

## M ETHODOLOGY

This research report was produced by the CIES Football Observatory using data collected by FIFA via an online survey. In total, 177 member associations (MAs) participated in the survey (full list on next page). The response rate was very high: $85.1 \%$.
The CIES Football Observatory academic team carefully verified the consistency of all answers provided by each member association who completed the survey. In a few cases, data was projected according to more reliable answers provided for other questions. Overall, the quality of the information gathered was good. Moreover, the adjustments undertaken allowed us to further enhance the reliability of the findings presented.

Answers provided by the respondents were analysed at four different levels:
Total: all respondents.
By confederation: respondents were divided according to their confederation. For CONCACAF, we also present separate data for the United States and Canada as their situation is quite different from that of other CONCACAF associations.

By size: member associations were divided according to their total number of employees. Four categories were identified: >100 employees (size 1), 50 to 100 employees (size 2), 20 to 50 employees (size 3) and <20 employees (size 4).
By level: analysis was also undertaken according to an MA's position in the FIFA women's football ranking: $1^{\text {st }}$ to $20^{\text {th }}$ rank (level 1 ), $21^{\text {st }}$ to $50^{\text {th }}$ rank (level 2), $51^{\text {st }}$ to $100^{\text {th }}$ rank (level 3 ), $>100^{\text {th }}$ rank and unranked (level 4).
The report systematically presents the information gathered from all respondents, as well as per confederation. Conversely, analysis according to size or level was sometimes redundant and it is thus not always included. To further enhance the findings, in specific cases we also opted to regroup some categories (for example levels 1 and 2 compared with levels 3 and 4).

## Glossary

MAs: FIFA member associations
WF: women's football
USD: United States Dollars
MoU: Memorandum of Understanding
FTE: full-time employee

| Confederation | Member <br> associations | Number of <br> answers | Response <br> rate |
| :--- | :---: | :---: | :---: |
| AFC | 46 | 34 | $73.9 \%$ |
| CAF | 54 | 45 | $83 \%$ |
| CONCACAF | 35 | 29 | $82.9 \%$ |
| CONMEBOL | 10 | 10 | $100.0 \%$ |
| OFC | 11 | 10 | $90.9 \%$ |
| UEFA | 53 | 49 | $92 \%$ |
| Total | 209 | 177 | $85.1 \%$ |



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SECTION 1
EXECUTIVE
SUM M ARY


## Abstract

The Executive Summary of the Women's Football Survey 2014 covers the findings on various topics including national women's football leagues, staff dedicated to women's football in member associations, presence of women on executive committees, number of female coaches and referees, as well as statistics on registered female players both youth and senior.
Further on in the executive summary, the focus shifts to the annual investment in women's football, also analysing the level of sponsorship and government support and investment.

Perception of women's football by the member
associations is also analysed to get an overall understanding of how women's football is seen around the world.

Finally, priorities in the next ten years for women's football are discussed, identifying and analysing the top five priorities per confederation.

The information provided enables the reader to understand the current situation of women's football across regions of the world and offers statistics to nurture future steps and further development of w omen's football.

## National top women's football leagues

MAs with a national top women's football league: 138
\% of MAs with a national top women's football league: 78\%

## By confederation

|  | MAs with a national top <br> women's football league | \% of MAs |
| :--- | :---: | :---: |
| AFC | 24 | $71 \%$ |
| CAF | 32 | $71 \%$ |
| CONCACAF | 23 | $79 \%$ |
| CONMEBOL | 6 | $60 \%$ |
| OFC | 8 | $80 \%$ |
| UEFA | 45 | $92 \%$ |

By size of the member association


## Size of MA

Size 1: >100 employees
Size 2: 50 to 100 employees
Size 3: 20 to 50 employees
Size 4: <20 employees

## By FIFA ranking



## FIFA ranking of MA

Level 1: $1^{\text {st }}$ to $20^{\text {th }}$ rank
Level 2: $21^{\text {st }}$ to $50^{\text {th }}$ rank
Level 3: $51^{\text {st }}$ to $100^{\text {th }}$ rank
Level 4: >100 th rank and unranked
$78 \%$ of MAs that took part in the survey
have a top national women's football league (138 out of 177). The lowest percentage was recorded at CONMEBOL level (60\%). UEFA finds itself at the opposite end of the table ( $92 \%$ ). The percentages for the AFC and CAF are also below the global average.

There is a correlation between the position of the MAs in the FIFA rankings and the existence of a top national women's league: from 100\% for level 1 MAs to 65\% for level 4 ones. This reveals the importance of the organisation of top national-level competitions for the development of women's football.

## League management and revenue streams

\% of top women's football leagues managed by the association: 82\%
$\%$ of revenues provided by the association: 64\%

## League management, by confederation

|  | $\%$ managed <br> by the association |
| :--- | :---: |
| AFC | $74 \%$ |
| CAF | $81 \%$ |
| CONCACAF | $89 \%$ |
| CONMEBOL | $100 \%$ |
| OFC | $75 \%$ |
| UEFA | $81 \%$ |

## Revenue streams, by confederation

|  | Association | Sponsors | Government | Other |
| :--- | :---: | :---: | :---: | :---: |
| AFC | $19 \%$ | $41 \%$ | $39 \%$ | $1 \%$ |
| CAF | $89 \%$ | $4 \%$ | $5 \%$ | $2 \%$ |
| CONCACAF* | $5 \%$ | $0 \%$ | $95 \%$ | $0 \%$ |
| CONMEBOL | $92 \%$ | $0 \%$ | $8 \%$ | $0 \%$ |
| OFC | $68 \%$ | $9 \%$ | $0 \%$ | $23 \%$ |
| UEFA | $79 \%$ | $14 \%$ | $0 \%$ | $7 \%$ |

* not including USA and Canada

\% of contribution to top women's football league per revenue stream


## Staff dedicated to women's football

## Total number of employees: 1,186

Av. number of employees dedicated to women's football per MA: 6.7 Overall \% of employees dedicated to women's football: 10\%

## By confederation

|  | Av. number of employees <br> dedicated to WF | \% employees dedicated to WF |
| :--- | :---: | :---: |
| AFC | 7.6 | $13 \%$ |
| CAF | 5.0 | $14 \%$ |
| CONCACAF | 4.9 | $13 \%$ |
| USA-CAN | 20.5 | $20 \%$ |
| CONMEBOL | 6.7 | $7 \%$ |
| OFC | 2.3 | $14 \%$ |
| UEFA | 9.6 | $8 \%$ |

## By size of the association



## By FIFA ranking

Average number of employees

20


## FIFA ranking of MA

Level 1: $1^{\text {ts }}$ to $20^{\text {th }}$ rank
Level 2: $21^{\text {st }}$ to $50^{\text {th }}$ rank
Level 3: $51^{\text {st }}$ to $100^{\text {th }}$ rank
Level 4: >100 ${ }^{\text {th }}$ rank and unranked

The 177 member associations that took part in the survey employ over 1,000 people dedicated to women's football (on average 6.7 per MA). This corresponds to $10 \%$ of all employees. The highest number and percentage of staff dedicated to women's football is in the United States and Canada. This reveals the key importance of women's football in these two CONCACAF associations.

Generally speaking, the bigger a MA, the greater the number of staff dedicated to women's football. However, the reverse holds true with regards to the percentage of the latter compared to all employees. This probably reflects the key importance for smaller MAs of programmes initiated by international football governing bodies to fund specific positions for the development of women's football.

## Staff dedicated to women's football

\% of full-time employees among staff dedicated to WF


## By confederation

|  | $\%$ of full-time employees |
| :--- | :---: |
| AFC | $46 \%$ |
| CAF | $47 \%$ |
| CONCACAF | $61 \%$ |
| USA-CAN | $95 \%$ |
| CONMEBOL | $70 \%$ |
| OFC | $72 \%$ |
| UEFA | $52 \%$ |

## By size of the association

\% of FTE among staff
dedicated to WF


## Size of MA

Size 1: >100 employees
Size 2: 50 to 100 employees
Size 3: 20 to 50 employees
Size 4: <20 employees
half of the overall staff dedicated to women's football is employed full-time. The percentage of full-time employees is twice as high in the United States and Canada (95\%) as in CAF ( $47 \%$ ) and the AFC ( $46 \%$ ). This figure is also relatively low for UEFA member associations (52\%).

Bigger MAs not only employ more people dedicated to women's football in total, but these employees also represent a higher percentage of association staff. However, even in the size 1 MAs (>100 employees), FTE only account for $57 \%$ of the total staff dedicated to women's football. This finding suggests that the provision of more full-time positions could be a key action to develop women's football. This would also allow employees dedicated to women's football to strengthen their positions within their respective MAs.

## Women on executive committees

## Total number of women on executive committees: 188

Average number of women on executive committees per MA: 1.1
\% of women on executive committees: $8 \%$

## By confederation

|  | Average number of women | $\%$ of women |
| :--- | :---: | :---: |
| AFC | 1.2 | $9 \%$ |
| CAF | 1.0 | $8 \%$ |
| CONCACAF | 1.4 | $13 \%$ |
| USA-CAN | 3.0 | $19 \%$ |
| CONMEBOL | 0.4 | $2 \%$ |
| OFC | 1.2 | $15 \%$ |
| UEFA | 0.9 | $6 \%$ |

## By size of the association

\% of women on the executive committee


## Size of MA

Size 1: >100 employees
Size 2: 50 to 100 employees
Size 3: 20 to 50 employees
Size 4: <20 employees

## By FIFA ranking

## $\%$ of women on the executive committee



## FIFA ranking of MA

Level 1: $1^{\text {th }}$ to $20^{\text {th }}$ rank
Level 2: $21^{\text {st }}$ to $50^{\text {th }}$ rank
Level 3: $51^{\text {st }}$ to $100^{\text {th }}$ rank
Level 4: $>100^{\text {th }}$ rank and and unranked

The total number of women on the executive committees of the 177 MAs that participated in the survey is 188 (on average 1.1 per MA). This figure corresponds to $8 \%$ of the total number of executive committee or board members. The lowest number and percentage was observed in CONMEBOL: 0.4 women on executive committees on average, $2 \%$ of members. The figures measured in UEFA are also below the global average.
These findings highlight the difficulties facing women in reaching senior positions in football governing bodies. They also show that this difficulty is greater in the more established MAs than in developing football associations. Women represent $10 \%$ of executive committee members in the smallest MAs, while they only account for $7 \%$ in the MAs with more than 50 employees (size 1 and 2).

## Female coaches registered

## Total number of female coaches registered*: 83,262

Average number of female coaches registered per MA: 496
\% of female coaches registered: 7\%

* Irrespective of licensing level


## By confederation

|  | Total female <br> coaches registered | Average per MA | $\%$ |
| :--- | :---: | :---: | :---: |
| AFC | 17,264 | 523 | $8 \%$ |
| CAF | 1,669 | 38 | $6 \%$ |
| CONCACAF | 30,046 | 1,036 | $20 \%$ |
| USA and Canada | 29,423 | 14,712 | $21 \%$ |
| Other associations | 623 | 23 | $6 \%$ |
| CONMEBOL | 119 | 17 | $3 \%$ |
| OFC | 357 | 40 | $17 \%$ |
| UEFA | 33,807 | 735 | $4 \%$ |

## By FIFA ranking



## FIFA ranking of MA

Level 1. 10 20 rank
Level 2: $21^{\text {ts }}$ to $50^{\text {th }}$ rank
Level 3: $51^{\text {st }}$ to $100^{\text {th }}$ rank
Level 4: $>100^{\text {th }}$ rank and unranked


On average, there are almost 500 registered female coaches per MA. Altogether, 83,262 female coaches are registered in the 177 MAs that took part in the survey. This represents 7\% of all registered coaches. However, information is missing about the number of female coaches who are currently actually in charge of a team.

The presence of female coaches registered is highly correlated to results. While the average number of female coaches for associations ranked in the top 20 positions is 5,037 ( $8 \%$ of coaches), this figure is below 250 for MAs ranked below the top 20 ( $4 \%$ of coaches). This suggests that the development of training programmes for female coaches in the least performing football associations could be an effective way to promote women's football.

## Female referees

## Total number of female referees: 76,458

Average number of female referees per MA: 432
\% of female referees: 10\%

By confederation

|  | Female referees | Average | $\%$ |
| :--- | :---: | :---: | :---: |
| AFC | 16,264 | 478 | $6 \%$ |
| CAF | 1,331 | 30 | $6 \%$ |
| CONCACAF | 48,759 | 1,681 | $27 \%$ |
| USA and Canada | 48,411 | 24,206 | $28 \%$ |
| Other associations | 348 | 13 | $6 \%$ |
| CONM EBOL | 370 | 37 | $11 \%$ |
| OFC | 286 | 29 | $4 \%$ |
| UEFA | 9,448 | 193 |  |

## By size of the association



## Size of MA

Size 1: >100 employees
Size 2: 50 to 100 employees
Size 3: 20 to 50 employees
Size 4: <20 employees

## \% of female referees



Female referees account for about 10\% of referees at global level. This percentage is almost 4\% greater than that measured for coaches.
This could be partially related to the mandatory use of female referees at FIFA competition level. It is also linked to the higher percentage of women referees compared to coaches in the United States and Canada: 28\% and $21 \%$ respectively.
The lowest percentage of female referees was observed in UEFA, where they only account for $4 \%$ of all referees. This can be contrasted with the OFC, where $16 \%$ of referees are women. In total, there are almost 10,000 female referees in the 177 member associations that took part in the survey.

## Registered female players

## Total number of registered female players*: 4,801,360

Average number of registered female players per MA: 27,126
Median number of registered female players per MA: 960

* The values for China and France come from the FIFA Big Count


## By confederation

|  | Female registered | Average per MA | Median per MA |
| :--- | :---: | :---: | :---: |
| AFC | 300,122 | 8,827 | 720 |
| CAF | 54,055 | 1,229 | 600 |
| CONCACAF | $2,287,185$ | 78,868 | 250 |
| USA and Canada | $2,255,000$ | $1,127,500$ | $1,127,500$ |
| Other associations | 32,185 | 1,192 | 250 |
| CONMEBOL | 25,459 | 2,546 | 2,346 |
| OFC | 38,736 | 3,874 | 1,190 |
| UEFA | $2,095,803$ | 41,916 | 2,472 |



## By FIFA ranking



## FIFA ranking of MA

Level 1: $1^{\text {st }}$ to $20^{\text {th }}$ rank
Level 2: $21^{\text {st }}$ to $50^{\text {th }}$ rank
Level 3: $51^{\text {st }}$ to $100^{\text {th }}$ rank Level 4: $>100^{\text {th }}$ rank and unranked

The United States and Canada have almost half of the 4.8 million female players registered at worldwide level (including China and France as per data provided by the FIFA Big Count). UEFA member associations also play a significant role by providing $44 \%$ of registered female footballers. In terms of participation, women's football is still heavily under-developed in the remaining associations and confederations. The average number of female players registered per MA is particularly low in CAF, as well as in CONCACAF associations other than the United States and Canada.

In total, 91\% of female players are registered with the top 20 MAs of the FIFA rankings. This result shows the strong correlation between the number of registered players and performance. It also indicates that an increase in registered female players is a necessary step to enhance the competitiveness of the associations that are currently not achieving top-level results. This should go hand in hand with the development of more women coaches and referees, as well as the organisation of a greater number of games and competitions.

## Registered female players (senior/youth*)

|  | Senior | Youth |
| :--- | :---: | :---: |
| Registered female players | $2,163,048$ | $2,582,551$ |
| $\%$ per age category | $46 \%$ | $54 \%$ |

* Youth: defined as players under 17 years of age as in the majority of MAs female footballers aged 17 or over already play in adult leagues


## By confederation



CAF


OFC



UEFA

Senior players represent a minority of registered female players: $46 \%$. This holds true in all confederations except for CONMEBOL and CONCACAF associations other than the United States and Canada. This shows the need for the latter confederations to put more emphasis on youth (defined here as players under 17 years of age) in order to develop the women's game.

## Total female players

## Total number of female players*: 30,145,700

Average number of female players per MA: 168,400

## Female players per 10,000 inhabitants: 47.4

* The values for non-registered players have been calculated by combining the data collected in this survey and those published in the FIFA Big Count


## By confederation

|  | Total female <br> players | Non-registered <br> female players | Per 10,000 <br> inhabitants |
| :--- | :---: | :---: | :---: |
| AFC | $6,327,700$ | $6,027,585$ | 17 |
| CAF | $1,225,400$ | $1,171,345$ | 14 |
| CONCACAF | $16,104,000$ | $13,816,784$ | 313 |
| USA and Canada | $15,877,400$ | $13,622,366$ | 450 |
| Other associations | 226,600 | 194,418 | 14 |
| CONMEBOL | 256,300 | 230,870 | 6 |
| OFC | 87,200 | 48,468 | 61 |
| UEFA | $6,145,100$ | $4,049,332$ | 71 |



## By FIFA ranking



The total number of female practitioners at worldwide level can be estimated at around 30 million. This figure includes a projection for the only two top associations in women's football that did not take part in the survey: China and France. Our projection, therefore, was made using data collected in the FIFA Big Count study.

On average, there are 168,400 female players per MA. This figure is over one million for the 20 best performing associations. The number of practitioners per 10,000 inhabitants is much greater in the United States and Canada than in any other world region. In addition, more women play football in Europe and Oceania than in Asia, Africa or South America.

## FIFA ranking of MA

Level 1: $1^{\text {st }}$ to $20^{\text {th }}$ rank
Level 2: $21^{\text {st }}$ to $50^{\text {th }}$ rank
Level 3: $51^{\text {st }}$ to $100^{\text {th }}$ rank
Level 4: >100 ${ }^{\text {th }}$ rank and unranked

## Annual investment in women's football

## Total annual investment (USD): 156,624,000

Average annual investment per MA (USD): 905,000
Median annual investment per MA (USD): 157,500

## By confederation

|  | Total annual investment (USD) | Average per MA (USD) | Median per MA (USD) |
| :--- | :---: | :---: | :---: |
| AFC | $22,054,000$ | 648,600 | 175,000 |
| CAF | $11,600,000$ | 263,400 | 37,500 |
| CONCACAF | $20,024,000$ | 690,500 | 75,000 |
| CONMEBOL | $2,462,000$ | 307,750 | 275,000 |
| OFC | $1,371,000$ | 152,300 | 40,000 |
| UEFA | $99,113,000$ | $2,022,700$ | 880,555 |



## By FIFA ranking



## FIFA ranking of MA

Level 1: $1^{\text {st }}$ to $20^{\text {th }}$ rank
Level 2: $21^{\text {st }}$ to $50^{\text {th }}$ rank
Level 3: $51^{\text {st }}$ to $100^{\text {th }}$ rank
Level 4: >100 th rank and unranked

The 177 MAs that took part in the survey invest 156 million USD per year in women's football. This represents on average nearly USD 905,000 per MA. The lower figure observed for the median (USD 157,000) indicates that strong discrepancies exist in the amounts available for women's football according to association. UEFA MAs invest by far the most in women's football: USD 99 million per year, on average USD 2 million per MA.

The average annual investment per MA is highly correlated to the results achieved. The MAs in the top 20 positions of the FIFA rankings invest on average USD 5.4 million per year in women's football. This figure is only between USD 1.2 and 0.1 million for the remaining level categories. This finding also helps to explain the performance gaps observed.

## Sponsor and government support

\% of MAs with a women's football sponsor: 29\%
\% of MAs with government support for women's football: 33\%
\% of MAs with both sponsor and government support: 12\%

## By confederation

|  | \% of MAs with a <br> women's <br> football sponsor | \% of MAs with <br> government support | \% of MAs with both <br> sponsor and <br> government support |
| :--- | :---: | :---: | :---: |
| AFC | $47 \%$ | $41 \%$ | $24 \%$ |
| CAF | $20 \%$ | $24 \%$ | $9 \%$ |
| CONCACAF | $31 \%$ | $41 \%$ | $14 \%$ |
| CONMEBOL | $0 \%$ | $40 \%$ | $0 \%$ |
| OFC | $50 \%$ | $50 \%$ | $20 \%$ |
| UEFA | $27 \%$ | $27 \%$ | $8 \%$ |

## By FIFA ranking


\% of MAs with both
sponsor and government support


Local government supports women's football in one third of the MAs that participated in the survey. The proportion of MAs with a women's football sponsor is slightly lower: 29.4\%. Only in Asia do we find that the percentage of MAs with a women's football sponsor is greater than that of MAs with government support.

Only $12.4 \%$ of the respondents are supported by both a sponsor and the government. This percentage is much greater for the best performing associations (33\%) than for MAs below $20^{\text {th }}$ place in the FIFA rankings (between 7 and $17 \%$ according to category level). This result shows the key importance of toplevel results and performance in attracting funds that will help MAs to further develop the women's game.

## Sponsor and government investments

|  | Sponsor | Government | Total |
| :--- | :---: | :---: | :---: | :---: |
| Total annual investment (USD) | $5,404,900$ | $18,500,800$ | $23,905,700$ |
| Av. annual investment per MA (USD)* | 110,300 | 411,100 | 521,400 |

* Only MAs with sponsor or government support

By confederation

|  | Sponsor (USD) | Government (USD) | Total (USD) |
| :--- | :---: | :---: | :---: |
| AFC | $2,350,400$ | $6,349,400$ | $8,699,800$ |
| CAF | 805,100 | $1,216,400$ | $2,021,500$ |
| CONCACAF | 349,000 | $3,244,500$ | $3,593,500$ |
| CONMEBOL | 0 | 95,000 | 95,000 |
| OFC | 201,500 | 730,000 | 931,500 |
| UEFA | $1,698,900$ | $6,865,500$ | $8,564,400$ |




## Perception of women's football

```
% of associations in which women's football is perceived:
    - as a great platform for international participation: 35%
    - as a vehicle for social development: 32%
    - as a sport for women which is culturally challenged: 30%
    - as a sport which is not traditionally seen as being for women: 29%
```


## By confederation

|  | International <br> participation | Social <br> development | Culturally <br> challenged | Not seen <br> as being <br> for women |
| :--- | :---: | :---: | :---: | :---: |
| AFC | $44 \%$ | $24 \%$ | $41 \%$ | $29 \%$ |
| CAF | $18 \%$ | $36 \%$ | $33 \%$ | $22 \%$ |
| CONCACAF | $31 \%$ | $34 \%$ | $28 \%$ | $28 \%$ |
| CONMEBOL | $60 \%$ | $40 \%$ | $40 \%$ | $20 \%$ |
| OFC | $50 \%$ | $40 \%$ | $10 \%$ | $0 \%$ |
| UEFA | $39 \%$ | $29 \%$ | $22 \%$ | $45 \%$ |

## By FIFA ranking





Football as a sport for women is culturally challenged


## FIFA ranking of MA

Level 1: $1^{\text {st }}$ to $20^{\text {th }}$ rank
Level 2: $21^{\text {st }}$ to $50^{\text {th }}$ rank
Level 3: $51^{\text {st }}$ to $100^{\text {th }}$ rank
Level 4: >100 ${ }^{\text {th }}$ rank and unranked

## Priorities in the next ten years

## Top five priorities for MAs surveyed:

1. Increasing the overall number of women/girls playing football
2. Player development
3. Promotion of women's football
4. Sourcing funding/sponsors/resources
5. Increasing the number of qualified coaches

* MAs were asked to rank 10 priorities (see the full list on page 70)


## By confederation

| Rank of top 5 priorities | AFC | CAF | CONCACAF | CONMEBOL | OFC | UEFA |
| :--- | :---: | :---: | :---: | :---: | :---: | :---: |
| Number of practitioners | 1 | 1 | 1 | 2 | 1 | 1 |
| Player development | 3 | 4 | 2 | 4 | 2 | 2 |
| Promotion of women's football | 2 | 3 | 3 | 3 | 4 | 3 |
| Funding | 4 | 2 | 5 | 1 | 8 | 4 |
| Qualified coaches | 5 | 5 | 4 | 8 | 3 | 5 |

## By FIFA ranking

Number of practitioners


Player development
Level 4

Promotion of women's football
Level 1


Qualified coaches


Level 3

Funding


Level 3

## IFA ranking of MA

Level 1: $1^{\text {st }}$ to $20^{\text {th }}$ rank Level 2: $21^{\text {st }}$ to $50^{\text {th }}$ rank Level 3: $51^{\text {st }}$ to $100^{\text {th }}$ rank Level 4: $>100^{\text {th }}$ rank and unranked

According to the 177 MAs that participated in the survey, the top priority for the next decade is to increase the overall number of women and girls playing football. This is considered the top priority in five out of six confederations. The only exception is CONMEBOL, where this issue ranks in second place. The second most cited priority is player development. This shows that from an MA perspective, the priorities for women's football are related to the game itself.

While the increase in the number of practitioners was considered the top priority for MAs below $20^{\text {th }}$ position in the FIFA rankings (levels 2, 3 and 4), the best-performing associations consider that their top priority is player development. This finding reflects the different situation for women's football according to the association. While the most competitive associations put the emphasis on the quality of players (player development), the less-developed associations prefer to focus on quantitative aspects (increasing the number of practitioners).

SECTION 2
OVERALL
DEVELOPMENT
AND LEAGUES

## Women's national teams established



By confederation

|  | Senior | U-19, U-20 | U-16, U-17 | U-15 |
| :--- | :---: | :---: | :---: | :---: |
| AFC | $82 \%$ | $50 \%$ | $47 \%$ | $41 \%$ |
| CAF | $69 \%$ | $51 \%$ | $58 \%$ | $4 \%$ |
| CONCACAF | $90 \%$ | $86 \%$ | $83 \%$ | $55 \%$ |
| CONMEBOL | $100 \%$ | $100 \%$ | $100 \%$ | $30 \%$ |
| OFC | $70 \%$ | $80 \%$ | $90 \%$ | $20 \%$ |
| UEFA | $92 \%$ | $92 \%$ | $88 \%$ | $59 \%$ |

## By FIFA ranking



U-15 team


## FIFA ranking of MA

Level 1: $11^{\text {th }}$ to $20^{\text {th }}$ rank
Level 2: $21^{\text {st }}$ to $50^{\text {th }}$ rank
Level 3: $51^{\text {st }}$ to $100^{\text {th }}$ rank
Level 4: >100 ${ }^{\text {th }}$ rank and unranked

Over 80\% of MAs that participated in the survey have a senior national team. This percentage is only about $50 \%$ for $U-19 / 20$ and $U-16 / 17$ youth categories in level 4 MAs This finding clearly shows the need to foster the establishment of youth national teams in the least competitive national member associations. This also holds true with regard to U-15 national teams.

## National top women's football leagues

## MAs with a national top women's football league: 138

\% of MAs with a national top women's football league: 78\%

## By confederation

|  | MAs with a national top <br> women's football league | \% of MAs |
| :--- | :---: | :---: |
| AFC | 24 | $71 \%$ |
| CAF | 32 | $71 \%$ |
| CONCACAF | 23 | $79 \%$ |
| CONMEBOL | 6 | $60 \%$ |
| OFC | 8 | $80 \%$ |
| UEFA | 45 | $92 \%$ |

By size of the association


By FIFA ranking


A top national women's football league operates in $78 \%$ of MAs that took part in the survey (138 out of 177). The lowest percentage was recorded at CONMEBOL level (60\%).
UEFA finds itself at the opposite end of the table ( $92 \%$ ). There is a clear correlation between the position of the MAs in the FIFA rankings and the existence of a top national women's league: from $100 \%$ for level 1 MAs to $65 \%$ for those at level 4.

## FIFA ranking of MA

Level 1: $1^{\text {st }}$ to $20^{\text {th }}$ rank
Level 2: $21^{\text {st }}$ to $50^{\text {th }}$ rank
Level 3: $51^{\text {st }}$ to $100^{\text {th }}$ rank
Level 4: >100 th rank and unranked

## Duration of the top w omen's football league season

Average duration of top women's football league season: 6.5 months

## By confederation

|  | Average duration of the <br> season (months) |
| :--- | :---: |
| AFC | 5.1 |
| CAF | 6.3 |
| CONCACAF | 5.3 |
| CONMEBOL | 7.5 |
| OFC | 4.9 |
| UEFA | 8.2 |

## By size of the association



## By FIFA ranking



## FIFA ranking of MA

Level 1: $1^{\text {st }}$ to $20^{\text {th }}$ rank
Level 2: $21^{\text {st }}$ to $50^{\text {th }}$ rank
Level 3: $51^{\text {tst }}$ to $100^{\text {th }}$ rank
Level 4: $>100^{\text {th }}$ rank and unranked

The average duration of top women's football leagues is 6.5 months: from 4.9 in the OFC to 8.2 in UEFA. The greater the size of an association, the longer the average duration of the season. This suggests that a lack of financial resources could be an obstacle for many MAs in organising more games each year. However, the average duration of a season is also related to weather conditions and the number of teams participating in the competition.

## Top w omen's football league management

\% of top women's football leagues managed by the association: $\mathbf{8 2 \%}$

## By confederation

|  | $\%$ managed <br> by the association |
| :--- | :---: |
| AFC | $74 \%$ |
| CAF | $81 \%$ |
| CONCACAF | $89 \%$ |
| CONMEBOL | $100 \%$ |
| OFC | $75 \%$ |
| UEFA | $81 \%$ |

## By size of the association



## By FIFA ranking



## FIFA ranking of MA

Level 1: $1^{\text {th }}$ to $20^{\text {th }}$ rank
Level 2: $21^{\text {st }}$ to $50^{\text {th }}$ rank
Level 3: $51^{\text {st }}$ to $100^{\text {th }}$ rank
Level 4: >100 ${ }^{\text {th }}$ rank and unranked

The vast majority of top women's football leagues are managed by the national member association ( $82 \%$ ). This is particularly true for the smaller and less competitive MAs. This finding confirms the important role of MAs in developing the women's game at both league and club level.

## Annual costs of the top w omen's football league

## Total annual costs (USD): 38,934,824

Average annual costs per MA* (USD): 319,138
Median annual costs per MA (USD): 50,000

* Only MAs with a national top women's football league

By confederation

|  | Total annual costs <br> (USD) | Average annual costs <br> per MA (USD) | Median annual costs <br> per MA (USD) |
| :--- | :---: | :---: | :---: |
| AFC | $8,012,426$ | 381,544 | 57,500 |
| CAF | $4,172,835$ | 134,608 | 50,000 |
| CONCACAF | $10,734,450$ | 564,971 | 15,000 |
| CONMEBOL | $1,150,000$ | 230,000 | 250,000 |
| OFC | 250,399 | 31,300 | 18,500 |
| UEFA | $14,614,714$ | 384,598 | 95,000 |



## By size of the association



## By FIFA ranking



## FIFA ranking of MA

Level 1: $1^{\text {st }}$ to $20^{\text {th }}$ rank
Level 2: $21^{\text {st }}$ to $50^{\text {th }}$ rank
Level 3: $51^{\text {st }}$ to $100^{\text {th }}$ rank
Level 4: $>100^{\text {th }}$ rank and unranked

## Size of MA

Size 1: >100 employees
Size 2: 50 to 100 employees
Size 3: 20 to 50 employees
Size 4: <20 employees

## Revenue streams of top w omen's football leagues

By confederation

|  | Association | Sponsors | Government | Other |
| :--- | :---: | :---: | :---: | :---: |
| AFC | $19 \%$ | $41 \%$ | $39 \%$ | $1 \%$ |
| CAF | $89 \%$ | $4 \%$ | $5 \%$ | $2 \%$ |
| CONCACAF* | $5 \%$ | $0 \%$ | $95 \%$ | $0 \%$ |
| CONMEBOL | $92 \%$ | $0 \%$ | $8 \%$ | $0 \%$ |
| OFC | $68 \%$ | $9 \%$ | $0 \%$ | $23 \%$ |
| UEFA | $79 \%$ | $14 \%$ | $0 \%$ | $7 \%$ |

* not including USA and Canada

\% of contribution to top women's football leaque per revenue stream


## By size of the association



## Size of MA

Size 1: >100 employees
Size 2: 50 to 100 employees
Size 3: 20 to 50 employees
Size 4: <20 employees

## By FIFA ranking



> The main support for the organisation of top women's football leagues comes from national member associations ( $64 \%$ ). The smaller and less competitive the MA is, the greater the importance of national member associations in financing the league becomes. Sponsors provide almost one quarter of funds, while governments are the third most important revenue stream (9\%).

## FIFA ranking of MA

Level 1: $1^{\text {st }}$ to $20^{\text {th }}$ rank
Level 2: $21^{\text {st }}$ to $50^{\text {th }}$ rank
Level 3: $51^{\text {st }}$ to $100^{\text {th }}$ rank
Level 4: >100 th rank and unranked

$30 /$ FIFA Women's Football Survey 2014

SECTION 3
GOVERNANCE AND
INTEGRATION

## Dedicated structures for w omen's football

```
% of associations with the following dedicated structure for WF:
    - women's football committee: 81%
    - women's football department: 32%
```


## Women's football committee

## By size of the association



By FFA ranking


Women's football department


## Size of MA

Size 1: >100 employees
Size 2: 50 to 100 employees
Size 3: 20 to 50 employees
Size 4: <20 employees

## FIFA ranking of MA

Level 1: $1^{\text {st }}$ to $20^{\text {th }}$ rank
Level 2: $21^{\text {st }}$ to $50^{\text {th }}$ rank
Level 3: $51^{\text {st }}$ to $100^{\text {th }}$ rank
Level 4: >100 th rank and unranked

## By confederation

|  | Women's <br> football <br> committee | Women's <br> football <br> department |
| :--- | :---: | :---: |
| AFC | $85 \%$ | $26 \%$ |
| CAF | $96 \%$ | $29 \%$ |
| CONCACAF | $76 \%$ | $14 \%$ |
| CONMEBOL | $80 \%$ | $50 \%$ |
| OFC | $50 \%$ | $40 \%$ |
| UEFA | $76 \%$ | $43 \%$ |

While a women's football committee exists in more than $80 \%$ of the 177 MAs who responded to the survey, only $32 \%$ also had a women's football department. This percentage is only about $50 \%$ for the biggest and best performing MAs. Therefore, the establishment of dedicated football departments could thus be seen as a key action to develop the women's game and help to support the implementation of various strategies conceived at football committee level.

## Dedicated structures for w omen's football

\% of associations with the following dedicated structure for WF:

- women's football national team coach(es): 46\%
- women's football development manager: 23\%


## WF national team coach(es) WF development manager

## By size of the association




## By FIFA ranking




## By confederation

|  | WF national team <br> coach(es) | WF development <br> manager |
| :--- | :---: | :---: |
| AFC | $35 \%$ | $12 \%$ |
| CAF | $20 \%$ | $9 \%$ |
| CONCACAF | $55 \%$ | $21 \%$ |
| CONMEBOL | $70 \%$ | $60 \%$ |
| OFC | $10 \%$ | $30 \%$ |
| UEFA | $76 \%$ | $35 \%$ |

Dedicated national team coaches only exist in $46 \%$ of MAs. This ranges from $83 \%$ in the most competitive associations to only $22 \%$ in the least competitive. The existence of development managers (23\%) dedicated to women's football is even lower than that of national team coaches. This confirms that women's football is still underdeveloped in the majority of MAs surveyed.

## MoU with the government

\% of associations with a Memorandum of Understanding with the government: 14\%

## By confederation

|  | \% of MAs with an MoU |
| :--- | :---: |
| AFC | $9 \%$ |
| CAF | $13 \%$ |
| CONCACAF | $17 \%$ |
| CONMEBOL | $0 \%$ |
| OFC | $20 \%$ |
| UEFA | $16 \%$ |

## By size of the association



## By FIFA ranking



## FIFA ranking of MA

Level 1: $1^{\text {st }}$ to $20^{\text {th }}$ rank
Level 2: $21^{\text {st }}$ to $50^{\text {th }}$ rank
Level 3: $51^{\text {st }}$ to $100^{\text {th }}$ rank
Level 4: $>100^{\text {th }}$ rank and unranked

Only 14\% of member associations have signed a Memorandum of Understanding or similar document with their local government. This ranges from $20 \%$ in the OFC to $0 \%$ in CONMEBOL. As governments play a key role in the funding of football in many MAs, the signing of MoUs which specifically address women's football should prove to be beneficial in the development of the game.

## Staff dedicated to women's football

## Total number of employees dedicated to women's football: 1,186

Av. number of employees dedicated to women's football per MA: 6.7


By size of the association


## By FIFA ranking



## FIFA ranking of MA

Level 1: $1^{\text {st }}$ to $20^{\text {th }}$ rank
Level 2: $21^{\text {st }}$ to $50^{\text {th }}$ rank
Level 3: $51^{\text {st }}$ to $100^{\text {th }}$ rank
Level 4: >100 th rank and unranked

## Staff dedicated to women's football

## Total number of employees in the MAs: 11,911

\% of employees dedicated to women's football: 10\%

## By size of the association



## Size of MA

Size 1: >100 employees
Size 2: 50 to 100 employees
Size 3: 20 to 50 employees
Size 4: <20 employees

## By FIFA ranking



By confederation

|  | Av. number of <br> employees per MA | \% of employees <br> dedicated to WF |
| :--- | :---: | :---: |
| AFC | 58 | $13 \%$ |
| CAF | 36 | $14 \%$ |
| CONCACAF | 38 | $13 \%$ |
| USA-CAN | 103 | $20 \%$ |
| CONMEBOL | 95 | $7 \%$ |
| OFC | 16 | $14 \%$ |
| UEFA | 126 | $8 \%$ |

Staff dedicated to women's football account for $10 \%$ of all employees in member associations. Interestingly, this percentage is greater in the smaller MAs than that found in their larger counterparts. This probably reflects the difficulty for women's football to challenge the men's game in the longer-established MAs. It could also reflect the key importance for smaller MAs to initiate programmes on behalf of international football governing bodies in funding specific positions for the development of women's football.

## Staff dedicated to women's football

\% of part-time employees among staff dedicated to WF: 48\%

## By confederation

|  | $\%$ of full-time <br> employees | \% of part-time <br> employees |
| :--- | :---: | :---: |
| AFC | $46 \%$ | $54 \%$ |
| CAF | $47 \%$ | $53 \%$ |
| CONCACAF | $61 \%$ | $39 \%$ |
| USA-CAN | $95 \%$ | $5 \%$ |
| CONMEBOL | $70 \%$ | $30 \%$ |
| OFC | $72 \%$ | $28 \%$ |
| UEFA | $52 \%$ | $48 \%$ |

## By size of the association



## By FIFA ranking

## full-time vs part-time



## FIFA ranking of MA

Level 1: $1^{\text {st }}$ to $20^{\text {th }}$ rank
Level 2 : $21^{\text {st }}$ to $50^{\text {th }}$ rank
Level $3: 51^{\text {st }}$ to $100^{\text {th }}$ rank
Level 4: >100 th rank and unranked

Only half of the staff dedicated to women's football is employed full-time. Even in the bigger MAs, FTEs only account for 57\% of the total staff dedicated to women's football. This finding suggests that the provision of more full-time positions could be a key action in helping to develop women's football.

## Women on executive committees

## Total number of women on executive committees: 188

Average number of women on executive committees per MA: 1.1


## By size of the association



## By FIFA ranking



## FIFA ranking of MA

Level 1: $1^{\text {ts }}$ to $20^{\text {th }}$ rank
Level 2: $21^{\text {st }}$ to $50^{\text {th }}$ rank
Level 3: $51^{\text {st }}$ to $100^{\text {th }}$ rank
Level 4: $>100^{\text {th }}$ rank and unranked

The total number of women on executive committees of the 177 MAs that participated in the survey is 188 (on average 1.1 per MA). The highest number per MA (3) was recorded in the United States and Canada. Women were seen to have better representation on executive committees of level 1 MAs than in associations where the results of the women's senior national team were not so good.

## Women on executive committees

Av. number of representatives on executive committees per MA: 13.2
\% of women on executive committees: $8 \%$

## By size of the association



## By confederation

Av. number of
representatives on executive committees per MA

| AFC |  |  |
| :--- | :---: | :--- |
| CAF | 14 | $9 \%$ |
| CONCACAF | 11 | $8 \%$ |
| USA-CAN | 16 | $13 \%$ |
| CONMEBOL | 19 | $19 \%$ |
| OFC | 8 | $2 \%$ |
| UEFA | 15 | $15 \%$ |

Women account for $8 \%$ of the total number of executive committee and board members recorded by the survey. The highest percentage was observed in the OFC (15\%), while the lowest percentage was observed in CONMEBOL (2\%).

This finding highlights the difficulties facing women in reaching senior positions in football governing bodies.

## Inclusion of football in the school curriculum

\% of MAs in which football is included in the school curriculum for girls: 59.3\%


## By confederation

|  | \% w ith football in school for girls |
| :--- | :---: |
| AFC | $62 \%$ |
| CAF | $69 \%$ |
| CONCACAF | $69 \%$ |
| CONMEBOL | $10 \%$ |
| OFC | $90 \%$ |
| UEFA | $47 \%$ |

## By size of the association



## By FIFA ranking

## Size of MA

size 1: >100 employees
size 2: 50 to 100 employees
Size 3: 20 to 50 employees
Size 4: <20 employees


## FIFA ranking of MA

Level 1: $1^{\text {st }}$ to $20^{\text {th }}$ rank
Level 2: $21^{\text {st }}$ to $50^{\text {th }}$ rank
Level 3 : $51^{\text {st }}$ to $100^{\text {th }}$ rank
Level $4:>100^{\text {th }}$ rank and unranked

$$
\begin{aligned}
& \text { In the majority of MAs worldwide, football } \\
& \text { is included as part of the school curriculum } \\
& \text { for both boys and girls. This holds particularly } \\
& \text { true in the OFC }(90 \%) \text {. However, the figure } \\
& \text { is below } 50 \% \text { in UEFA ( } 47 \% \text { ) and CONMEBOL } \\
& \text { (10\%). This highlights an opportunity for } \\
& \text { both UEFA and CONMEBOL MAs to develop } \\
& \text { closer links and collaborations with schools. }
\end{aligned}
$$

## Existence of specific grassroots programmes

\% of MAs with a specific programme for grassroots*: 39.7\%

* Grassroots programmes were defined in the questionnaire as programmes dedicated to U-12 girls

By confederation

|  | \% of MAs with a specific <br> programme for grassroots |
| :--- | :---: |
| AFC | $47 \%$ |
| CAF | $24 \%$ |
| CONCACAF | $55 \%$ |
| CONMEBOL | $10 \%$ |
| OFC | $50 \%$ |
| UEFA | $45 \%$ |

By size of the association


By FIFA ranking


## FIFA ranking of MA

Level 1: $1^{\text {st }}$ to $20^{\text {th }}$ rank
Level 2: $21^{\text {st }}$ to $50^{\text {th }}$ rank
Level 3: $51^{\text {st }}$ to $100^{\text {th }}$ rank
Level 4: >100 th rank and unranked

Only four out of ten MAs have specific grassroots programmes. Interestingly, no significant gaps were observed according to the size of the association or their FIFA ranking. This illustrates a general opportunity to develop training programmes focused on registered or non-registered players under 12 years of age.


SECTION 4
FEM ALE
PARTICIPATION IN FOOTBALL

## Female coaches registered

## Total number of female coaches registered*: 83,262

Average number of female coaches registered per MA: 496
Median number of female coaches registered per MA: 15

* Irrespective of licensing level



## By FIFA ranking



In total, 83,262 female coaches are registered with the 177 MAs that took part in the survey. While the average number of female coaches for associations ranked in the top 20 positions is 5,037, this figure is below 250 for MAs ranked outside the top 20. The concentration of female coaches in the most competitive member associations explains the much lower figure observed for median values than for averageperforming associations. This finding suggests that the development of training programmes for female coaches in the lower-performing football associations could be an effective way to promote women's football.

## FIFA ranking of MA

Level 1: $1^{\text {st }}$ to $20^{\text {th }}$ rank
Level 2: $21^{\text {st }}$ to $50^{\text {th }}$ rank
Level 3: $51^{\text {ts }}$ to $100^{\text {th }}$ rank
Level 4: >100 th rank and unranked

## Female coaches registered

Total number of coaches registered: 1,242,966
\% of female coaches registered: 7\%

## By size of the association

## \% of female coaches

 registered

## By FIFA ranking

## \% of female coaches registered

## FIFA ranking of MA

Level 1: $1^{\text {st }}$ to $20^{\text {th }}$ rank
Level 2 : $21^{\text {st }}$ to $50^{\text {th }}$ rank
Level 3: $51^{\text {st }}$ to $100^{\text {th }}$ rank
Level 4: >100 ${ }^{\text {h }}$ rank and unranked

## Size of MA

Size 1: >100 employees
Size 2: 50 to 100 employees
Size 3: 20 to 50 employees
Size 4: <20 employees

## By confederation

\% of female coaches registered

| AFC | $8 \%$ |
| :--- | :---: |
| CAF | $6 \%$ |
| CONCACAF | $20 \%$ |
| USA and Canada | $21 \%$ |
| Other associations | $6 \%$ |
| CONMEBOL | $3 \%$ |
| OFC | $17 \%$ |
| UEFA | $4 \%$ |

Women represent 6.7\% of all registered coaches. This percentage is much higher in the United States and Canada (21\%)
than in any other world region. The relative presence of women among coaches is also much higher in the OFC (17\%) than in the remaining confederations. The lowest recorded figures were observed in CONMEBOL (3\%).

## Female referees

## Total number of female referees: 76,458

Average number of female referees per MA: 432
Median number of female referees per MA: 20

## By confederation

|  | Female referees | Av. female referees per MA | Median female referees per MA |
| :--- | :---: | :---: | :---: |
| AFC | 16,264 | 478 | 11 |
| CAF | 1,331 | 30 | 16 |
| CONCACAF | 48,759 | 1,681 | 6 |
| USA and Canada | 48,411 | 24,206 | 24,206 |
| Other associations | 348 | 13 | 6 |
| CONMEBOL | 370 | 37 | 28 |
| OFC | 286 | 29 | 23 |
| UEFA | 9,448 | 193 | 47 |



* CAF, CONMEBOL, OFC and CONCACAF not including USA and Canada

USA and Canada

By size of the association


## Size of MA

Size 1: >100 employees
Size 2: 50 to 100 employees
Size 3: 20 to 50 employees
Size 4: <20 employees

## Female referees

Total number of referees: 736,563
\% of female referees: $\mathbf{1 0 \%}$

## By size of the association



## By FIFA ranking



## By confederation

|  | $\%$ of female <br> referees |
| :--- | :---: |
| AFC | $6 \%$ |
| CAF | $6 \%$ |
| CONCACAF | $27 \%$ |
| USA and Canada | $28 \%$ |
| Other associations | $6 \%$ |
| CONMEBOL | $11 \%$ |
| OFC | $16 \%$ |
| UEFA | $4 \%$ |

## Size of MA

Size 1: >100 employees
Size 2: 50 to 100 employees
Size 3: 20 to 50 employees
Size 4: <20 employees

## Registered female players

Total number of registered female players*: 4,801,360
Average number of registered female players per MA: 27,126
Median number of registered female players per MA: 960

* The values for China and France come from the FIFA Big Count

By confederation

|  | Female registered | Average per MA | Median per MA |
| :--- | :---: | :---: | :---: |
| AFC | 300,122 | 8,827 | 720 |
| CAF | 54,055 | 1,229 | 600 |
| CONCACAF | $2,287,185$ | 78,868 | 250 |
| USA and Canada | $2,255,000$ | $1,127,500$ | $1,127,500$ |
| Other associations | 32,185 | 1,192 | 250 |
| CONMEBOL | 25,459 | 2,546 | 2,346 |
| OFC | 38,736 | 3,874 | 1,190 |
| UEFA | $2,095,803$ | 41,916 | 2,472 |

* AFC, CAF, CONMEBOL, OFC and CONCACAF not including USA and Canada


By FIFA ranking


The United States and Canada account for almost half of the 4.8 million female players registered at worldwide level (including China and France as per data provided by the FIFA Big Count). UEFA member associations also play a significant role by representing 44\% of all registered female footballers. In terms of participation, women's football is still heavily under-developed in the remaining associations and confederations.

## FIFA ranking of MA

Level 1: $1^{\text {st }}$ to $20^{\text {th }}$ rank
Level 2: $21^{\text {st }}$ to $50^{\text {th }}$ rank
Level 3: $51^{\text {st }}$ to $100^{\text {th }}$ rank
Level 4: >100 th rank and unranked

## Registered female players (senior/youth)



* Youth: defined as players under 17 years of age as in the majority of MAs female footballers aged 17 or over already play in adult leagues


## By confederation

|  | \% senior | \% youth |
| :--- | :---: | :---: |
| AFC | $37 \%$ | $63 \%$ |
| CAF | $46 \%$ | $54 \%$ |
| CONCACAF | $47 \%$ | $53 \%$ |
| USA and Canada | $46 \%$ | $54 \%$ |
| Other associations | $56 \%$ | $44 \%$ |
| CONMEBOL | $58 \%$ | $42 \%$ |
| OFC | $29 \%$ | $71 \%$ |
| UEFA | $46 \%$ | $54 \%$ |

By size of the association


## By FIFA ranking



## FIFA ranking of MA

Level 1: $1^{\text {st }}$ to $20^{\text {th }}$ rank
Level 2: $21^{\text {st }}$ to $50^{\text {th }}$ rank
Level 3: $51^{\text {st }}$ to $100^{\text {th }}$ rank
Level 4: >100 th rank and unranked

Senior players represent a minority of registered female players, with a figure of $46 \%$ recorded. This holds true in all confederations except for CONMEBOL and CONCACAF (excluding the United States and Canada). This shows the necessity for these Confederations to put more emphasis on youth development (defined here as players under 17 years of age) of the women's game.

## Total female players

## Total number of female players*: 30,145,700

Average number of female players per MA: 168,400

* The values for non-registered players have been calculated by combining the data collected in this survey and those published in the FIFA Big Count

By confederation

|  | Total female players | Av. total female players <br> per MA |
| :--- | :---: | :---: |
| AFC | $6,327,700$ | 180,800 |
| CAF | $1,225,400$ | 27,200 |
| CONCACAF | $16,104,000$ | 555,300 |
| USA and Canada | $15,877,400$ | $7,938,700$ |
| Other associations | 226,600 | 8,400 |
| CONMEBOL | 256,300 | 25,600 |
| OFC | 87,200 | 8,700 |
| UEFA | $6,145,100$ | 122,900 |

* CAF, CONMEBOL, OFC and CONCACAF not including USA and Canada



## By FIFA ranking



## FIFA ranking of MA

Level 1: $1^{\text {th }}$ to $20^{\text {th }}$ rank
Level 2: $21^{\text {st }}$ to $50^{\text {th }}$ rank
Level 3: $51^{\text {st }}$ to $100^{\text {th }}$ rank
Level 4 : $>100^{\text {th }}$ rank and unranked

The total number of active female participants at worldwide level can be estimated at around 30 million. On average, there are 168,400 female players per MA. This figure is over one million for the 20 best-performing associations. This confirms the importance and influence of high participation levels in achieving the best possible results.

## Total female players

## Female players per 10,000 inhabitants: 47.4

\% of non-registered female players: 84\%

## By size of the association



## By FIFA ranking

Female players per 10,000 inhabitants

## Size of MA

Size 1: >100 employees
Size 2: 50 to 100 employees
Size 3: 20 to 50 employees
Size 4: <20 employees

## FIFA ranking of MA

Level 1: $1^{\text {st }}$ to $20^{\text {th }}$ rank
Level 2: $21^{\text {st }}$ to $50^{\text {th }}$ rank
Level 3: $51^{\text {st }}$ to $100^{\text {th }}$ rank Level 4: >100th rank and unranked

## By confederation

|  | Female players <br> per 10,000 <br> inhabitants | \% of non- <br> registered female <br> players |
| :--- | :---: | :---: |
| AFC | 17 | $95 \%$ |
| CAF | 14 | $96 \%$ |
| CONCACAF | 313 | $86 \%$ |
| USA and Canada | 450 | $86 \%$ |
| Other associations | 14 | $86 \%$ |
| CONMEBOL | 6 | $90 \%$ |
| OFC | 61 | $56 \%$ |
| UEFA | 71 | $66 \%$ |

Non-registered female players represent 84\% of women playing football at worldwide level. The only confederations where this proportion is below two thirds are UEFA and the OFC. This finding shows the great opportunities available for MAs to focus on girls and women to significantly increase their overall number of registered players.


[^0]SECTION 5
INVESTM ENT IN WOMEN'S
FOOTBALL

## Annual investment in women's football

## Total annual investment (USD): 156,624,000

Average annual investment per MA (USD): 905,000
Median annual investment per MA (USD): 157,500

## By confederation

|  | Total annual investment (USD) | Average per MA (USD) | Median per MA (USD) |
| :--- | :---: | ---: | :---: |
| AFC | $22,054,000$ | 648,600 | 175,000 |
| CAF | $11,600,000$ | 263,400 | 37,500 |
| CONCACAF | $20,024,000$ | 690,500 | 75,000 |
| CONMEBOL | $2,462,000$ | 307,750 | 275,000 |
| OFC | $1,371,000$ | 152,300 | 40,000 |
| UEFA | $99,113,000$ | $2,022,700$ | 880,555 |



By FIFA ranking


## FIFA ranking of MA

Level 1: $1^{\text {st }}$ to $20^{\text {th }}$ rank
Level 2: $21^{\text {st }}$ to $50^{\text {th }}$ rank
Level 3: $51^{\text {st }}$ to $100^{\text {th }}$ rank
Level 4: >100 th rank and unranked

The 177 MAs that took part in the survey

> invest in total USD 156 million per year in women's football. This represents an average of nearly USD 905,000 per MA (median USD 157,000 ). The great discrepancies between the average and median values reveal the high concentration of significant investment levels in only a few member associations. For example, the median investment of UEFA member associations is 24 times greater than investment within CAF.

## Sponsor and government support

\% of MAs with a women's football sponsor: 29\%
\% of MAs with government support for women's football: 33\%
\% of MAs with both sponsor and government support: 12\%

## By confederation

|  | \% of MAs with a <br> women's <br> football sponsor | \% of MAs with <br> government support | \% of MAs with both <br> sponsor and <br> government support |
| :--- | :---: | :---: | :---: |
| AFC | $47 \%$ | $41 \%$ | $24 \%$ |
| CAF | $20 \%$ | $24 \%$ | $9 \%$ |
| CONCACAF | $31 \%$ | $41 \%$ | $14 \%$ |
| CONMEBOL | $0 \%$ | $40 \%$ | $0 \%$ |
| OFC | $50 \%$ | $50 \%$ | $20 \%$ |
| UEFA | $27 \%$ | $27 \%$ | $8 \%$ |

## By FIFA ranking


\% of MAs with both sponsor and government support 33\%


Local government supports women's football in one third of the MAs that participated in the survey. The proportion of MAs with a women's football sponsor is slightly lower at 29\%. Only in Asia was the percentage of MAs with a women's football sponsor greater than that of MAs with government support. Only $12 \%$ of the respondents were supported by both a sponsor and the government.

## Sponsors dedicated to women's football

Total annual investment by sponsors: USD 5,404,900
Average annual investment per MA*: USD 110,300
\% of annual investment by sponsors**: 3\%

* Only for MAs with sponsor or government support
** Including MAs without sponsor dedicated to women's football


## By confederation

|  | Total annual <br> investment by <br> sponsors (USD) | Average per MA <br> (USD) | $\%$ of total annual <br> investment |
| :--- | :---: | :---: | :---: |
| AFC | $2,350,460$ | 146,904 | $11 \%$ |
| CAF | 805,100 | 89,456 | $7 \%$ |
| CONCACAF | 348,957 | 38,773 | $2 \%$ |
| CONMEBOL | - | - | - |
| OFC | 201,530 | 40,306 | $15 \%$ |
| UEFA | $1,698,876$ | 141,573 | $2 \%$ |



* CONCACAF, CONMEBOL, OFC

By size of the association

Av. annual investment made by government per MA (USD x1000)

## Size of MA

Size 1: >100 employees
Size 2: 50 to 100 employees
Size 3: 20 to 50 employees
Size 4: <20 employees

\% of total annual investment made by sponsors


Sponsors invest more than USD 5 million per year in women's football. This corresponds to an average annual investment per MA of about USD 110,000. The record high was observed in the AFC (USD 147,000 per MA on average). Conversely, no CONMEBOL association was able to attract sponsor investments.

## Support from governments

## Total annual investment by governments: USD 18,500,700

Average annual investment per MA*: USD 411,000
\% of annual investment by governments**: 12\%

* Only for MAs with sponsor or government support
** Including MAs without support from government


## By confederation

|  | Total annual <br> investment by <br> government (USD) | Average per MA <br> (USD) | \% of total annual <br> investment |
| :--- | :---: | :---: | :---: |
| AFC | $6,349,400$ | 634,900 | $29 \%$ |
| CAF | $1,216,400$ | 173,800 | $11 \%$ |
| CONCACAF | $3,244,500$ | 270,400 | $16 \%$ |
| CONMEBOL | 95,000 | 47,500 | $4 \%$ |
| OFC | 730,000 | 365,000 | $53 \%$ |
| UEFA | $6,865,400$ | 528,100 | $7 \%$ |



* CAF, CONCACAF, CONMEBOL, OFC


## By size of the association



## Size of MA

Size 1: >100 employees
Size 2: 50 to 100 employees Size 3: 20 to 50 employees Size 4: <20 employees

The total annual investment by governments in women's football is almost USD 20 million. The average yearly investment per MA is USD 411,000, ranging from USD 950,000 for the largest MAs to USD 64,000 for the smallest. However, the latter are more dependent on government support than the former: 19\% of total investments by governments compared to $12 \%$


SECTION 6
AWARENESS AND MEDIA COVERAGE

## Media platforms promoting women's football

## \% of MAs with at least one platform* promoting WF: 92\% <br> \% of MAs with at least two platforms promoting WF: 84\% <br> \% of MAs with at least four platforms promoting WF: 46\%

* Printed press, TV, radio, website, social media

By size of the association


## By FIFA ranking



## By confederation

|  | At least one <br> platform | At least tw o <br> platforms | At least four <br> platforms |
| :--- | :---: | :---: | :---: |
| AFC | $91 \%$ | $79 \%$ | $44 \%$ |
| CAF | $82 \%$ | $73 \%$ | $33 \%$ |
| CONCACAF | $97 \%$ | $86 \%$ | $52 \%$ |
| CONMEBOL | $90 \%$ | $90 \%$ | $60 \%$ |
| OFC | $90 \%$ | $80 \%$ | $60 \%$ |
| UEFA | $100 \%$ | $96 \%$ | $51 \%$ |

In the vast majority of MAs there is at least one media platform that promotes women's football. However, media coverage is significantly greater in the biggest MAs (women's football is promoted by at least four platforms in 67\% of size 1 member associations) and in the most competitive associations (83\%).

## Media platforms promoting women's football

\% of MAs in which women's football is promoted by...<br>Printed press: 80\%<br>Television: 59\%<br>Website: 71\%<br>Social media: 62\%<br>Other media: 4\%<br>None: 9\%

## By confederation

|  | Printed <br> press | TV | Radio | Website | Social <br> media | Others | None |
| :--- | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| AFC | $79 \%$ | $62 \%$ | $41 \%$ | $71 \%$ | $65 \%$ | $9 \%$ | $12 \%$ |
| CAF | $76 \%$ | $56 \%$ | $67 \%$ | $40 \%$ | $31 \%$ | $2 \%$ | $18 \%$ |
| CONCACAF | $86 \%$ | $52 \%$ | $62 \%$ | $72 \%$ | $66 \%$ | $3 \%$ | $3 \%$ |
| CONMEBOL | $70 \%$ | $60 \%$ | $40 \%$ | $90 \%$ | $80 \%$ | $0 \%$ | $10 \%$ |
| OFC | $90 \%$ | $60 \%$ | $70 \%$ | $70 \%$ | $40 \%$ | $0 \%$ | $10 \%$ |
| UEFA | $80 \%$ | $65 \%$ | $47 \%$ | $96 \%$ | $86 \%$ | $4 \%$ | $2 \%$ |

## By FIFA ranking



Printed press

Website


Social media


FIFA ranking of MA
Level 1: $1^{\text {st }}$ to $20^{\text {th }}$ rank
Level 2: $21^{\text {st }}$ to $50^{\text {th }}$ rank
Level 3: $51^{\text {st }}$ to $100^{\text {th }}$ rank
Level 4: >100th rank and unranked

Radio

Women's football is promoted by print media in almost $80 \%$ of the MAs that responded. This is $20 \%$ more than for television and $25 \%$ higher than for radio. These relatively high figures for both websites and social media demonstrate the strong potential for digital platforms to promote women's football.

## Media platforms used by the MAs

\% of associations with at least one platform* used: 96\%
\% of associations with at least two platforms used: 88\%
\% of associations with at least four platforms used: 43\%

* Printed press, TV, radio, website, social media


## By size of the association



At least four platforms


## Size of MA

Size 1: >100 employees
Size 2: 50 to 100 employees
Size 3: 20 to 50 employees
Size 4: <20 employees

## By FIFA ranking



## By confederation

|  | At least one <br> platform | At least two <br> platforms | At least four <br> platforms |
| :--- | :---: | :---: | :---: |
| AFC | $97 \%$ | $79 \%$ | $38 \%$ |
| CAF | $89 \%$ | $82 \%$ | $31 \%$ |
| CONCACAF | $100 \%$ | $83 \%$ | $55 \%$ |
| CONMEBOL | $100 \%$ | $90 \%$ | $40 \%$ |
| OFC | $90 \%$ | $90 \%$ | $60 \%$ |
| UEFA | $100 \%$ | $100 \%$ | $47 \%$ |

Only a minority of the 177 MAs that participated in the survey use at least four media platforms to promote women's football. This percentage is particularly low at CAF level, where the use of digital platforms such as websites and social media is still limited (only $27 \%$ of MAs as detailed on the next page).

## Media platforms used by the MAs

```
% of MAs using the following media platforms to promote WF:
Printed press: 74%
Television: 56%
Social media: 61%
Radio: 52%
Website: 76%
Social media: 61\%
Other media: 3\%
None: 4\%
```


## By confederation

|  | Printed <br> press | TV | Radio | Website | Social <br> media | Others | None |
| :--- | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| AFC | $68 \%$ | $53 \%$ | $29 \%$ | $82 \%$ | $62 \%$ | $3 \%$ | $3 \%$ |
| CAF | $80 \%$ | $58 \%$ | $69 \%$ | $49 \%$ | $27 \%$ | $4 \%$ | $11 \%$ |
| CONCACAF | $83 \%$ | $55 \%$ | $66 \%$ | $76 \%$ | $69 \%$ | $3 \%$ | $0 \%$ |
| CONMEBOL | $60 \%$ | $50 \%$ | $50 \%$ | $90 \%$ | $60 \%$ | $0 \%$ | $0 \%$ |
| OFC | $80 \%$ | $60 \%$ | $70 \%$ | $70 \%$ | $60 \%$ | $0 \%$ | $10 \%$ |
| UEFA | $69 \%$ | $57 \%$ | $43 \%$ | $96 \%$ | $88 \%$ | $2 \%$ | $0 \%$ |

## By size of the association



## Partnership with a national TV station

\% of MAs with a partnership with a national TV station that WF also benefits from: $24 \%$

## By confederation

|  | \% of MAs w ith TV partnership | Only for the national team |
| :--- | :---: | :---: |
| AFC | $24 \%$ | $9 \%$ |
| CAF | $20 \%$ | $4 \%$ |
| CONCACAF | $17 \%$ | $10 \%$ |
| CONMEBOL | $20 \%$ | $10 \%$ |
| OFC | $30 \%$ | $10 \%$ |
| UEFA | $33 \%$ | $10 \%$ |

## By FIFA ranking

\% of MAs with TV partnership

\% of MAs with TV partnership only for national team

## FIFA ranking of MA

Level 1: $1^{\text {st }}$ to $20^{\text {th }}$ rank
Level 2: $21^{\text {st }}$ to $50^{\text {th }}$ rank
Level 3: $51^{\text {st }}$ to $100^{\text {th }}$ rank
Level 4: >100 th rank and unranked

## By size of the association



Nearly one quarter of MAs have a contractual partnership with a national TV station from which women's football benefits. This percentage is much greater for the most competitive MAs (78\%) than for those at the least competitive level (9\%). This finding confirms the importance of performing at a competitive level to be able to attract interest from national television networks.

## Size of MA

Size 1: >100 employees
Size 2: 50 to 100 employees
Size 3: 20 to 50 employees
Size 4: <20 employees

## SECTION 7 <br> PERCEPTION, NEEDS AND CHALLENGES

## Women's football perception

| \% of MAs which declare that, in their country, women's football is perceived as ... |  |
| :--- | :--- |
| $36 \%$ | a great platform for international participation (GP) |
| $33 \%$ | a vehicle for social development (VS) <br> $31 \%$ |
| a sport for women which is culturally challenged (CC)  <br> $31 \%$ a sport not traditionally seen as being for women (NW) <br> $15 \%$ a high participation sport (HP) <br> $13 \%$ a quality sport (QS) <br> an expression of a modern lifestyle (ML) <br> $7 \%$ <br> an attractive area for investment (Al)  <br> $5 \%$  |  |

## By confederation



Women's football is considered as a great platform for international participation by $36 \%$ of the respondents. At the opposite end of the table, only $5 \%$ of MAs consider that women's football is perceived as an attractive area for investment. Cultural barriers are still relatively common, especially in AFC and CONMEBOL.

## Women's football perception

## By FIFA ranking



The perception of women's football at the best-performing MAs is very different to that observed at the less competitive associations. In the best-performing MAs, women's football is seen as a high participation sport, which is not the case in the less competitive associations. Moreover, only $11 \%$ of level 1 MA respondents considered that women's football was not a traditional sport for women. This reveals the close links between top-level results and social acceptance of women's football.

## Biggest challenges for women's football

The biggest challenges preventing women's football from moving to the next level are..

very strong challenge (10)

not a challenge at all (1)

Average score of the challenges:
1 meaning 'not a challenge at all'
10 meaning 'very strong challenge'

## By confederation


Qualified staff
Support within the football family
Availability of football Bottom 3
equipment


```
Qualified staff
```

Qualified staff
Competitions
Competitions
Number of players
Number of players
Bottom 3
Bottom 3


CONCACAF


| Infrastructure |
| :--- |
| Cultural barriers |
| Social barriers |


| UEFA |  |
| :--- | ---: |
| Investment | Top 3 |
| Number of players |  |
| Infrastructure |  |
| Social barriers |  |
| Competitions |  |
| Availability of football |  |
| equipment | Bottom 3 |

The need for increased investment is considered as the biggest challenge preventing women's football from moving to the next level. This holds true in all confederations. Respondents highlighted infrastructure as the second-most important challenge facing women's football in the years to come.

## Biggest challenges for women's football

## By FIFA ranking





Qualified staff




Average score of the challenges:
1 meaning 'not a challenge at all'
10 meaning 'very strong challenge'

## FIFA ranking of MA

Level 1: $1^{\text {st }}$ to $20^{\text {th }}$ rank
Level 2: $21^{\text {st }}$ to $50^{\text {th }}$ rank
Level 3: $51^{\text {st }}$ to $100^{\text {th }}$ rank
Level 4: >100 th rank and unranked

## Priorities and goals for the next ten years

Priorities and goals for the next ten years
Increase the number of practitioners
Player development $\quad$ high promority
Funding
Qualified coaches of WF

| Media support |
| :--- |
| Women's football structure |
| Improve the football facilities |$\quad$| Performance of the national team(s) |
| :--- |

## By confederation

| AFC | CAF | CONCACAF |
| :---: | :---: | :---: |
| Increase the number of practitioners Top 3 <br> Promotion of women's football <br> Player development | Increase the number of practitioners Top 3 <br> Funding <br> Promotion of women's football | Increase the number of practitioners Top 3 <br> Player development <br> Promotion of women's football |
| Improve the football facilities <br> League development <br> Media support <br> Bottom 3 | Improve the football facilities <br> Women's football structure <br> Performance of the national <br> team(s) <br> Bottom 3 | Media support <br> Performance of the national team(s) <br> Improve the football facilities <br> Bottom 3 |
| CONMEBOL | OFC | UEFA |
| Funding Top 3 <br> Increase the number of practitioners <br> Promotion of women's football | Increase the number of practitioners Top 3 <br> Player development <br> Qualified coaches | Increase the number of practitioners Top 3 <br> Player development <br> Promotion of women's football |
| Qualified coaches <br> Women's football structure <br> Performance of the national team(s) <br> Bottom 3 | Performance of the national team(s) <br> Improve the football facilities <br> Media support <br> Bottom 3 | League development <br> Women's football structure <br> Improve the football facilities <br> Bottom 3 |

According to the 177 MAs that participated in the survey, the top priority for the next decade is to increase the overall number of women and girls playing football. This is considered the top priority for five out of six confederations. The only exception is CONMEBOL, where this issue is ranked in second place. The second most cited priority is player development. This shows that from an MA perspective, the priorities for women's football are related to the game itself.

## Priorities and goals for the next ten years

## By FIFA ranking

Increase the number of practitioners


Funding


Performance of the national team(s)


Player development


Women's football structure


Promotion of women's football


Improve the football facilities


* Average rank of the priority as defined by the MAs (from 1, most important priority, to 10, least important one), full list of priorities on page 70


## FIFA ranking of MA

Level 1: $1^{\text {st }}$ to $20^{\text {th }}$ rank
Level 2: $21^{\text {st }}$ to $50^{\text {th }}$ rank
Level 3: $51^{\text {st }}$ to $100^{\text {th }}$ rank
Level 4: $>100^{\text {th }}$ rank and unranked

## Needs with regard to priorities and goals

```
Average score* of needs:
1. Funding: 8.7
2. Promotion, advocacy, aw areness: 7.7
3. Technical expertise: 7.7
4. Infrastructure (football pitches, training facilities): 7.1
5. Football equipment: 6.6
```

* 1 for not an urgent need at all and 10 for a very urgent need


## By confederation



Funding is considered as the most important priority for women's football in the next ten years by all confederations except CONMEBOL. This result is in line with the findings presented on pages 68 and 69. In addition to funding, respondents also highlighted the need for the further development of promotion and technical expertise.

## Needs with regard to priorities and goals

## By FIFA ranking



## FIFA ranking of MA

Level 1: $1^{\text {st }}$ to $20^{\text {th }}$ rank
Level 2: $21^{\text {st }}$ to $50^{\text {th }}$ rank
Level 3: $51^{\text {st }}$ to $100^{\text {th }}$ rank

Funding is considered as the most urgent requirement by all MA level categories. However, the score for the best-performing associations is significantly lower than for that recorded by the least competitive associations. Technical expertise and football equipment are considered as urgent needs by all MAs below level 4. This reflects the current low development level of women's football in these associations.


SECTION 8
CONCLUSIONS AND
RECOMMENDATIONS

## Conclusions and Recommendations

The survey which is the basis of the present report allowed FIFA to assess the state of women's football development at worldwide level. The survey also provided an opportunity for member associations to give their opinion and express their needs regarding women's football.
The very high response rate confirms the relevance of the approach and reinforces the importance of the present study. In total, 177 member associations participated in the survey, which corresponds to a response rate of about $85 \%$.
The analysis of answers provided by the respondents per confederation and according to their position in the FIFA rankings allowed us to highlight the diversity of existing situations from a women's football development perspective.

> Various indicators were analysed and revealed the great discrepancies in the stages of women's football development at worldwide level. Differences were found in the number of practitioners and/or licensed players, number of staff dedicated to women's football, existence of top women's football leagues and the resources available.
For example, there is a correlation between the position of the member associations in the FIFA rankings and the existence of a top national women's league. This ranges from $100 \%$ for the bestperforming member associations to $65 \%$ for the least competitive.

The existence of consistent competitions at various levels is closely related to the higher number of female players registered in the most successful member associations than that found in the least successful. This shows the need to organise more competitions at different levels (youth and senior).


The relatively low number of registered female players in the least competitive member associations is not only due to the lack of competitions and playing opportunities for women and girls, but often also to the non-existence of a registration system.
In total, $91 \%$ of female players are registered with the top 20 member associations of the FIFA rankings. The research also pinpointed that the number of practitioners for 10,000 inhabitants is much greater in the United States and Canada than in any other world region.
For all member associations, the development of grassroots programmes should be a priority. Indeed, in only four out of ten member associations do training programmes exist which are focused on registered or non-registered female players under 12 years of age. No significant differences were observed according to the size of the association or their FIFA ranking.
With regard to administration, the larger member associations not only employ more people dedicated to women's football, but also for a higher contract percentage. However, full-time employees only account for $57 \%$ of the total staff dedicated to women's football in the member associations with more than 100 employees.
In all cases, from a staff perspective, it is thus important to raise the number of full-time employees. This would provide more time and resources to put strategies into practice and reinforce the position of the personnel dedicated to women's football within the member associations.
The research also highlighted the crucial role that member associations must play in developing women's football. The annual investment in women's football by member associations is much greater than that of any other revenue source. Moreover, most women's football leagues are organised by their member associations and with no separate league system.
The 177 member associations that took part in the survey invest in total USD 156 million per year in women's football. However, the research also reveals the high concentration of significant investment levels at only a few member associations.
The member associations in the top 20 positions of the FIFA rankings invest on average USD 5.4 million per year in women's football. This figure is only between USD 1.2 and 0.1 million for the remaining level categories.

Governments are also more active in the funding of women's football than sponsors. From a member association perspective, this shows the opportunity to work more closely with public bodies while developing parallel sponsorship programmes to attract private funds.
According to the findings, the private sector is more inclined to invest in league development activities (high-performance projects). This confirms that competitions have to be developed before investment is made by private entities. The percentage of their investment is much higher at successful member associations.
However, the overall need for financial support remains one of the most urgent requirements for member associations to develop women's football, as well as the need for greater media exposure.

Media coverage is greatest in member associations with a high level of development in women's football. However, further improvements can still be made such as greater inclusion of women's football as part of the general communication strategy of a member association.
Social media represents one of the most utilised platforms among the better developed member associations, whereas print media and radio remain the preferred platforms for developing member associations.
TV partnerships are generally related to success levels. Furthermore, these partnerships are often linked with men's national team deals rather than reached independently for women's football.

The study also shows that the integration of women's football within the member association structure should be further enhanced. This goal could be achieved with the creation of women's football departments who would be responsible for the implementation of strategies conceived at executive body level.

While a women's football committee exists in more than $80 \%$ of the 177 member associations who responded to the survey, only $32 \%$ also had a women's football department. This percentage is only about $50 \%$ for the biggest and best performing member associations.
The research also highlighted that there is currently very low female representation on executive committees within the associations and the higher levels of football. Women represent only $8 \%$ of executive committee members at association level. This underlines the difficulties for women in reaching key senior positions in member association structures.

The creation of women's football departments should go hand in hand with greater presence of women's football representatives on executive committees and the recruitment of more personnel dedicated to women's football.
The report confirmed a much lower number of female coaches in comparison with male colleagues. Of the 177 associations that participated in the survey, only $7 \%$ of registered coaches were female. The report does not give information on how many of these coaches are actively involved in the training of teams.

Highly ranked member associations had more female coaches registered. This is probably because these member associations place more emphasis on female participation and role models.
Another possible reason is that highly ranked member associations have increased opportunities to provide for female coaches, including better education and development programmes. The higher percentage of female referees (10\%) compared to coaches (7\%) could be partially related to the mandatory use of female referees in FIFA women's football competitions.
The development of training programmes for female coaches and referees should also be a priority in the least performing member associations to promote women's football.

While 36\% of member associations consider women's
football to be a great platform for international participation, only 5\% perceive it as an attractive area for investment. This shows the need to work more on promoting and selling women's football as a product.


Although more member associations compete in FIFA Women's World Cup ${ }^{\text {TM }}$ qualification competitions, they lack in performance due to insufficient preparation and/or non-existence of local competitions.
From a development point of view, the study also reveals the necessity to adopt a tailor-made approach for every context and situation. Indeed, the most advanced member associations from a women's football perspective place an emphasis on the necessity to develop the quality of players and female coaches, while the less-developed associations prefer to focus on the need to firstly increase the number of practitioners. This is a normal reaction as before considering quality, quantity has to exist (FIFA pyramid - from grassroots to elite).
To achieve all of the above-mentioned objectives, cultural change is often still needed. While such a change will require time, it can be implemented step by step in different ways. For example, an increase in the number of competitions and licensed players would allow member associations to improve the level of the women's game and raise performance standards. In turn, this will help to raise awareness of women's football and help to change perceptions.

To initiate and promote this type of cultural change, the support of FIFA and the confederations will be essential. Indeed, the latter play an important role in assisting the member associations with the development of women's football (with consultancy, education and finance).
To be fully efficient, the support from international governing bodies should be in line with the needs expressed at member association level. Indeed, it is of key importance to define and agree on priorities by first considering the existing context and stages of women's football development.
This would allow both international football governing bodies and member associations to implement tailor-made strategies and solutions for different areas of the game: competitions, grassroots, awareness/visibility and structure.

However, a crucial starting condition to successfully develop the women's game is to convince member associations of the benefits to them. This should progressively become more obvious as this research clearly reveals that the development of women's football would allow member associations to significantly increase their overall number of members.
The greater inclusion of women as active participants in football will also better support football in its claim of being a truly universal sport.

## APPENDIX




# Fédération Internationale de Football Association 

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[^0]:    52 / FIFA Women's Football Survey 2014

