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Women's football is taking off in **Europe.** It is seeing more fans, more teams, more money and more players than ever before.



Fans have never had so much accessibility and opportunities to watch the sport that they love, while new supporters are embracing the beautiful game. But it's also driven by authentic values and connections with its stars; terraces are bouncing, TV viewership is on the up and the game is reaping the benefits.

The Collective Think Tank / European Women's Football



Image Source: UEFA.COM

▶ 140,000

**Tickets Sold For
The Women's Euro
2020 In The First
Three Weeks***

Don't just take our word for it though. The Collective Think Tank at Wasserman in collaboration with our partners at the Impulse Network [Student Initiative at the University of St. Gallen] have carried out proprietary research to uncover the drivers for this unprecedented growth demonstrating that there is a need to move away from the school of

thought that only fans migrating from the men's game will grow the sport.

We've carried a custom survey across seven European markets to identify the latest trends. 1,749 people responded to the online survey that was carried out across France, Germany, Italy, Poland, Russia, Switzerland and the UK.

➤ **This Collective Think Tank series is unpacked across the following three findings:**



Drive accessibility of women's football



Uplift its stars and role models



Fuel the 'casual participation to professional game' ecosystem. By enabling casual and grassroots play, we drive interest in professional stars and leagues.



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The Rise and Rise of Women's Football

For it to continue its growth, women's football needs to be accessible and visible. In our research, developed in collaboration with the Impulse Network, we found 88% of participants said that they would

watch more women's football if it was more accessible.

For potential partners and sponsors, this is a big opportunity to tap into a commercially valuable market and thereby benefit the sport.

Social platforms play a big part in making women's football more accessible. We have already seen the UEFA Women's Champions League partner with streaming service DAZN and YouTube, and the video platform is especially popular with female fans aged 20-30 years old. Social platforms that support communal viewing experiences will be integral to organic access and engagement while creating passionate communities.

The Collective Think Tank | European Women's Football



Image Source: UEFA.COM | *Percentage of channel's users who consider women's football to be accessible

The pandemic also saw a spike in participation and interest in the women's game. 19% of females who were not normally interested in football played more during COVID-19, while there was also a 16% increase in female fans actively playing the game. By comparison, we only saw a rise of 15% in male fans taking to the pitch.

This was particularly true of Poland, Russia and the UK, with many women turning to the sport both to keep healthy and to harness community and forge connections during times of restrictions.

This increased playing time during the pandemic coincided with an uptick in interest for the professional game (RunRepeat predicts a 359% increase in viewership based on interest from EU fans), showing that there's an obvious ecosystem emerging between the two.

This is an opportunity for brands to capitalise, tapping into the power of togetherness that women's football was able to provide in the turbulent COVID years. But it is important that they don't just sit and wait for this interest to increase further. Instead, they should be seen as enablers.

Women's football is seen as most accessible by fans in Italy (55% definitely yes), France (53%) and Switzerland (49%), while fans in Germany found it the least accessible (22% definitely not)

“ Broadcasters and publishers can play an integral role for the next phase of growth for the women's game. ”

Change the Game

- **Increase access and visibility for gameplay across media channels, focused on free or low-cost access for consumers**
- **Win over Gen-Z & lagging markets by creating or facilitating opportunities for content creators and players (especially female) to share the game. On social media, Twitter, Twitch and Instagram reflect the top channels for accessibility, while TikTok emerges as a channel showing high potential.**

Donna-Maria Cullen, Executive Director, Tottenham Hotspur FC



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Female stars are in their own league

Female footballers are being left in the slipstream of their athlete counterparts when it comes to followers on social platforms.

In our research in collaboration with our partners at the Impulse Network [Student Initiative at the University of St. Gallen], the research shows that only 36% of participants follow female

footballers, compared to 58% who follow female athletes. Tellingly, most respondents, even fans, could not name an individual European female player (86%).

This should come as no surprise, with the US sport significantly bigger and more mature than in Europe. An opportunity perhaps to learn from our American cousins on how to promote it.

Most named European players

No player mentioned, (86%) *
Wendie Renard, France (2%) *
Amandine Henry, France (2%) *
Ewa Pajor, Poland (1%) *

But what European female footballers lack in followings, they make up for in inspiration and motivation. Their appeal to their fan communities comes from the motivation they give for development, growth and hard work, particularly among young fans (under 20's). For them, "grit" ranks as a top 3 trait in a role model, while motivating themselves

to become successful players is their top reason to follow players on social media.

There is potential for brands and commercial partners to support and elevate these female players while reflecting through content the values that fans want to see: honesty, relatability and integrity, ranked as the top three traits

57% of respondents have noticed female players involved in social justice activity on social media.

There needs to be a commitment to increasing the viability of female players, ensuring a focus on what their communities want to see: skill, encouragement and the motivation that comes with their success.

The research also highlights more opportunities than ever to tap into the social drives of female footballers, elevating great causes and giving voices to those less fortunate. Again, this taps into the communities and fans who have proved to be more receptive to their beliefs and struggles.

Image Source: UEFA.COM | *% of respondents who could name each player



Julia Kagie, Ajax

66% of football fans said seeing female players engage in social issues made them see the player more positively (+9 percentage points more than seeing male players). 34% because they stand up for something. 26% because they use their reach for good.

There is also a real need to recognise the close connections between grassroots play and support for professional players. Utilise the stars, leaders and role models in this community as a source of inspiration, motivation and empowerment.

Perhaps soon we will have people channelling new heroes in Lucy Bronze, Sara Gama, Amandine Henry, Ewa Pajor and Wendie Renard alongside the likes of Alex Morgan and Megan Rapinoe.

Change the Game

- ⚡ **When elevating and using female players, recognise they make connections with fans based on values and impact, not just star power. Their positive influence and ability to communicate social issues make them powerful tools to reflect the game and drive commercial value.**
- ⚡ **Everyday role models are just as important for grassroots and casual players. Spotlight, elevate and enable the key players embedded in local communities.**

“

The support we get from our communities and fans is incredible. They make us realise how important what we're doing is for representation and visibility, especially for young players; after-all they're the ones who will carry the baton forward for the foreseeable future, a brighter future.

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Image Source: UEFA.COM



Lotte Wubben-Moy | England and Arsenal Football Player



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The 12th Woman

Men's football has continued to grow and thrive, mainly down to the lifelong relationships of its fans. For many, it's their life. You start supporting a team from a young age, often passed down from your parents, and stick with them through thick and thin.

For others, it goes from kicking the ball for the first time as a child to playing Sunday League on a muddy pitch in your thirties.

Women's football needs to forge the same relationships if it wants to drive the grassroots and professional ecosystem forward.



Female fans playing football are more likely to consume football content (64%) compared to fans who rarely play (6%)

Fans feel a clear connection with the professional game, meaning that it is of the utmost importance to protect the pipeline between grassroots and amateur play. We are still seeing female players dropping out of the sport at key points, with the most common reasons cited for leaving the game behind being school/work commitments (48%) and health reasons (22%).

Research from The Women's Sports Foundation also showed that key barriers for female athletes are resource constraints, pressures of sport, feeling unwelcome and the lack of availability, as well as the poor visibility of role models. These are all challenges that brands and organisations

can tackle, as seen recently with the UEFA initiative 'We Play Strong.'

Again, it's about starting at the bottom, facilitating the grassroots system that in turn helps the professional game. Brands, clubs and properties need to support both the stars and the fans of the future, driving interest and engagement in football. Women in Football's "Get Onside" initiative urges them to publicise actions they're taking to promote gender equality in football, a great starting point for conversations and plans.

This means addressing the bottlenecks in football engagements (such as friends, homework and health) by focusing on more casual and flexible playing opportunities, at all levels.

Image Source: UEFA.COM

Female players on mixed or male teams are more likely to stop playing because of friends (or lack thereof), and 41% of leisure players find themselves the only woman on their team.

Many rituals involved in casual and grassroots play are inherently male (such as the dressing room banter and trips to the pub), so does this need to change to retain female

Change the Game

- ❖ **Casual play is just as impactful as a grassroots team, and both can be drivers of interest in pro stars and game.**
- ❖ **Brands, properties and platforms might consider how to use their reach and influence at the highest level to shine a light on grassroots play.**
- ❖ **Look for the smaller/understated changes that can be made to ease participation or interaction with the women's game, recognising the real issues affecting**



“When women stop playing football, they often stop watching football too. We need to remove the barriers to their participation in order to stop women drifting away from the game altogether.”

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Thank you.

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The Collective Think Tank at Wasserman was conceived to conduct research and share insights into issues surrounding gender parity and diversity. A first-of-its-kind initiative, brings together academic institutions and sports organisations, including properties, brands and media companies, to gather and disseminate insights to promote more opportunity for women to succeed in sports.



The Impulse Network is run by the Sports Business Club at the University of St. Gallen. A non-profit platform created by a team of volunteering students within the sports industry. Their purpose is to drive international and inter-generational exchanges of ideas and strategies to shape the future of our industry.



Supporting Participant: UEFA is the governing body of European football. It is an association of associations, a representative democracy, and is the umbrella organisation for 55 national football associations across Europe. Its objectives are, among other things, to deal with all questions relating to European football, to promote football in a spirit of unity, solidarity, peace, understanding and fair play.