

UK Parliament: Evidence to DCMS Inquiry on Women's Sport

From: University of Edinburgh [Academy of Sport](#)

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Introduction

1. We welcome the call for evidence concerning women's football and more broadly women's sports organisations and the challenges involved in growing audiences and revenues. One of the key messages from our submission is that a data inequality gap exists between men's and women's football – particularly around off-field data. This is something we can help with.
2. The submission is from the **University of Edinburgh Academy of Sport**² who have significant experience of (i) providing policy advice; (ii) working with the football industry; (iii) developing unique data sets on sport including data on fan engagement and the social-demographic analysis of fans³ (iv) have membership of women in football and (iv) hold Non-Executive Directorships on boards of premier women's football clubs. We also have a five-year partnership with Barcelona FC whose model of an inclusive club has informed other club set ups in England⁴.

Background Evidence

3. The growth of English women's football at all levels provides a real opportunity that needs to be fully grasped, sustained, and progressed. Investment, recognition, the closure of inequality gaps, the avoidance of strategic implementation gaps and genuine football for all remains work in progress. Such observations can be made while still recognising for example, the increased financial support for FA Women's National League clubs aimed at helping the development of the women's game and improving facilities at the grounds that clubs play at. An investment that follows on from earlier announcements that the Premier League is providing £1.75 million per annum for the next three years for The FA's new network of Girls' Emerging Talent Centres, to help grow the existing talent programme for women's football in England. Recent investment in women's and girls' football has been estimated to be just under £10 million.
4. The English Men's Premier League as of January 2023 has just broken the previous record for transfer spend in one transfer window by spending £815 million in this latest transfer window. The record for a full season has already been broken by a summer

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² [University of Edinburgh Academy of Sport](#)

³ [Recent research reports and briefings from the Academy of Sport](#)

⁴ University of Edinburgh and FC Barcelona agree winning partnership -

<https://www.ed.ac.uk/news/2018/university-and-fc-barcelona-agree-winning-partners>

outlay of £1.92 billion. It is unlikely that the brand of the English Premier League will decline in the near future, but a question remains how best to redistribute and regulate the wealth within English football. The business model linked to a growing number of English Premier League Teams, i.e., the multi-club ownership model, is not politically neutral particularly when investment comes from countries who may not protect, value, encourage the right to girls and women in football. In Europe and the UK About 200 football teams belong to a wider ownership group operating a multi-club model, an increase from about 111 before the pandemic. Such a trend needs to be monitored in relation to English football as a whole.

5. The 2023 Deloitte commercial analysis of football evidenced the revenue generating strength of the Premier League⁵. For the first time it reported on the revenues generated by women's teams at Money League Clubs. Clubs reported an average €2.4 attributable to the women's sides in the 2021/22 season. In the short term, the revenue superiority of English clubs is unlikely to be challenged and the question remains as how this funding is distributed to help the growth of the women's game at different levels. 50% of the top twenty revenue generating clubs came from the Premier League with all of them having affiliated women's teams and generating income and profit directly attributable to the player transfers in the women's game⁶.
6. An increasing number of international reports have evidenced the significant growth in women's football globally. There has been a growing interest not just from sponsors, but fans, stakeholders, broadcasters, professional football clubs, and historically men's football clubs- all of which has helped to provide for a better-informed understanding of the current landscape of women's elite football including leagues, clubs, and players.
7. The CIES analysis on trends revealed the economic development occurring at the top of the pyramid of women's professional football. It noted the need to reflect further on regulatory mechanisms to limit any negative effects due to market logics that had already been observed in the men's game. This includes, among others, the speculation on young players, the concentration of resources, and competitive imbalance.
8. Both the first (2021) and second (2022) FIFA benchmarking reports included data about women's football in England.
9. The first FIFA benchmarking report on women's football (2021) reported several key findings⁷. These were:

⁵ Deloitte football money league: growth grasped in the women's game (2023) [retrieved 2 February 2023] - <https://www2.deloitte.com/uk/en/pages/sports-business-group/articles/deloitte-football-money-league-women.html>

⁶ Deloitte football money league: growth grasped in the women's game (2023) [retrieved 2 February 2023] - <https://www2.deloitte.com/uk/en/pages/sports-business-group/articles/deloitte-football-money-league-women.html>

⁷ Setting the Pace. FIFA benchmarking report women's football (2021). [Retrieved 2 February 2023] <https://digitalhub.fifa.com/m/3ba9d61ede0a9ee4/original/dzm2o61buenfox51qjot-pdf.pdf>

- For leagues in which 80% or more participating clubs have a girls' youth structure, the average national-team ranking is 13, compared to a ranking of 28 for all other leagues.
- leagues with both a club licensing system and financial controls have a higher proportion of clubs that are profitable or break even (36% v. 32%) and a higher average club revenue (USD 0.9m v. USD 0.3m).
- In 65% of nine FIFA leagues surveyed, teams with the highest qualified coaches outperformed other teams, underlining the importance of coach education and development in the women's game.
- Clubs with better access to a higher number of and quality of facilities outperform other clubs in their league: 50% of teams with access to a set standard of higher number and quality facilities were league champions in the last five years, compared with only 23% for all other clubs.
- Broadcasting women's football on traditional and digital platforms represents a significant growth opportunity with broadcast income currently accounting for an average of 6% of revenue for clubs and 18% of revenue for leagues that were surveyed.
- Teams offering a season ticket had higher average league attendances (1,400 v. 1,000) and earned higher revenue (USD 0.8m v. USD 0.3m).
- Clubs with a written strategy for women's football tend to have higher average club revenue (USD 0.6m v. USD 0.3m), more facilities available to the first team and higher match attendances (1,400 v. 700).
- Leagues that negotiate broadcast rights exclusively for the women's league generate, on average, USD 0.7m revenue from broadcast compared with only USD 0.1m for other leagues that do not.
- 72% of clubs reported that they negotiate some of their sponsorship contracts for the women's team only. On average, these clubs achieved a higher total revenue and sponsorship revenue⁸.
- The clubs that generate the highest revenue (more than USD 1m) raise over half of it through sponsorship, compared to less than a third of clubs averaging revenue of less than USD 1m.

10. The second FIFA benchmarking report (2022) further substantiated a set of statements concerning trends in women's football and also the accelerated growth of the game worldwide⁹. The expansion typically reflects the increased number of competitive teams in each country and delivers an increased geographical spread of teams – expanding the catchment area from which to entice existing or new fans of the sport.

11. Key findings from the 2022 report included¹⁰:

⁸ Setting the Pace. FIFA benchmarking report women's football (2021). [Retrieved 2 February 2023] <https://digitalhub.fifa.com/m/3ba9d61ede0a9ee4/original/dzm2o61buenfox51qjot-pdf.pdf>

⁹ Setting the Pace. FIFA benchmarking report women's football (2022) [Retrieved 2 February 2023] https://digitalhub.fifa.com/m/70a3f8fbc383b284/original/FIFA-Benchmarking-Report-Womens-Football-Setting-the-pace-2022_EN.pdf

¹⁰ Setting the Pace. FIFA benchmarking report women's football (2022) [Retrieved 2 February 2023] https://digitalhub.fifa.com/m/70a3f8fbc383b284/original/FIFA-Benchmarking-Report-Womens-Football-Setting-the-pace-2022_EN.pdf

- 73% of leagues had a midseason break in the 2021/22 (or 2022) season – which can be important for player welfare.
- Teams that had won the league in the last three years had several common characteristics, including having: a written strategy for women’s football (78% for those that had won the league in the last three seasons v. 65% for those that had not); players earned a higher gross average salary (USD 16,000 v. USD 13,000); and a greater number of sponsors with a value given to the women’s football team (8 v.6.2).
- Investment in youth structures (e.g., academies) can provide a pipeline for generating home-grown talent and reduce growing transfer costs. Clubs that were “part of a wider football club” that includes an affiliated men’s team (with the same or a different name, but part of the same legal entity) were much more likely to have an academy that included girls (80%) compared to those that were stand-alone (67%).
- Having a written strategy can establish a clear vision, direction, and goals for a club – helping to achieve their potential, and ultimately assist the collective growth of the women’s game. (90%) of leagues had a written strategy compared to 79% in the 2021 report, showing a continued commitment to helping shape and develop the women’s game.
- There were a number of characteristics that were more prominent in stand-alone clubs than affiliated clubs. These include having: a higher number of average sponsors (17 for stand-alone clubs v. six for affiliated clubs); and higher revenue (USD 395,000 v. USD 343,000) in the 2020/21 (or 2021) season. However, there tended to be a lower: proportion of players that were professional (66% v. 71%); and number of fulltime equivalent (FTE) staff (five v. seven).
- The number of leagues with a title sponsor has grown, with 77% of leagues having a title sponsor, compared with 66% of leagues in the previous edition of this report. The industry composition of title sponsors is similar to the industry composition of sponsors at club level, with financial services being the largest industry.

Specific Review Questions

12. **How can the growth in domestic women’s football be accelerated?** A traditional monetisation model for the football industry is often based on audiences, events, reach, and impressions, while a community-based monetisation model is driven by, for example, storytelling, conversations, access, and direct-to-consumer commerce. Understanding English football communities better has the potential of developing a much more community focused model that could unlock powerful new ways to produce, distribute, and measure football engagement and relationships based upon what fans and communities, including online communities want. Women’s sports in the USA are driving this community-based monetisation model successfully.

13. **What should other sports be learning from the growth of women's football leagues in the UK?** Leadership, real knowledge of youth sport, community sport and high-performance sport are all important factors. This has not exclusively been provided by the appointment and experience of Baroness Sue Campbell, but it has certainly helped.
14. Knowledge gathered through being involved with sport, strategy, funding and having an international lens all helps particularly when reflecting upon on what can be learned from other countries. The ability to put in place evidenced logic models of growth with targeted focused evaluated outcomes is important. The link between inspiration and sustained participation levels has been questioned by many countries and has still to be evidenced.
15. The CIES demographic analysis on ten women's leagues between 2017 and 2002 reported that the United States stands out as the main exporting country in women's football. With 82 footballers abroad, US citizens outrank the Swedes (46 expatriates) and the Canadians (42)¹¹. Players from the United States are present in all the leagues studied, with a maximum of 22 representatives in the Swedish Damallsvenskan. In total, 73 associations had at least one expatriate in one of the ten championships analysed.
16. Leagues that have cup competitions also present an opportunity for additional commercial inventory to be sold.
17. **What is needed for women's sporting organisations to grow audiences and revenues?** It is important for clubs to know who their key influencers are to work with them on a regular basis in order to sustain a meaningful relationship. Key influencers, including online communities, are people who can and do influence the narrative around the club but also can extend the club's reach¹².
18. There is a need for a better understanding of fan engagement at all levels, including what girls, women and families want in terms of, for example, seating arrangements at both men and women's games. The means to understand fan engagement and other off-field business data has moved beyond that of simple fan surveys¹³.
19. Advances in technology and the use of AI can provide for a much better-informed understanding of fans and potential fans. Very few if any sentiment analysis has been carried out by the football industry. An investment in strong partnerships aligned with digital technologies can support emerging fan behaviours.
20. The data inequality gap between men's and women's football needs to be addressed, as does the data gap and investment in on-field performance data and off-field

¹¹ CIES Football Observatory monthly report 76 June (2022) – Demographic analysis of ten women's leagues 2017-2022. [Retrieved 2 February 2023]- <https://www.football-observatory.com/IMG/sites/mr/mr76/en/>

¹² Academy of Sport Micro Briefing Report on Scottish Women's Football (2021) [Retrieved 2 February 2023] <https://www.ed.ac.uk/sites/default/files/atoms/files/1-scottish-women-football-briefing-sept2021.pdf>

¹³ Academy of Sport Hibernian Football Fan Engagement Report (2022) [Retrieved 2 February 2023] https://www.ed.ac.uk/sites/default/files/atoms/files/aos-hibernian-fan-engagement-study-apr2022_copy.pdf

business and marketing data. Could the English FA Foundation help to fund a service for clubs? This might also help with impact data concerning not just football outcomes but how women's football helps to deliver non-football outcomes – health, education, social cohesion, cultural relations (UK soft power).

21. There is a need to further recognise and integrate women and girls in para-football communities. UEFA recognised developments in Scotland around the setting up and funding of a National Para Football Association¹⁴. The advocacy and example set by the current Chair of sport Wales – Tanni Grey Thomson has been inspirational.
22. A recent sports innovation report talks of a fluid landscape and the age of the fluid fan¹⁵. New fans joining the football family are an important avenue of growth for the women's and men's football industry¹⁶.
23. Data from American women's sports tell us that brand affinity can jump to over 100% for those who sponsor women's sports. Key aspects of increasing fan engagement with women's football in the USA have been (i) Storytelling: fans of women's football in the USA have increasingly engaged with content both in- and out-of-season; and (ii) Purpose-led conversations: women's sports putting their values on display and engage/ buy based on how brands/ media/ teams/ athletes align with those values. Women athletes and fans want to engage with the social issues of the day. Societal topics drive conversation but also increase viewership.
24. Building a global digital footprint requires an active presence in countries with different languages and cultures. While fans in all countries may understand the sport, telling athlete/women's football stories requires local language engagement — using a community manager and media partners who can deliver the content in local language is key¹⁷.
25. As well as being key to future financial growth, commercial revenue is the largest self-generated revenue source for most women's clubs, accounting for 56% of revenue.
26. The FIFA 2022 report also suggested that unlike many professional men's leagues, broadcast revenue is not the key driver of revenue in the women's game, with the sport still in a development phase with regard to its broadcast offerings. This has to change¹⁸. The majority of leagues (57%) indicate that they negotiate for women's

¹⁴ <https://www.scottishparafootball.co.uk/>

¹⁵ Academy of Sport Hibernian Football Fan Engagement Report (2022) [Retrieved 2 February 2023] https://www.ed.ac.uk/sites/default/files/atoms/files/aos-hibernian-fan-engagement-study-apr2022_copy.pdf

¹⁶ Academy of Sport Micro Briefing Report on Scottish Women's Football (2021) [Retrieved 2 February 2023] <https://www.ed.ac.uk/sites/default/files/atoms/files/1-scottish-women-football-briefing-sept2021.pdf>

¹⁷ Academy of Sport Micro Briefing Report on Scottish Women's Football (2021) [Retrieved 2 February 2023] <https://www.ed.ac.uk/sites/default/files/atoms/files/1-scottish-women-football-briefing-sept2021.pdf>

¹⁸ Setting the Pace. FIFA benchmarking report women's football (2022) [Retrieved 2 February 2023] https://digitalhub.fifa.com/m/70a3f8fbc383b284/original/FIFA-Benchmarking-Report-Womens-Football-Setting-the-pace-2022_EN.pdf

football only, with the second most common method of negotiation being with other competitions including the men's league.

27. The need to remain flexible, innovative, agile, and responsive is an observation from the pandemic that holds true for both the men's and women's football.
28. **What action is needed to tackle sexism and misogyny in sport?** There are lessons to be learned from other countries. In Canada steps taken at the national level during the last few years, the outcome of the persistent lobbying of athletes, researchers, and some in the sports sector, and the initiatives of federal sports ministers. The Universal Code of Conduct to Prevent and Address Maltreatment in Sports (UCCMS), agreed to in 2020, has established a comprehensive, research-based statement of abusive practices that need to be eradicated from all levels of Canadian sport. The Office of the Sport Integrity Commissioner (OSIC), established in Canada last year, promised an independent authority to investigate allegations of abuse, counsel and support survivors, discipline perpetrators and steer cultural change.
29. A broad program of communication, education, and training at all levels of football is urgently needed to make it effective. Your committees could perhaps help by recommending that all sports organizations at all levels in UK —not just National Sports Organisations adopt and enforce a UK equivalent of UCCMS.
30. Elsewhere in the world, governments and sports bodies have made major efforts to reform the governance of sport. Commonwealth Sports Ministers, the European Sports Commission, the International Olympic Committee, and national governments such as Australia have all issued statements of good sports governance and begun to monitor sports bodies for compliance. In 2011, the Danish NGO Play the Game issued *The Cologne Consensus*, a widely supported call for eight principles for better sport governance and now issues a regular report card for compliance for the international federations. These are many valuable suggestions and lessons from what other sports and countries have done. They need to be made more comprehensive and mandated for all UK sport including football. Despite the good work by UK Sport and the English FA this is clearly work in progress because the problem still exists.
31. We draw to your attention that in partnership with Fanalytics Ltd, we have access to a globally unique data set of players' social media data, which can be used to measure and track the abuse received on Twitter for players across seven top European leagues, including the English Premiership and Championship for both the men's and women's game. Using this data, we can use natural language processing (NLP) techniques to identify and categorise the abuse received across different player demographics. We have been assisting other national football associations with evidencing abuse in football.
32. What needs to change at a regulatory level to facilitate more parity between men's and women's sport? This is a difficult one because of the power balances within not just English Football. The case for and against an independent regulator have been widely circulated and if an independent regulator is not the answer it still leaves the

question open as to what is the answer to more integration, equitable board representation, redistribution of resource all aimed at a achieving a planned outcome of greater equity and parity of esteem? Whether it be independent clubs or local authorities who are responsible for the vast majority of grass roots women's and girl's football or integrated or separate parent club models the current status quo requires culture change and the diminishing of inequality gaps, including data inequality.

Concluding Remarks

The purpose of this response has been to make a small contribution to an evidenced based answer to most, but not all, of the questions raised by the inquiry. It also contains an offer of assistance in helping to close data equity gaps by supporting the development of more off-field data to support a better understanding and development of in this case women's and girl's football in the UK.

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