. grants from government) that did not relate to COVID-19? **Yes** 



Proportion of clubs to receive player transfer income. FAN ENGAGEMENT

Was the league broadcast in any form (TV, OTT, social media, other platforms)? **Yes** 

**919k** Total followers on social media used by league.



Average cost of adults (and concession, e.g. children, students, etc.) match ticket.

TICKET

**100%** Proportion of clubs to sell merchandise for the women's team.

#### PLAYERS

Is there a players association/union that represents women?



Does the league have a collective bargaining agreement? **Yes** 

Does the league have a salary cap? **Yes** 

Proportion of players in first-team squad that are professional/ amateur: **99%/1%** 



# **Glossary of terms**

# **Basis of preparation**

#### Definitions

Administrative staff: any member of non-technical and multidisciplinary staff (e.g. marketing, media or finance) staff except players.

Affiliated club: a club that is part of a wider football club that includes a men's team.

Aggregate club revenue (league

name): the sum of club revenue across the named league. Please note that this has been estimated in cases in which not all clubs have provided a response

Amateur league: a league that is a self-declared amateur league.

Amateur player: any player who is not a professional player

Association income: subsidies provided to clubs by the association. This does not include distributions related to broadcast revenue or resulting from the central sale of broadcast rights.

Bundling: the aggregating of broadcast or commercial rights into one package (e.g. the selling of broadcast rights for a women's league in the same package as the broadcast rights to a men's league).

Club revenue: the total operating revenue of a specific club.

Club programme income: income attributed to the women's team that is part of a wider club programme, e.g. cross-funding from the men's team.

**Concessions:** tickets for children. students etc. (i.e. not an adults ticket).

Club licensing: a system that uses principles-based criteria and sets minimum standards that clubs must satisfy in order to be licensed and, consequently, be able to participate in a given competition.

Domestic player: a player who has trained at the club or trained at a club within the country of the league for a particular period of time prior to a certain age, usually as defined in the relevant league's regulations.

Financial year: the financial year ending in the club/league's 2019/20 (or 2020) or 2020/21 (or 2021) seasons.

First-team player: a player registered to participate in the domestic league matches of a club.

Head of women's football: the individual responsible for women's football (could also be the director of women's football or the head coach).

International player: a player who has made five or more international appearances.

League revenue: the total operating revenue of a specific league.

Linear TV: TV programs that are scheduled at a certain time and on a certain channel.

Men's cuts: merchandise sold in men's versions or sizes.

Operating costs: all costs incurred by the club or league excluding any costs unrelated to the operations of the club or league

**Pay-TV:** TV channels that require a paid subscription to access.

Player wages: the gross annual wage paid by a club to a player over a 12-month period. Note that if a player is contracted for less than 12 months, the wage over this period has been assumed to be the 12-month wage: the value has not been adjusted to reflect the shorter period

Professional league: a league that is a self-declared professional league

Professional player: a player who has a written employment contract with a club and is paid more for her footballing activity than the expenses she effectively incurs for her footballing activity.

Regular stadium: The stadium where a club plays most of its home league matches.

Semi-professional league: a league that is a self-declared semiprofessional league

Social media follower: a person who has subscribed to receive updates from a specific user on a social media platform

Subsidy (clubs): government, local municipality, university, league, member association, FIFA and confederation grants, donations, owner funding or funding from men's department/club

Subsidy (leagues): government, member association, FIFA and confederation grants, donations, owner funding, funding from men's department, other

Stand-alone club: a club that is not part of a wider football club.

Technical and multidisciplinary team staff: any member of on-pitch staff (e.g. coaches, physiotherapists and doctors) except players.

Traditional platforms (social media): Facebook, Instagram and

Women's cuts: merchandise sold in women's versions or sizes.

Abbreviations

App: application

AFC: Asian Football Confederation

**CAF:** Confederation of African Football

**CBA:** collective bargaining agreement

**CEO:** Chief Executive Officer

Concacaf: Confederation of North, Central America and Caribbean Association Football

**CONMEBOL:** South American Football Confederation

Correlation co-efficient: a statistical measurement of the relationship between two variables (ranging from -1: perfect negative correlation, to +1: perfect positive correlation)

FC: football club

FIFA: Fédération Internationale de Football Association

FTA: free-to-air

FTE: full-time equivalent

m: million

MA: FIFA member association

N/A: not applicable

**OFC:** Oceania Football Confederation

**OTT:** over-the-top

p.a.: per annum

UEFA: Union of European Football Associations

**USD:** United States dollar

#### Some of the matters discussed in this report are technical by nature. The intended recipients of the report (clubs, leagues, member associations and other stakeholders in the football and wider sports industry) are familiar with the issues, facts and other matters addressed, and the report was written with that in mind.

This report has been prepared with the assistance of Deloitte LLP.

- Sources of information
- Surveys were sent to 30 leagues and 360 clubs in English, Chinese (Mandarin), French, German or Spanish. All 30 leagues and 294 clubs (82%) responded. All 30 leagues that participated in the first edition of the report were invited to participate in this version. The methodology by which these 30 leagues were selected can be found in the previous version of the report. 29 of these leagues opted to participate again in this version of the report, with the top-tier league in Thailand opting out. This was replaced by the toptier league in Portugal, who achieved the highest ranking using last year's methodology (further details can again be found in the first edition of the report).
- Consultations were held with key stakeholders across women's football between March 2022 and July 2022, including:
- Liga MX Femenil; Women's Empowerment (WE) Professional Football League:
- Orreco Female Health Platform; - FIFA+:
- Brighton & Hove Albion;
- Sociedade Esportiva Palmeiras: and Florence Nakiwala Kivingi,
- Information for case studies regarding Edina Alves Batista, Chan Yuen Ting and Rebekah Stott was gathered from public sources, however permission was sought and received from each party.
- Some data was also gathered from public sources.

#### Data quality and comparability

- The survey gathered the following categories of information: 1) general; 2) sporting; 3) governance; 4) financial landscape; 5) fan engagement; 6) players; and 7) other. All responses were analysed for accuracy, and adjustments were made to maximise compatibility.
- · Legal entities within the global women's football ecosystem are not consistent in the way they record and classify financial transactions and other data points. It is common for the operations and financial performance of women's football teams to be consolidated within the structure of a larger club, making it difficult to measure their financial performance independently from other teams (typically a men's team) in the structure. This is especially prevalent in the case of commercial agreements covering both teams.

- · Due to the ongoing development of women's football and the early developmental stage it is currently at in some regions, financial reporting can be limited, reducing the availability and accuracy of data. Financial data and the value of commercial and broadcasting agreements in respect of women's football are rarely publicised, limiting the verifiability of the responses provided
- In the 2019/20 (or 2020) and 2020/21 (or 2021) seasons, some factors will be significantly impacted by COVID-19 (e.g. revenue, attendances etc.), and this should therefore be considered when reading this report.
- Any data points that were clearly erroneous were removed from the data set and this report. Where figures were clearly entered incorrectly (e.g. transposition errors), they were manually corrected and were included in the data set and hence this report.
- the top division in each country. Where data was provided for multiple leagues in a country, data was either removed or adjusted when it differed from the known, publicly available information.
- · Verification work or an audit of the financial information contained in the financial statements or other sources in respect of any organisation was not performed for the purpose of this report.

#### Terminology and approach

- Throughout the report, when reference is made to a percentage of clubs, it refers to the percentage of clubs that answered a specific question, as opposed to a percentage of all clubs that were invited to complete the survey. Similarly, when referencing a percentage of leagues it refers to the percentage of leagues that answered that specific question, as opposed to a percentage of all 30 leagues
- · Data is only shown for clubs as part of a league, if over half of the clubs in the league answered. For any instances in which fewer than half of the clubs in a league responded, the data has been excluded. Likewise, for the league snapshot data, data points have only been included if half of the clubs in the league answered a specific question. Due to the low response rates for some questions, countryby-country analysis (e.g. revenue, wages) has been limited.
- · Whilst some data from clubs has therefore been removed when analysing responses from clubs across a league (i.e. if less than half of the clubs in a league responded), it has been included in the analysis of all clubs (e.g. average revenue of all
- Where this report refers to an average, it refers to the mean value, calculated as the sum of all values divided by their total number. This report also refers to the median (middle value in the data set) to provide additional context with regard to

Throughout the report the term "leagues" refers to

the average. This is because, in some cases, there are a minority of clubs or leagues with significantly higher results than others and thus skew the average value.

- The data for the 2019/20 or 2020 and 2020/21 or 2021 season has been used for the number of matches and teams per league in the report, except for the league snapshots, in which the most up to date data is provided (2021/22 or 2022 season)
- The majority of data in this report relates to the 2019/20 (or 2020) or 2020/21 (or 2021) seasons. Where this is not the case, it is clearly stated.
- When comparisons have been made to the previous edition of the report, this includes only data for the clubs that provided information in both editions of the report.
- The majority of data in this report is sourced from the survey answers that were provided by the leagues and their member clubs. As such. the answers to some questions may have been interpreted differently.
- Written analysis on clubs has been sourced from survey answers provided by member clubs. In the league snapshots, some data is based on league responses in respect of their member clubs and hence there may be discrepancies in data, as not all clubs responded to the survey.
- The league snapshot data has been validated by the respective leagues. Where the league provided a different answer to those provided by its clubs in aggregation, the league's answer has been disclosed in the snapshot (providing it did not materially differ to the club responses - in which case it is shown as n/a). In the body of the report, when analysing club data in aggregation, the club's responses have been used.

#### Photographs

The photographs published in this report have been sourced from Getty Images.

#### Exchange rates

For the purpose of comparison, financial data has been converted into US dollars using the average exchange rate for the periods 01 January 2020 to December 2020 (when referring to 2019/20 or 2020) and 01 January 2021 to December 2021 (when referring to 2020/21 or 2021).



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