



FIFPRO

2020

RAISING OUR GAME

WOMEN'S FOOTBALL REPORT



Improving Industry Standards for
Professional Football Players

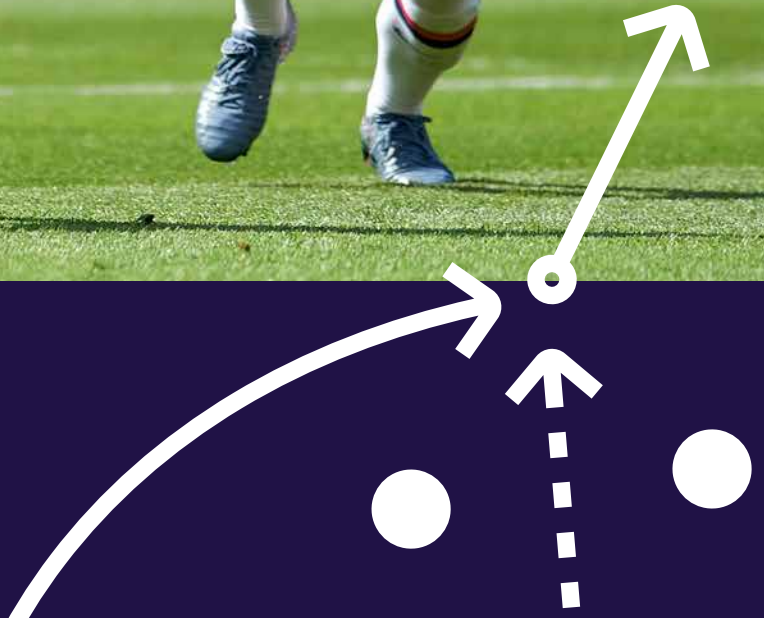




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ABOUT

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The 2020 Raising Our Game Report provides an overview of the global women's football industry, placing the rights and conditions of players at the centre. The report builds on the 2017 FIFPRO Women's Global Employment Report and takes account of the most recent industry developments affecting the working environment of professional footballers worldwide. The industry is continuously evolving along with its regulations, rules, policies, business and competition models. This report gives the players' perspective along with key stakeholders on the most recent growth patterns and trends, best practices, policies and regulations relevant to the sustainability of the professional football industry.

OBJECTIVES

The aim of the report is to help unions, players, clubs, leagues, national federations, Confederations, FIFA, sponsors and media stakeholders to navigate football's evolving landscape from a female player-centric perspective. And then to enable the formulation of key policies to protect the rights and interests of players, allowing them to benefit from future opportunities, and thus promote a sustainable industry.

This report is the first of its kind to present the growth of the industry from the perspective of elite female players. FIFPRO intends to continue to release these reports, using this report as a benchmark.

The 2020 Raising Our Game Report offers insight and guidance to:

ENGAGE

in transparent discussions about the future shape of the professional football industry.

CONTRIBUTE

to factual, evidence-based, player-driven analysis and decisions.

INFORM

industry policymakers, influencers and media about the needs and fundamental interests of players in an ever-changing employment market for professional footballers.

DRIVE

player-centred policy development to protect and safeguard the rights and interests of the professionals at the heart of the game.



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WELCOME

Professional women's football is rapidly growing, and the sport is emerging as a strong and viable industry. However, viable career paths and proper working conditions are still lacking across many regions. Economic progress in the industry must be accompanied by the development and implementation of global labour standards that protect the rights and well-being of players.

Female players have a right to reach their full potential in the game, and the game will truly flourish when this is realised. The conditions under which players train, perform and compete must support their physical and mental well-being, promote their ability and protect their integrity. Now is the time to prioritise player-centric investments and make sure this trajectory of growth does not overshadow working conditions.

Women's football cannot follow in the footsteps of the men's game nor be positioned as its little sister. We must learn from the challenges and opportunities we have seen develop across the football industry and use this knowledge to help lay the foundation for a sustainable global employment market built on healthy and safe working environments.

RAISING OUR GAME

Female players are no longer willing to wait. Worldwide, they are organising and increasingly holding the international football community accountable for better conditions. Their call to action is loud and clear: fair treatment, decent work, equal opportunities and

the right to viable career paths as professionals in the industry. Female players are also extending their voice beyond the pitch, using the growing popularity of their game and its visibility to unite their struggle for women's rights and employment rights with social justice movements off the field.

The development and enforcement of global labour standards must become the responsibility of FIFA, international stakeholders, national federations, leagues and clubs. Following this path requires open debate, accountable decision-making and committed action plans on the part of professional football stakeholders. Employers, player organisations and competition organisers need to reinforce the social contract that gives all actors a fair share of economic progress, respecting their rights and contribution to the football economy. Collective bargaining must play a key role in managing changes and players must be seen as equal partners who have a shared interest in the future of their game.

At FIFPRO we are grateful to the tremendous level of engagement from players and other stakeholders who participated in this research. We hope the 2020 FIFPRO Raising Our Game report serves as a platform and reference document for our industry to engage with players and their unions to form stronger relationships and shape a sustainable and innovative professional women's football industry.

For more information, please visit FIFPRO.org



Jonas Baer-Hoffman
FIFPRO General Secretary



Amanda Vandervort
FIFPRO Chief Women's Football Officer



Caroline Jönsson
FIFPRO Global Board Member



**WE WANT FEMALE PLAYERS
TO BE PROFESSIONAL IN OUR
COUNTRY. IT'S NOT FOR US
ANYMORE, WE'RE WORKING
FOR THE NEXT GENERATION
AS THE PREVIOUS ONE
WORKED FOR US.**

Sara Gama | Italy
Juventus FC Women

EXECUTIVE SUMMARY

1



EXECUTIVE SUMMARY

While global trends drastically shape the present and future growth opportunities and challenges of women's football, our findings suggest that the pursuit of economic growth must entail employment creation with protection for basic rights of players and proper conditions. This means that the current growth in the women's game requires innovation and intervention to establish the basis for a long-term sustainable industry.

KEY FINDINGS AND RECOMMENDATIONS

1 WOMEN'S FOOTBALL IS PROVING ITS VALUE

While women's football has long been viewed as a cost to the industry, it is in fact an asset of great value – to the sport and society – that can steer the industry in a positive and sustainable direction.

2 THE INDUSTRY IS GROWING

There is greater commercial interest in women's football; attendance in league and national team competitions shows signs of incredible potential, broadcaster viewership is increasing and many new sponsors have recently appeared as high-profile partners.

3 PROFESSIONALISATION IS UNDERWAY

More women's leagues and clubs at the domestic level are forming and professionalising, others are reforming, and elite competitions are taking new shape.

4 GLOBAL STANDARDS FOR PLAYER CONDITIONS ARE NECESSARY

Adverse labour conditions still plague the game. Action is needed to establish, implement and enforce global industry standards for working conditions in women's football – in both labour contracts and international competitions – to protect the players and enable the just, decent and stable growth of the industry.

THE WAY FORWARD

The following chart details the top findings from the 2020 Raising Our Game Report, and our resulting recommendations. This includes both top-down and bottom-up considerations, as well as a reflection on the roles of external stakeholders in achieving a collective vision for a strong, vibrant and lasting women's football industry.

CURRENT STATE OF WOMEN'S FOOTBALL

Global standards for the conditions of players are lacking, subjecting players to a range of adverse working conditions and serving as a barrier to the growth of the industry.

Female players are not given the opportunity to be heard or to play a part in developing their industry.

While football's doors are beginning to open to women, the professionalisation of the women's game is still contending with the effects of decades-long underinvestment and exclusion.

The lack of competitive leagues, too few matches, short seasons, discrepancies between elite teams and the rest, and gaps in many markets limit opportunities for both player development and commercial investment.

There is a growing interest in consumption and sponsorship of women's football. However, commercial opportunities have not been fully committed to and therefore, are currently unrealised.

RECOMMENDATIONS

Establish a set of basic standards for the working conditions of professional women's football players - for both club and national team levels - recognising their fundamental rights as workers and investing in areas that improve the game.

Pave a joint path forward through collective bargaining. Develop more opportunities for players to move into expert and leadership roles within the industry.

Financial investment is not enough; the women's game requires a common vision that unites national strategies and implements regulatory interventions to achieve sustainable growth and employment.

Implement new, innovative and attractive competition designs with a balance between club and national teams so that players are not left patching together leagues, clubs and tournaments to fill their year.

Identify solutions to measure the value of women's football and develop a long-term roadmap for success. Drive growth and opportunity through innovation and long-term investments.

3+3 WOMEN'S FOOTBALL GAME PLAN

The FIFPRO 3+3 Women's Football Game Plan provides guidance for actions to drive the sustainable professionalisation of women's football. The strategic actions are mutually reinforcing and match the players' view on what is required to enable current and future generations of players to reach their next level of play and contribute to the overall development of professional women's football.

RECOMMENDATIONS FOR FOOTBALL STAKEHOLDERS

VISION AND LEADERSHIP

Women's football represents one of the most significant areas of growth potential for professional football. Shifting consumer dynamics will continue to drive the growth of the game. The professional football industry must develop a common vision that provides a definitive pathway for the sustainable evolution of the game. Developing this joint vision will require exceptional leadership from across the football industry – including a growing number of female professionals. We also recommend that sponsors, broadcasters and other third-parties contribute to this new vision for women's football, ensuring that it extends far beyond the hype of a single tournament or reputational exercise.

COMPETITION STRUCTURES

Professional female players need sustainable competition structures which allow them to develop their talent, balance their commitment between club and national competitions, and perform at their peak at all times. The current competition structures are insufficient to push players to reach their maximum performance. The creation of innovative competition formats is required to strengthen the global club footballing landscape at both domestic and international levels. More competitive and balanced leagues and tournaments would not only be meaningful for the players but also for fans, sponsors and broadcasters.

INVESTMENT STRATEGIES

The implementation of our common vision and the design of new structures will require investment – including human capital, organisational capacity and financial resources. The current staff structures in women's football are insufficient to support the current surge in interest around women's football and to implement growth strategies. This does not mean arbitrary cash injections or short-sighted investments but rather a strategic investment plan based on priorities and Key Performance Indicators (KPIs). The development of new income models for competitions will require considerable financial contributions. While these might be seen as high costs initially, they represent wise investments for the future.

REQUIREMENTS FOR PROFESSIONAL FOOTBALL

GLOBAL MINIMUM LABOUR STANDARDS FOR PROFESSIONAL FOOTBALL

The professional women's game is subject to adverse labour conditions which negatively impact the sporting performance of players, pose direct obstacles to the development of their potential or force them to leave the game early. As such these conditions not only infringe on the basic rights of players but also block the growth of the industry. They are not only harmful to players but to federations, leagues and clubs. To protect the workplace conditions of players, national employment laws and regulations must be followed in addition to a set of basic standards for the working conditions or professional players established by the football industry. Enforcing these workplace standards is essential for creating the appropriate training and competition environments for players to perform at their peak; for ensuring that players are provided with decent, safe and secure jobs within the football industry; and for the industry to reach its potential and flourish in a sustainable manner. FIFPRO and domestic player unions will continue to advocate and if necessary litigate to defend these basic workplace conditions for players.

GLOBAL STANDARDS FOR INTERNATIONAL TOURNAMENTS

While basic conditions must apply to all professional players, a separate set of conditions applies to those participating in elite global competitions such as international and continental tournaments – both at club or national team level. Competition organisers have a duty to ensure that the playing conditions of their competitions are the same elite standard for all participating players and thus it is critical to establish Global Standards for Player Conditions in International Tournaments. This is about ensuring that all football players competing in international tournaments on the world's top stages can perform to the best of their abilities. Establishing global standards for a specific set of conditions in football's top tournaments means fair and equitable conditions are provided across the game, giving the world's best players the opportunity to perform at their peak in the world's greatest football events. FIFPRO is calling on FIFA, confederations and national associations to implement a universal standard for playing conditions in international tournaments.

PLAYER OPPORTUNITIES

Female players must be given the opportunity to enter and stay in professional football as a viable career option. This means ensuring stable employment markets that create possibilities for security and longevity in the industry as a player. From the bottom up, the sport also needs more opportunities for girls at the grassroots level to play and pathways for them to develop their talent, excel and stay in the game. This means access to elite talent development schemes and academies. Only with access to top level training environments can we expect players to develop the outstanding skills to raise the standard of play and become the stars of tomorrow. Once players turn professional, they must be guaranteed a secure and stable working environment.

INTRODUCTION

2



INTRODUCTION

The women's football industry is experiencing tremendous growth. National teams are proving to be key drivers of the women's elite game. The public is increasingly turning its attention to watch world class athletes compete at the FIFA Women's World Cup and Olympic Games, as well as regional competitions including the UEFA European Championship and CONMEBOL's Copa America.

At the same time the women's professional club game is moving forward as more domestic leagues are launched, established leagues become more competitive, and visibility increases across the board. For this growth to continue, the women's game needs to further professionalise, and it is critical that the working conditions to which female players are exposed match the performance expectations, ambitions and potential of the game.

BACKGROUND

In 2017, FIFPRO carried out the first ever global survey amongst elite female footballers worldwide, resulting in the publication of the first global employment report on the working conditions in the women's game. This report revealed the working conditions of over 3,000 female players. Findings highlighted the challenges of a very slim professional sector, showing many women struggle to create a sustainable career as a professional player. Over 90% of the female players reported they were considering leaving the game early. Their responses showed that the single biggest obstacle for the development of the sport and the women in it is that many of the best in the game are not professionals and cannot dedicate themselves fully to this profession.

Our 2017 recommendations suggested that growing the women's game and creating stable and decent work for female players will require stakeholders — at a global, national and local level — to step up, display initiative and take responsibility. This means the development and implementation of a women's football model that provides for real career prospects through a sustainable professional employment market. The questions are how to build such a model and what it should look like.

We know that women's football cannot follow in the footsteps of the men's game nor be positioned as its little sister.

This will require a unique model involving a commitment to enhancing the current strengths, balanced with the future potentials of the women's national team game and club competitions.

In turn, FIFPRO has undertaken this new research, to build on the global employment report by taking a holistic look at the economic and societal growth of professional women's football. The objective is to support players, unions and other stakeholders in the field to determine and take action on how best to nurture and sustain dignified and decent careers for female players within an equally just framework for the game overall.



Photo by: Cole Burston

GROWTH AND LABOUR STANDARDS

Women's football is professionalising and growing. Investors are starting to seize the economic opportunities and the women's game is gaining a foothold in the market. The potential of the game is making headlines. Yet little research to date has examined how this growth, accompanied by the current industry developments and expectations put on players to perform, is impacting the working environments and wellbeing of female players.

In this report, we examine the women's football industry and assert that there is an urgent need to take action to establish global industry labour standards for women's football.

In today's globalised economy, international labour standards are essential mechanisms to ensure that the growth of the global economy provides benefits to all. It is widely recognised that the pursuit of economic growth through employment creation and income generation must be balanced with protection of the basic rights of workers. While sport often assumes a position of exceptionalism in the global political-economy, it is in fact no outlier. The establishment and enforcement of labour standards are just as relevant for the football industry as any other and are a critical element for ensuring that the growth of the global football economy provides benefits to all.

What the ILO's founders recognised in 1919 was that the global economy needed clear rules in order to ensure that economic progress would go hand in hand with social justice, prosperity and peace for all. This principle has not lost any of its relevance.

International Labour Organisation (ILO), 2019

FEMALE PLAYERS AND FOOTBALL CONDITIONS

While increasing attention is being placed on the economic value of women's football as a product, this report looks at how the player and her working conditions are valued within this context of industry expansion and economic growth.

Investors and sponsors are starting to respond to the rising value placed on women's football. However, financial investments in the game and economic growth do not *necessarily* lead to improved or proper conditions for the players nor automatically translate into a better game.

Men's football as an industry has clearly demonstrated that economic expansion without proper regulations and intervention is neither sufficient nor sustainable. The findings from the 2016 FIFPRO Men's Global Employment Report revealed that with industry expansion the exploitation of players has continued, and in some countries worsened. Denial of proper contracts, overdue pay, inadequate facilities, restrictions on freedom of movement, and discrimination, represent some of the many challenges that male players face. Furthermore, as male players get traded and sold and ever-more narrowly valued through the lens of the market, the struggle to assert their rights as workers and their basic human rights remains a formidable task.

With women's football in the nascent stages of global growth, the opportunity exists to get ahead or even 'leapfrog' these major issues to create a working environment whereby players are not exploited, their rights are valued, and they are accorded full respect. It is also important to acknowledge that in many countries female players are likely to face a greater struggle than their male counterparts – they are fighting for both the rights of the player and the rights of women. The latter makes the former harder to achieve.

As the women's game evolves, now is the time to consider how to prioritise the concerns of players and make sure this trajectory of growth does not overshadow the conditions of female players.

The rights, interests and wellbeing of players must be properly safeguarded during this important period of industry development. FIFPRO maintains that in order to create any lasting foundation for the professionalisation of the game, a set of global labour standards for the working conditions of professional female players must be established.

IT'S NOT ALWAYS ABOUT MONEY. IT'S ABOUT ATTITUDE AND RESPECT.

Ada Hegerberg | Norway
Olympique Lyonnais Féminin

BBC Sport (May 2019)



RESEARCH FRAMEWORK

To closely examine the current state of women's football, the aim of the research undertaken was to present a situational analysis. This type of research entailed mapping-out the facts and figures from global, continental and national levels.

The situational analysis first presents the economic aspects of the women's football industry, then reports on the key issues concerning the working conditions of female players.

REPORT STRUCTURE

The research is based on a forward-looking analysis that aims to understand the relationship between the economic environment and the labour conditions of the players, followed by the recommended course of action.

The state of the game is analysed with a distinct focus on the working conditions and economic environment of the women's game.



WORKING CONDITIONS

What is the situation of female players' working conditions today? What are the key issues and challenges that female players are facing? How are the working conditions of players key to professionalising the game?



ECONOMIC ENVIRONMENT

What is the current state of the women's football economy? How is economic growth propelling the professionalisation of the women's game? What types of investments resources, and regulations are needed?

Guiding question: How do the working conditions of players need to be factored into the economic picture in order for the football industry to stimulate and strategically build a sustainable growth path?



PLAYER SURVEY

The 2019 FIFPRO female player survey was conducted among national team players from countries which qualified for the 2019 FIFA Women's World Cup, in addition to several other nations. In total, **186 female players completed the survey** from **18 different countries**. Representing the top female players in the world, these players provided their perspectives on the working conditions and the ongoing professionalisation of their game.



STAKEHOLDER SURVEY

We requested information from all the **24 national football federations** in the 2019 FIFA Women's World Cup, and in some cases, information was also requested from the first division of the women's league or a set of domestic clubs in a given country. All six FIFA Confederations (UEFA, AFC, CAF, CONCACAF, CONMEBOL, OFC), as the continental governing bodies, were also approached for data collection due to the pivotal roles they play in both international and club football.

DATA COLLECTION AND METHODOLOGY

In order to be able to draw a realistic and comprehensive picture of women's football on a global scale, data and information were collected from multiple sources and through various methods, including a player survey, stakeholder surveys, primary interviews with executives and experts, and secondary research focusing on existing thought leadership studies in relation to women's football. Key findings from previous FIFPRO studies also provided valuable input to the discussion of women's football today. The use of multiple sources helped in corroborating the same facts.

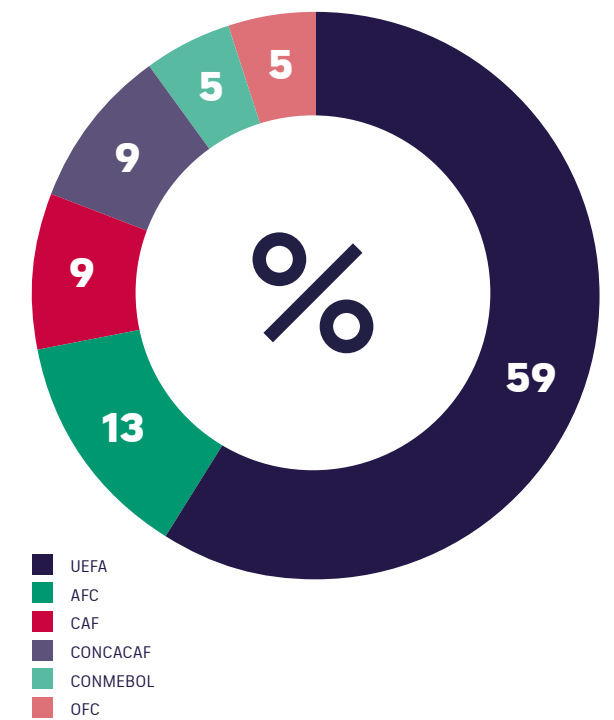
SURVEYS: The countries who qualified for the 2019 FIFA Women's World Cup in France were the main target group of our surveys. Several additional countries were also selected based on the development of women's football in the country. The combination of the player survey and the stakeholder survey was the core component of the data collection process.

We received valuable data and insights from two-thirds of the countries contacted through the stakeholder survey, while four out of six continental confederations also provided detailed answers, giving this analysis credible global coverage. Their responses and perspectives form the bedrock of our analysis.

Unsurprisingly, given the relatively high concentration of developed footballing nations, most responses came from Europe. However, other important non-UEFA participants from the women's football scene are also represented.

All data obtained through primary research methods, including the stakeholder and female player surveys, is presented in an aggregated or anonymised way in this report in order to protect the respondents.

FIGURE 1. COMPOSITION OF STAKEHOLDER SURVEY RESPONDENTS BY CONFEDERATION



Secondary research was used to supplement the findings, especially where primary data needed further investigation. Official FIFA documents and publications, articles about confirmed commercial and media deals, studies about player working conditions and various statistical databases are just some examples of the secondary sources used in this research.

Finally, it must be noted that the research was finalised in November 2019, a few months after the 2019 FIFA Women's World Cup.

GLOBAL TRENDS THAT DRIVE OUR INDUSTRY

Shifts in the global landscape have been profoundly transforming the world of sport: technological change and development of the digital economy, demographic growth, the globalisation of trade, changes in demand, individual aspirations, and more.

To analyse the political, economic, social and technological factors creating new opportunities or generating obstacles for the development of professional women's football, we applied a PEST (political, economic, socio-cultural and technological) analytical model. The objective of this model is to identify the key global trends that are shaping our world today and driving the development of women's football. Through this exercise we have identified four significant global trends: shifting consumer dynamics; gender equality in sports; internationalisation; and new technologies. In this section we take a brief look at each trend and the implications for women's football.



SHIFTING CONSUMER DYNAMICS



GLOBAL TREND

Shifting consumer dynamics refer to changing preferences and behaviour in the market. This is often linked to increasing spending power and accessibility. The rapid economic development of so-called 'emerging countries' is leading to a sizeable expansion of the middle-class around the world. The contribution of women to the global economy has been growing on a global scale and is now measured at close to USD 18 trillion. In addition to changes in the composition and spending power of consumers, expectations and tastes are also shifting. Overall, consumers are more diverse, influential and digitally connected than ever before.

IMPACT ON WOMEN'S FOOTBALL

Football is one of today's prime live products. As more people are able to spend money on entertainment, women's football can benefit because it has various opportunities to generate income from the sale of previously unexploited rights. These range from stadium naming rights through to shirt sponsor spots. The recent influx of major companies as partners to various clubs and leagues, for example deals with Avon, Barclays, Visa, etc., is a reflection of sponsors responding to these opportunities. However, intense competition for the attention of consumers means women's football must find creative ways to market itself.



GENDER EQUALITY & HUMAN RIGHTS IN SPORTS



GLOBAL TREND

With the gradual shifts in public perceptions and the subsequent policy and legislative changes in gender equality and human rights, female participation and engagement in sports, particularly football, has been on the rise. The attention to human rights within sport is growing continuously and national and international sporting federations are increasingly instituting human rights policies and practices. At the same time, social pressure on sporting federations, companies and public entities to 'do the right thing' is growing. Due to its exposure and visibility, the sports entertainment sector is in a unique position to be at the forefront of instigating change or, conversely, attracting criticism on this front given its reach and influence.

IMPACT ON WOMEN'S FOOTBALL

The fight for equality and inclusion in sport starts on the field with the players acting as the protagonists of their sport. Professional female players will continue to strive for equality on the national and international level – especially in terms of playing and working conditions. The demands on clubs, leagues and federations are highlighted by recent litigation cases in professional women's football and the need for improvement will be voiced by the collective representation of athletes and individual activism. Women's football is in a prime position to serve as a platform to advocate for positive values and their associated human rights.



INTERNATIONALISATION



GLOBAL TREND

Our world is becoming more interconnected than ever with the transfer and cross-border movement of capital, people, data, goods and services. There is a growing tendency of institutions to operate across national borders; products and services are increasingly adaptable across contexts; better transport and telecommunication infrastructure have brought improvements in connectivity. Through international formats and the liberalisation of the employment market, entertainment has been at the forefront of the process. Even more crucially, audiences of leading formats are now measured on the global rather than the domestic scale, transcending borders, beliefs and nationalities.

IMPACT ON WOMEN'S FOOTBALL

Internationalisation and an increasingly global mindset drives the development of the professional football industry and its commercial and competition models at the top end of the game. The effects of this are evident in the women's game, for example, with prominent men's clubs who are operating in international markets moving in, like Manchester City FC, Juventus FC and Real Madrid. The official introduction in 2018 of female players into the FIFA Transfer Matching System (TMS) for international player transfers also signifies the increasing importance of tracking and monitoring players' cross-border movement. However, with this, protecting the employment rights of players also becomes more pressing than ever. Moreover, internationalisation of the game without grassroots growth of the professional game carries the risk of leading to a very narrow investment field.



DIGITISATION AND NEW TECHNOLOGIES



GLOBAL TREND

Digitisation and new technologies are turning information into digital form. This process is impacting all areas of our economy and is driven by the convergence of social media, mobile, big data and the consumer demand to instant access. New technological solutions and applications are rapidly transforming various markets and products, and the entertainment industry (including professional sports) is no exception. The emergence of these technologies is challenging the traditional and tested ways of doing business.

IMPACT ON WOMEN'S FOOTBALL

Sports stakeholders have already started to create unique content and experiences for their fan bases. In women's football, the appearance of various new media and broadcasting methods provide opportunities for the game to raise visibility and reach new audiences. Data analytics is now prevalent in most sports with more sophisticated and detailed uses than ever before. Scientific analysis can boost the sporting performance. Still, such advances can also pose risks to the rights and wellbeing of players who must be protected in the digitalization processes.



THOUGHT LEADERSHIP THE TRAJECTORY FOR THE SPORT IS ON AN UNSTOPPABLE UPWARD CURVE

The last year may be seen as a turning point for the commercial fortunes of women's elite football. A raft of major investments led by Barclays, Visa and MasterCard were followed by other notable brands such as Budweiser, Mars, Standard Chartered and Dove amongst others. These investments clearly demonstrate that the trajectory for the sport is on an unstoppable upward curve. The reasons for this situation are complex but worth assessing.

The central axiom in sport is that talent follows money, eyeballs follow talent and money follows eyeballs. The key to improving standards in any sport is to give talent both the time, the opportunity and the guidance to be the best they can. As standards improve the audience and interest grows. This then creates the conditions for media interest. Where media audiences grow, sponsorship blooms soon after. There is every reason to believe that women's football is close to this tipping point.

Women's football offers a superb metaphor for the issues of diversity and inclusion which have become central to the agendas of most modern businesses and a central issue for consumers. Women's football has faced an historic struggle with prejudice and provides a ready shorthand for the growing belief in the empowerment of women and their right to participate in those areas of society thought of as male preserves. It is also clear that consumers want their brands to stand for something and equality, diversity and inclusion would rank highly in any list of causes seen as desirable to the public. This values-based approach is a fascinating development and the first example of a sport generating this type of sponsorship investment ahead of a fully evolved quantitative and audience based proposition.

There is no doubt that the club level of the women's game is still playing catch-up with variations in standard affecting credibility, although this is changing. UEFA Women's Champions League and domestic competitions still have ample potential to grow further and invest better. The area where the recipe is almost complete are select competitions, where standards are high, competition intense and the commercial proposition is already in place backed by money, impeccable broadcast platforms and a genuinely global reach. There is also a promising event horizon to really accelerate the women's game with Olympics, World Cups and a European Championship in England. All of these events will have terrestrial broadcast platforms. Thus there are strong reasons for brands to invest and leverage women's football especially whilst entry level costs are extremely competitive and the players are still unaffected and free of the weapon proof PR and communications and access protocols that so stifle the men's game.

By Phil Carling, Managing Director of Football - Octagon Worldwide.



Octagon is the global sports and entertainment marketing arm of IPG and current Sports Industry Agency of the year.



THOUGHT LEADERSHIP THE TRANSFORMATIVE IMPACT OF HUMAN RIGHTS IN SPORTS

We are currently experiencing a significant movement around the integration of human rights into sport. As athletes, coaches, fans, human rights activists and other stakeholders continue to speak up against discrimination, violence and injustices across sports, the profile of human rights in sport has never been higher.

Female athletes have represented a tremendous source of leadership in this movement through the push for gender equality and in addressing gender discrimination across sports — as they always have. But in just the past couple of years, we have witnessed an extraordinary catalysing effect with women from football, ice hockey, and basketball, among others, demanding their rights be recognised as athletes, as women, as workers, and as fans.

Female footballers have played a large role in generating this momentum: from the 2015 gender discrimination lawsuit they filed against FIFA over playing on synthetic grass at the 2015 FIFA Women's World Cup, to the continued demands for equal treatment, improvement of opportunities and conditions within confederations and national federations, to the courageous voices that have drawn critical attention to the presence of discrimination and, in some terrible cases, gender-based violence and abuse within football federations. The voices of these women have been instrumental in driving positive change.

In response, the global governing body of football has been taking important steps to prioritise human rights on the global agenda and to implement standards across all of their operations. The 'Ruggie Report', "For the Game, For the World: FIFA and Human Rights" published as an independent report in 2015 by John Ruggie of Harvard University,

is based on the United Nations Guiding Principles on Business and Human Rights ("UNGPs") and lays out recommendations for FIFA to embed human rights across its global operations. This report represents a key milestone in the movement. Subsequently in April 2016, FIFA introduced a commitment to human rights and gender equality in its revised statutes and in May 2017, FIFA published its landmark Human Rights Policy.

Sports bodies who have adopted the UNGPs are now applying them to everyday sport governance and mega sporting events. In doing so, we find that existing processes may need to be adapted to be "fit for purpose" when it comes to handling situations concerning human rights. The work of understanding how to apply the UNGPs in new sport contexts is also one that requires navigating. To assist with this important work, organisations like FIFA have internal staff dedicated to human rights, as well as an independent Human Rights Advisory Board, to assist with this complex work. The Centre for Sport and Human Rights plays an important role in this work as we convene human rights stakeholders around critical human rights issues in sport, share knowledge on best practice, build capacity through tools to assist sport bodies with doing the critical work to embed respect for human rights, and protect those who are involved in sport and its events. Key to this work is ensuring that those at the sport's core, its athletes, are respected and protected.

By Mary Harvey, CEO Centre for Sport & Human Rights; former U.S. Women's National team player, 1991 FIFA World Cup champion and 1996 Olympic Gold Medalist.



The Centre for Sport and Human Rights is a human rights organisation for the world of sport.

ECONOMIC GROWTH IN WOMEN'S FOOTBALL

3



ECONOMIC GROWTH IN WOMEN'S FOOTBALL

The last decades have seen the exceptional rise of professional football into one of today's prime entertainment products. Propelled by new technologies and globalisation, top football competitions and clubs have expanded their fan bases and transformed their businesses. The appeal of the sport has attracted high-profile sponsors and new investors, while the media value of the top competitions has increased.

This industry expansion, however, has largely excluded female players who until recently marginalised and side-lined by the world's most popular sport. This dynamic is changing. Today, encouraging signs are pointing to the increasing value of women's football globally, and in some places at an exponential pace.

More than three-quarters of the respondents to our 2019 FIFPRO Stakeholder Survey (including confederations, federations and leagues) said they believe commercial opportunities in women's football will keep on improving and revenues will significantly increase. Interestingly, there were no responses anticipating a downturn in the fortunes of women's football from an economic perspective.

ASSESSING ECONOMIC GROWTH

To closely examine the current state and growth of women's football, FIFPRO worked with research partners at KPMG Football Benchmark to assess the industry landscape. Measuring economic growth and financial value in the football industry, the following three revenue streams are examined: matchday, broadcast, and commercial. This approach mirrors the conventional framework in which football clubs and similar sports entities present financial figures.

Gathering data specifically on revenue represented a limitation of our research. Some explanations for the obstacles limiting the breadth and range of data that could be obtained during data collection are as follows:

- The professionalisation of women's football is in its very early stages in some regions. This is underlined by various shortcomings in administration and management: crucial financial and operational data simply lack availability and accuracy.
- Financial and other deals of commercial and broadcasting agreements are rarely publicised. Several federations and leagues signalled their inability to share financial values with us (even with anonymity) due to confidentiality clauses.

- In many cases, women's football teams and departments are integrated into the structure of a club or federation making it difficult to measure their own financial performance independently from the men's side. This is especially prevalent in the case of commercial agreements covering both teams.

We present our findings on the economic trends and the degree of growth taking place. We do not present an economic forecast or financial valuation of the industry, as this is not yet feasible given the lack of appropriate and accessible data. We also do not provide a nuanced picture of the correlations or causations of the growth.

In this report we as FIFPRO are focused on how the labour conditions of players are being accounted for within this economic growth.



MATCHDAY ATTENDANCE

The crowd is a crucial ingredient of the commercial product of professional football. Having more people at live matches helps create sponsorship opportunities, builds brand awareness, supports long-term fan engagement, and drives revenue through ticket sales, food and beverages, parking, consumer products and more. However, matchday attendance trends in women's football must be considered alongside other factors as well. It is evident that women's football tournaments and matches are being allocated to specific geographies for reasons other than aiming to achieve maximum attendance. Other factors that are influencing decisions include consideration of legacy impact, new growth markets, and visibility in low-participant areas.

The matchday attendance research is grouped into the following categories:

- International Tournaments
- Club Football Matches

INTERNATIONAL TOURNAMENTS

International football plays a crucial role in raising the overall profile of women's football. As national teams represent an entire country, they are in a prime position to reach a large audience and establish ties with new fans. In this section, we will review attendance at the FIFA Women's World Cup as well as various continental tournaments.

FIFA Women's World Cup

Our assessment of international tournaments shows there is potential for growth. Apart from 2003 and 2011, total attendances at FIFA Women's World Cup has not increased substantially but is sitting around an average of 1.2 million (Figure 2).

Total attendance set a new record in 2015, largely due to the number of participating teams being increased from 16 to 24. However, even with more matches in the schedule, the tournament maintained a per match average attendance figure similar to that of the 2011 tournament, as both of them landed slightly above the 26,000 spectators per game mark.

The 2019 FIFA Women's World Cup in France showed a dip in total attendance as well as in average per match attendance in comparison to the 2015 tournament. While many matches were officially sold out, there was a considerable number of no-shows. Nevertheless, the matches of the France Women's National Team and also many knock-out games registered high attendance figures.

Shifts in certain variables, such as number of participating teams and number of matches influence the attendance figures. It is revealing to see that the matchday attendance figures at the 2019 FIFA Women's World Cup were lower both in total and per-match average than the 1999, 2007, and 2015 FIFA Women's World Cups.

FIGURE 2. ATTENDANCE EVOLUTION AT THE FIFA WOMEN'S WORLD CUP

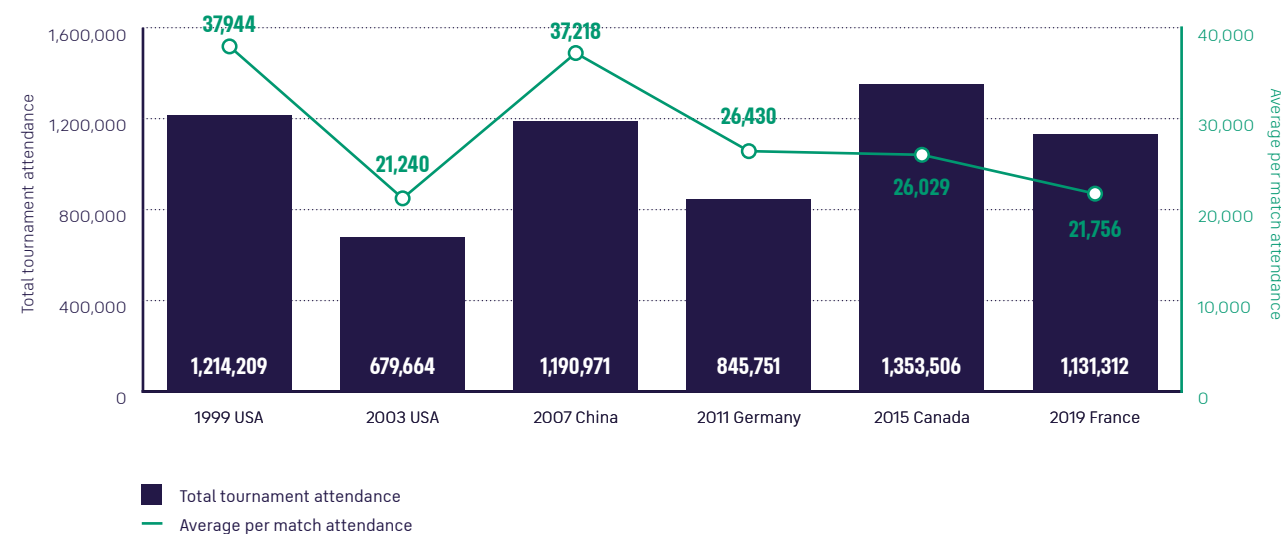


Photo by: Alessandra Tarantino

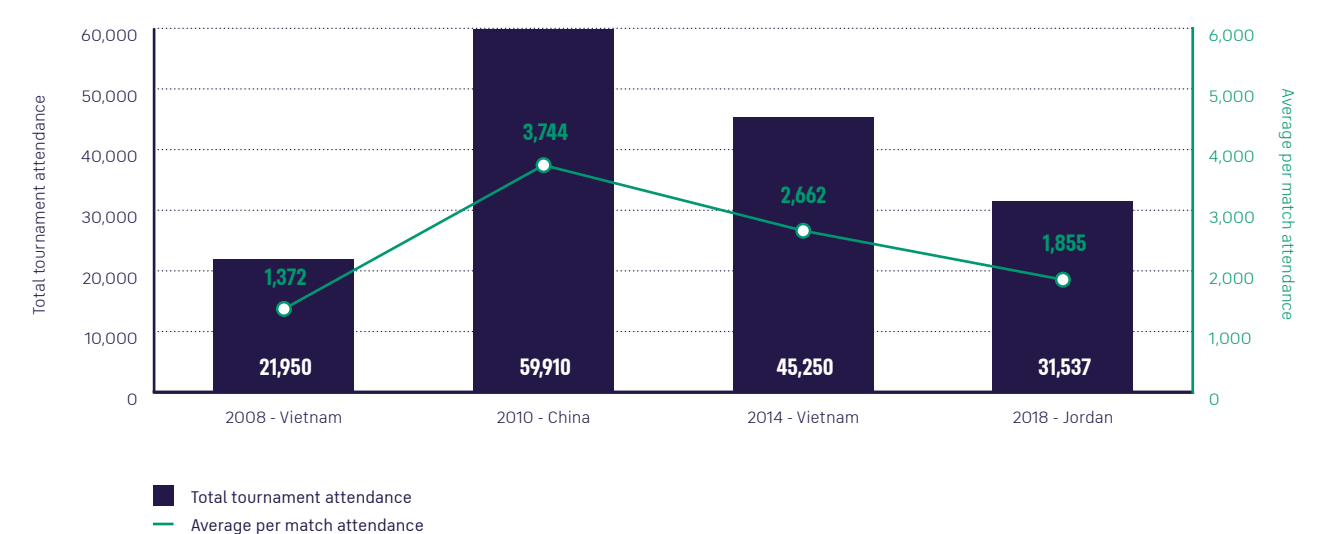
Continental Tournaments

Looking one level below, attendance at continental competitions are yet to register the high numbers of the FIFA Women's World Cup, and overall there is a wide variance across regions. Attendance trends at continental competitions have also not been consistent across or within regions.

The AFC Women's Asian Cup achieved its peak attendance in China in 2010. However, the per match average was only a fraction of that recorded at the 2007 FIFA Women's World Cup, also hosted in China just three years prior. This is a sign that the pulling power and brand value of the FIFA Women's World Cup is difficult to replicate (Figure 3).

This does not mean there are no signs of improvement. In South America, the 2018 edition of the Copa América Femenina was the first one in the competition's history that was televised in its entirety. This led to much more visibility, and according to CONMEBOL, the tournament broke records of attendance and ratings. The most viewed match was Chile versus Peru, viewed by approximately three million people within Chile, meaning almost one-fifth of the population watched the game. At the venue, 18,000 were in attendance. The tournament was described by Chilevision broadcasting as the 'milestone' of the year.

FIGURE 3. ATTENDANCE EVOLUTION AT THE AFC WOMEN'S ASIAN CUP

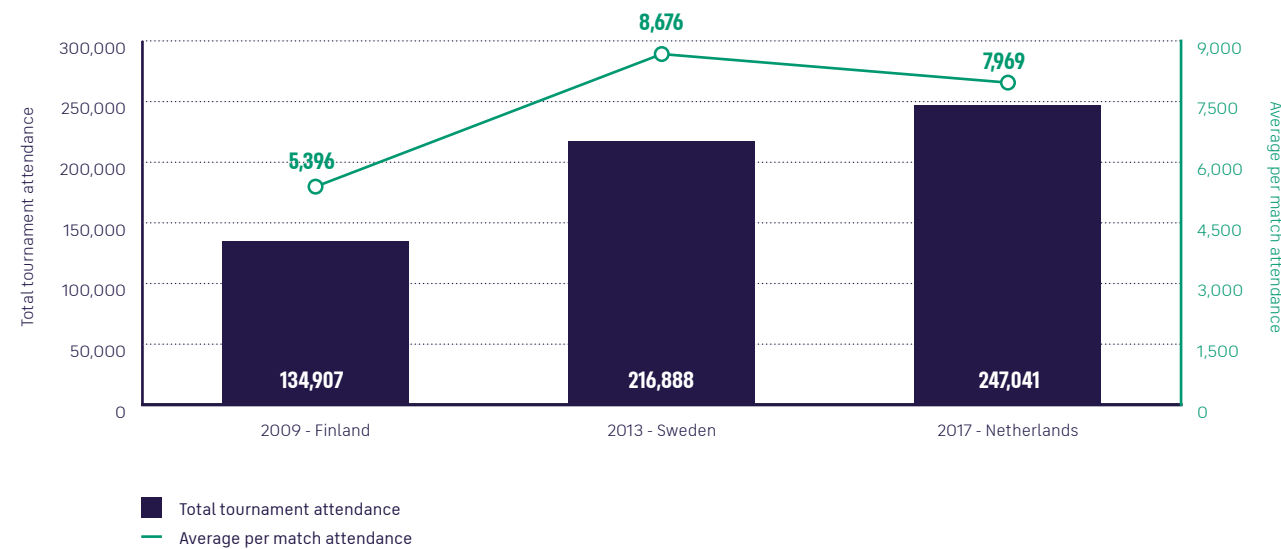


In Europe, the average attendances at the last two UEFA Women's European Championships (2013 and 2017) were close to or above 8,000 spectators, even after the expansion to 16 teams in time for the 2017 tournament. While these figures are far from those reached at the FIFA Women's World Cup, it must be noted that a large share of the European Championship matches were played in smaller stadiums with a capacity of approximately 10,000 seats. (Figure 4).

Flagship tournaments for national teams have a significant role to play in the development of elite women's football. Attendance at women's international tournaments has been characterised by overall growth and, in recent years, encouraging numbers in certain regions including Europe and South America.

A closer examination of variables such as tournament location, stadium capacity, and socio-cultural-political issues of the host country would be important to further understand these figures.

FIGURE 4. ATTENDANCE EVOLUTION AT THE UEFA WOMEN'S EURO



CLUB FOOTBALL MATCHES

Evidence from recent seasons shows that overall attendance in women's club football has been relatively stagnant. Average attendance in most countries' top domestic leagues can still be considered low – under 1,000 spectators per match (Figure 5).

There are many potential explanations for these low average attendances. Our 2019 FIFPRO Stakeholder Survey respondents and respective interviewees cited the following factors as the most significant:

- Lack of effective marketing and local promotion of matches taking place, communication channels not used to their full extent (e.g. 2018 UWCL Final in Kiev);
- Lack of coordination of schedules and match times (e.g. winter games); clashes with more established men's football time slots (e.g. 2019 FIFA Women's World Cup Final on the same day as the men's Copa America Final and the CONCACAF Gold Cup Final;

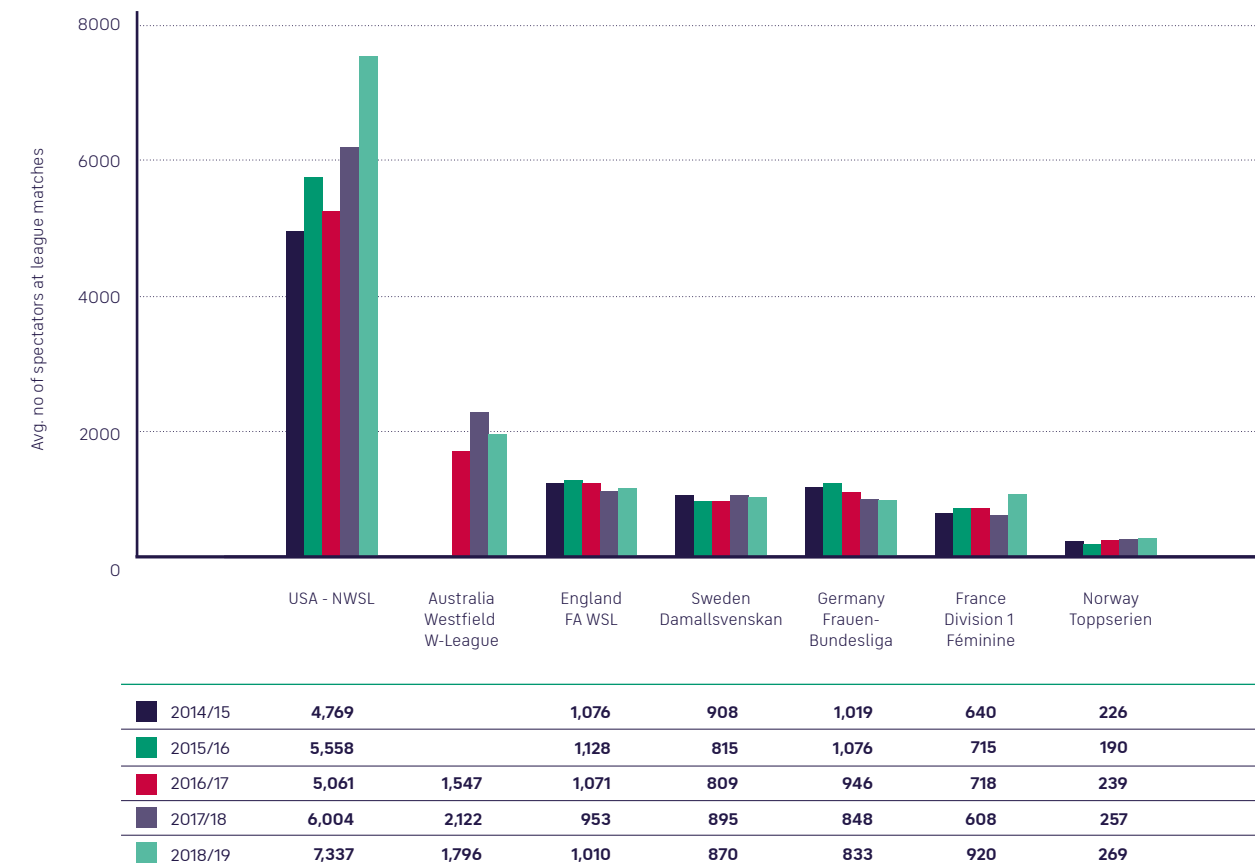
West Ham United men's and women's teams playing at the same time during the 2019 Women's FA Cup Final).

- Venues for women's team matches are often located far from the club's main home, which may perpetuate a sense of disconnect from the established fan base.

An outlier to this trend, the National Women's Soccer League (NWSL) in the United States has grown since the league's inaugural season in 2013. The 2019 season saw an average of 7,337 spectators among the 9 teams, the highest average attendance in league history. This is a 21.8% increase over the previous record of 6,024 set in 2018. The 2019 average was a 71.8% increase over the 4,270 average in the league's inaugural 2013 season, a growth rate of 9.4% per year.

Portland Thorns FC stand out from the rest of the NWSL, with an average home league attendance of 20,098 spectators and their highest 2019 home game attendance of 25,218 spectators on August 11 versus

FIGURE 5. AVERAGE ATTENDANCE STATISTICS OF SELECT DOMESTIC LEAGUES



Note: for leagues with a summer season (NWSL, Damallsvenskan, Toppserien), 17/18 refers to the 2018 season, 16/17 to 2017 and so on.

North Carolina Courage. However, it should be noted that when the NWSL started it was building on two professional league predecessors dating back to 2001, while in most other countries' professionalisation started later.

High-Attendance Club Football Matches

While average attendances are low in the majority of leagues, there are some commendable initiatives which demonstrate that under the right conditions, there is enormous potential for reaching higher attendance numbers at women's club football competitions.

Many clubs from all over the world have decided to move some of the matches of their women's team to the main stadium of the men's team. For example, Boca Juniors of Argentina organised a double-header in March 2019 when the men's and the women's teams played their league matches on the same day at La Bombonera. There have been several Spanish teams who opened

their main stadia for women's league matches, including storied clubs such as Sporting de Gijón, RCD Espanyol de Barcelona and Real Betis. However, the most compelling example came from Atlético de Madrid Femenino which hosted FC Barcelona Femeni at the club's new Wanda Metropolitano Stadium (venue for the men's 2019 Champions League Final) in front of 60,739 spectators in March 2019, close to full capacity. The match set a new attendance record for European women's club football, overtaking the game between Athletic Club Bilbao Femenino's cup match against Atlético Madrid, which took place at the San Mamés Stadium and attracted 48,000 spectators. It also overtook the *world* record for women's club football, surpassing the 51,211 spectators in May 2018 in Mexico's Liga MX Femenil between Tigres UANL Femenil and CF Monterrey Femenil in Estadio BBVA Bancomer.

Similar initiatives have occurred in Italy, England and France. Juventus FC Women played for the first time at the Allianz Stadium in March 2019 in front of 39,027 spectators, surpassing the previous record for a women's club match in Italy of 14,000. It is important to highlight that access was free for all supporters, an element for discussion regarding the overall strategy for increasing attendance.

Following the 2019 FIFA Women's World Cup, there has been a marked rise in attendance at club football matches in countries like England and France. In England, the cumulative crowd across six WSL games on the first day of the 2019/20 season in September was 74,247. For context, the figure across the entirety of the 2018/19 season was 107,141. In France, a total of 30,661 fans were in attendance for Olympique Lyonnais Féminin vs. Paris Saint-Germain Féminine in November 2019, besting a previous record of 25,907 set by the same two teams in April 2019.

Marquee events such as cup finals also have the potential to draw large crowds. In England, the Women's FA Cup Final's attendance at Wembley Stadium has been showing strong improvements in recent years: over 40,000 people saw the game live in both 2018 and 2019. The latter final between Manchester City Women's Football Club and West Ham United FC Women may have had an even higher figure had it not been held at the same time as a West Ham men's team played a Premier League home match.

These matches are clear evidence that women's teams can expect higher crowds when they play at the club's well-established venues, when appropriate resources

are dedicated to effective marketing, and when the match itself draws on fans' needs and interests. In fact, iconic and modern stadiums – usually dedicated to men's football matches – can generate exceptional live attendance for women's football.

During 2019, several clubs in different regions also took the initiative to move their women's teams to larger and more established stadia on a more consistent basis. Access to this type of venue on a more regular basis is an important consideration for the growth potential of matchday attendance.

European Club Competitions

The flagship competition of UEFA Women's Champions League does not show major improvements during the tournament, as illustrated by the following charts (Figures 6 and 7). The average attendance of the knock-out stages was 2,494 in 2017/18, less than in the two preceding seasons. Although numbers did pick up in the 2018/2019 tournament, they failed to reach the heights of previous seasons.

Attendance at the UEFA Women's Champions League Finals has been increasing for some time, but the 2018 event in Kiev, Ukraine attracted only 14,000 fans, just days before the men's final was played in the same city in front of over 60,000 fans. While this comparison might seem harsh, it highlights an opportunity to decouple women's matches from the men's competitions in order to allow more attention and space for growth. Developing a distinctive identity of women's competitions may help establish a unique position for the women's game.

FIGURE 6. ATTENDANCE EVOLUTION AT UEFA WOMEN'S CHAMPIONS LEAGUE

Knock-out stage matches, excluding qualifying rounds

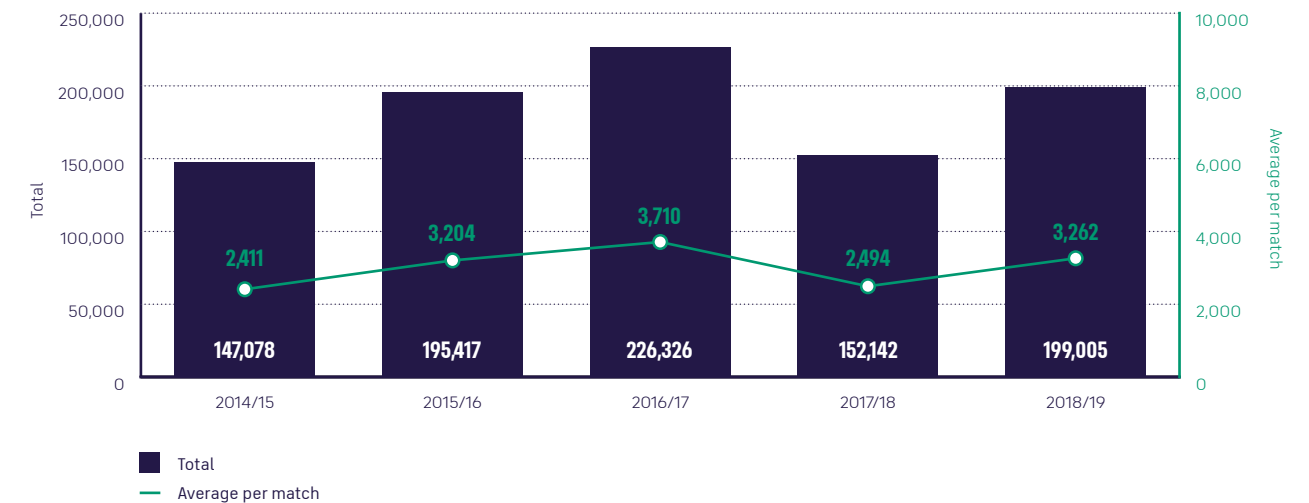
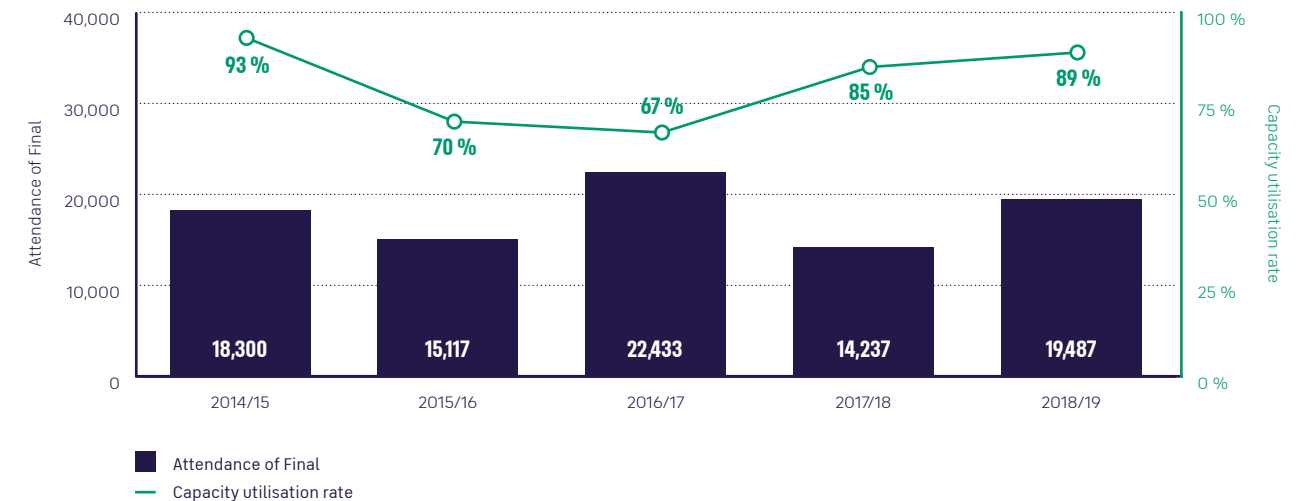


FIGURE 7. UEFA WOMEN'S CHAMPIONS LEAGUE FINALS

Attendance and utilisation



From 2018/19 onwards, UEFA hosted the Men's and Women's UEFA Champions League Finals in different cities and with more time between them. The women's 2019 final was played in Budapest, Hungary (18 May) in front of a sold-out stadium of close to 20,000 spectators. While giving the event its own dedicated space certainly helped, the high attendance was also a result of low ticket prizes of around € 3.

UEFA has recently announced a new format and restructuring for the Women's Champions League, coming into effect for the 2021/22 season. This change introduces a 16-team group stage with centralised media rights from the group stage onwards, with UEFA producing every game for television or online streaming purposes. Sponsorship rights will be partially centralised. By replacing the current knockout round of 16 with a group stage, UEFA have increased the number of matches by 20%. This gives those who qualify for the tournament access to more competitive games and increased visibility.



Photo by: Gerrit van Keulen



CASE STUDY
ATLÉTICO DE MADRID FEMENINO VS. FC BARCELONA FEMENÍ



One of the biggest 2019 stories regarding women's football was the match between Atlético de Madrid Femenino and FC Barcelona Femení at the Wanda Metropolitano Stadium in Madrid, Spain, which broke the previous attendance record for women's club football. The official figure was 60,739 spectators, surpassing the 53,000 set in 1920 in Liverpool. In addition, the online viewership of the match through a free-to-air platform was also significant with a peak of 413,000 viewers.

The promotional campaign for the match included a well-structured communications plan, a social media push, buses featuring images of the players circulating in Madrid, a signing session held at the club's store ahead of the match, and a special celebratory event for three players who had reached 100 caps.

The fact that women's club matches are very rarely held in the main stadiums of the men's teams added to the allure of the occasion, and ticket pricing was a key element to drawing attendance. Consequently, 56% of the attendees did not have to pay for their tickets as members of the home supporter's club, while the remaining 44% only had to pay between five and 10 euros.

It is important to point out that Atlético de Madrid Femenino's average matchday attendance for the 2018/19 season (at their training ground) was 800 spectators; and for the 2019/20 season (at another training centre) was 1,500 spectators. So, while the record-breaking attendance figures are impressive, the average figures demonstrate the need for sustained strategic investment over a longer period of time.

(Note — FC Barcelona Femení reported that it does not have attendance figures for its women's team for the 2018/19 season; only data for the men's team was published in its annual review.)



Photo by: ZUMA Press, Inc.



CASE STUDY
PORTLAND THORNS FC



The Portland Thorns FC, located in the United States, are one of the most successful professional women's sports teams in the world, providing a model of women's sports franchise success.

Attendances have been consistently over 10,000, reaching an average of 20,098 in 2019. There are several factors behind this:

- The ownership status is unique in Portland as it was the only Major League Soccer (MLS) franchise in 2013 (when the NWSL kicked off) that accepted the invitation to join the new league.
- A strong market is important: Portland is a city that has long embraced football. The existing community bond helped build-up a fanbase for the professional women's team.
- The stadium's location is close to downtown and within a walkable distance from many residential areas.

The Thorns front office handles the Thorns on equal terms with the men's Portland Timbers FC, their MLS counterpart. The two teams' logos at the stadium have the same size and the squads have access to the same training facilities and supporting staff. There are more than 130 employees, almost all of whom work for both the men's and women's teams. Shared resources provide an advantage compared to other franchises which don't have an established male team.



Photo by: ZUMA Press, Inc.

BROADCASTER VIEWERSHIP

Having a stable broadcasting agreement and structure to build on is crucial to generate both awareness and revenue. In many sports, broadcasting deals are usually negotiated at the league or competition level with the proceeds being distributed among the participating teams according to a pre-defined formula. The overall revenue generated from this source is often a good measure of the popularity of the league and the sport, as broadcasters are looking to secure rights for sporting events with high viewership potential and valuable advertising spaces.

The findings of our research are grouped into the following categories:

- International Viewership
- Club Football Viewership
- New Media Channels



Photo by: Dave Shopland/BPI/REX

INTERNATIONAL VIEWERSHIP

Viewership of international football, especially of the FIFA Women's World Cup has been growing significantly. This demonstrates the potential driving nature of international tournaments for the women's game. At the same time, it highlights the need for more regular engagement with fans and viewers.

The viewing figures of the 2019 FIFA Women's World Cup paint an encouraging picture. The total television audience has been steadily increasing over the past few tournaments, with FIFA reporting that 1.12 billion viewers watched coverage of the 2019 tournament on television at home, on digital platforms or out-of-home. The tournament reached 993.5 million unique individuals for at least one minute on in-home linear television, up by 30.0% on the reach of Canada 2015. (Figure 8)

Meanwhile, the growth in similar measures for the FIFA Men's World Cup was only 20% – albeit from a much higher base – between 2010 and 2018. This shows us that while men's football continues to grow on the margins, women's football presents in relative terms the biggest possibilities for the football industry in the years to come.

The 2017 edition of UEFA Women's European Championship broke their previous record figures for television viewership. The tournament in total had 50 million more viewers than the 2013 event, while almost one-quarter (4.1 million) of the population of the Netherlands watched as the host country triumphed in the final. Matches of other countries, such as England and Austria, also set national records as the most watched women's football matches in their respective countries.

Even with all these encouraging growth figures, a sobering reality is that the majority of our 2019 FIFPRO Stakeholder Survey respondents admitted that broadcasting rights to national team and league matches are often given away for free, essentially giving up an important revenue source. This may often be a necessary step in smaller markets because the product cannot yet attain a high market valuation, yet broadcasting games is still important to increase the visibility, generate a buzz and raise awareness. In most cases, at least the production costs are covered by the broadcaster and, more often than not, the country's public broadcaster picks up these rights.

FIGURE 8. IN-HOME AUDIENCE REACH

Total in-home audience reach



CLUB FOOTBALL VIEWERSHIP

Recent numbers for the Women's World Cup and other international tournaments point to significant industry growth, but these events take place only once every four years. It is up to the domestic leagues and club competitions to 'fill the gap' and provide continuous high-quality content for football fans.

Regular changes to the competition structure, general uncertainty around a league's existence and erratic scheduling can hurt potential broadcast audiences. One of the key challenges identified for regular broadcasts is to find available broadcasting time slots due to the high density and fragmented calendar of men's competitions.

In this regard, women's football still relies on the pulling power of major finals and showpiece games such as cup and league finals in England, France and Germany, which routinely attract over one million viewers.

In most other countries, the rights to women's top tier matches are often sold in a bundle together with the men's league. In Germany, for example, the rights to the men's third division and the women's first were recently sold together. This makes it impossible to determine the value of women's football as a stand-alone product, and therefore hinders the ability to negotiate broadcasting rights.

Positive examples include the Spanish, French and United States first divisions, which all generated over EUR 1 million in television rights income per season in the recent past, attesting to the power of centralized negotiations.

Low or no income at all from broadcasting is a stumbling block in the development path of women's football. Centrally distributed broadcasting revenue for all clubs in a league can kick-start further growth. This requires leadership and investment decisions to equip existing competitions for a competitive broadcasting environment in the sports and entertainment market.

FIGURE 9. ANNUAL BROADCASTING INCOME FOR TOP EUROPEAN DIVISIONS (2018/19)

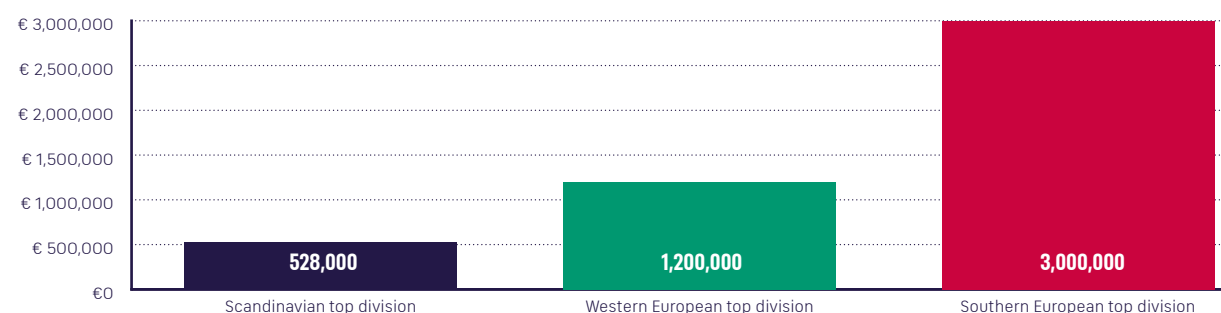


Photo by: Vegard Wivestad Grøtt

NEW MEDIA CHANNELS

The changing landscape of media consumption habits and the rise of new technologies define the opportunities for women's football to reach a broader audience; new and larger audiences can be targeted all over the world at a far lower cost than was previously possible.

Although television is still leading the way in live sporting broadcasts, other platforms are steadily gaining relevance. New media channels include streaming, social media, and other non-traditional platforms that offer innovative broadcast solutions for distributing women's football matches. While most traditional media and television channels have all launched their own platforms as an extension to their usual offering, the online streaming field is also being embraced by popular social media platforms (e.g. Facebook and Twitter) and telecom and technology companies (e.g. Amazon, Verizon, Yahoo). More and more corporations are trying to elevate their profile by building a portfolio of online and streaming sports rights.

Multiple respondents to our 2019 FIFPRO Stakeholder Survey said that national team games are often available to watch online, especially when the broadcast is managed by the public television broadcaster in their country.

Some leagues have been inventive in their approaches to achieving greater visibility. For example, the Damallsvenskan in Sweden has been showing all of their matches online for a number of seasons. The FA WSL in England launched the FA Player in 2019, where all top-tier league matches are streamed online and in the app. The NWSL in the United States streams all their matches online and offers on-demand replays. These innovative distribution methods make it easier for fans to get access, both domestically and abroad, while the combination of advertising-based platforms, subscription and pay-per-view models also provide income. It is important to note that none of these streaming deals entirely replaced traditional cable television broadcasts entirely.

Additional leagues are choosing to stream their matches on their own websites or social media platforms. For example, in England the FA Player is a free live-streaming platform and has access to both tiers of women's domestic competition. The W-League in Australia is free and accessible to international audiences in countries without a broadcasting rights holder on YouTube and through the MyFootball channel. While this certainly needs dedicated resources, there is a benefit to the rights holder (national federation or privately-run league) of retaining creating control and shaping the perception of the league. Social media also offers a cost-effective way to distribute match highlights and reach more targeted fan segments. Breaking down the match content into smaller clips is often used to reach a broader audience and raise awareness.

**Make bigger investments.
Then the level will grow,
the crowds will grow, the interest
will grow, the profit will grow.**

Professional Player | Italy
2019 FIFPRO Female Player Survey



Photo by: Gteig Cowie/BPI/REX



OFF THE BACK OF THE WORLD CUP, NOW IS THE TIME TO KEEP PEOPLE INVESTED IN THE GAME - NOT JUST AT NATIONAL LEVEL, BUT AT CLUB LEVEL - AND KEEP PEOPLE COMING AND WATCHING.

Millie Bright | England
Chelsea FC Women

BBC Sport (September 2019)

SPONSORSHIP

Sponsorship refers to the commercial programming, merchandising and advertising of clubs, leagues, federations and/or confederations. The revenue from these sponsorships is of paramount importance to the development of the game. The importance of sponsors also goes beyond pure financial gains; association to established brands and well-designed campaigns can fuel the awareness and interest in the game itself. Especially in the early stages of professionalisation, securing sponsors is key in putting leagues or clubs on a sound financial footing.

The findings of our research on sponsorship are grouped into the following categories:

- Value
- Duration
- Bundling

VALUE

As women's football gains more visibility and popularity, sponsors are beginning to tap into the economic and social capital that female players represent, as well as the positive values reflected in the women's game.

Sponsors increasingly see clear advertising opportunities for their products, converting such value into revenue streams. They are investing more than ever before and experimenting with innovative models and modes of delivery to align their brands with the inherent values that women's football delivers upon.

As already mentioned as one of the limitations to our study, it is often difficult to get a clear picture of the commercial strength of the entities in women's football due to either the element of confidentiality, the dearth of reliable data or the bundling with men's football rights. That said, our 2019 FIFPRO Stakeholder Survey and the complementary secondary research resulted in some important findings.

The following figures (Figure 10 and 11) illustrate the scale of sponsorship revenues that clubs and competitions of different profile can expect in the current market. The data collected in preparation for this study are anonymised to protect confidentiality.

This paints the picture of a sport that is clearly in the early stages of professionalisation, with annual sponsorship deals generally valued below the EUR 1 million mark. Given this, it is still possible at this stage to sponsor a club or competition for a relatively low fee when compared to men's football. The same trend is apparent in the case of national team partners and competition sponsors. Consequently, for many companies, association to men's football brands is often financially out of reach but entry into the market is still relatively inexpensive through the women's game. For first movers and pioneers there are high rewards in a professionalising sector.

Moreover, in our various discussions with sponsors of women's football, the appealing nature of positioning female players in promotional campaigns was a recurring remark. For example, Mastercard recently signed several footballers as brand ambassadors including Lyon's Kadeisha Buchanan, Saki Kumagai, Wendie Renard, Sam Kerr, Pernille Harder and Ada Hegerberg, the first women's Ballon d'Or winner. Visa has launched an initiative that helps to build the profile of 14 players across Europe. This is something they have not done with men's football.

The general commercial appeal of a sport is to a large degree defined by its target demographic and ability to reach consumers. Growing public image and popularity of players and clubs can translate into higher commercial revenues for the sport when sponsors and stakeholders capitalise on the opportunities.

DURATION

The evidence collected from our 2019 FIFPRO Stakeholder Survey and secondary research shows that the women's game is similar to the men's in terms of the duration of sponsorships and commercial deals. These are the main findings:

- One of the most valuable type of rights are the title sponsorships to competitions. In women's football these agreements are usually signed for at least three seasons, pointing to a commitment from both parties. The latest high-profile deal is Barclays' sponsorship of the English FA WSL for a period of three years, starting in 2019/20.
- For clubs and national teams, kit supplier (technical sponsor) deals are generally much longer than other sponsorship types. Stakeholder survey respondents mentioned deals as long as 12 years, but six to eight years were also not uncommon. This is in line with the trends witnessed in men's football: the average kit supplier deal length in the "big five" leagues of Europe is currently five and a half years, while main shirt sponsor deals are generally signed for just under four years.
- Several women's football clubs reported short-term sponsorship deals that run for only a handful of seasons, while leagues and federations generally operate with longer agreements spanning four to five years.

The length to which a company commits to sponsoring a football club or competition says a lot about how they see the prospect of the partnership and their commercial investment.

FIGURE 10. SELECTION OF WOMEN'S FOOTBALL SPONSORSHIP DEALS - DOMESTIC LEAGUES 2018/19

Values league naming rights (title) sponsor deals (in EUR)

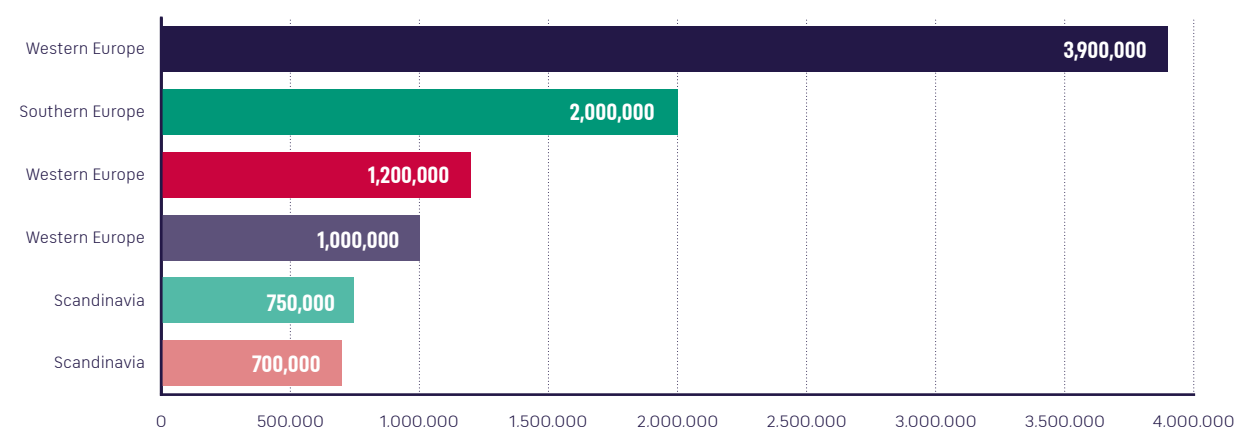
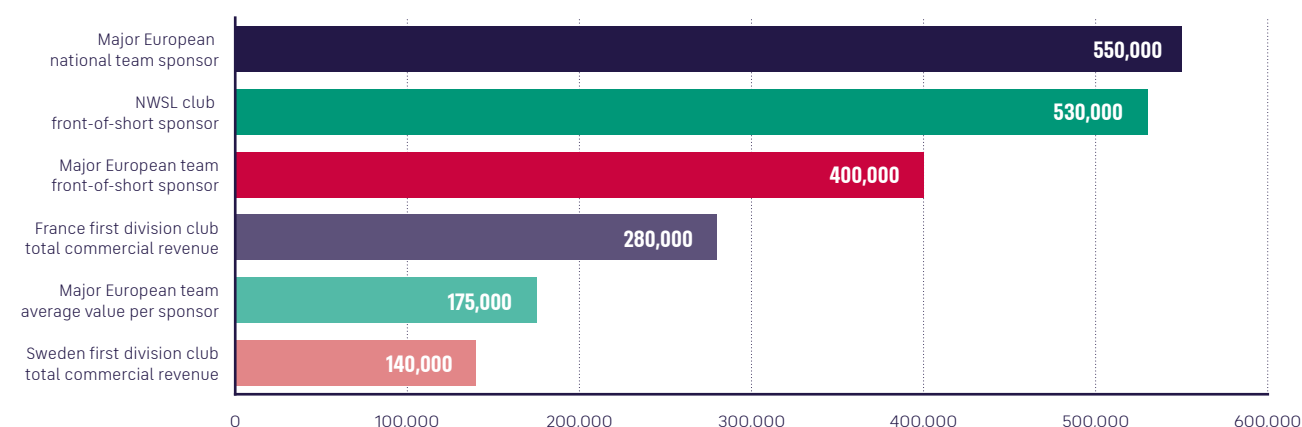


FIGURE 11. SELECTION OF WOMEN'S FOOTBALL SPONSORSHIP DEALS - CLUBS AND NATIONAL TEAMS 2018/19

Annual deal values (in EUR)



BUNDLING

As expressed by multiple stakeholders in response to our 2019 FIFPRO Stakeholder Survey, it can be difficult to estimate the value of commercial rights of women's clubs and competitions because they are often sold as part of a larger deal that is, primarily, focused on men's teams. In some cases, the partnership with the women's teams is simply seen as an extension to more established sponsorship relationships. As long as these rights are not valued separately, a true market value cannot be accurately defined.

Only 30% of federations in the survey said they currently have sponsors that are exclusive to their women's national team. The rest of them reported deals that encompass both men's and women's teams that are mostly built on past relationships with the men's squad. While there are benefits to leveraging the men's team it also poses obstacles to the independent development and evaluation of the women's game. When sponsors are shared, the total amount should also indicate the individual value attached to each team.

Of course, combined sponsorships are not necessarily detrimental to the development of women's football, but as long as these rights are not valued separately, a true, appropriate market value cannot be defined.

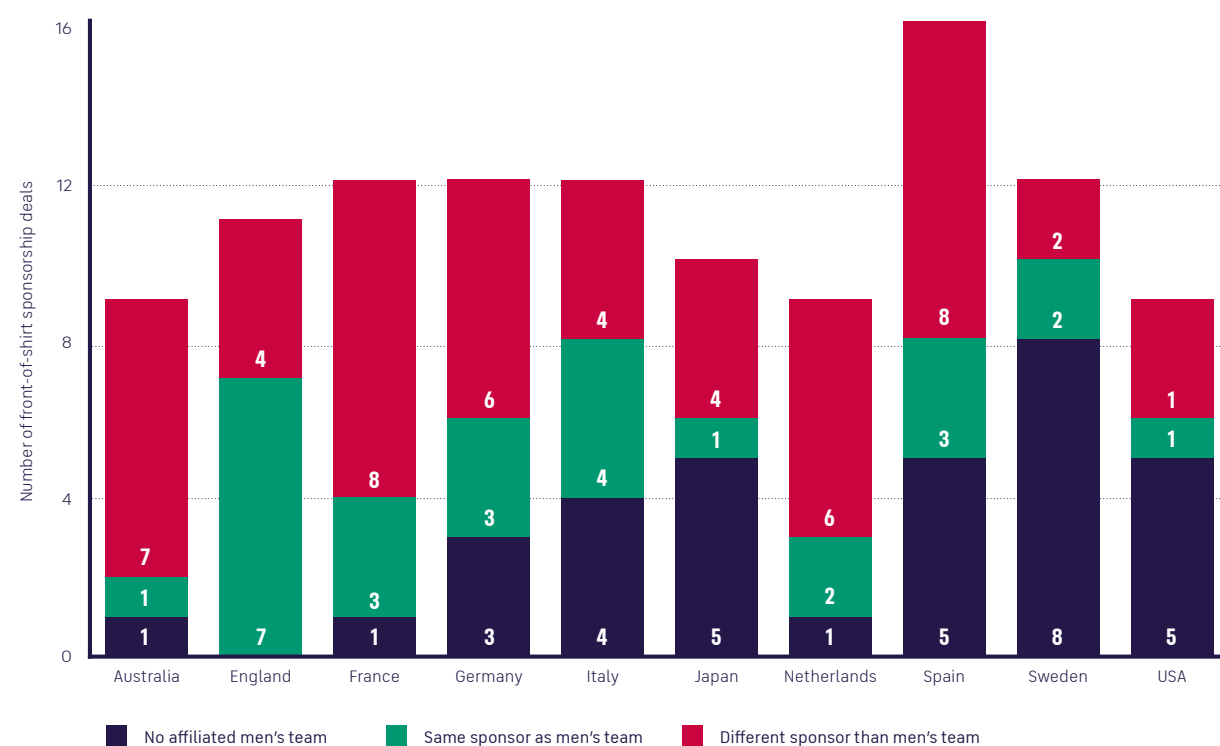
Benchmarks are required to guide future deals and avoid undervaluation.

An analysis of 10 domestic first division leagues show a varied picture of how leagues and clubs are bundling men's and women's rights together. First of all, in some countries, including Sweden and the United States, the majority of professional women's teams do not have an affiliated men's team; most of them were founded independently. The FA Women's Super League is the only competition in our sample in which all participating teams are part of established, men's football clubs (Figure 12).

Among those clubs that have both a men's and a women's team, only 34% had a shared main shirt sponsor between the two. Two-thirds of the clubs have different partners for the two teams. A recommendation on the pathway for sponsorship rights bundles has to be given on a case by case basis. However, even if rights are sold together, they must mark an individual value for each team to properly estimate and track the value of the women's team.

Finally, let's take a look at the FIFA Men's and Women's World Cup sponsorship landscape and how sponsorships are managed across them.

FIGURE 12. FRONT-OF-SHIRT SPONSORSHIP LANDSCAPE OF WOMEN'S FIRST DIVISION LEAGUES AROUND THE WORLD 2018/2019



FIFA World Cup – Sponsorship Structure

In its current format, the FIFA Women's World Cup sponsorship structure is very much tied to that of the men's. The main actors are the FIFA partners, who have great access to women's football through their agreement with the governing body. However, while being present is one thing, the level of activation and the degree of involvement in the tournament is another and the latter is key when discussing the value a sponsor can bring. In the build-up to the 2019 FIFA Women's World Cup, there seemed to be a shift in attitude: while in the past some sponsors did not attach strategic importance to the rights to the women's event, there was more interest in running dedicated programmes.

Although the six key FIFA partners are all present at both tournaments (Figure 13), the rest of the sponsorship pyramid is different for the two events. While the men's FIFA World Cup boasts a three-tier structure in which dedicated tournament and regional sponsors join the six FIFA partners, the FIFA Women's World Cup currently only has so-called national partners as a second tier. The combined deal value of these six partners was estimated at USD 11.75 million by Sportcal.

FIFA officials have already stated their intention to set up a new commercial strategy from 2022 onwards; this would potentially unbundle the rights of the two tournaments altogether and could even introduce dedicated tournament and regional sponsors to the pyramid of the FIFA Women's World Cup. The decision will mark an important direction for the future commercial structure of the women's game.

SUMMARY OF ECONOMIC GROWTH

There is a growing commercial interest in women's football; attendance shows signs of incredible potential, broadcaster viewership is increasing, and many new sponsors have appeared recently as high-profile partners. As the (elite) men's game is becoming even more saturated with sponsorship deals and it is getting more difficult to stand out from the crowd, women's football offers what could be called an alternative investment. In addition, the required outlay for a deal in women's football is still comparatively low-cost, while the potential gains are huge if the general interest continues to increase. This 'low risk, high reward' scenario can be appealing to many would-be broadcasters, sponsors and investors.

FIGURE 13. FIFA WORLD CUP – SPONSORSHIP STRUCTURE





CASE STUDY INVESTMENT IN WOMEN'S SPORT



Energy company, Iberdrola, is organising successful programs to promote women's sport in Spain.

Iberdrola has been the title sponsor of the Spanish first division since 2016. The Bilbao-based electric utility company was the first in Spain to make a commitment to fostering women's sports participation. This move was partially encouraged by the Spanish government: in 2016, the Ministry of Education, Culture and Sport started an initiative called Women's Universe, aiming to promote and develop women's sport and recognise the role played by women in sport and in society, as well.

As part of this initiative, Iberdrola has organised a campaign called "Women, Health and Sport," promoting success stories of women's sport, gender equality and healthy habits from an early age. The main objective was to raise public awareness of women as active and fundamental part of sport in Spain. The programme toured seven Spanish cities in 2017 and another five in 2018.

Iberdrola have also collaborated extensively with 15 Spanish sporting federations, football being one of them. The background of Iberdrola's investment is that the company considers gender equality as one of the organisation's essential values. The company is considered as one of the most appealing for women in Spain. Their involvement is a good example of sponsorships that go beyond pure financial aspects and develop partnerships based on shared values.



Photo by: ZUMA Press, Inc.



CASE STUDY WOMEN'S FOOTBALL SPONSORSHIP



In 2019, UEFA announced a partnership with Visa – the first ever sponsor of the European Federation dedicated to women's football.

The bundling of the men's and women's football sponsorship rights has been a common model for clubs and leagues with a presence in both. However, as the professionalisation of women's football gains pace, it is starting to create its own structures and step out of the shadow of well-established men's football brands. Commercial rights can be valued independently in order to find their true market value and to create the baseline for future growth.

An important step in this direction was when UEFA announced a 7-year agreement with Visa for the sponsorship of the Women's Champions League and other UEFA competitions. It was just the first in an expected line of other future partnerships that wish to unbundle these rights from men's football. Visa have also joined UEFA's football marketing platform (Together #WePlayStrong), which is aimed at getting more girls and women to play football.

Why are Visa and others investing in the sport? Adrian Farina, the Head of Marketing at Visa Europe said that the investment in women's football was a logical next step as it is a "hugely underdeveloped opportunity". The values of inclusion and equality that characterize women's football are well aligned with the corporate language and brand of Visa. They wish to make a statement with the UEFA partnership, become a leader in this field and inspire other brands to follow.

For Visa there are several assets that make women's football an appealing proposition to potential sponsors. The authenticity and commitment of players to achieve success in a very challenging environment is a crucial component of this profile. In addition, female players seem to be much more connected to the fans than their male counterparts and there are fewer "superstar" clichés that might be alienating to some.

Visa is planning to leverage their investment through a variety of future initiatives, including the support for 14 female players in building and raising their public profile and helping them to become ambassadors of the sport. Visa sees the lack of role models and high-profile players as one of the key issues of women's football, alongside the shortage of live television broadcasts and the underinvestment in the grassroots of the sport.



Photo by: Sebastian Gollnow

PLAYER CONDITIONS

4



PLAYER CONDITIONS

The playing environments at international and domestic levels are key for the overall working conditions of players. The stable growth of women's football will depend heavily on both the domestic professional leagues and the national team competitions, and how these two levels of the game interact and impact the lives of female players.

While the public is increasingly turning its attention to watch world class athletes compete in the FIFA Women's World Cup and Olympic Games, yet the women's professional club game has been taking steps forward with more domestic leagues launching, and the strengthening of others in terms of competition and visibility.

In this next section, we look at player conditions and structures in professional club football and at the national team level, and examine how they are impacting the lives of female players and influencing the growth of the industry.

PROFESSIONAL CLUB FOOTBALL

WORKLOAD AND MATCH CALENDAR

In order to improve, players need to take part in matches at the highest level. In addition, the season must be long enough to provide sufficient elite/high level playing opportunities that warrant the professional status of players.

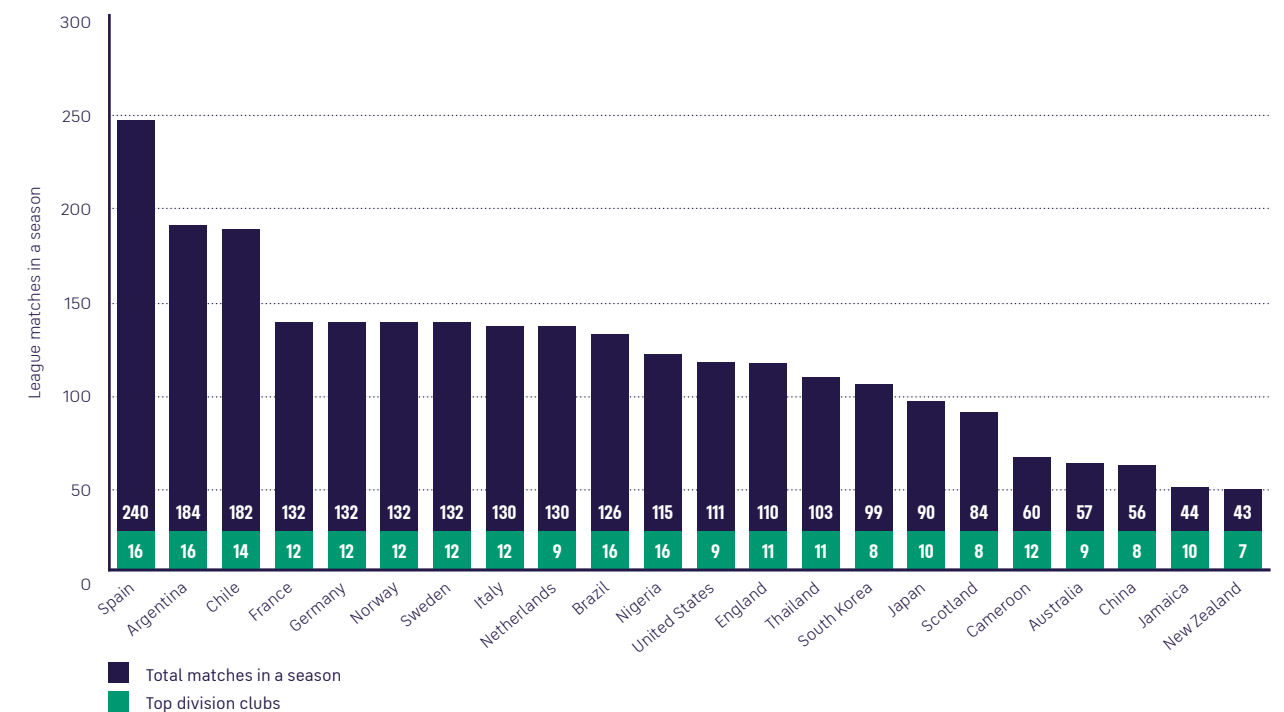
We analysed the first divisions of the 24 participating countries of the 2019 FIFA Women's World Cup. This is a sample that covers most of the countries where women's football has been developing at the fastest rate in recent years. The data shows that even the biggest leagues have only 16 teams and, on average, the top divisions have just over 11 participants. In the majority of the countries the seasons are relatively short and consist of less than 100 or 150 matches in total (including playoffs). In most leagues an individual player can play a maximum of 22 or even fewer matches per season, which is hardly enough for sustained development. As a result, it is not uncommon for professional players to sign for two clubs in different countries — even at the very top of the pyramid - in order to prolong their own seasons and play the number of matches that is conducive to the career of a professional footballer. In too many cases, female players are forced to play for multiple teams to accommodate short seasons and financial shortcomings.

There are only a few fully professional leagues such as in England (FA Women's Super League), while the vast majority of leagues and clubs show varying degrees of professionalism. In many cases only a select number of players have professional status, often financed by the national football federation. Financial instability has plagued many of these leagues in the past, leading to long gaps within a season to frequent changes in the number of participants and uncertainty around fixtures.

We recognise that fulfilling all criteria regarding professional status is often a costly undertaking and requires a long-term strategy and commitment. More elite teams would be necessary to raise the standard of play in a country and usher in a new era of better conditions for players. While several major footballing countries already have an established professional league, the dominance of only a few (in some cases, just one) teams creates a competitive imbalance that hurts the growth and long-term development of the sport.

FIGURE 14. TOP DIVISION CLUBS AND MATCHES IN 2019 FIFA WOMEN'S WORLD CUP PARTICIPANT COUNTRIES

Latest full season (2018 or 2018/19)



CASE STUDY INTERNATIONAL MATCH CALENDAR

There are pressing issues related to the international match calendar. In some cases, there are too many clashes between club and country; in other cases, there aren't enough opportunities for players to get a competitive match.

Many female national team players experience clashes between club and country fixtures, a tough choice that no player should have to make. This points to the need for FIFA and the regional confederations to better coordinate the women's international match calendar with leagues.

In Cyprus, female players have been quitting the national team in their twenties because they hadn't been entered in FIFA Women's World Cup or UEFA European Championship qualifying. (The men's national team have entered both competition since the 1960s.)

A second issue tied to the international match calendar has to do with competition structure and participation. A player may get called to represent her nation, and may even be compensated to do so, but in many countries the federation is not utilising the international match calendar windows allocated to them.

"Even girls aged 20 and 21 have felt they had no incentive to carry on," one team member said. The F.A. repeatedly told players they weren't good enough until recently, when officials agreed to enter the women's team into European Championship qualifying. Although it's too late for generations of players, Cyprus began playing its first UEFA Women's European Championship qualifiers (from August 2019) against Scotland, Portugal, Finland and Albania.

For example, national team players in Colombia went over 700 days without competing in a single match for their country, after having displayed a solid performance at the 2015 FIFA Women's World Cup and the 2016 Olympic Games.



Photo by: Dave Winter/Icon Sport

WAGES

Financial compensation for female players is often lacking and varies greatly between countries. Generally, it is not enough to make a decent living.

The 2017 FIFPRO Global Employment report found that written and detailed contracts are rare, and most of the payments are generally paid less than USD 600 per month (after tax). Our survey asked national team players how their annual salaries have changed over the last three years. One of the major findings is that the average club salaries are rising (Figure 15).

Even after removing top and bottom outliers from the sample, a large increase in monthly club salary is apparent between 2016 and 2018 (+68% of the top 5% and bottom 5% of answers are cut). There are sizeable gains in the median figure, too.

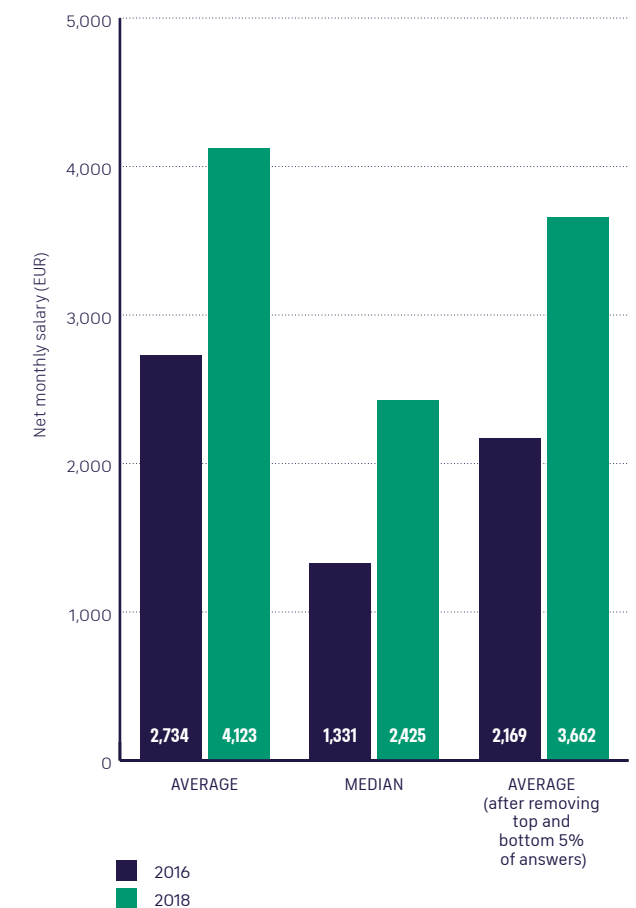
In 2019, there were positive cases where women's teams and players have been guaranteed the same minimum wages as their clubs' male teams; The professional leagues for men and women in Australia (A-League and W-League respectively) implemented the same base condition across the two leagues. Likewise, in July 2019 the professional club AFC Ajax was the first Dutch club to sign a collective agreement for players which guarantees women the same minimum wage, holidays, health insurance, and loss of income insurance.

In 2019, research by France Football compiled a list of the estimated annual club salaries of the 20 highest-paid female players. This group is largely dominated by United States and France-based players, who took up 11 spots. This is not surprising, given that these two countries are home to several high-profile and successful professional clubs.

There are large differences within this top group: the highest earner receives around EUR 400,000 in gross salary per year, which is more than 150% higher than the salary of the 20th ranked player. These values are in the range of what an average male professional player can expect in a mid-sized European top division (outside the "big five" leagues of England, Spain, Germany, Italy and France). In contrast, leading male footballers (usual participants of UEFA Champions League) usually earn the same, or more in a single month, than what the best paid female players earn in a year.

3.6% of players taking part in our 2019 FIFPRO Female Player Survey reported not receiving any money to play; this is unacceptable. These are women competing in FIFA Women's World Cups and playing at the top of the game.

FIGURE 15. SALARY RECEIVED FROM CLUB
(excluding those who do not receive salary at all)



Note: The figures do not take commercial contracts or any additional sources of income into account. All answers were translated to monthly figures in EUR for comparability.

NON-FINANCIAL BENEFITS

Non-financial benefits provided by clubs are a significant feature of the women's elite game. Respondents in the 2019 FIFPRO Female Player Survey were also asked about the benefits they receive from their club (Figure 16). Housing, health insurance and food, along with gym membership were the primary benefits that players reported receiving. 17% of respondents reported not receiving any benefits from their club (Figure 16). It is also worth mentioning that 'Other transportation' often means that the club refunds the public transportation costs of a player, generally a relatively small figure.

While these provisions are important, it is crucial to recognise that many clubs in the women's game relinquish responsibility for remunerating their players financially by providing these additional resources. Clubs must remunerate their players appropriately in addition to providing the relevant non-financial benefits.

FIGURE 16. DO YOU RECEIVE ANY OF THE FOLLOWING BENEFITS FROM YOUR CLUB?

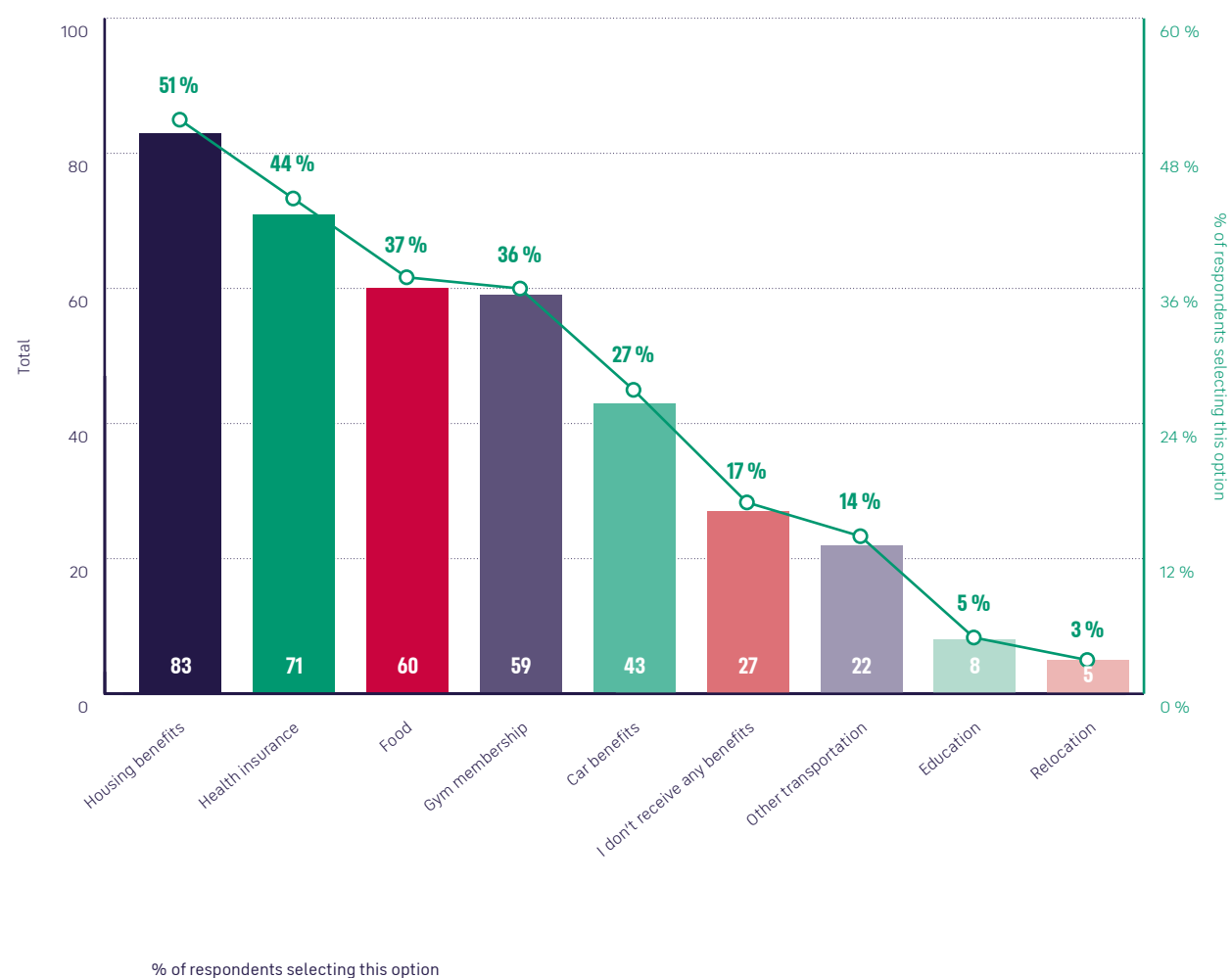
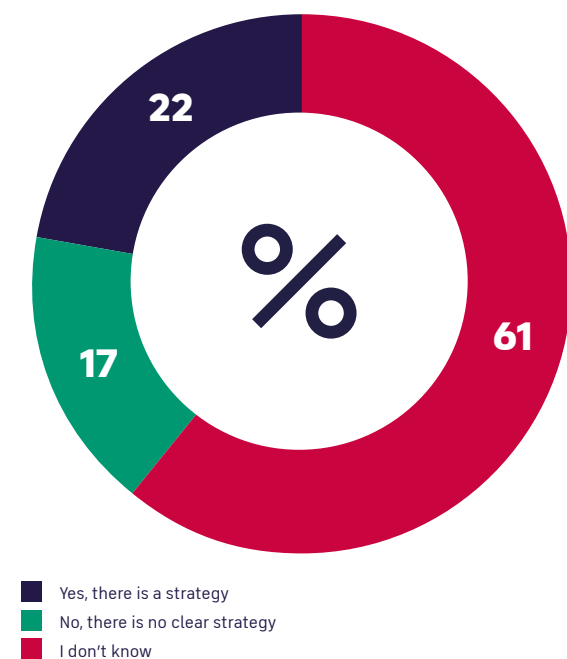


FIGURE 17. DO YOU KNOW IF YOUR CLUB HAS A DEFINED STRATEGY FOR FOSTERING THE GROWTH OF ITS WOMEN'S TEAM?



CLUB STAFF, STRUCTURES AND STRATEGIES

The majority of our 2019 FIFPRO Female Player Survey respondents felt there are not enough highly-qualified executives in the governance of the game and in football club hierarchies needed to move the game forward. The lack of creativity in the marketing and promotion of women's football were also often cited as challenges.

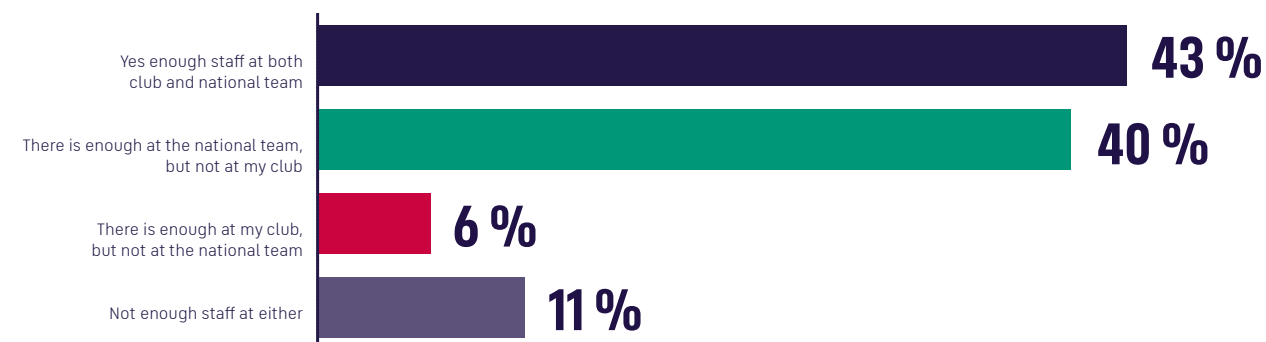
In our 2019 FIFPRO Female Player Survey, we asked female national team players about the women's football strategies and human resources at their professional clubs. The following data points provide revealing insights:

- 105 players (78% of respondents) said that their club has no clear strategy or they at least were not sure of it;
- Just more than half of the players (54 players) said that the club is also understaffed; they do not have enough backroom staff members to fulfil their needs as players. Only 8 of them said that the club has enough staff members;
- 23 players replied that their club has no clear strategy.

It can also be an encouraging sign that almost half (43%) of the respondents believe that there are enough staff currently employed at their clubs and national teams to fulfil their needs as players. But it is significant to see that 40% of players feel that there are not enough staff at their club level, while national team staffing is sufficient (Figure 18). This suggests the need for further investigation on improving human resources in women's elite football at the club level.

When we examine the specific staff positions reported by players as most lacking, we should be concerned to see that physiotherapist, team doctor and assistant coach are the top three reported roles (Figure 19).

FIGURE 18. DO YOU THINK THERE ARE CURRENTLY ENOUGH STAFF EMPLOYED AT YOUR CLUB AND NATIONAL TEAM TO FULFIL YOUR NEEDS AS A PLAYER? (% of respondents selecting this option)



TRAINING AND MATCH ENVIRONMENTS

The lack of proper sporting infrastructure was listed as a challenge by most of the respondents in the 2019 FIFPRO Stakeholder Survey. This is not limited to stadiums; even many professional teams have to contend with substandard training facilities.

Inappropriate facilities became a global subject of debate in 2015 when female players spoke out against playing the FIFA Women's World Cup on artificial turf – an occurrence not only subjecting them to greater health risks and injuries, but also reflecting gender discrimination.

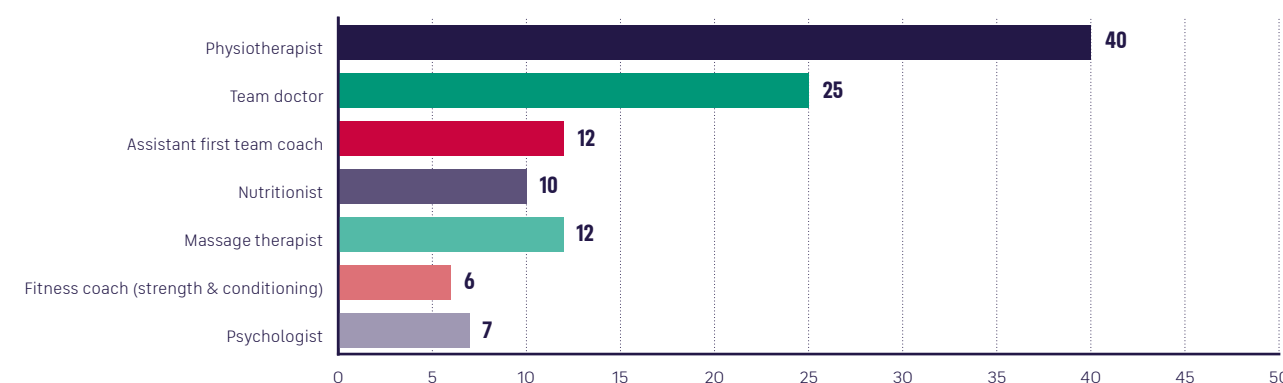
In 2017, Irish female national team players spoke out about the humiliation of changing into their tracksuits in airports because the federation would only loan them apparel. Women's national team players from Argentina, Brazil and Colombia have also drawn attention to inadequate accommodation, transportation and training facilities, which are vastly inferior to their male counterparts.

Colombian player union Acolfutpro released a report at the end of 2019 analysing the working conditions in Liga Águila Profesional Femenina, the women's professional league in Colombia. They found that eight out of 20 training pitches used by teams in the 2019 women's championship, Liga Águila, were not suitable for professional football. Some were unsafe, others were uneven or without grass, and most did not have changing rooms or showers.

If women will go to those lengths to play football, we can only imagine how the women's game will develop under the right global conditions.

Kelly Lindsey | United States
Former Professional Player
CNN (March 2019)

FIGURE 19. WHAT STAFF POSITIONS/ROLES THAT ARE NOT FILLED DO YOU MISS THE MOST?



Note: In many cases players said that a function is not available to them in a full-time capacity. In other cases they cite the absence of a qualified person in the role.



Photo by: Maurizio Borsari/AFL0



CASE STUDY FIFA PROPOSES SWEEPING CHANGES FOR WOMEN'S FOOTBALL DEVELOPMENT



On July 5, 2019, FIFA President Gianni Infantino held a press conference to outline five proposals for the women's game, two days prior to the FIFA Women's World Cup Final. These included the creation of a FIFA Club World Cup for women; the creation of a FIFA Women's World League (FWWL); the expansion of the FIFA Women's World Cup from 24 teams to 32 team; the doubling of the prize money for the next FIFA Women's World Cup; and the doubling of the investment committed to women's football over the next four-year cycle from USD 500 million to USD 1 billion.

The announcements acknowledge that new initiatives, including competition creation and reform, are needed to ensure that the power of football at the elite end of the game and its associated benefits are enjoyed across the globe. Another aspect is recognition of the key role club football plays in the advancement of the women's game, and the impact that developments in club football will have on the global landscape and international game. For example, the FWWL would aim to increase the quality and quantity of playing opportunities for women's national teams across the world. It would have a unique format that allows access for all 211 national federations, with development driven from both the top down, and from the bottom up.

Infantino stated in the press conference that he would like to launch the Club World Cup for women "as soon as possible." FIFA have already released

plans for an expanded Club World Cup for men to be played every four years, due to begin in 2021. In November 2019, FIFA and the Asian Football Confederation (AFC) launched a "pilot" Club Championship, which was known as the 2019 FIFA-AFC Pilot Women's Club Championship. This pilot featured four teams from the AFC and ran across five days in South Korea. The format was a single round-robin tournament, with Nippon NTV Beleza crowning the inaugural winners.

The investment proposals in their recent announcements, as well as the increased opportunity for visibility through elite competition, shows that FIFA is focused on ensuring development that would cascade down through the structures of football in each participating country. The proposals would encourage the strengthening of domestic competitions, and ultimately the clubs, leagues, and grassroots structures.



Photo by: Bagu Blanco/BPI/REX

NATIONAL TEAMS

PLAYER PAYMENTS

Many elite female players are still required to stitch together their football incomes as patchworks from various sources since one source — whether that be a single club or their national team — is often not enough to support them.

Payments for national team appearances are much more infrequent than the club salary, with year-round compensation for national team play being rare. Many players in the 2019 FIFPRO Female Player Survey reported that they did not receive any payment at all from their respective federations (hence the low median from 2016) (Figure 20).

It is common practice to only pay players if there was a training camp in the month or if they played any matches. In some cases, players said that they receive payments from the federation every 4 or 6 months, with others stating that they only get paid if they participate in international competitions. There are also instances of a performance-based payment system in which players receive compensation only if they win or draw a game. It must be mentioned that national team payments coming from the federation are generally infrequent and a share of surveyed players do not receive any compensation at all (although they are removed from this analysis). The results show that there was a small increase in per month national team payment over the last few years.

Ensuring stable financial footing is a challenging task for many elite female players who live in a constant state of financial precarity — resulting in many leaving the game prematurely. Many of these players are perpetually looking for ways to fill the gap between seasons with additional employment, not to mention where to play next season, in order to continue developing and be able to pay their monthly bills.

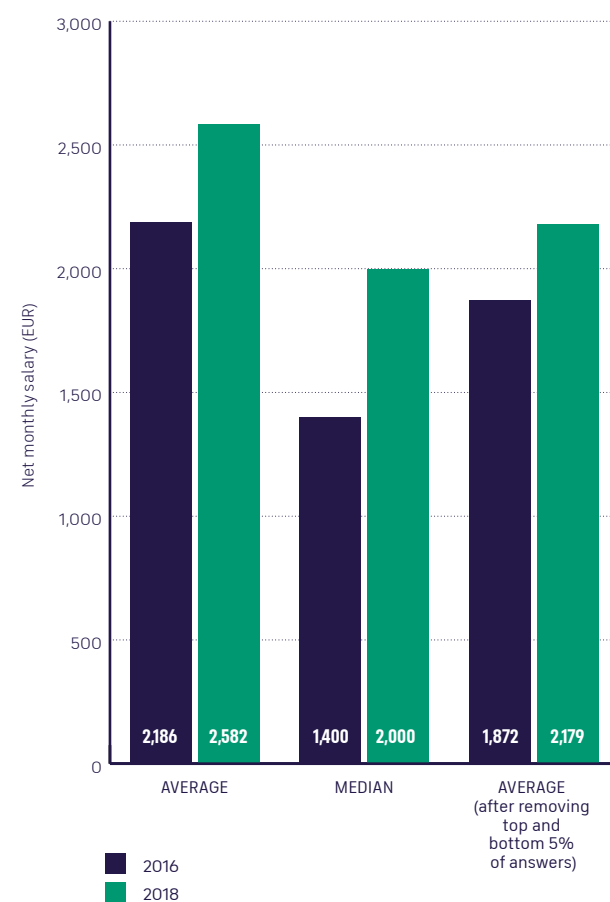
90% of respondents in our 2019 FIFPRO Female Player Survey reported receiving their football income from their club; and 80% from their national team (FA) (Figure 21). Significantly, 25% of players are receiving their football income from sources other than club, national team or sponsor. Respondents were able to select all categories that may apply, so many of these players may likely be receiving income from a combination of sources. We also know that many female players are required to play for two or more clubs in one year in order to make ends meet and fill the gaps of short calendar seasons.

Increase the salary so I can make football my #1 priority.

Professional Player | Denmark
2019 FIFPRO Female Player Survey

FIGURE 20. SALARY RECEIVED FROM NATIONAL TEAM

(excluding those who do not receive salary at all)



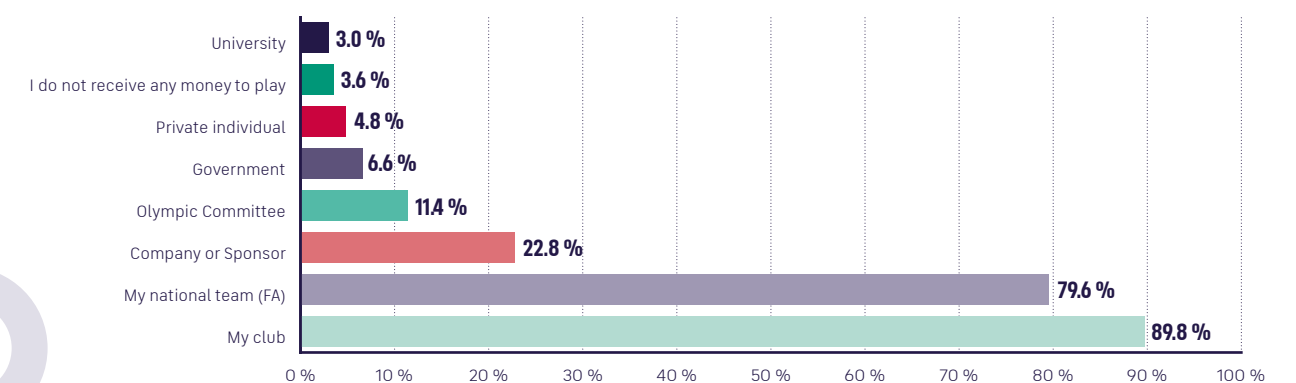
I'm finishing university next year and entering full employment. Pay from national team will be an important aspect for me. Compensation for national team must be at least at the level of my pay at work.

Professional Player | Slovakia
2019 FIFPRO Female Player Survey

FIGURE 21. SOURCES OF FOOTBALL INCOME

From which sources do you receive your football income?

(Percentage of respondents selecting the option)



COMPETITION PARTICIPATION

Within FIFA, 100% of the member associations (MAs) have a men's national team. This is not true for the women's game. Figure 22 illustrates the disparity between the men's and women's game at national level, with 73% of the 211 national federations having an active women's national team. This figure also represents a promising rise within the women's game as can be seen in Figure 22: in 2017 just 55% of national federations had an active women's national team according to the FIFA Women's Football Member Associations Survey Report 2019.

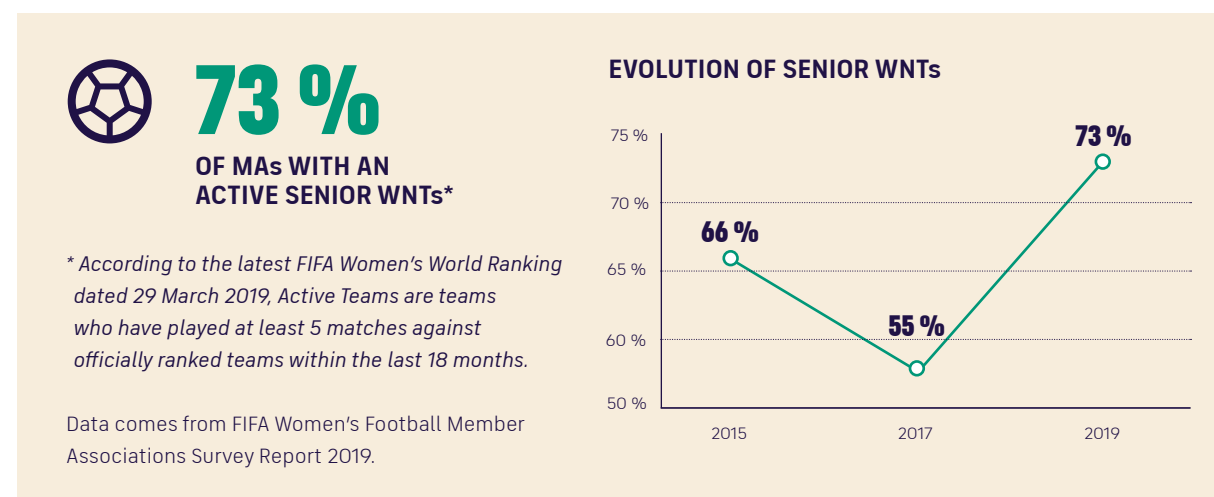
By the FIFA definition, active teams are teams who have played at least five matches against officially ranked teams within the last 18 months. Therefore, 27% of FIFA's member associations have inactive senior women's national teams.

It is important to highlight that the FIFA definition of 'active' does not take into account the regularity and frequency of play. In other words, a team does not need to have played consistently over 18 months, but rather just to have played five times. For example, all five matches could occur in one FIFA window and that team would qualify as 'active'.

NATIONAL FEDERATIONS WITH WOMEN'S FOOTBALL STRATEGIES

Recent data from the FIFA Member Associations Women's Football Survey (2019), shows that 76% of national federations have a women's football strategy; and 49.5% of national federations have a women's football department.

FIGURE 22. PERCENTAGE OF NATIONAL FEDERATIONS WITH ACTIVE WOMEN'S NATIONAL TEAMS (FIFA/COCA-COLA WOMEN'S WORLD RANKING, 03.29.19)

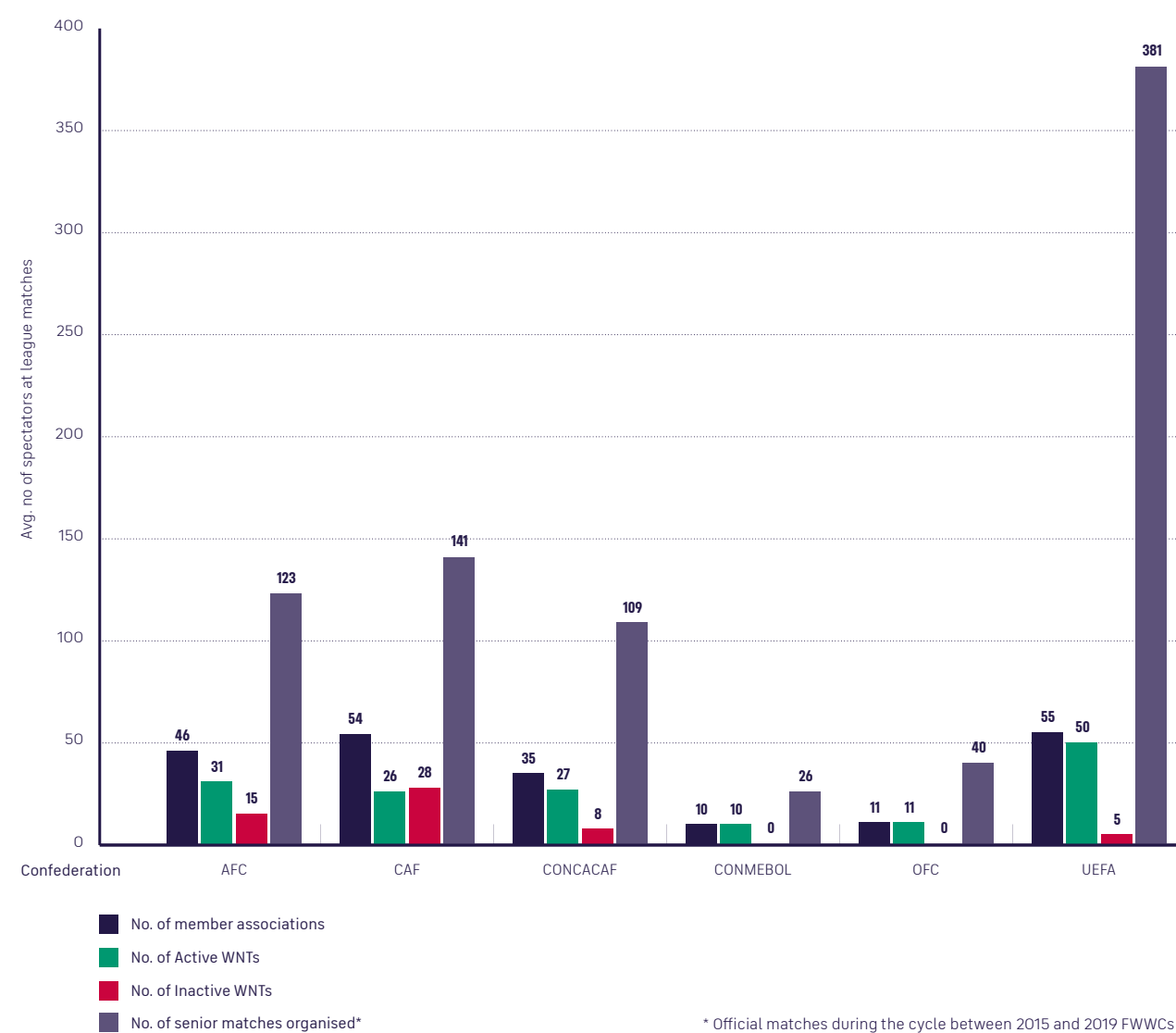


SUMMARY OF PLAYER CONDITIONS

Although some challenges were almost universally mentioned as important issues by all respondents in the 2019 FIFPRO Stakeholder Survey, it is clear that countries often have different priorities based on their respective level of professionalisation. The centrality of proper labour conditions was emphasized by over 80% of stakeholder respondents, who believe this to be a major concern and acknowledge that by not providing players with adequate working conditions, players are prevented from reaching their potential. There was a particular emphasis on wages that are still low in most places, which often results in players leaving the game early and well before they have been able to peak.

A sizeable share of respondents in the 2019 FIFPRO Stakeholder Survey also acknowledged that the domestic development of women's football is hindered by the negative cultural stigma attached to it. It is clear that the adverse conditions confronting female players today are heavily rooted in biases and preconceived notions that have long placed a lack of value on the women's game and those who play it. These biases manifest in the material realities, so moving mindsets and changing attitudes is a crucial part of the change required. However, female players and their professional game cannot and should not wait – and indeed they are not, as we discuss in the next chapter.


FIGURE 23. ACTIVITY LEVEL OF WOMEN'S NATIONAL TEAMS BY CONFEDERATION



CASE STUDY TRAVEL AND ACCOMMODATION: ARGENTINA

The Argentinian FA arranged for both the men's and women's national teams to play on consecutive days against Uruguay in Montevideo in August 2017. The men were playing in a 2018 Men's World Cup qualifier and the women in a warm-up ahead of the 2018 Copa América Femenina. While the Football Association organised for Lionel Messi and his teammates to stay in a 5-star hotel on the eve of

their match, they instructed the women to leave Buenos Aires at 4 a.m. by bus on the day of their match – their first game in 18 months – and return immediately after the match. The female players protested against their treatment a few months later by posing for a team picture on the field with their hands cupped to their ears, asking for federation officials to listen to their complaints.



**IT'S NOT JUST ABOUT
THE MONEY, IT'S ABOUT
RESETTING THE PRECEDENT
AND STANDING FOR WHAT
WE AND FUTURE
GENERATIONS DESERVE.**

Chinyelu Asher | Jamaica

Stabæk IF

Instagram (September 2019)



CASE STUDY PLAYER PAYMENTS AND PRIZE MONEY

Prize money and fees granted on the basis of participation and performance in a competition are one of the key conditions of tournaments. FIFPRO has included these within the Global Standards for International Tournaments under 'Player Payments' as they essentially represent a redistribution of income from competitions to teams and eventually to the players themselves.

As the professionalisation process of women's football – and women's sport more broadly – pushes forward, the issue of inadequate prize money is rightfully coming to the fore. The main issue is that the prize money in women's football competitions is much lower than in men's tournaments organised by the same entities (FIFA, UEFA, CONMEBOL etc.).

The largest sum of prize money for a women's competition is currently offered by the FIFA Women's World Cup, which doubled to USD 30 million for the 2019 tournament. However, this still pales in comparison to the USD 400 million allocated for the 2018 FIFA Men's World Cup, and only equates to 7.5% of the total Men's World Cup prize money in 2018. Moreover, prior to the 2007 edition of the women's tournament, there was no prize money at all.

In the wake of the 2019 tournament, FIFA President Gianni Infantino promised that the prize money pool will once again double (amounting to USD 60 million) for the next Women's World Cup in 2023. However, there are several caveats to this. News of the raise came before the announcement of expanding the competition from 24 to 32 teams, which somewhat reduces its significance as it will be distributed between more national teams. Moreover, the FIFA Men's World Cup will benefit from an increase of USD 40 million for their next event in 2022, which only serves to further widen the already massive prize money gap between the two tournaments. It must also be mentioned that the exact prize money figures are not yet finalised, and FIFA have left room for negotiations in the time between now and 2023.

The UEFA Women's European Championship has

the second highest prize pool after the FIFA Women's World Cup with a total prize money of USD 9.2 million, while the other continental tournaments are far behind. The Women's African Cup of Nations has a prize pool of slightly less than USD 1 million. In other confederations (AFC, CONMEBOL, CONCACAF) there is no prize money at present for playing in national team competitions.

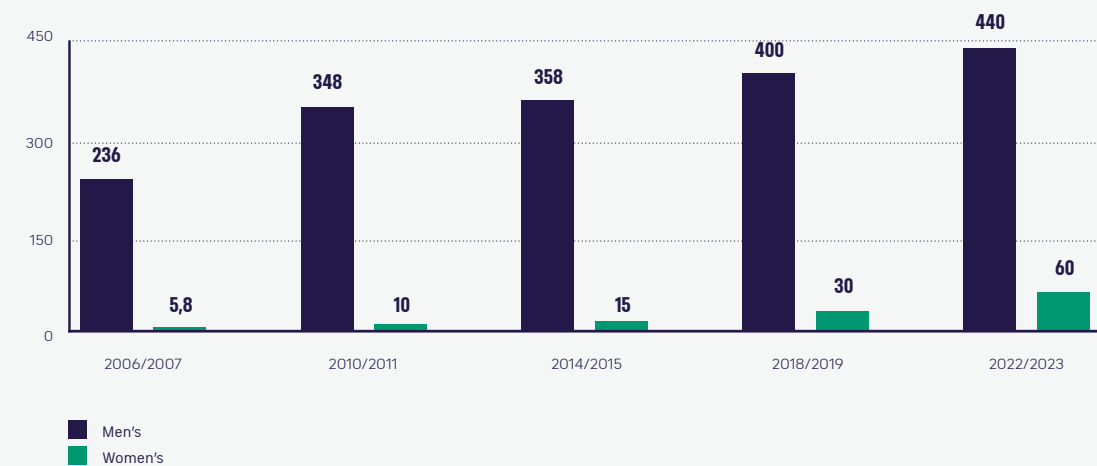
Regarding club competitions, the situation is similar. In UEFA's flagship competition, the Women's Champions League, the winning club only received a bonus payment of EUR 250,000 in the 2018/19 season, with a total prize pool of around EUR 5 million. As a comparison, the men's Champions League's most recent season boasts a total prize pool close to EUR 2 billion.

In CONMEBOL's Copa Libertadores, the gaps keep increasing with poor incentives and unequal treatment. In 2018, the men's Copa Libertadores doubled the prize money for the champion and runner-up from USD 3 to 6 million and USD 1.5 to 3 million respectively, with a total pool of USD 103.5 million. In 2019, the prize pool increased 50%, reaching USD 211.1 million, with an accumulated prize of USD 20.4 million for the winner. In 2019, the women's Copa Libertadores prize money pool was USD 285,000 allocating USD 85,000 to the winner. The men champions win 240 times more than the women; in other words, the women's prize represents 0.41% of the men's.



THE EVOLUTION OF FIFA WORLD CUP PRIZE MONEY FOR MEN'S AND WOMEN'S

(USD million)



PLAYERS' VOICES

5



Photo by: Dave Winter/Icon Sport

PLAYERS' VOICES

Players have strong views about their industry. In time, many will work in the industry and help shape the game. It is essential to listen to and understand their views, interests and values for the game and their profession.

KEY MESSAGES FROM OUR 2019 FIFPRO FEMALE PLAYER SURVEY

STRONG FOUNDATIONS

Players have a realistic understanding of their career prospects and measure progress not only for themselves but also for coming generations. They do not want short-term progress to come at the expense of long-lasting solutions for the game. It is important to further develop the distinctive DNA of the women's game. That means protecting the valuable and distinct assets the women's game has cultivated thus far – including proximity to fans, accessible role models, and opportunities for education.

RECOGNISE US

For many players the biggest challenge for their generation is still the daily struggle for recognition and staying in the game. This dominates their global outlook in the women's game and their views on industry responsibilities are seen through this prism. Their status as professionals is still undefined in many regions of the world. Contracts are often precarious and prevent players from being able to focus on their job responsibilities.

We need more belief in female players.

Professional Player | Portugal
2019 FIFPRO Female Player Survey

A LEVEL PLAYING FIELD

While players are enthusiastic about innovative new competitions, many want to nurture national competitions. They want a level playing field for teams to ensure the best sporting competition. A competitive championship will define its commercial value and underpin the employment opportunities for players.

TELLING OUR STORY

Women's football has come a long way and there is no one who knows this better than the players themselves. Players are well aware of the obstacles women's football has overcome and the ones still ahead. This has given many female players the strength to fight for equality on and off the pitch. Many are eager to share their experiences and perspectives about their journeys.

A COLLECTIVE RESPONSIBILITY

Players have experienced the lack of investment in their game and are seeking a collective vision by federations, leagues, clubs, confederations, FIFA and action plan for the women's game. Many players also see a key role for men's clubs to provide expertise, infrastructure and equal opportunities.



Photo by: Chloe Knott for The FA/REX

PLAYER ACTIVISM

Female players worldwide are organising and demanding better conditions as their game professionalises. Through joining their national unions and establishing new ones, they are building collective representation. They are developing collective bargaining agreements with their federations and leagues at the domestic level, and simultaneously joining in solidarity at the international level to demand just and fair conditions for the FIFA Women's World Cup and regional competitions. At the same time, many of these players see their role extending beyond the pitch, using their growing popularity and visibility to unite their struggle for women's rights and labour rights with social justice movements off the field.

In the sections below, we outline some of the recent actions and demands of female players from across the world at both the collective and individual level, making evident the global movement underway and the power of players' voices to incite change.

Women's football has a rich history of player activism – both at the level of the individual and the collective. While activism in women's football has taken on various forms and been carried out through numerous avenues across different contexts worldwide, in almost all cases it has been about the demand for equality of opportunity and fighting against prejudicial treatment to ensure all are treated fairly and with respect. This has created a strong sense of justice and solidarity amongst female players.

With the growing industry and the influence of shifts in the global economy, the role and reach of these women is also shifting. While many of the issues for which they are fighting remain the same, female players are becoming more visible, recognisable, popular and public facing. Consequently, individually and as a collective, players are being seen more widely and heard more loudly as global stars and ambassadors of the game. At the same time, they are also joining their peers and women worldwide in the fight for equality and justice.



CASE STUDY
DISCRIMINATION AND ABUSE OF WOMEN IS A GLOBAL CRISIS



Gender discrimination, sexual harassment and abuse represent major issues in the women's game, and in many regions, the prejudice towards women who play the sport is continuous.

A recent case in Afghanistan reveals the harrowing treatment confronted by female players. In November 2018, the footballing world was rocked by horrific accounts of sexual abuse of players in the Afghanistan Women's National Football Team. Keramuudin Karim – then President of the Afghan Football Federation (AFF) – was at the heart of these allegations. A number of the women who courageously spoke out were forced to flee the country. FIFPRO supported their resettlement and lobbied FIFA for a full investigation.

In June 2019, FIFA handed down a lifetime ban for Karim, and ordered him to pay a CHF 1 million fine. In October 2019, the General Secretary of AFF was suspended by FIFA for 5 years and fined CHF 10,000 for complicity and failing to act on the allegations, and FIFA continues to investigate other football officials in the Federation. In Afghanistan, a criminal investigation has been opened against Karim and others. Danish sportswear manufacturer Hummel, who sponsored the women's team, cut ties with AFF citing the abuse allegations. All these developments send a clear message to those seeking to abuse their power and exploit women in the game that abuse will not be tolerated.

The bravery of these women has led to a global footballing #MeToo movement, and it's become clear that Afghanistan is not an isolated case. Since the Afghan story broke, reports of sexual abuse of girls and women have surfaced around the world including Colombia, Ecuador, Gabon, Canada, India and more.

There is an urgent human rights crisis at hand, with significant long-term impacts to players' lives. As the women's game grows, so does the risk of abuse. At the governance level, appropriate measures are needed to ensure players are protected and safe and have proper access to reporting and remedy mechanisms. Further, there is no clear process for urgent support of players who have been affected. FIFA and its stakeholders must now fully investigate and address these systemic issues, overhaul its systems to ensure they are transparent and fit for purpose, and put in place an effective support process for victims and whistle-blowers.



Photo by: Khalida Popal



CASE STUDY
U.S. WOMEN'S NATIONAL TEAM FILES GENDER DISCRIMINATION LAWSUIT



On 8 March 2019, International Women's Day, the U.S. Women's National team filed a gender discrimination lawsuit against the U.S. Soccer Federation over pay equity and working conditions. The players stated that the discrimination affects more than their paychecks, also impacting how they train, where they play and how often, how they travel to matches, medical treatment and coaching.

This U.S. women's team includes some of the most accomplished female athletes in the world representing a team that is a four-time FIFA Women's World Cup champion and four-time Olympic gold medalist. The U.S. women are ranked number one in the world, 30 places above their male counterparts, and generated nearly USD 20 million more revenue in 2018 – but are still paid significantly less. The women's players argue that the financial support and infrastructure they receive from their federation is inferior to that of their male counterparts. Moreover, they are required to play more games than the men's team, while they win more of them, and yet still receive less pay from the federation.

The lawsuit stipulated that if each team played and won 20 exhibition games in a year, "Female WNT players would earn a maximum of USD 99,000 or USD 4,950 per game, while similarly situated male MNT players would earn an average of USD 263,320 or USD 13,166 per game". The gender gap in payment from U.S. Soccer around the FIFA World Cup is also significant. From World Cup qualification payment, to squad bonuses, to win bonuses, to bonuses for advancing to the group stages and prize money for winning the World Cup, the U.S. women receive less than the U.S. men.

The players have made clear that this is about much more than the money. This is about ensuring decent and fair working conditions that enable female players to perform and compete at their peak. And to likewise garner the support and resources that they deserve so that they can generate the full potential their talent warrants.



Photo by: Jonathan Moscrop

TIMELINE OF RECENT FEMALE ATHLETE ACTIVISM

Player activism takes place all over the world and touches on several issues. Female players have bravely stood up for their rights and beliefs on and off the pitch. These cases show that the impacts extend beyond the players themselves, into the wider society and environment in which they are operating.

Female players are demanding investment in their game, a removal of the barriers inhibiting equal participation in football and an overall equal playing field. Their demands have never had such potential to reach and garner an attentive audience as today. The reach and platforms owned and defined by the players as individuals and collectively, as well as general societal trends, suggest that their messages for a more just game and society will continue to be amplified.



2016

USWNT

USWNT filed a wage discrimination action against the US Soccer Federation with the Equal Employment Opportunity Commission.

2015

2015 FIFA WWC

81 players from 13 countries, petitioned FIFA to change their decision to play the competition on artificial surfaces and opted to sue as a case of gender discrimination.



2017

ENI ALUKO

Aluko courageously spoke out in 2017 against racial discrimination in women's football in England and continues to use her platform to call out racial injustice in football.



2017

USA HOCKEY

USA Women's hockey team announced plans to boycott the World Championship, unless they received fairer compensation and increased support.



2017

CRISTIANE

In Brazil the firing of the first woman to lead the country's national team triggered the retirement of several top players and unleashed a torrent of criticism against the national soccer federation (CBF) over several issues related to its treatment of women. Star player Cristiane was very vocal in this fight.



2018

WORLD SURF LEAGUE

Professional female surfers fought for equal prize money, resulting in the World Surf League providing equal prize money for male and female competitors on their Championship Tour.



2018

SERENA WILLIAMS

Serena Williams, one of greatest athletes of all time, has not only been vocal in the fight against sexism and the necessity of equal pay, but has also been normalising the conversation about mothers returning to elite sport after childbirth.



2018

AFGHANISTAN WNT

In 2018, players from the Afghanistan women's national team courageously spoke out against sexual abuse and discrimination within their federation.



2018

WNBA

The WNBA players pushed for better treatment and compensation by opting out of their CBA with the league.



2019

MEGAN RAPINOE

Reign FC and US women's National team player Rapinoe has been a leading voice in the fight for social justice, leveraging her prominent star status and football platform to propel LGBTIQ rights, gender equality and racial justice.



2019

USWNT

All 28 players on the USWNT sued the US Soccer Federation on March 8th for unequal pay and treatment.



2019

MACARENA SANCHEZ

Argentinian player, Macarena Sanchez, sued the Argentinian Federation and her club, UAI Urquiza, demanding the recognition of her employee status and the rights of female players.



2019

NADIA NADIM

Nadim, who fled Afghanistan as a child and became a refugee in Denmark, has been outspoken on refugee rights. In 2019 she was named ambassador for Danish refugee council and designated UNESCO champion for girls and women's education.



2019

JAMAICA WNT

Jamaica women's national team spoke out about non-payment by the Federation following their first ever participation in the World Cup.



Photo by: Elise Amendola



CASE STUDY
INSIGHTS FROM TENNIS FOR ADDRESSING THE GENDER GAP IN SPORTS



Tennis is one of the most popular women's sports, certainly the top non-team activity. Attendance figures at tournaments are often similar to the men's game and TV viewership figures are sometimes even higher. As an example, the 2018 US Open Women's Final was watched by 3.1 million viewers, while the Men's Final drew a little over 2 million.

But these impressive figures have not come out of nowhere. The movement for equality in tennis was spearheaded by Billie Jean King in the 1970s, showing how important and influential a high profile and popular figure can be for women's sports. She founded the Women's Tennis Association (WTA) with eight other players, demanding equal prize money and creating a robust structure for competitions and an appealing backdrop for sponsors and broadcasters.

Around 50 years ago, there was a huge difference in tennis prize money between the men's and women's competitions – women only received around 20-40% of what men got for the same results. The first big milestone happened in 1973 when the US Open introduced equal prize money for the women's and men's tournaments. Before this decision, the relative maximum prize for female players compared to their male counterparts was 60%. The next Grand Slam which introduced equal pay was the Australian Open, starting from 2001. There was a short period in the 1980s and 1990s when prize money was already similar between the sexes. Interestingly, women even received more prize money in 1987 and 1988.

However, the new policy of equal prize money was introduced only later. The French Open was the third high-profile tournament to set equal prize money for

men and women in 2006. Finally, Wimbledon also decided to join the other Grand Slams: since 2007 there has been equal prize money in all four Grand Slams.

While the prize money in all four of the major tennis tournaments is the same for men and women, this is still not the case across other Association of Tennis Professionals and Women's Tennis Association (WTA) competitions. The prize money in tennis has doubled since 2009 reaching USD 130 million and today female tennis players have the opportunity to land big-money endorsements and enjoy a wide media coverage. But even tennis, often a best-practice example in the fight for women's rights in sport, continues to have to fight for gender equality and a level playing field.

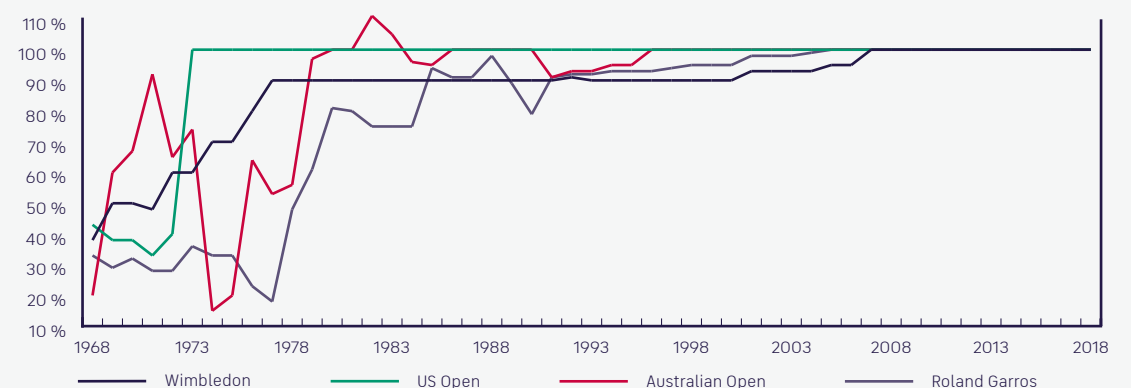
Top player Serena Williams, who holds the record for winning the most Grand Slam titles in the Open Era – and who was the only women on the Forbes list of top 100 highest paid athletes in 2017 – was outspoken in 2018 on the necessity for all players to be paid equally.

Who believes that equal prize money in tennis is justified because the women today generate just as much revenue, have an equally strong viewership and consumer demand as their male counterparts must keep in mind that the revenue and viewership are the effects and not the causes of giving the women's game a chance.

There is still more work to do even in tennis to expand the chances and opportunities for women in the game, but football can already glean some key insights.

GRAND SLAM WOMEN SINGLES WINNERS' PRIZE MONEY BETWEEN 1968 AND 2018

(100 % = men's event prize money)



PLAYER INFLUENCE

As female players become more visible and speak more loudly for change at the level of their game and society, they are gaining a stronger foothold as influencers in the public sphere. Through these platforms they are able to market themselves and drive fan engagement from player-centric positions.

In the process, they are spreading messages of inclusion, equality and authenticity as they demand equal treatment and simultaneously showing how their struggles on the field mirror wider struggles of women beyond the game.

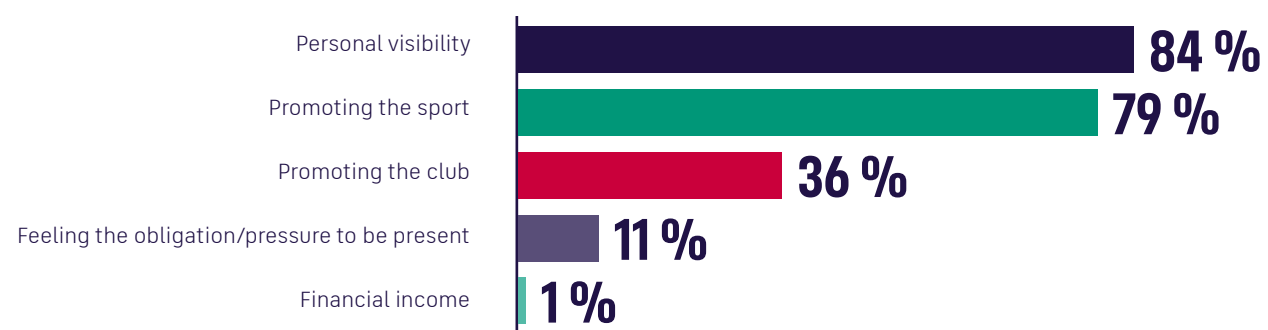
Star players are increasingly able to use their icon status and high-profile visibility via new media channels to generate attention and support for their game. Fans are responding and sponsors are jumping at the opportunities. Where do these women stand in

comparison to the men's game and to other female athletes in terms of garnering attention and using these platforms? And what are the messages they are sending out? Our analysis shows that significant changes are taking place while there is ample potential to further leverage the power and influence of star players.

96% of respondents in our 2019 Female Player Survey reported being active on social media. In terms of platforms, 97% are active on Instagram; 78% on Facebook; and 54% on Twitter, with lots of overlap possible.

The majority of respondents reported that their reason for presence is for personal visibility (84%) and for promoting the sport (79%). About one third of respondents reported it is for promoting the club (36%); and 11% said it was because of the pressure and feeling of obligation to be present in this space. Only 1% reported that they do it for financial income (Figure 24).

FIGURE 24. WHY ARE YOU ACTIVE ON SOCIAL MEDIA?



We have to do more in general—we have to be the athlete, we have to be the role model, we have to lead the way for the next generation.

Alex Morgan | United States
Orlando Pride
Time Magazine (May 2019)

TOP 20 ACTIVE FEMALE PLAYERS BY NUMBER OF FOLLOWERS ON SOCIAL MEDIA (AUGUST 2019)

Facebook, Twitter and Instagram combined, million followers

PLAYER	POSITION	CLUB	COUNTRY	FOLLOWERS IN MILLIONS	6-MONTH CHANGE IN %
Alex Morgan	Forward	Orlando Pride	USA	16.8	34%
Megan Rapinoe	Midfielder	Seattle Reign	USA	3.6	180%
Sydney Leroux	Forward	Orlando Pride	USA	3.6	3%
Carli Lloyd	Midfielder	Sky Blue FC	USA	2.8	17%
Marta	Forward	Orlando Pride	Brazil	2.8	92%
Ali Krieger	Defender	Orlando Pride	USA	2.0	22%
Kelley O'Hara	Forward	Utah Royals	USA	1.5	42%
Christen Press	Forward	Utah Royals	USA	1.4	31%
Julie Ertz	Defender	Chicago Red Stars	USA	1.4	48%
Lieke Martens	Forward	FC Barcelona	Netherlands	1.4	53%
Ashlyn Harris	Goalkeeper	Orlando Pride	USA	1.3	37%
Tobin Heath	Midfielder	Portland Thorns	USA	1.3	31%
Heather O'Reilly	Midfielder	N.C. Courage	USA	1.1	7%
Morgan Brian	Midfielder	Chicago Red Stars	USA	0.9	10%
Becky Sauerbrunn	Defender	Utah Royals	USA	0.9	13%
Toni Duggan	Forward	FC Barcelona	England	0.8	21%
Eugenie Le Sommer	Forward	Lyon	France	0.8	39%
Christiane Endler	Goalkeeper	Paris Saint-Germain	Chile	0.8	84%
Meghan Klingenberg	Defender	Portland Thorns	USA	0.7	2%
Mallory Pugh	Forward	Washington Spirit	USA	0.7	85%



**FAR TOO OFTEN WE SEE
WOMEN HAVING TO MAKE
A CHOICE BETWEEN
MOTHERHOOD AND THEIR
CAREER. IT WOULD BE VERY
SAD TO LOSE OUT ON THE
TALENT WE HAVE BECAUSE
THEY FEEL LIKE THEY
CAN'T DO BOTH.**

Sydney Leroux Dwyer | United States
Orlando Pride

Twitter (February 2020)

COLLECTIVE BARGAINING & ORGANISING

Collective bargaining in professional women's football helps to identify the right balance between employment conditions of players and the economic resources of leagues, clubs and federations to allow sustainable growth for the women's game. However, not enough players are given the opportunity to play a part in developing their industry.

If we look at the four countries that made it to the semi-finals of the 2019 FIFA Women's World Cup – USA, Sweden, Netherlands, England – it is no coincidence that all four of these countries have strong collective bargaining agreements (CBAs) in place between their women's national teams and the federations.

COLLECTIVE BARGAINING AGREEMENTS OF 2019 FIFA WOMEN'S WORLD CUP SEMI-FINALISTS

USA
CBA SIGNED 2017




SWEDEN
CBA SIGNED 2017



NETHERLANDS
CBA SIGNED 2017



ENGLAND
CBA SIGNED 2019



The top ranked team in the world, the US has the top conditions for its players as negotiated in their new CBA; Sweden also signed a new agreement in 2017 with much improved conditions and which ensures the same structure as their male counterparts. England likewise signed a CBA in 2019 just prior to the World Cup; and the Netherlands' new agreement will guarantee equal conditions with their male counterparts by 2023.

The example of the US national team also shows the importance of elite talent development and access to equal training and development opportunities from an early age onwards. The existence of US government regulation through Title IX of the Education Amendments Act of 1972, had a huge impact on the sport system in the United States. This federal civil rights law protects people from discrimination based on sex in

all federally funded educational institutions; for sports this means that athletic programs across schools and universities are required to provide equal access, benefits and opportunities to male and female athletes.

In UEFA's recently released Women's Football Strategy 2019 - 2024, a stated key commitment was the establishment of collective agreements in women's football in all 55 of their member associations by 2024.

While similar commitments have yet to be made by the other confederations, it is encouraging to witness an increase in collective action amongst the female players who are finding various ways to voice their concerns and demands for better conditions and collective bargaining.



2015

Female players in Italy made an important breakthrough in their quest to be recognised as full-time professionals, after the threat of strike action saw local football authorities finally agree to put previously agreed principles in writing.



2015

The Australian women's national team abandoned their training camp and canceled their trip to play against World Champions USA as protest against the disrespectful treatment from their federation; they stated they would only make their appearance when there was a new CBA between PFA Australia and the FFA.



2017

After Danish female players protested over pay and conditions by sitting out a match against Holland and a World Cup qualifier against Sweden, the Danish team successfully negotiated a new four-year agreement on working conditions with their federation. The agreement allows the players to combine their daily life with the national team.



2017

The Republic of Ireland women's team spoke out about their sub-standard conditions including changing in airport bathrooms and sharing tracksuits. The Irish women had the Professional Footballers Association of Ireland (PFAI) represent them in negotiations with the Football Association of Ireland (FAI) to improve their conditions.



2017

The Argentina women's national team went on strike in 2017 over non-payment of USD 10 stipends, and citing structural problems and lack of basic resources to properly train and play matches.



2017

Norway's footballers signed an equal-pay agreement with the Norwegian FA that will see all international senior male and female players paid the same wages.



2018

In early 2018, New Zealand footballers reached an historic agreement wherein both male and female players fall under the same contract.



2019

The Finnish FA announced a new four-year equal pay deal, wherein it will pay its men's and women's national teams equally and hopes the example will inspire other entities involved in women's football.



2019

In November 2019 the National Federation of Australia and the players' union struck a new 4-year landmark CBA that closes the pay gap between Australia's men's and women's national teams.



Photo by: Greig Cowie/BPI/REX



CASE STUDY PLAYERS PURSUE CHANGE IN SOUTH AMERICA



The registration and participation of teams in South America remains a key concern, but players are organising and demanding proper and equal treatment.

By the end of 2016, six of the ten CONMEBOL members – Argentina, Bolivia, Chile, Peru, Paraguay and Uruguay – were removed from the women's FIFA ranking as a result of inactivity for over 730 days. This stagnation, allied to opportunities for female players in the region to share experiences and organise collectively, prompted a female player-led movement in South America demanding proper and equal treatment.

The FIFPRO South American Forum in August 2018 was the first meeting for regional players from Argentina, Brazil, Chile, Colombia, Uruguay and Venezuela. This meeting created a space for international collaboration amongst the players and emphasized the importance of collective action for women to reach agreements and progress in improving the conditions.

Many collective actions to defend the rights of female players in Latin America have subsequently taken place as outlined on the following pages.



Photo by: Juan Karita

FEMALE PLAYERS ORGANISING IN SOUTH AMERICA: A TIMELINE

2016 — 2017 — 2018

First professional women's league launches in Colombia and Venezuela.

AUGUST

Chile establishes their own female footballer players' association, ANJUFF. The organisation collaborates with the Chilean FIFPRO member, SIFUP.

SEPTEMBER

After 17 years, Cristiane resigns from Brazil's national team due to the conditions.

In Argentina, the national team goes on a two-week strike to force their federation to improve conditions. Less than a year later they qualify for the FIFA Women's World Cup after a 12-year absence.

OCTOBER

Brazilian players write an open letter over conditions and the unequal treatment of women in the federation.

APRIL

During Copa América, Argentina's women's national team demand improved conditions by recreating Riquelme's iconic goal celebration and protest gesture.

AUGUST

FIFPRO South American Women's Forum held in Chile with female players and union representatives from Argentina, Brazil, Chile, Colombia, Uruguay and Venezuela.

DECEMBER

Female players get two seats on the board of the Uruguayan Football Association.



Photo by: ZUMA Press, Inc.

2019

CONMEBOL's club licensing regulations come into force: to compete internationally clubs must have a female team and one female youth category.

MARCH

The first professional women's league in Argentina. AFA, in an agreement with players' union (FAA) covers the professional contract of eight players per squad. It contains a wage slightly above the national minimum, social security cover and a preseason medical check-up from the FAA.

The Colombian federation tries to end the professional league. The decision is revoked. With a working group including female players and union representatives the league is improved.

In Chile, Members of Parliament elaborate a bill to professionalise women's football.

APRIL

Ecuadorian players accuse national team staff of sexual abuse.

A lawyer and some Colombian players created AFUTCOL an association for female players.

JULY

The Colombian players' union request an intervention from the constitutional court for discrimination against female players.

Brazil's round-of-16 match against France was viewed by more than 35 million people on Globo TV in Brazil, the largest domestic audience to watch a women's football match anywhere in history.

NOVEMBER

The Argentina players' union and FA reach an agreement on player pregnancy. Players will receive their salary until returning to activity, even if the contract expires.

New attendance record for women's football in Brazil: 28,862 people watched final of São Paulo state championship.

DECEMBER

Brazil and Colombia bid for the FIFA WWC 2023, a continent that has never held the event, reflecting the growing attention for WF.



Photo by: Richard Sellers

CALL TO ACTION

6



CALL TO ACTION

As female players organise, the call to action is loud and clear: fair treatment, decent work, equal opportunities and the right to viable career paths as professionals in this industry. Players are the most important resource for all football teams and the athlete is central to the existence of sport. The potential of the game and the industry is dependent on the potential of the player being fulfilled. This can only be realised under proper conditions that support the physical and mental well-being of players and protect and promote their ability and integrity.

While there are going to be numerous models that might be applied to foster the growth of sustainable employment markets for professional women's football, there is one common denominator required: the working conditions under which players train and perform must

match the ambitions and potential in the game. This means the establishment of basic global standards for player conditions at both the domestic club level and the international level.

ESTABLISHING STANDARDS FOR THE WORKING CONDITIONS OF PLAYERS

International labour standards set out the basic principles and rights at work. The International Labour Organisation (ILO) has developed a system of international labour standards aimed at promoting opportunities for people to obtain decent and productive work, in conditions of freedom, equity, security and dignity. Meeting these labour standards and creating the conditions of work that comply with national and international standards is essential to players in the football industry and the protection of their rights as athletes.

We need to set standards, and these should not be based on what the women will accept but rather a higher set of standards similar to what would be done for men.

Professional Player | Canada
2019 FIFPRO Female Player Survey

IMPLEMENTATION AND ENFORCEMENT

Establishing these industry standards is essential, but the full application of such working standards depends on proper implementation and enforcement. How these standards for player conditions are applied must be monitored and enforced through a joint responsibility between FIFA and FIFPRO.

These standards for global conditions will only be the bare minimum required. How these conditions are implemented will vary significantly across regions, leagues, and clubs. However, they must be implemented in order to ensure that players are at the centre of the game's development. As FIFPRO, we are not suggesting a single model or formula for the implementation of these conditions. Rather we are presenting them as necessary ingredients.





GLOBAL MINIMUM LABOUR STANDARDS FOR PROFESSIONAL FOOTBALL

Together with the need to recognise the fundamental worker's rights and human rights of players is the necessity for the industry to establish a set of global minimum labour standards for the working conditions of professional female football players. The following 12 categories require minimum labour rules for global professional women's football:



Note: Each of these categories must have a minimum standard below which no condition shall fall. Yet, this minimum standard must not become a cap. For example, management (FA's / Clubs) can and should be encouraged through collective bargaining to give their players benefits greater than those stipulated in the minimum standards.



CONTRACTS

Written contracts are an essential component of recognising the professional status of players and ensuring they are protected under employment law. Agreements between leagues and players, and between national federations and players, are also crucial. A lack of written contracts in the women's game creates deep-seated insecurity and uncertainty, leaving players unprotected.



HEALTH & SAFETY

Players must be safe from precarious conditions and protected from harm arising from their employment, including protection from abuse, violence and harassment in the workplace.



TRAINING & MATCH ENVIRONMENTS

Players must be given the adequate infrastructure, facilities and material conditions to perform their job at their peak. Proper playing environments also means appropriate human resources and staffing.



WAGES & COMPENSATION

Players must receive adequate and regular wages. The regular payment of wages and the guarantee of a minimum wage are necessary.



WORKLOAD

Players must benefit from obligatory rest and recovery periods. Within the club environment, players must have a mid-season break and an off-season break which should be treated as paid leave. This is about ensuring their rights as workers are protected and the expected high performance standards are upheld while safeguarding players' physical and mental health.



EMPLOYMENT PROMOTION

Stakeholders representing management as employers, governing bodies or investors in the international football community must take action to promote employment and sustainable growth in professional football. This means a) promoting competition participation; b) stabilising and innovating competitions; c) marketing competitions; and d) ensuring work-life balance.



SOCIAL PROTECTION

Social security is a human right which responds to the universal need for protection against certain life risks and social needs. Effective social security systems guarantee income security and health protection. Players must be guaranteed minimum standards of protection – just like workers in other professions – through benefit schemes in case of sickness, unemployment, old age, employment injury, data protection, and maternity and parental responsibility.



PLAYER DATA PROTECTION

Players have the right to protection and exploitation of their image and their personal and performance data. Data protection, specifically the General Data Protection Regulation (GDPR) applies to the collection and use of personal player data. The rights of players and the application of data privacy rights to the football industry are emphasised in more detail by the FIFPRO Charter of Players Rights.



FREEDOM OF ASSOCIATION & COLLECTIVE BARGAINING

Every professional player has the right to organise and join player unions that are independent of government and employer influence. Every professional player also has the right to collective bargaining.



NON-DISCRIMINATION

Every player is entitled to equality of opportunity without distinction of any kind and to be free from discrimination, harassment, abuse and violence.



ACCESS TO REMEDY

Players must be able to access an effective remedy in the event that their rights are violated. Players must be empowered to alert authorities about gaps and defects in the application of these global player conditions and to advocate for proper enforcement.



EDUCATION

To achieve their full potential, every player has the right to an education and the pursuit of work and life beyond sport supplemented by the resources of the sport.

GLOBAL MINIMUM LABOUR STANDARDS FOR PROFESSIONAL FOOTBALL



GLOBAL STANDARDS FOR INTERNATIONAL TOURNAMENTS

When it comes to major international tournaments, a single universal standard for playing conditions must be established and implemented. These standard conditions must be instituted and enforced by the competition organisers to ensure that players participating in elite global competitions – both club or national team – are protected and can perform at their peak.





FACILITIES & EQUIPMENT

The provision of suitable training and match facilities is an essential element of competition. These are the grounds on which players prepare for and perform. The quality and standard must reflect that. Inadequate facilities and equipment pose serious challenges to the development of the women's elite game.



ACCOMMODATION

Specific accommodation conducive to a high-performance environment for teams is important to ensure they are well-rested during competition. This has implications for the number of players per room, the distance between the hotels and the training grounds, and various other elements of these arrangements.



TRANSPORTATION

The conditions of transportation for national teams to competitions and between matches are crucial to the wellbeing and performance of players. This has implications for mode of transportation as well as features of travel including flight class and directness of routes.



HEALTH & SAFETY

Players must be protected from precarious playing conditions and have sufficient rest and recovery time. All national team players must have comprehensive medical coverage in the event that they become injured on national team duty. On the medical staff there should be a doctor, physical trainer, physical therapist and psychologist.



TECHNOLOGY

New technology also has a key role to play in the evolution of football, with cutting-edge devices and materials increasingly needing to be integrated into the experience of the players.



TEAM STAFF

It is crucial to the team's performance that it has an experienced and capable staff. The national team delegation should include at a minimum a head coach, assistant coach, team coordinator, press officer and an equipment manager, as well as medical staff. At least 30% of any one gender must be represented in the staff.



PLAYER PAYMENTS

Every player has the right to share fairly in the economic activity and wealth of their sport and receive fair and just pay and remuneration, including prize money. For some female players competing for their country, the overlap between club and national team can add a layer of stability and job security.



MATCH SCHEDULE

Competitive tournaments and major competitions must have a suitable number of games with appropriate spacing between matches. The spacing between national team and club games must also be accounted for as the player transitions between domestic and international competition. National federations must be mandated to use the International Match Calendar windows allocated to them and participate in competition.



TOURNAMENT PREPARATION

Resources and support provided by the tournament organiser as preparation should be the same for male and female players competing in the respective events. Resources going into preparation via the federation, the club or directly to the player must reflect gender equity.



PARENTAL POLICY

Family leave, childcare and flexibility must be available to the players. If a female player temporarily withdraws from the national team while pregnant she must not lose any compensation or benefits due to her. Players travelling with an infant must receive adequate structural and financial support for childcare.



NON-DISCRIMINATION

Every player is entitled to equality of opportunity without distinction of any kind and to be free from discrimination, harassment, abuse and violence.



PLAYER DATA PROTECTION

Players have the right to protection and exploitation of their image and their personal and performance data. Data protection, specifically the General Data Protection Regulation (GDPR) apply to the collection and use of personal player data. The rights of players and the application of data privacy rights to the football industry are emphasised in more detail by the FIFPRO Charter of Players Rights.



GLOBAL STANDARDS FOR INTERNATIONAL TOURNAMENTS

PROFESSIONAL STATUS OF PLAYERS

It is crucial that the professional status of players be recognised as the starting point. In other words, the work carried out by female players must first be recognised as labour.

One of the biggest challenges confronting many female players in the elite game today is that they are playing under professional obligations without being granted professional status. Without such legal status recognition, the protection of the players' labour rights is at risk as they are excluded from the scope of national employment legislation and, moreover, there is no ground on which to professionalise the sport. This is actively hampering and putting barriers on unleashing the potential of the women's game – the decades of bans on women's football may have been lifted, but the lack of professional recognition serves as a form of modern-day ban. Because so many professional female players are not recognised as such by football stakeholders, players are not given the appropriate rights and protection as workers. One of the many implications is that they cannot join unions or collectively bargain the terms of their involvement in the game.

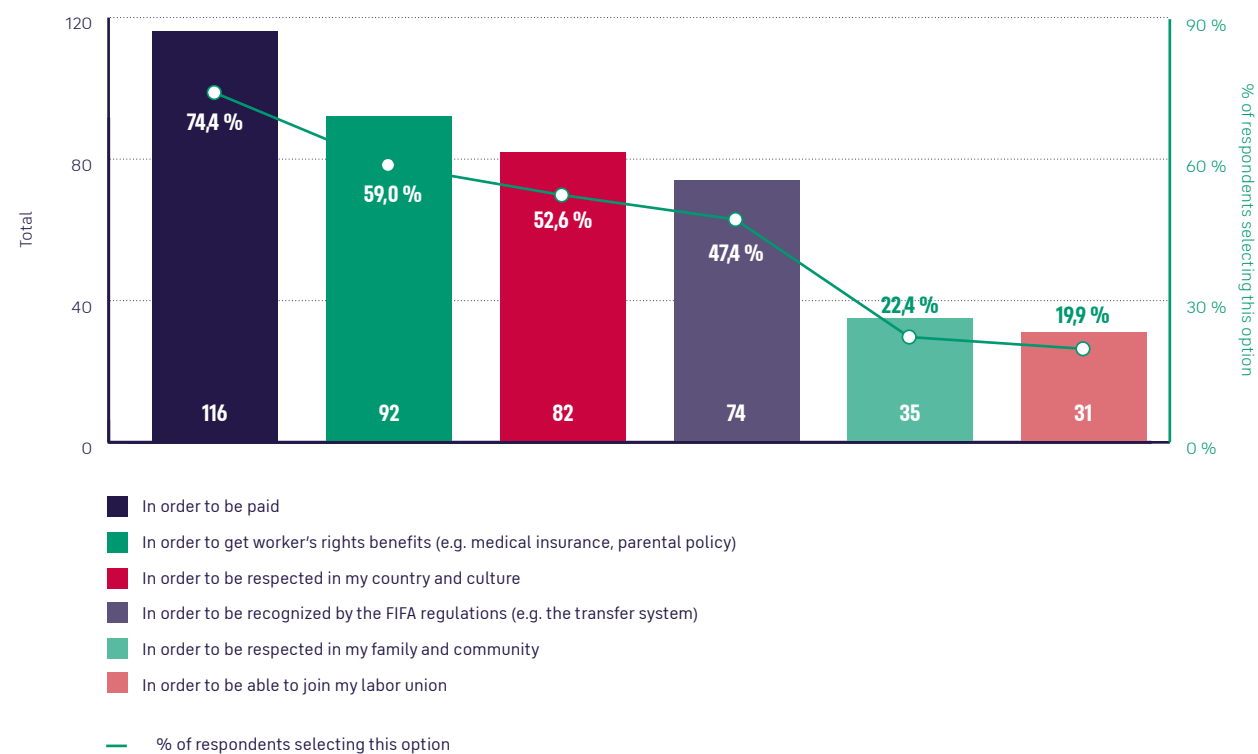
Exacerbating the situation is the fact that female players have seldom demanded their rights and protections due to a long history of oppression in the game. More positively, the situation has started to show signs of change over the past couple years with female players from various countries, including Australia, United States, Argentina, Brazil, Colombia, Ireland, Sweden, Denmark and New Zealand, organising and speaking up for their rights.

Respondents to the 2019 FIFPRO Female Player Survey stated the following reasons why having professional status is important (Figure 25).

Success for women's football would be that it's globally accepted and viewed as a real job. Girls shouldn't have to work on the side to be able to live.

Professional Player | The Netherlands
2019 FIFPRO Female Player Survey

FIGURE 25. WHY PROFESSIONAL STATUS IS IMPORTANT - PERCEPTIONS OF PLAYERS



CASE STUDY PROFESSIONAL STATUS OF PLAYERS IN ARGENTINA



One of the most football-mad nations, with some of the best players in the world, has a culture – at all levels – of hostility towards women in football. Traditionally the life of female players in Argentina has been precarious.

For over two years the national team was inactive and the main league – based only in the capital – was barely surviving with no money invested by the national football federation. This meant no coverage for medical staff, transportation, venues, nutrition, gear, technical support, marketing, prize money, salaries, accommodation, nor strategy to enhance the activity.

Everything depended on clubs, and the players shouldered most of the weight. Some even paid their clubs to participate in the main league. This scenario underwent an important shift when an agreement was signed between the federation (AFA) and players' union, Futbolistas Argentinos Agremiados, on 16 March 2019: Women's football in Argentina became professional.

The league is composed of a 16-team first division. The minimum number of professional contracts is now eight per club: the conditions applied to these professional players are the same as to those applied to the male players of the 4th division under a Collective Bargaining Agreement (CBA): a standard contract, social security, infrastructure check done

by the players' association, and a working group set between both parties. It was announced that AFA will provide assistance to clubs that do not have their own facilities and create a high performance centre in Buenos Aires. The health of players will be looked after, with all players having medical checks carried out by the union. Additionally, a federal cup will promote the game outside the capital city. The number of players will inevitably increase given a continuity clause in the CBA, which states that players with professional contracts can only move to another club with the same status.

The negotiation was triggered by the legal action started by the player Macarena Sanchez, who lodged a complaint in the national labour courts against her club UAI Urquiza and AFA asserting that she had been employed by the club for 6 years, yet this had not been recognised. Her legal case was still pending at the time of publication. I do not know when this report will be published, but by then there will probably be a decision in the Macarena Sanchez case. Maybe the decision is already there.



Photo by: Julien Mattia/NurPhoto

CONCLUSIONS

7



CONCLUSIONS

As shown in our assessment of industry growth and the current playing environments, the upward growth path for women's football has not been linear nor consistently progressive and there is great variance occurring across and within regions and competitions. However, there are encouraging signs: women's football is full of opportunities. In order to nurture the further development of the professional game worldwide, this expansion must be assessed and approached from outside business as usual and we must listen to the voices of the players.

It is clear that no single formula is going to serve as a one-size-fits-all model, but a consistent wide-reaching base of proper conditions and fair treatment are the cornerstones for building the future of women's football. Economic growth must be grounded in the establishment of labour standards that become the responsibility of national federations, leagues and clubs to implement and enforce at domestic levels. Ultimately, when labour standards are in place, growth can equate to higher standards of play, more professional clubs, and stronger competitions on all fronts. This has the potential to be a virtuous cycle.

Various stakeholders of the women's game seem to increasingly recognise that the existing conditions are inadequate and agree on the importance of change. There is an opportunity and urgency identified in this early phase of the development of the game to set basic and fundamental employment rights. This will require a collective effort on the part of governing bodies and stakeholders together with the players through innovation, reform and regulation in the following ways.

We need all the actors to unify and come together on this.

Professional Player | Spain
2019 FIFPRO Female Player Survey

LEADERSHIP: DEVELOP A UNITED VISION

A clear and united vision should be a starting point that guides the planning for the future growth of the sport. For some, women's football is still primarily considered as a social responsibility initiative. Others increasingly believe in its commercial power and plan to exploit its potential. Of course, this lack of coordinated vision does not necessarily mean that there are no strategic plans. FIFA has published its first-ever women's football strategy and many confederations are following suit. The UEFA Women's Football Strategy shows encouraging signs on collective bargaining agreements and overall player conditions and development. However, a commonly accepted development path that could strengthen all initiatives into women's football has yet to be articulated.

GOVERNANCE: REFORM, INNOVATE AND REGULATE

The conditions are largely dependent on the governance and economic actions of stakeholders, entailing investment of resources and leadership. The rules, regulations and policies that are put in place in and around the game serve a central role in shaping the landscape of the sport and the playing conditions under which professional players work. This means that global and regional policy reform, resource mobilisation, shifts in regulations and legislation, and new frameworks must be established. This implicates governing bodies in the game, including FIFA and its member associations; sponsors, investors and the media; and it also means Football associations (FAs) must continue to find ways to integrate female players into their structures for fair and adequate representation. When the women's game becomes integrated into the official structures of the sport and players into the regulations, it also means that formal investments can be made.

We cannot completely copy the format of men's football, we have to walk another way.

Professional Player | Brazil
2019 FIFPRO Female Player Survey

RESEARCH: COLLECT, DOCUMENT AND ANALYSE DATA

FIFA and member associations are recognising that the regulations in the game are not sufficient and need to be updated: female players must be counted and appropriately included in the game's official regulation and monitoring systems of the game. For example, the integration of female players into FIFA's Transfer Matching System (TMS) occurred in 2018, with data starting to accumulate. Likewise, it is becoming recognised that regulations concerning the employment and playing schedule of players, including the FIFA Regulations on the Status and Transfer of Players (RSTP), must be revised and made applicable to the women's game. It is also increasingly clear that regulations from the men's game, many of which also require revision as well, should not be blindly applied to the women's game. This could lead to negative developments, such as the application of training compensation rules which could significantly hinder the flow of young talent and the development of girl players.

PARTNERSHIPS: ENGAGE STAKEHOLDERS

Professionalisation does not stop with more players achieving full-time status nor the implementation of labour standards – these represent the foundation upon which all the other ingredients can be soundly added. Professionalisation must also be present in the business processes and support environment around women's football. The commitment of sponsors, media and other partners sends a strong message to the market and bolsters the industry. A viable business case is important to ensure financial sustainability and a stable market, but the business case must not be used to justify the movement. Female players deserve the right to professional careers as footballers.

VISIBILITY: BUILD THE PROFILE OF WOMEN'S FOOTBALL

Professional sports are a popular form of entertainment, capable of reaching huge audiences and generating emotion from the fans. In recent years more and more media outlets have featured coverage of women's football, especially in the wake of successful national team tournaments that have captured the imagination of the general public. Moreover, inclusion, equality, fair play and close player-fan relationships are all values that are often associated with women's sport. This puts women's football in a prime position to have an educational role and shape the perception of the public and challenge stereotypes. Embracing this 'ambassadorial' role, and showcasing these values, is an opportunity for women's football to be positively influential for society.

Potential of the Football Future

How we value our own product shapes how others value it. The international football community cannot expect professional women's football to excel if we undermine its most valuable assets – the players – and until we recognise its contribution as a powerful resource for sport and society. While the growth of football is driven by external opportunities and strategic decisions of the industry, unless the players have the opportunity to perform to their full potential, progress will be hindered. Proper and fair labour conditions will lay the groundwork for a sound and stable professionalisation process and a flourishing industry. But these conditions will not automatically come in tandem with economic growth – instead they require top-down governance actions to establish standards and ensure these are implemented across leagues and tournaments worldwide. If the professional football industry believes in the future of women's football, this must be done with the players as equal partners who have a shared interest in the future of their game.



**SO MANY HAVE PLAYED
A PART TO HELP GROW THE
GAME TO WHERE IT IS TODAY.
BUT REMEMBER, WE'RE NOT
FINISHED YET.**

Elise Kellond-Knight | Australia
Twitter (November 2019)

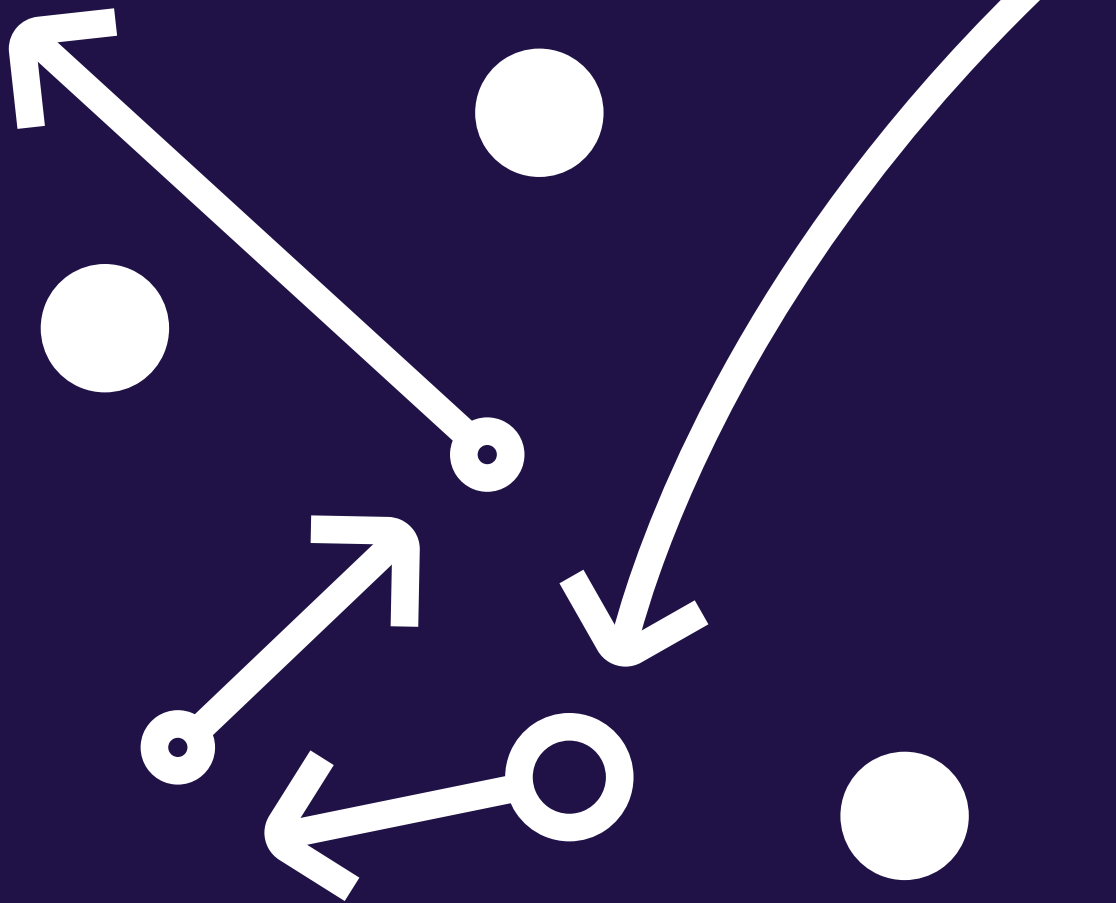
ANNEX

WORLD PLAYERS ASSOCIATION UNIVERSAL DECLARATION OF PLAYER RIGHTS

Every Player:

- HAS THE RIGHT** to a sporting environment that is well governed, free of corruption, manipulation and cheating and protects, respects and guarantees the fundamental human rights of everyone involved in or affected by sport, including the player.
- HAS THE RIGHT** to access and pursue sport as a career and profession based solely on merit.
- IS ENTITLED** to equality of opportunity in the pursuit of sport without distinction of any kind and free of discrimination, harassment and violence. A player's right to pursue sport cannot be limited because of his or her race, colour, birth, age, language, sexual orientation, gender, disability, pregnancy, religion, political or other opinion, responsibilities as a carer, property or other status.
- who is a minor **IS ENTITLED** to the opportunity to freely pursue sport in an inclusive, adapted and safe manner, and to have his or her rights as a child protected, respected and guaranteed
- HAS THE RIGHT** to work, to the free choice of employment, and to move freely in pursuit of that work and employment
- HAS THE RIGHT** to organise and collectively bargain and to form and join player and athlete associations and unions for the protection of his or her interests
- HAS THE RIGHT** to share fairly in the economic activity and wealth of his or her sport which players have helped generate
- HAS THE RIGHT** to just and favourable remuneration and conditions of work, including a minimum wage, fair hours of work, rest, leisure, the protection of wages, the certainty of a secure contract, the protection of his or her status as a worker within the employment relationship and equal pay for equal work
- IS ENTITLED** to a safe and secure workplace and sporting environment, which promotes the player's safety, physical and mental health and his or her social wellbeing. He or she must be treated and supported with utmost integrity by healthcare professionals when injured or ill, and have direction and control over that treatment and support
- HAS THE RIGHT** to an education and the pursuit of work and life beyond sport supplemented by the resources of the sport
- HAS THE RIGHT** to a private life, privacy and protection in relation to the collection, storage and transfer of personal data
- IS ENTITLED** to have his or her name, image and performance protected. A player's name, image and performance may only be commercially utilised with his or her consent, voluntarily given
- HAS THE RIGHT** to freedom of opinion and expression
- HAS THE RIGHT** to the protection of the law and equality before it
- IS ENTITLED** to due process including, where charged, to the presumption of innocence. Any penalty must be lawful, proportionate and just
- IS ENTITLED** to have any dispute resolved through an impartial and expeditious grievance mechanism in which the player has an equal say in the appointment of the grievance panel, arbitrator or other decision-making person or body. His or her sport must ensure he or she is provided with access to an effective remedy where his or her rights under this Declaration have not been protected or respected
- HAS A DUTY** to respect the rights of his or her fellow players under this Declaration, and to respect the fundamental human rights of everyone involved with or affected by sport.





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