



WOMEN'S FOOTBALL LEAGUE INDEX

Knowledge report

December 2021

Agenda

1 Introduction

2 Index and findings

3 Notes on methodology

What is the “Women’s Football League Index” (WFLI)?



Context and objectives

- Portas has developed the Women’s Football League Index published on January 2022
- The Index assesses how global women’s top-tier football leagues perform across key areas of the game
- The objective of the index is to bridge the data gap in women’s football leagues and create new insights that can help grow the game



Scope

- The index will assess the following leagues due to their developed status and potential...
 - **Europe:** England, France, Germany, Spain, Italy, Sweden, Netherlands, Norway
 - **APAC:** Japan, Australia
 - **Americas:** USA, Mexico
- ...across 5 key metrics:
 - Fans
 - Players
 - Product
 - Workforce
 - Commercial



Methodology

- Data is collected from **publicly available** information and **reports** including but not limited to: soccerway.com, worldfootball.net, fbref.com, ECA report, FIFA league benchmarking report, SportsPro, Statista, Global Data
- The data is collected for seasons 2018/2019, with 2019 season for summer leagues; there are some outliers where data from other years was used, depending on availability

WFLI assesses 12 leading women's football leagues across 5 key metrics



Leagues analysed



Metrics assessed



Fans – Attendance and followership



Players – Player quality, sustainability and professionalization



Product – Competitiveness, excitement and visibility



Commercial – sponsorship, broadcasting and club revenues



Workforce – Coaches, officials and staff

Countries were chosen based on performance and data availability

Note: Latest logo and league names used throughout study

Source: Portas analysis

Each of the five areas covers 3 KPIs that contribute to the league's ranking

WFLI – FRAMEWORK & KPIS

WORKFORCE

1. **COACHING:** Proportion of head coaches with Pro Licence
2. **OFFICIALS:** No. of licensed female referees per federation
3. **CLUB WORKFORCE:** Average number of full time technical and administrative staff per club

COMMERCIAL

1. **SPONSORSHIP:** Annual title sponsorship value
2. **BROADCASTING:** Number of countries broadcasted to (TV)
3. **CLUB FINANCIALS:** Annual average club revenue



FANS

1. **ATTENDANCE:** Average attendance per game
2. **CLUB FOLLOWERSHIP:** Average club social media following / 100k population
3. **LEAGUE FOLLOWERSHIP:** Average league social media following / 100k population

PLAYERS

1. **SUSTAINABILITY:** % Homegrown players
2. **QUALITY:** Players released for World Cup 2019 / number of clubs
3. **PROFESSIONALIZATION:** % First-team players with football as their primary source of income

PRODUCT

1. **VISIBILITY:** % Fixtures available on national TV
2. **EXCITEMENT:** No. of league winners in the past 5 seasons
3. **COMPETITIVENESS:** Average Goal margin Per Game (GMPG)

The 15 KPIs chosen were shortlisted from a long list of KPIs based on suitability and data availability

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WFLI ranking: NWSL (USA), BFAWSL (England) and Liga MX Femenil (Mexico) ranked highest overall in the index



Note: Latest logo and league names used throughout study
 Source: Portas analysis

Main ranking observations



- There is very high growth potential for women's football leagues
- The women's game is global with top rankings earned by leagues from different continents
- North American leagues, US' NWSL and Mexico's Liga MX Femenil, emerge as top performers across metrics
- England's Barclay's FA Women Super League performing best in Europe and is in the lead on fans and commercial
- The WE league in Japan earned high rankings on commercial and workforce
- Spain's Primera Division was constantly among top 5 in ranking

WFLI ranking: Fans

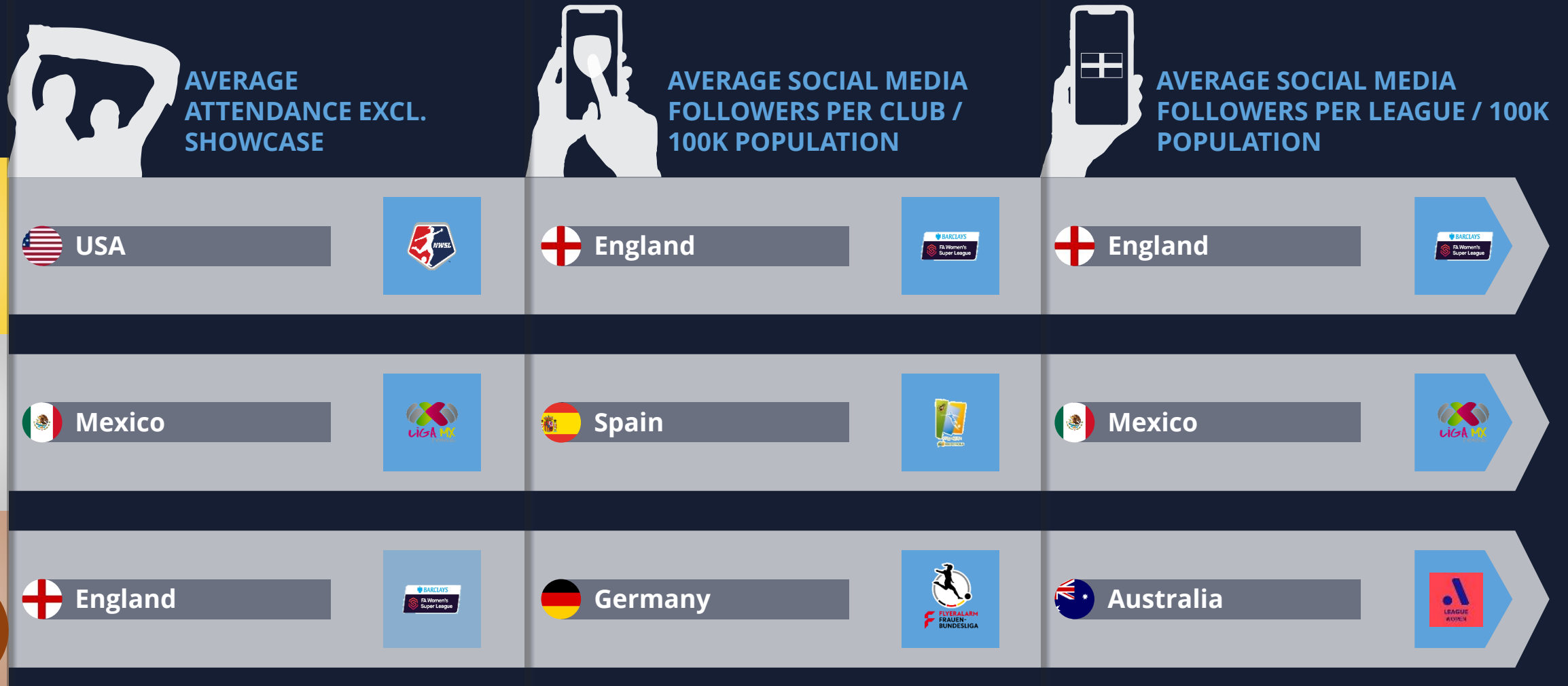


FANS

- 1. ATTENDANCE:** Average attendance per game
- 2. CLUB FOLLOWERSHIP:** Average club social media following / 100k population
- 3. LEAGUE FOLLOWERSHIP:** Average league social media following / 100k population



Fans sub-ranking



Note: Latest logo and league names used throughout study
 Source: Portas analysis

Fans: Attendance figures are highest in North American leagues, with the BFAWSL (England) leading across Europe

Women's top-tier football leagues' game attendance¹
Average attendance excl. showcase game (18/19)



1. Showcase defined as free entry game or game played in men's stadium with higher capacity than average

Note: Latest logo and league names used throughout study

Source: Portas analysis, Soccerway, WorldFootball, Fbref

WFLI ranking: Players



PLAYERS

1. **SUSTAINABILITY:** % Homegrown players
2. **QUALITY:** Players released for World Cup 2019 / number of clubs
3. **PROFESSIONALIZATION:** % First-team players with football as their primary source of income



Players sub-ranking



% HOMETGROWN PLAYERS



PLAYERS RELEASED FOR THE WORLD CUP / TEAMS



% FIRST TEAM PLAYERS WITH FOOTBALL AS PRIMARY SOURCE OF INCOME

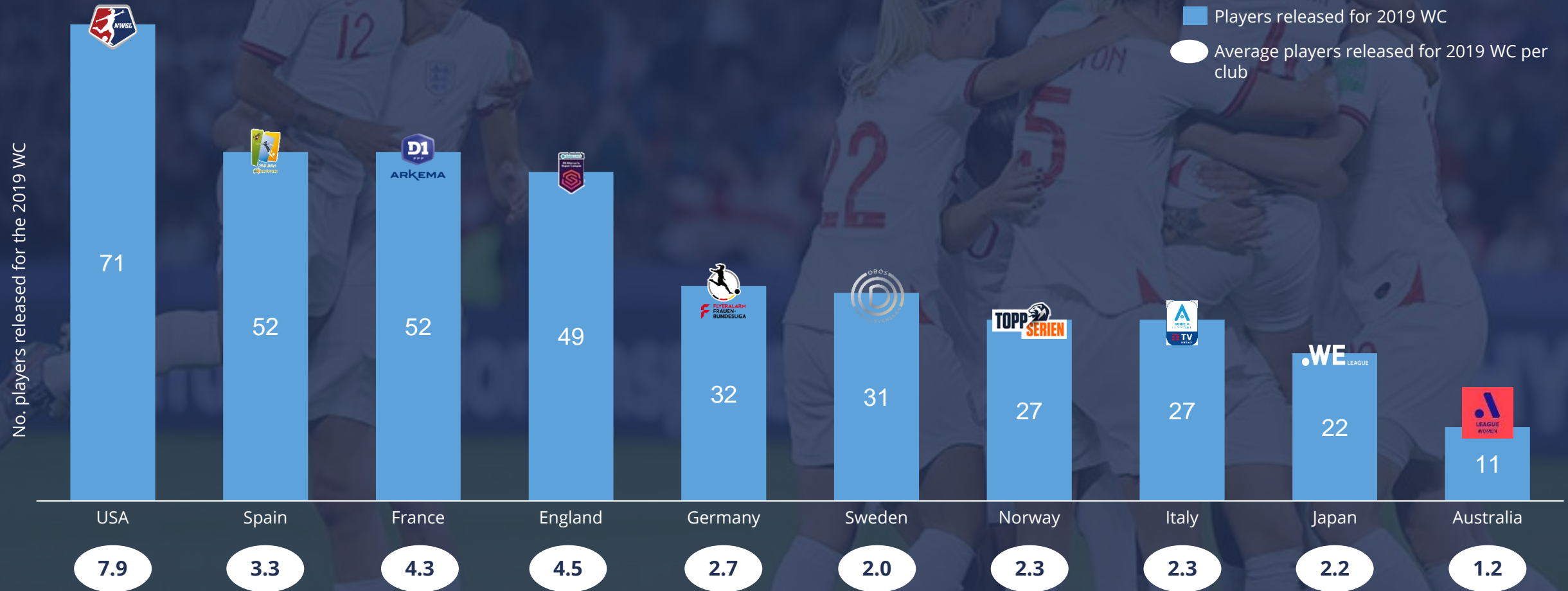


Rank	Country	League	Released for World Cup / Teams	Primary Source of Income
1	Mexico	LIGA MX	USA	Spain
2	Netherlands	women eredivisie	England	USA
3	Norway	TOPP SERIEN	France	England

Players: The NWSL (USA) attracts top international players from around the world with Spain, England and France leading in Europe

World cup players by women's top-tier football leagues

No. players released for the 2019 World Cup per league



Note: Latest logo and league names used throughout study

Source: Portas analysis, ECA

WFLI ranking: Product



- 1. VISIBILITY:** % Fixtures available on national TV
- 2. EXCITEMENT:** No. of league winners in the past 5 seasons
- 3. COMPETITIVENESS:** Average Goal margin Per Game (GMPG)

PRODUCT



Product sub-ranking



NR. OF LEAGUE WINNERS IN THE PAST 5 YEARS



% FIXTURES ON NATIONAL TV



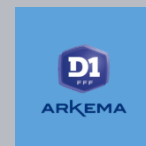
GOAL MARGIN PER GAME



 Sweden



 France



 USA



 Netherlands



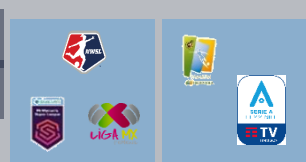
 Mexico



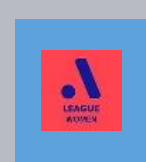
 Mexico



 USA
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 Australia



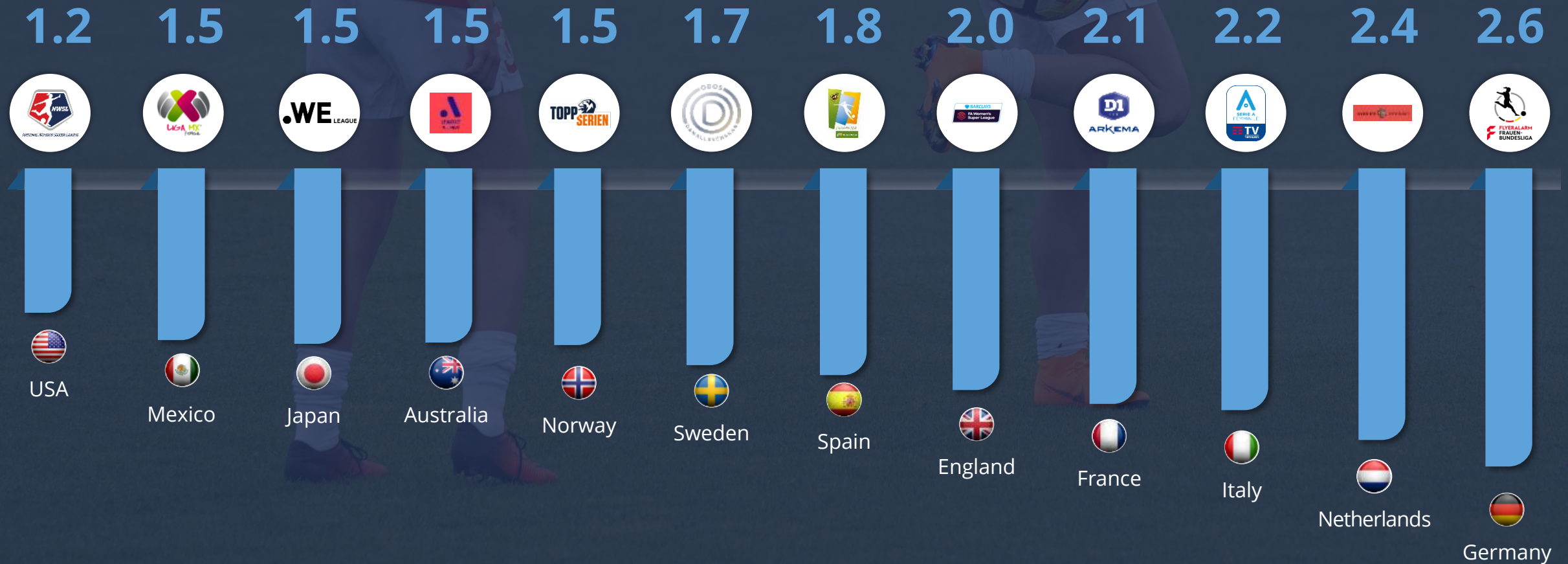
 Japan



Product: Average Goal Margin per Game is lowest in North American leagues, with Norway's Topp Sieren performing best in Europe

Women's top-tier football leagues competitiveness

Average goal margin per game (GMPG) (2018/19)

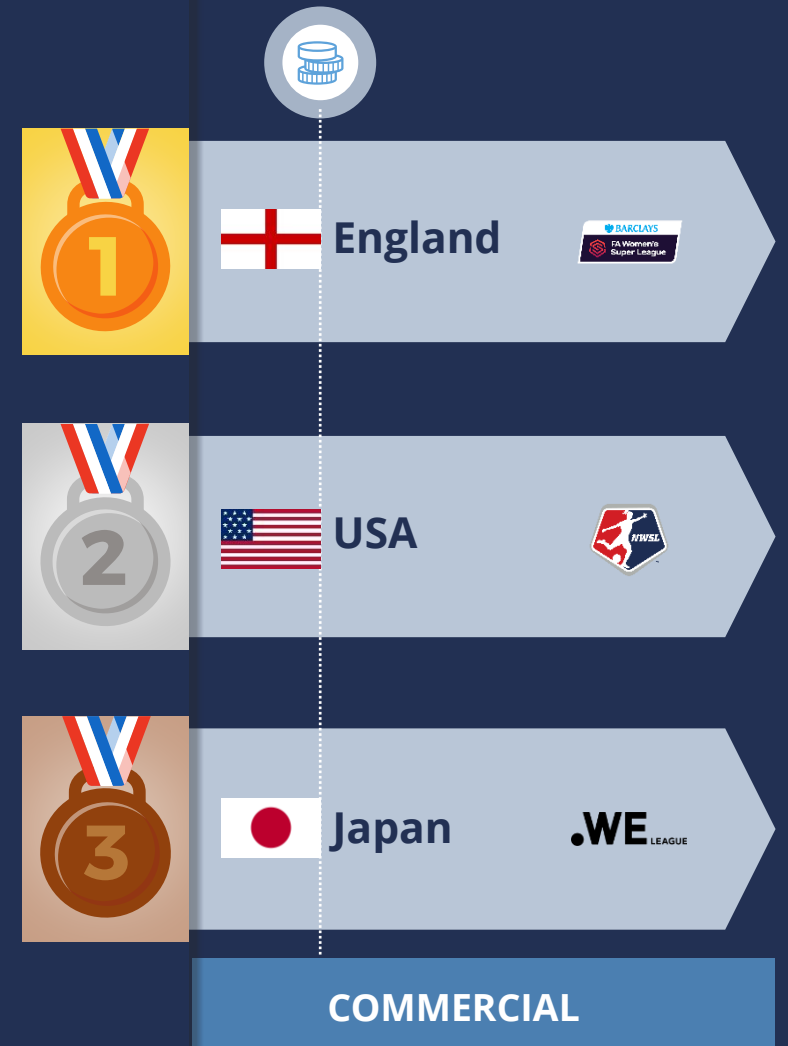


WFLI ranking: Commercial



- 1. SPONSORSHIP:** Annual title sponsorship value
- 2. BROADCASTING:** Number of countries broadcasted to (TV)
- 3. CLUB FINANCIALS:** Annual average club revenue

COMMERCIAL



Commercial sub-ranking



ANNUAL TITLE SPONSORSHIP



NBR OF COUNTRIES BROADCASTED TO (TV)



ANNUAL AVERAGE CLUB REVENUE



Rank	Country	Annual Title Sponsorship	Nbr of Countries Broadcasted to (TV)	Annual Average Club Revenue
1	England	Barclays FA Women's Super League	Australia	Japan (WE LEAGUE)
2	Spain	Liga F	USA (WWSL)	Sweden (Damallsvenskan)
3	Germany	Frauen-Bundesliga	England	England (Barclays FA Women's Super League)

Note: Latest logo and league names used throughout study
 Source: Portas analysis

Commercial: League title sponsorship values have also increased overtime; BFAWSL (England) is leading the way with highest deal of all women's leagues

Women's top-tier football leagues annual Title Sponsorship Values
Current vs previous annual title sponsorship valuations (\$m/year) (1.dp)



Note: Latest logo and league names used throughout study
1. Deal also includes WSL 2, the first division league
Source: Portas analysis, Global Data

- Analysis only includes leagues with title sponsors and publicly known data

Commercial: The gap between men's and women's title sponsorship deals is large but decreasing, with England being equal today

Men's and Women's top-tier football leagues' annual title sponsorship values

Most recently agreed annual title sponsorship valuations (\$m/year) (1.dp)



Note: Latest logo and league names used throughout study

Source: Portas analysis, Global Data

WFLI ranking: Workforce



WORKFORCE

- 1. COACHING:** Proportion of head coaches with Pro Licence
- 2. OFFICIALS:** No. of licensed female referees per federation
- 3. CLUB WORKFORCE:** Average number of full time technical and administrative staff per club



Workforce sub-ranking



PROPORTION OF HEAD COACHES WITH A PRO LICENSE



AVERAGE NBR OF ADMIN & TECHNICAL STAFF BY CLUB



NBR OF LICENSED FEMALE REFEREES PER FEDERATION



Rank	Country	Logo	Country	Logo	Country	Logo
1	Mexico		USA		USA	
2	Sweden		Mexico		Japan	
3	Spain		Italy		Australia	

Workforce: While clubs in North American leagues have higher staff numbers, clubs in Italian and English leagues have higher number of technical staff

Club staff

Number of admin and technical club staff (2018/19)



Note: Latest logo and league names used throughout study

Source: Portas analysis, FIFA

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Index and findings

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Notes on methodology

Note on methodology

- For leagues who have changed names since 2018/2019 season , the study uses the latest league name e.g., WE league for Japan, A-League for Australia
- Data used across most metrics was for seasons 2018/2019; for those leagues that are summer leagues, 2019 data was used
- Specific data outliers were as follows:
 - Clubs and leagues social media following were measured in [May] 2021
 - Broadcast territories included domestic and international territory with TV deals between 2018 until 2022
 - Homegrown players % data was used for 2019/2020 seasons because of data availability
 - Annual title sponsorship value was measured for 2019/2020 given that many leagues did not have title sponsorships prior to 2019; cup sponsorship value or main sponsorship values were taken as proxy where no annual title sponsorships existed, joint deals with men's were broken down with approximate figures
- In the ranking calculations, leagues were first given a score based on standard deviation with all KPIs receiving equal weight; leagues were then ranked based on scores received
- Wherever there was a lack of data on specific league KPIs, the KPI was not accounted for in the scoring calculation
- The analysis of club social media following did not take into account clubs with joint accounts between men and women