



ECA Women's Football Committee
Women's Club Football Analysis



> BACKGROUND

Figures show that football is the No1 team sport for women in Europe, and that the number of registered female players has risen from some 239,000 in 1985 to approximately 1.8 million in 2011. Women's football is growing at a faster pace than men's football. Therefore the ECA Executive Board recently decided to establish a Women's Football Committee (WFC) within ECA.

The first meeting of the ECA Women's Football Committee was held at Stamford Bridge Stadium in London on the 23rd of May 2013 at the occasion of the ECA Women's Champions League final. During this initial meeting, the Committee decided to conduct a survey on women's football to gain greater insight into the current situation of the game. The survey aims to define key areas concerning women's football, notably its positive changes, its challenges and its governance.

> METHODOLOGY

The ECA Administration has carried out a survey during the season 2013/2014 amongst its Women's Football Committee members in order to better identify the current situation on different topics: the administrative situation of the club, the club's position on the strategic issues, its relations with other stakeholders, as well as success and constraint factors in European Women's football. This summary is completed by a few other observations.

CONTENTS

8

Women's Club

20

Strategic Issues

36

Relation with Stakeholders

40

Success and Constraint Factors

44

Concluding Remarks

FOREWORD

Today, football is the most popular team sport for women in Europe, continuously growing at a very fast pace. At Olympique Lyonnais, we consider women's football to be a pillar of our club, alongside our men's first team and our Academy. As you might know, we have developed our women's section since its creation in 2004, and today we are very proud to play the UEFA Women's Champion's League on a regular basis. However, even if women's football shares similarities with the men's game, it needs particular attention in its development and needs to create its own dynamic.

The growing success of the sport, coupled with the ever increasing interest in women's professional football, has led to several new developments on the European scene, with ECA being at their forefront. In fact, in 2013, I had the honour of being appointed by the ECA Executive Board as Chairman of the newly created ECA Women's Football Committee, whose aim is to offer a platform for European women's club football to be discussed at all levels, including UEFA and FIFA.



Today, football is the most popular team sport for women in Europe, continuously growing at a very fast pace.

The different meetings of the Women's Football Committee so far have featured very interesting discussions on important topics such as the International Calendar, Insurance/Compensation and the UWCL marketing concept. Additionally, and more importantly, the Survey on women's football, whose results are being presented on the following pages, allowed the Women's Football Committee members to better understand the current status of various aspects of the game. Areas such as administration, stakeholder relations, and success and constraint factors have all been analysed, with the results presented in the upcoming chapters.

I am personally very committed to the women's football cause and confident about its future, and I sincerely hope that this publication can be seen as an important step in the continuous development of the women's game.

A handwritten signature in black ink, consisting of stylized initials and a long horizontal line extending to the right.

Jean-Michel Aulas

Women's Football Committee Chairman
ECA Executive Board Member

The aim of the survey is to improve ECA's knowledge about women's football and to share knowledge amongst the WFC members. The purpose is to better protect women's clubs, not only amongst ECA Members but women's clubs across Europe.

22 clubs from the WFC representing 20 different National Associations replied to the survey. The WFC members are as follows (in alphabetical order by National Association):

- **NÖSV Neulengbach** Austria
- **Standard de Liège Féminin** Belgium
- **AC Sparta Praha** Czech Republic
- **Brøndby IF** Denmark
- **FC Levadia Tallinn** Estonia
- **FC Honka Ry** Finland
- **Olympique Lyonnais Féminin** France
- **Paris Saint-Germain FC** France
- **1. FFC Turbine Potsdam 71 e.V.** Germany
- **FC Bayern München AG** Germany
- **PAOK A.C.** Greece
- **Torres Calcio** Italy
- **SK Liepājas Metalurgs** Latvia
- **FC Twente 65** Netherlands
- **Lillestrøm FK Kvinner** Norway
- **Birkirkara FC** Malta
- **Zvezda-2005** Russian Federation
- **ŠK Slovan Bratislava** Slovakia
- **Valencia CF Femenino** Spain
- **Umeå IK FF** Sweden
- **LdB Malmö** Sweden
- **FC Zürich Frauen** Switzerland

In this research, the use of the masculine form refers equally to the feminine.

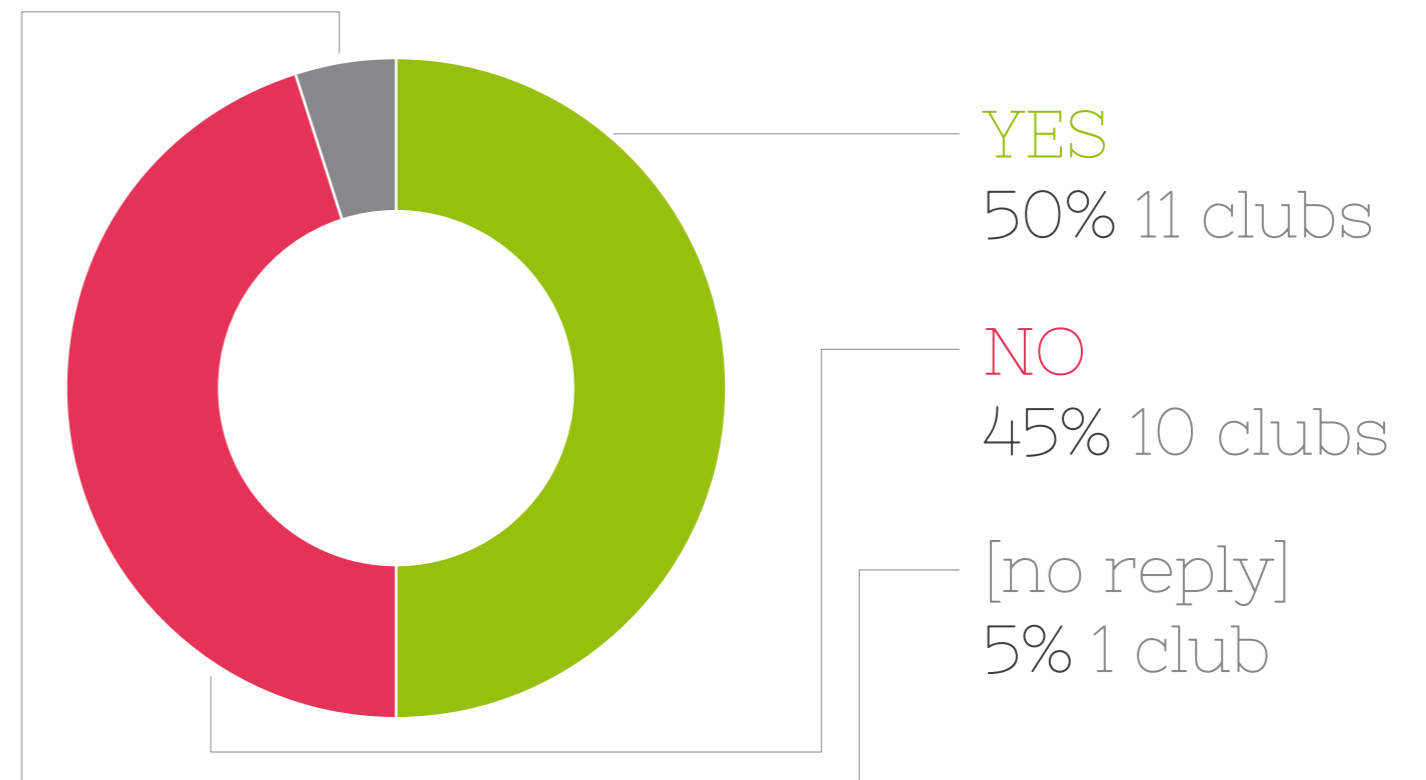


Women's Club

Half of the sample clubs have their Board representing both women's and men's football.

CHART 1

Does the Board of your club represent both women's and men's football?



As we can see in **Chart 1**, half of the sample clubs have their Board representing both women's and men's football, a figure similar to representation of the Youth Academy Manager in the Board¹.

¹See ECA Report on Youth Academies, p. 108

CHART 2

Is the management of the women's football team part of the overall management of the club?

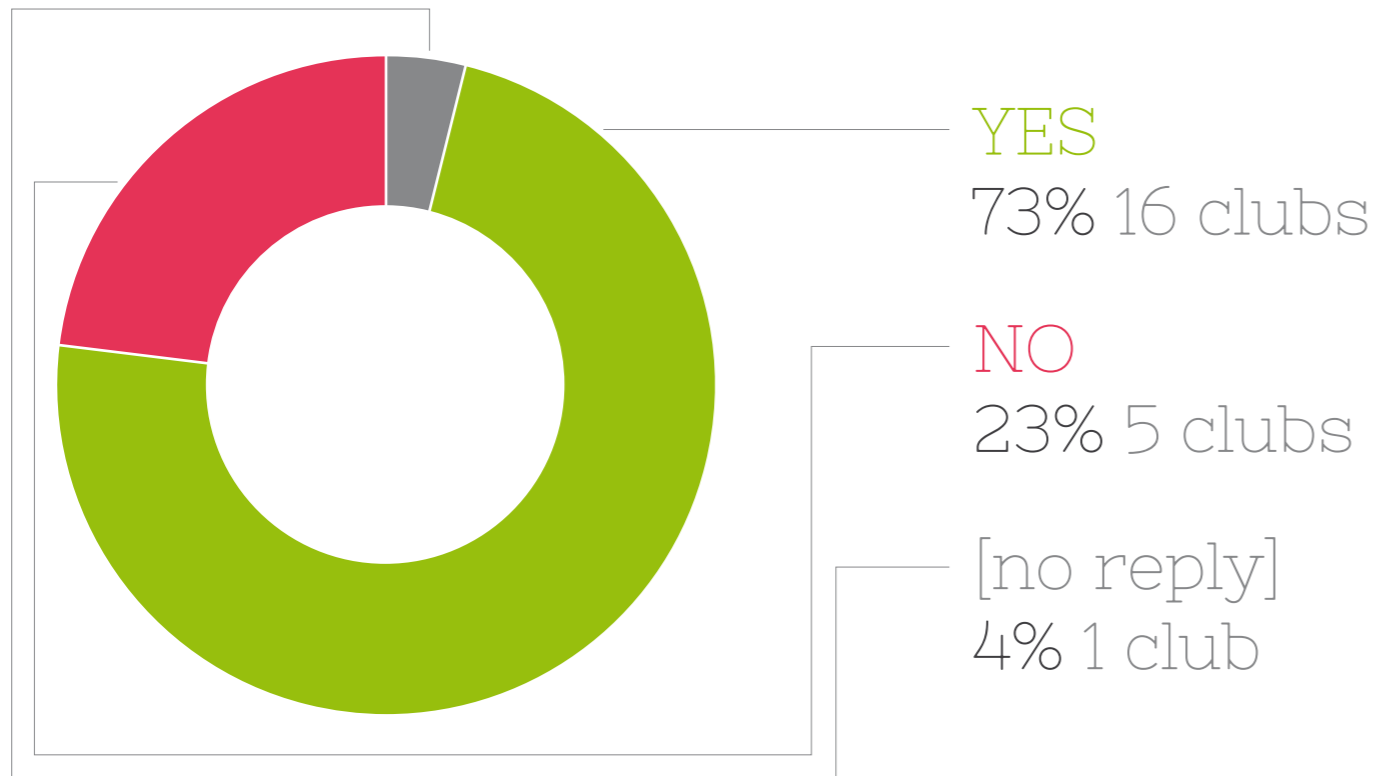


Chart 2 shows that almost **3 out of 4** clubs (**73%**) have integrated women's football into the general management of the club. Out of the five clubs that answered no, only one of them is a club that does not have a men's section (either amateur or semi-professional). Therefore, we note here that four clubs, despite bearing the same name as the men's section, remain independent or are excluded from the club's main management.

Some clubs continue to rely heavily on support from volunteers for most of their day-to-day operations.

CHART 3

How many employees do you have in the club dedicated to the women's section? What is the ratio of men to women?

Chart 3 shows that **9 clubs out of 22** have less than five employees (full or part-time) in the club including paid coaches. In total, more than **3 out of 4** have less than ten people (full or part-time) in total employed by the club exclusively for the women's section.

Clubs from Central Eastern Europe are the clubs with most staff, even though the salary remains low.

It is interesting to note that in women's football, some clubs continue to rely heavily on support from volunteers for most of their day-to-day operations.

Generally speaking, apart from some exceptions, the gender ratio within the club's staff is approximately 50/50.

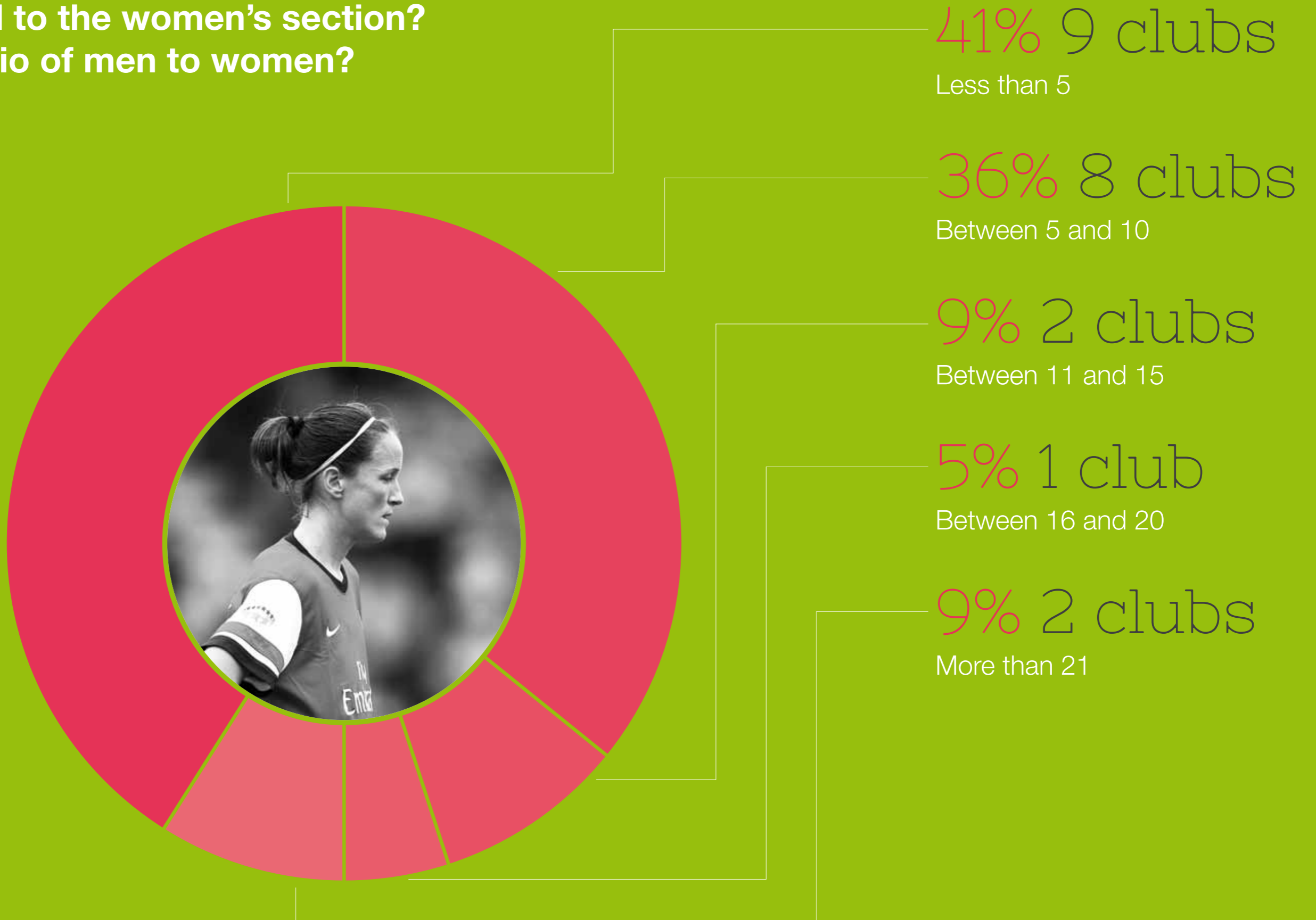
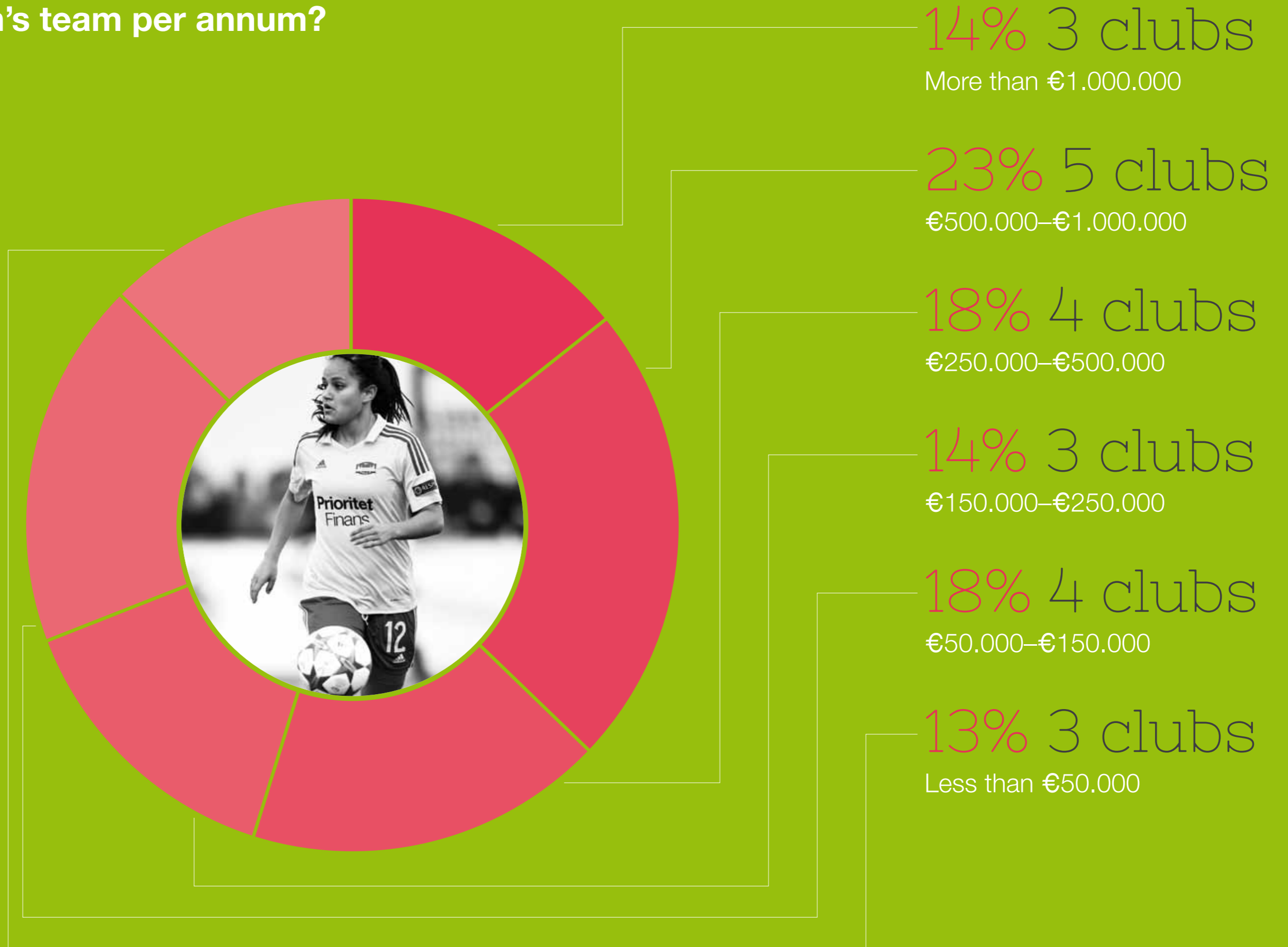


CHART 4

What is the average budget of the women's team per annum?



The sample clubs are almost equally split into six different categories, the lowest being a budget less than €50.000 a year. **Chart 4** indicates that three clubs out of twenty have a budget higher than €1 million per season. Two clubs did not answer to the question and were allocated to one of the groups according to research made based on media reports.

CHART 5

Top three sources of income in order of significance [Number of clubs]

From the following: UEFA/FIFA grants; Prize money; Membership fees; Government/public grants; financial contribution from men’s section; Gate receipts.

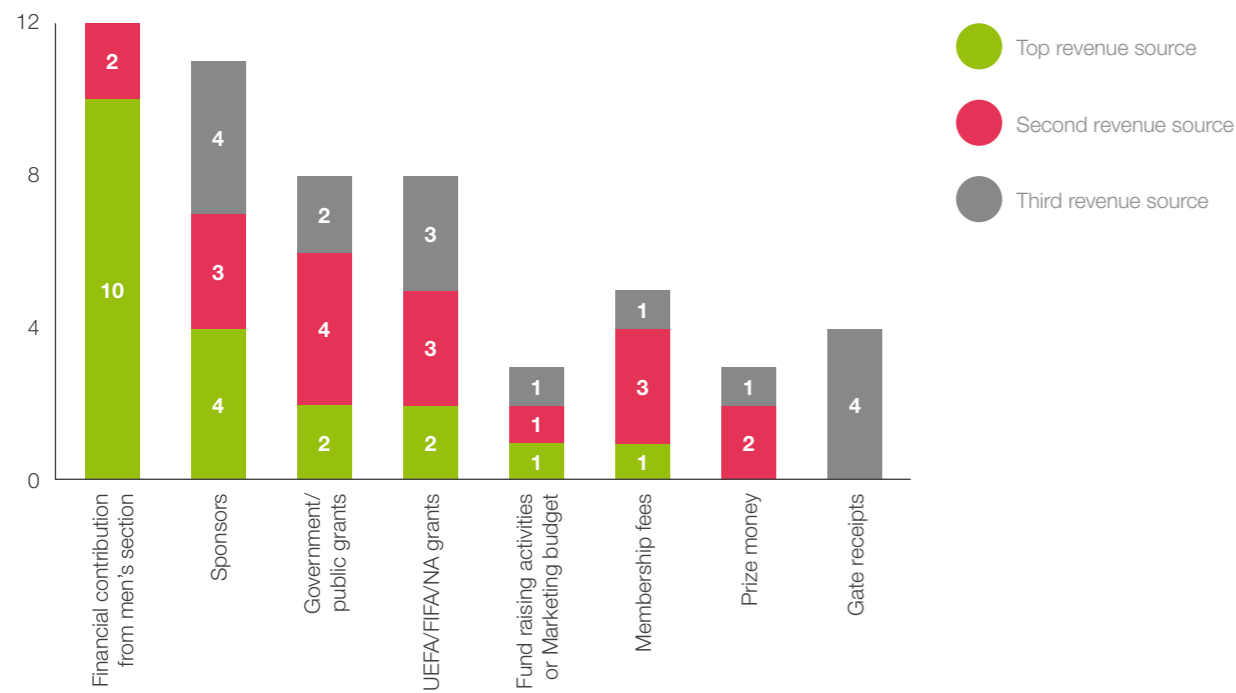


Chart 5 clearly shows that the most important source of revenue for a women’s football team is the financial contributions that it receives from its men’s section. Sponsors and grants from various fields remain an important contributor to a women’s football club’s budget. As expected, gate receipts were only mentioned by four clubs as the third source of revenue.

CHART 6

Top three costs in order of significance [Number of clubs]

From the following: Player salaries; Staff; Training and matches; Infrastructure and facilities; Rent/depreciations; Transport to away games.

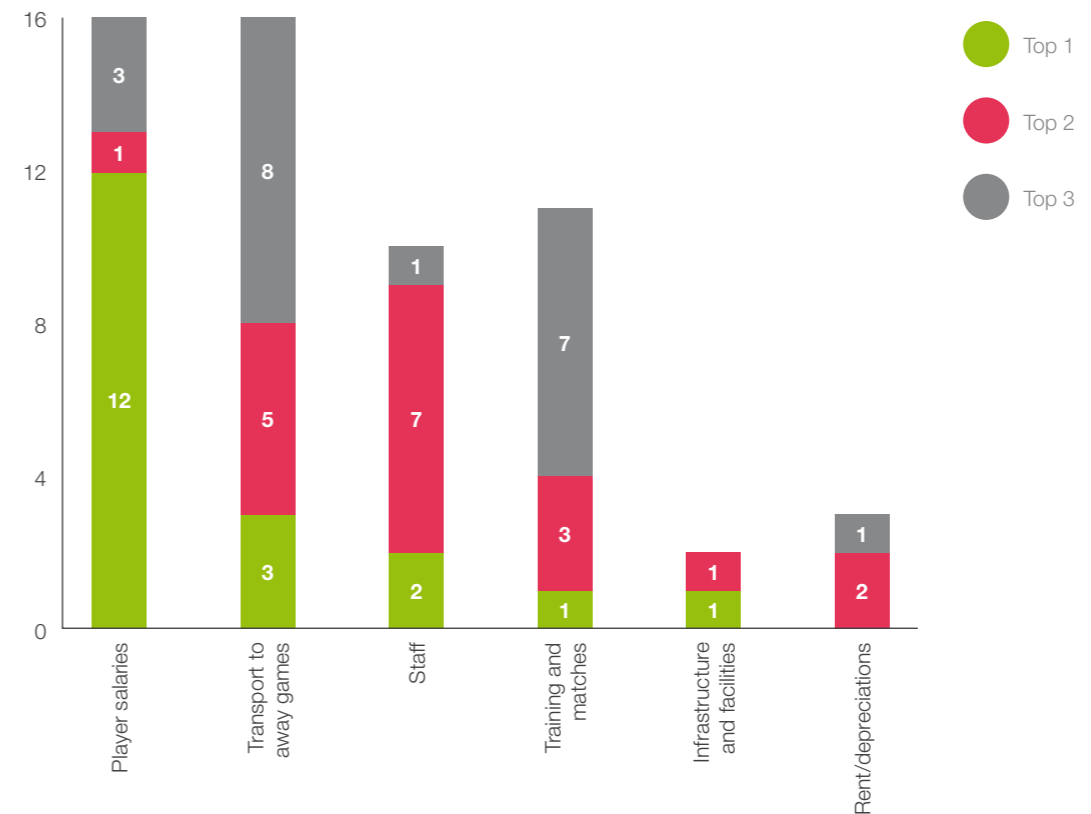


Chart 6 shows that player and staff salaries are the largest costs for fourteen clubs. Transport to away games (league games or European games) was also frequently (sixteen clubs) mentioned as one of the club’s top three costs. For clubs from smaller NAs, costs related to transportation to away games tend to take up a large part of the club’s expenses.

A comment frequently seen for the improvement of the UWCL, but related to budget issues (as underlined in Chart 6) shows that, overall, clubs are worried by the raising costs of the competition without being able to rebalance with ticketing, broadcasting or other tangible revenues.

Transport to away games (league games or European games) is frequently mentioned as one of the club's top 3 costs (by 16 clubs).

The outcome is that clubs from smaller NAs find the UEFA Women's Champions League a source of financial burden to compete in, unless they are actually the host country², whereby there is no extra cost occurred for logistics. Currently, most of the travel costs are covered by fund raising and generous sponsors. Needless to say that in smaller NAs clubs would not be able to operate without the help of volunteers.

Clubs are worried by raising cost of the competition without being able to rebalance with ticketing, broadcasting or other tangible revenues.

²UEFA Regulations of the Women's UCL 2013/14 art. 5.03. The participating clubs are drawn into groups of four teams. The qualification path to the round of 32 depends on the number of entries for the competition. All matches in the qualifying round must be played in the form of a minitournament in one of the countries in the group.

CHART 7

In terms of salary, what is a) the average? b) the highest? c) the lowest?

Including benefits such as housing, car and boarding.

There is a large variety of salaries amongst women's football clubs. We decided to divide the clubs in two groups, according to their respective budgets. Group 1 includes clubs whose budget does not exceed €250.000, while Group 2 includes clubs with a budget of over €250.000.

Group 1: ten clubs form this group with a budget lower than €250.000. Out of the ten clubs, only six provided data relative to the players' salaries, while the remaining four either provided data only for coaches or did not provide any. According to the available data, the average monthly salary is €545, the highest is €5.000, and the lowest is €40.

Group 2: twelve clubs with a budget of over €250.000 are included in this second group. One club did not provide any figure, and another one only pays a seasonal performance bonus. As for the remaining ten clubs, the average monthly salary is €1.515, the highest is €18.000, and the lowest is €330.

As we saw in the previous chart and according to these data, salary is one of the biggest costs, even though salaries in women's football cannot be compared to those in men's football.



Strategic Issues

The ECA-UEFA MoU signed in 2012 improved the status of men's club football in Europe. Women's clubs welcome the agreement and acknowledge the benefits for men's football.

CHART 8

Which aspect of the MoU would you consider a priority for women's football?

Please rank by priority from the following:

- a) International Match Calendar;
- b) Insurance of Players' Salaries;
- c) Compensation for international matches/tournaments (ie EURO);
- d) Governance

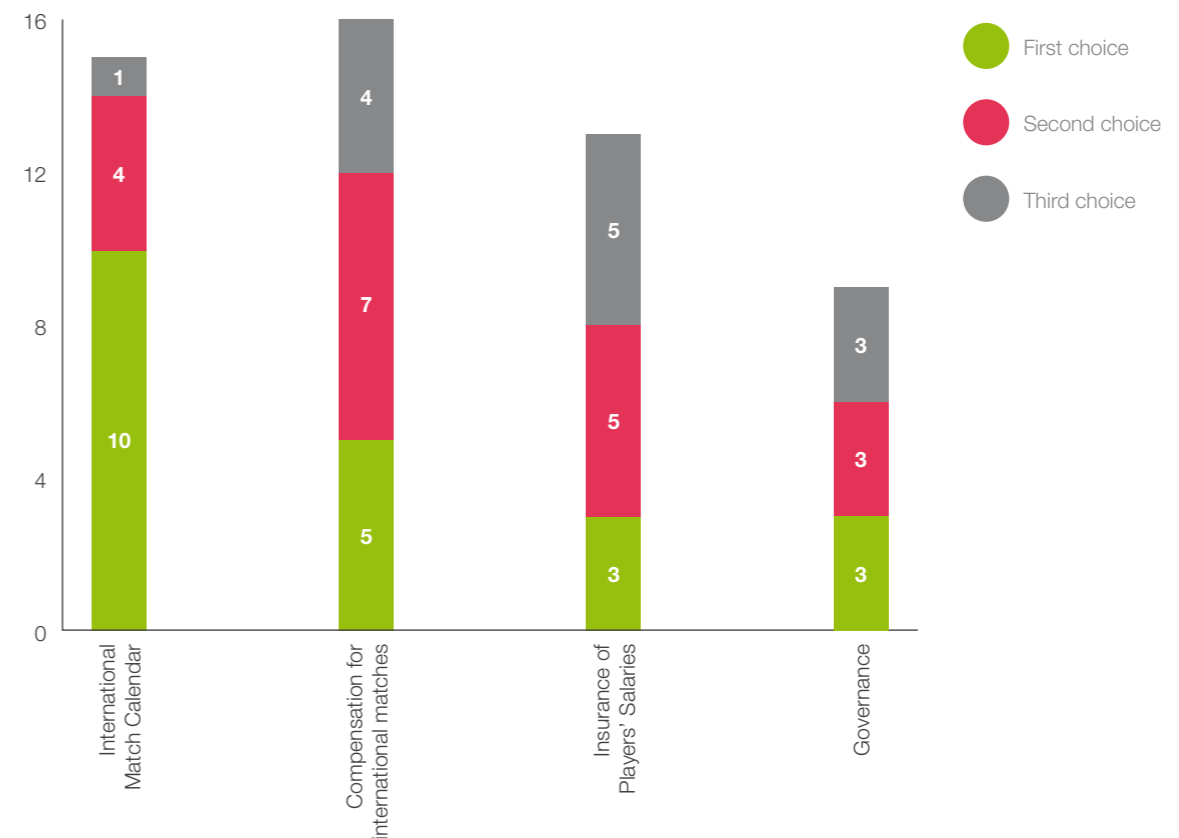


Chart 8 shows which aspects of the MoU are considered the most important and which would be most beneficial for women's football. Following comments during the launch of the ECA WFC in London,

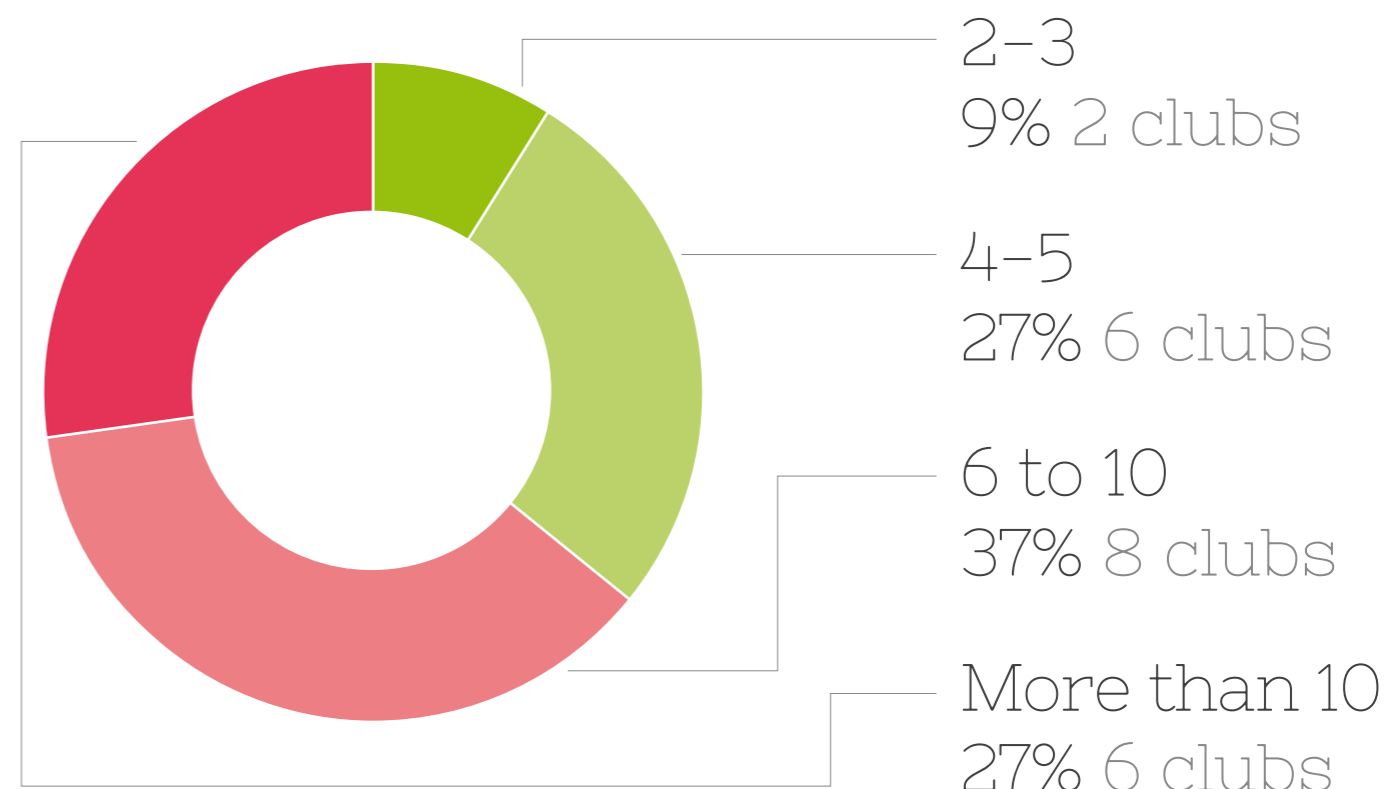
nearly half of the clubs believe that the top priority is the issue of the International match calendar.

For sixteen clubs, compensation for international matches is an important success in men's football and they would like to see it reproduced in women's football. While the release of national team players is compulsory on official match days, NAs often also call club players on non-official dates. Though international matches may benefit the promotion of women's football, clubs would also appreciate that player development work undertaken by the clubs be recognised by the main governing bodies.

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CHART 9

On average, how many players in your squad do you release for national team matches?



In **Chart 9**, the numbers of released players per club for their national teams irrespective of their nationality is shown. **1 out of 3** clubs release six to ten players which is a very high proportion of their own team. **27%** release even more than 10 players.

It is important to note that the clubs selected for the survey are generally considered the best in their respective national championships. Therefore, it is not surprising that they release such a high proportion of their squads for national team matches.

CHART 10

Out of those players, how many play for your own national association? Do you sometimes release players for the younger age groups?

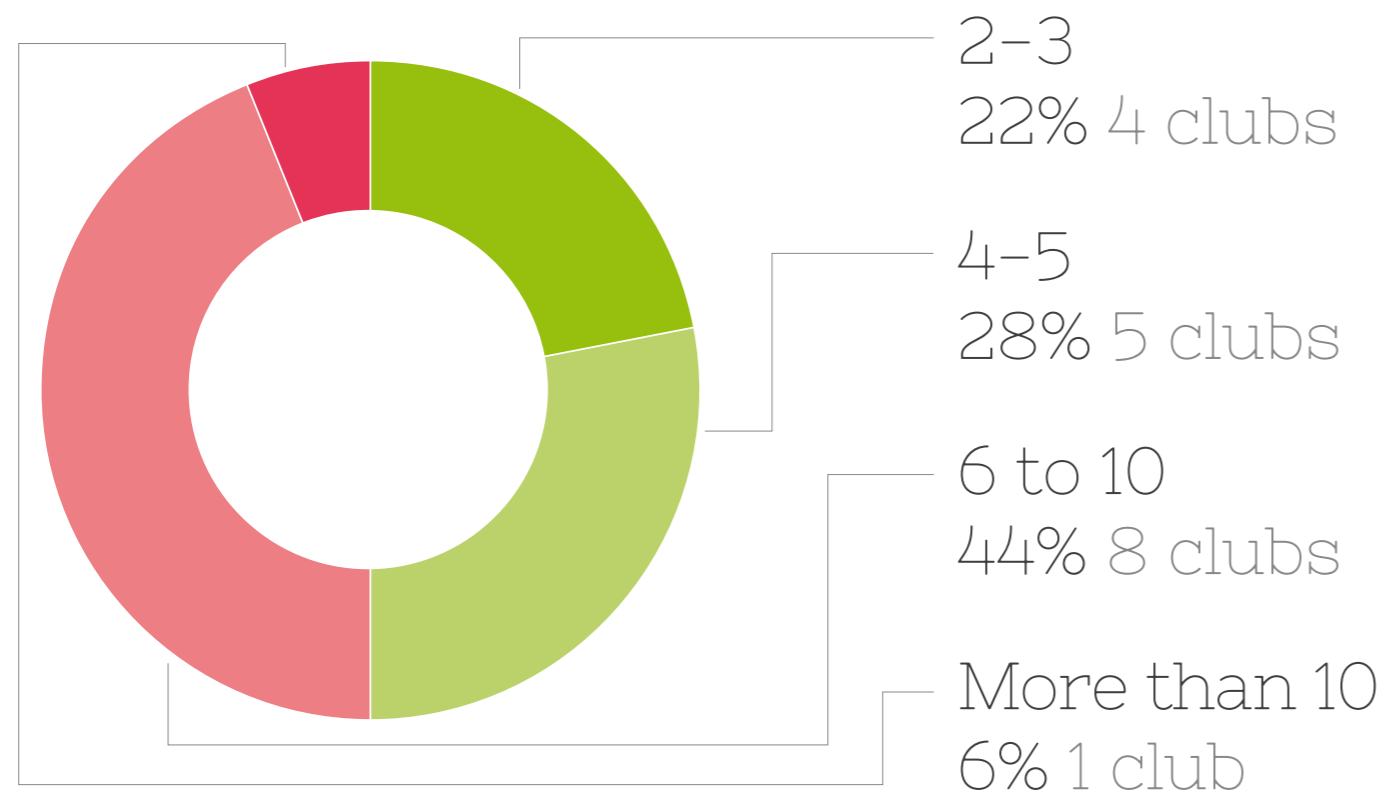
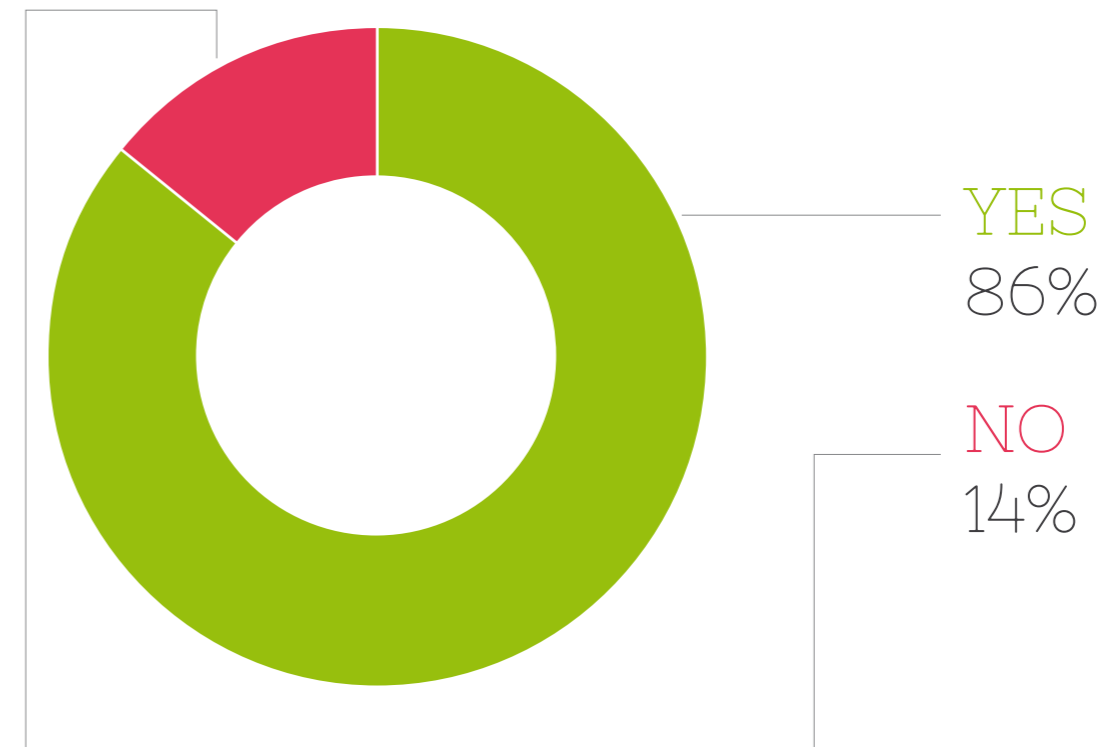


Chart 10 is complementary to the previous one. It is interesting to note that a large majority of the player releases from top clubs are for their respective national associations. Five clubs exclusively released players to their own national association. Both graphs underline the extremely high proportion of player releases and prove that women's national teams mostly rely on the best teams of their own national championship.

100% of the clubs (22) answered that they release players for the youth teams.

CHART 11

Should a specific international release period be fixed, similar to the men's calendar?



86% of the clubs (19) replied that fixed dates should be in place.

100% replied that a specific calendar should be established for women's football.

CHART 12a

Are you satisfied with the current UWCL format implemented in 2009?

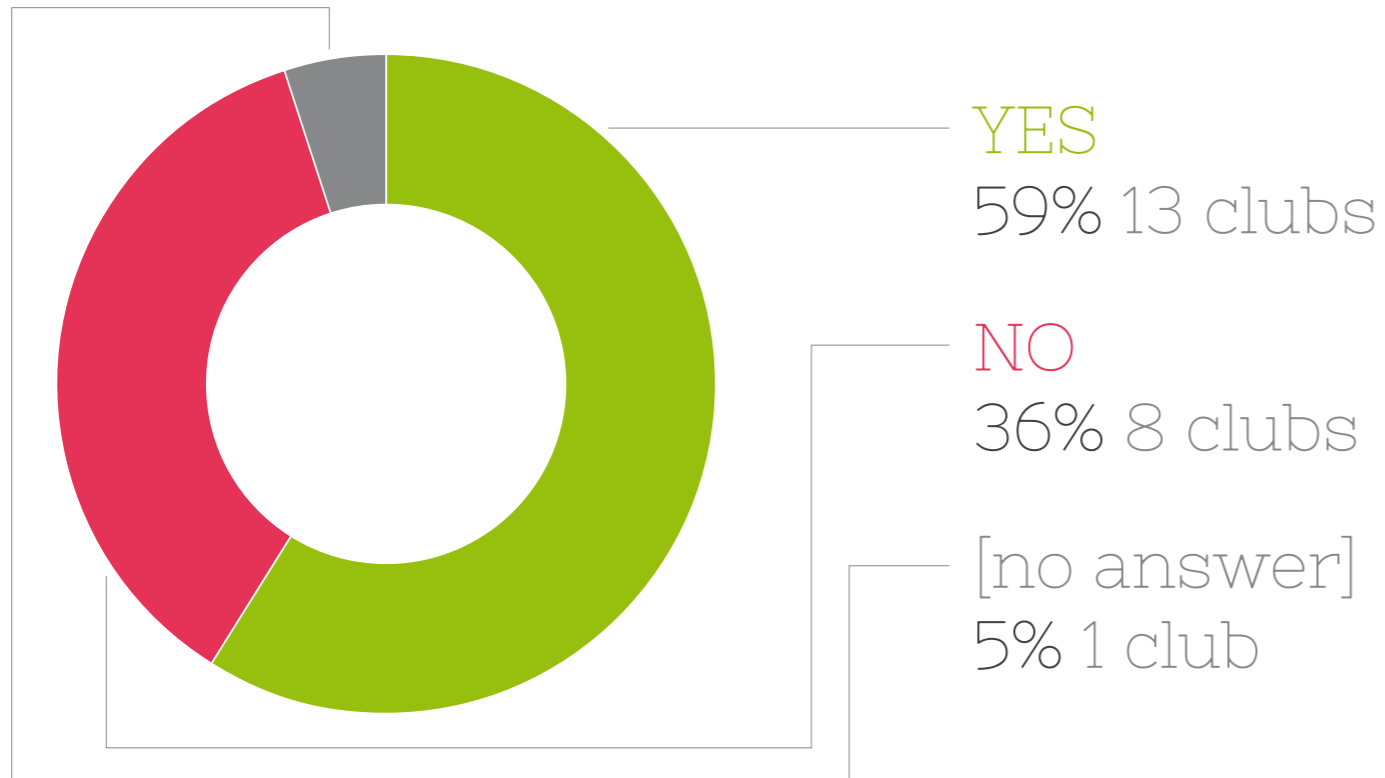
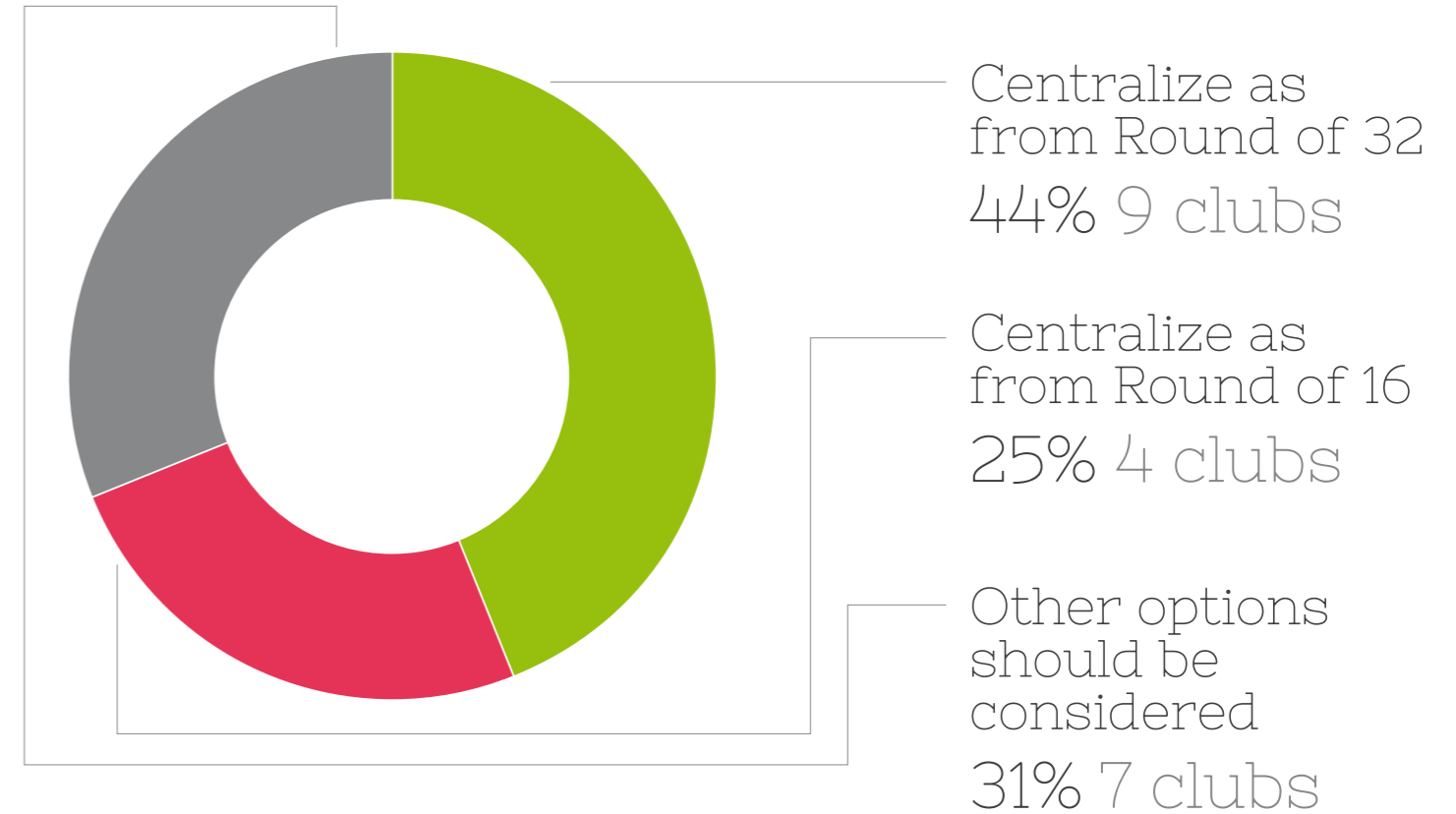


Chart 12a shows that **59%** of clubs are satisfied with the current UWCL format implemented in 2009 following nine changes in the first 13 years of existence of the competition. More than a third still considers that some changes should be done. These proposed changes are described on the following pages.

CHART 12b

How could the UWCL revenues be increased?



Following discussions at the inaugural WFC meeting in London, **Chart 12b** demonstrates the views of the clubs concerning the proposal of centralising the UWCL as from the various rounds. Nine clubs suggested starting the centralisation as from the round of 32, four clubs as from the round of 16. Interestingly, seven clubs, or **1/3**, are convinced there are better ways to increase revenue than the centralisation of the competition.

Do you have any suggestions to improve the UWCL competition?

> Group stages for UWCL

Overall, clubs were of the opinion that introducing a new format to the UWCL would be extremely beneficial to the overall competition. The addition of a group stage would increase public interest in the competition and develop a similar atmosphere as in the men's Champions League. The present model with high costs could be turned into an "investment" model with a profit to be made from participation. According to the clubs, this model would enable top clubs to grow into the competition and in turn promote the competition itself.

> Financial contribution

The UWCL is far from being a self-sustainable competition, but it definitely has great potential. UWCL sponsors and the media should cooperate in order to get the UWCL closer to the men's UCL in all possible terms. As an immediate step, a more sensible financial contribution should be in place for teams that remain in the competition as of the Round of 32, as traveling costs are extremely high. Interestingly, most of the clubs consider that within a period of 10-20 years, they will be self-sustainable.

> UWCL has an important potential, but remains fragile

Some clubs mentioned that the competition might be weakened by the emergence of several new rich clubs. The risk is that semi-professional clubs will struggle to compete with clubs with a stronger financial power and, as a result, may decide to stop investing in women's football. Consequently, the important CSR work that these clubs undertake would suffer and a similar fate might be reserved to the development of women's football, as it currently relies heavily on volunteer work.

> Proposal for new rankings and access list

Overall, clubs suggested rethinking the current ranking list. The discussion could lead to establish a new access list (currently the first fourteen NAs have a club with direct access to the competition and seven NAs have one domestic league runner-up). However, the main issue remains that too much disparity still exists between the teams' level of play. The better national championships should provide more teams to the competition in order to improve the quality of the matches (i.e. 2-3 teams from Germany, France). Furthermore, the current ranking system is updated once a year and finalised only in June. According to the clubs, it should be updated more frequently (after each match, as with the men's competition).

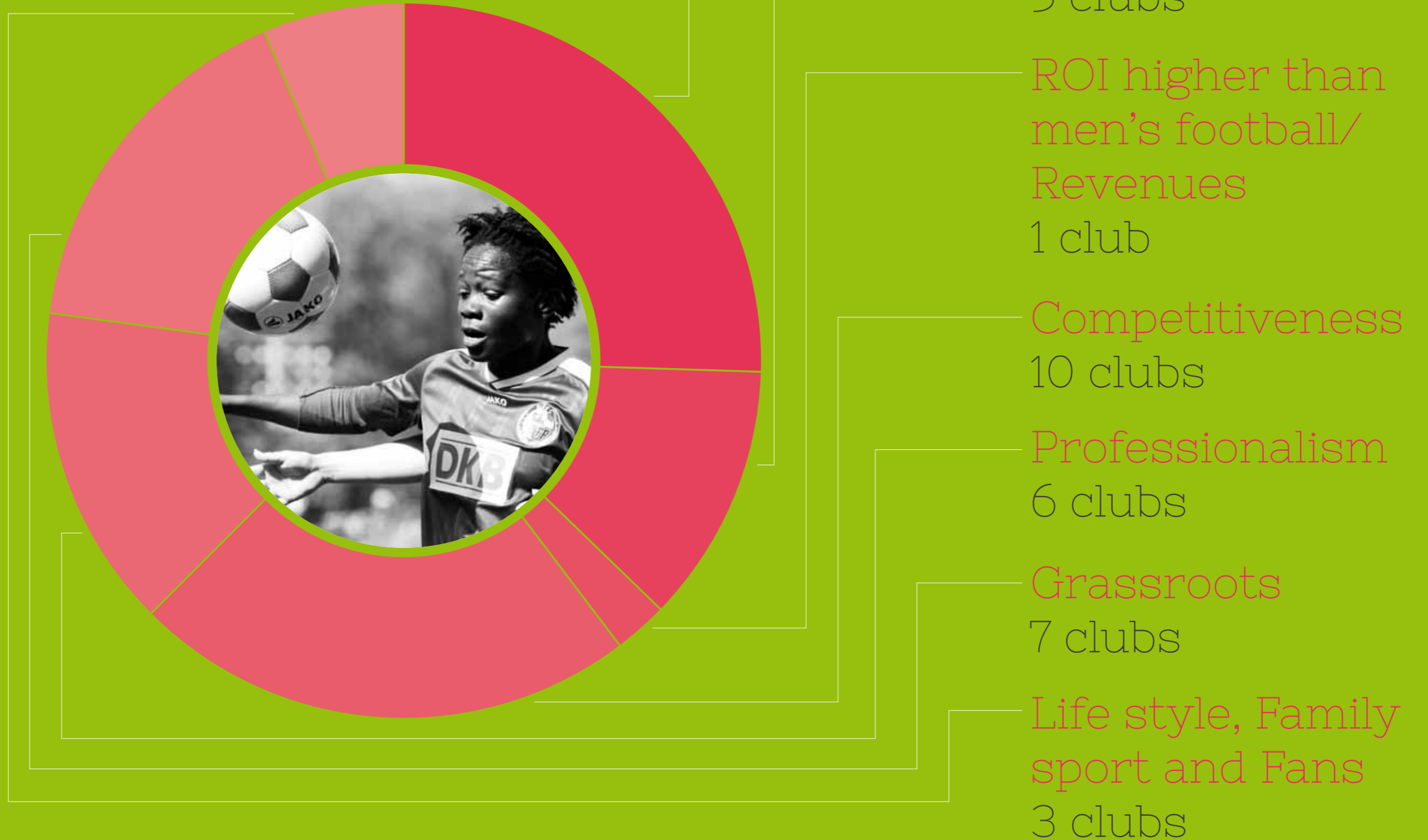
> Avoid clashes with men's football

In establishing the football calendar in Europe, UEFA should avoid clashes between UWCL and UCL/UEL matches. As it stands, these are usually played in the same week. As a result, fan and media attention towards women's football is very limited and not enough visibility is granted for the public. Furthermore, in logistical terms, it is complicated for clubs with both a men's and women's team in European competition to organise two matches within the same week.

CHART 13

In your opinion, which of the following categories best characterizes women's football?

[Select up to 3]



Half of the clubs consider women's football primarily as an entertainment but many clubs consider the sports value of the women's team as important. Furthermore, women's football is perceived more accessible for fans because women's players tend to behave in a more genuine way.



Women's football is perceived as more accessible for fans because women's players tend to behave in a more genuine way.

CHART 14

What is for you the main objective of women's football?

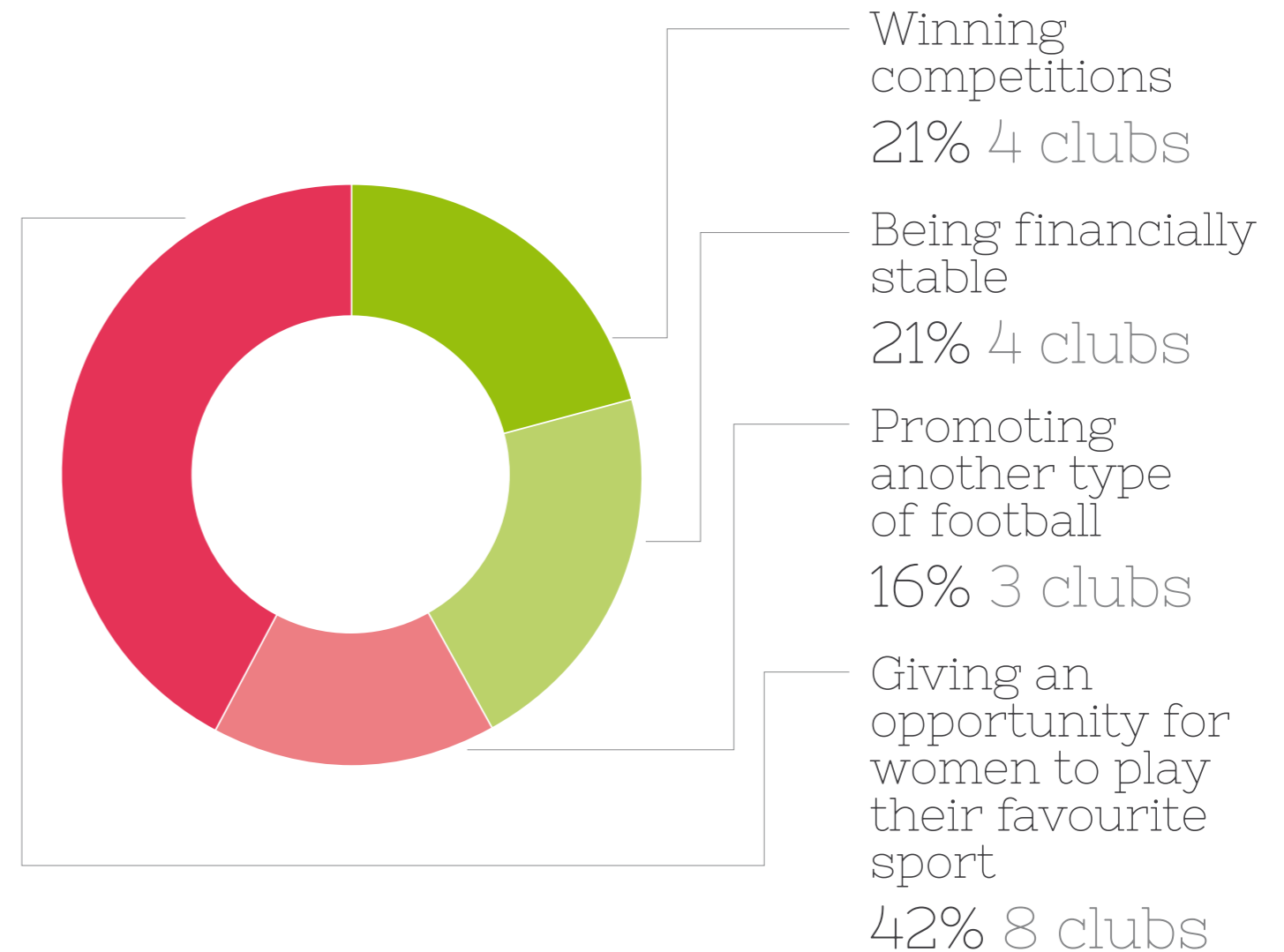


Chart 14 demonstrates the main objectives of women's football in the eyes of the clubs. The chart shows that for eight clubs out of nineteen, the main goal of women's football is to give women an opportunity to participate in their favourite sport.

Interestingly, a prominent club mentioned that women's football also gives the opportunity for stakeholders to build stable projects learning from the commercial mistakes done in men's football.

An improved marketing process benefiting all clubs, a better distribution share of merchandising revenues, more media attention and interest should be done in order to develop women's football in Europe.

The UWCL final and international tournaments such as the Women's Euro, where stadium attendances are high, demonstrate that people enjoy women's football and that it has the potential to further develop if marketed correctly.

The main goal of women's football is to give women an opportunity to participate in their favourite sport.



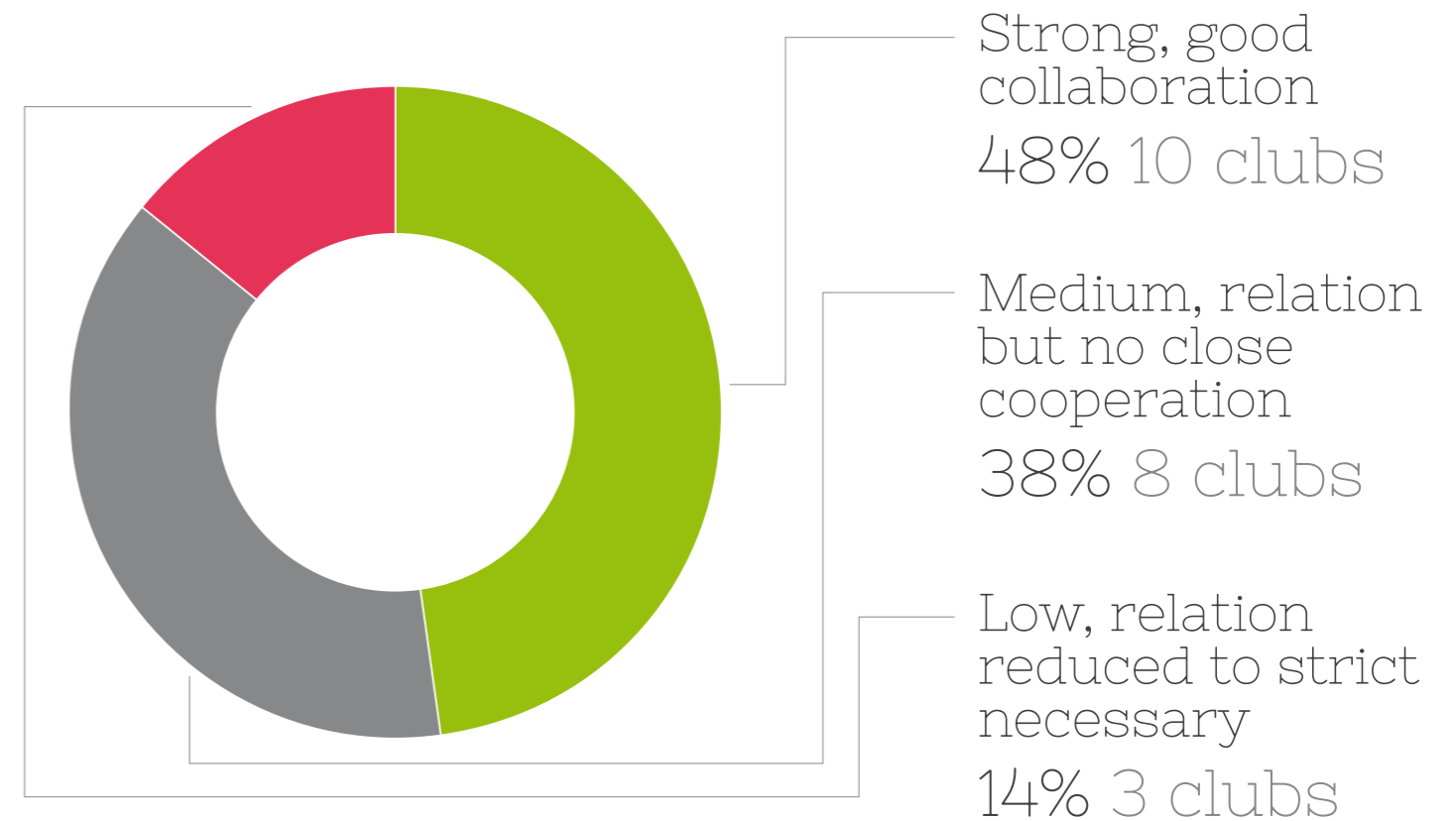


Relation with Stakeholders

CHART 15

How is your relation with your national association?

[Women's department if applicable]



Half of the clubs which participated in the survey work hand-in-hand with their respective NAs. Overall, the feedback concerning the relationship between clubs and their NA is rather positive.

CHART 16

Is your club's voice taken into account by your NA when making decisions on women's football in your country?

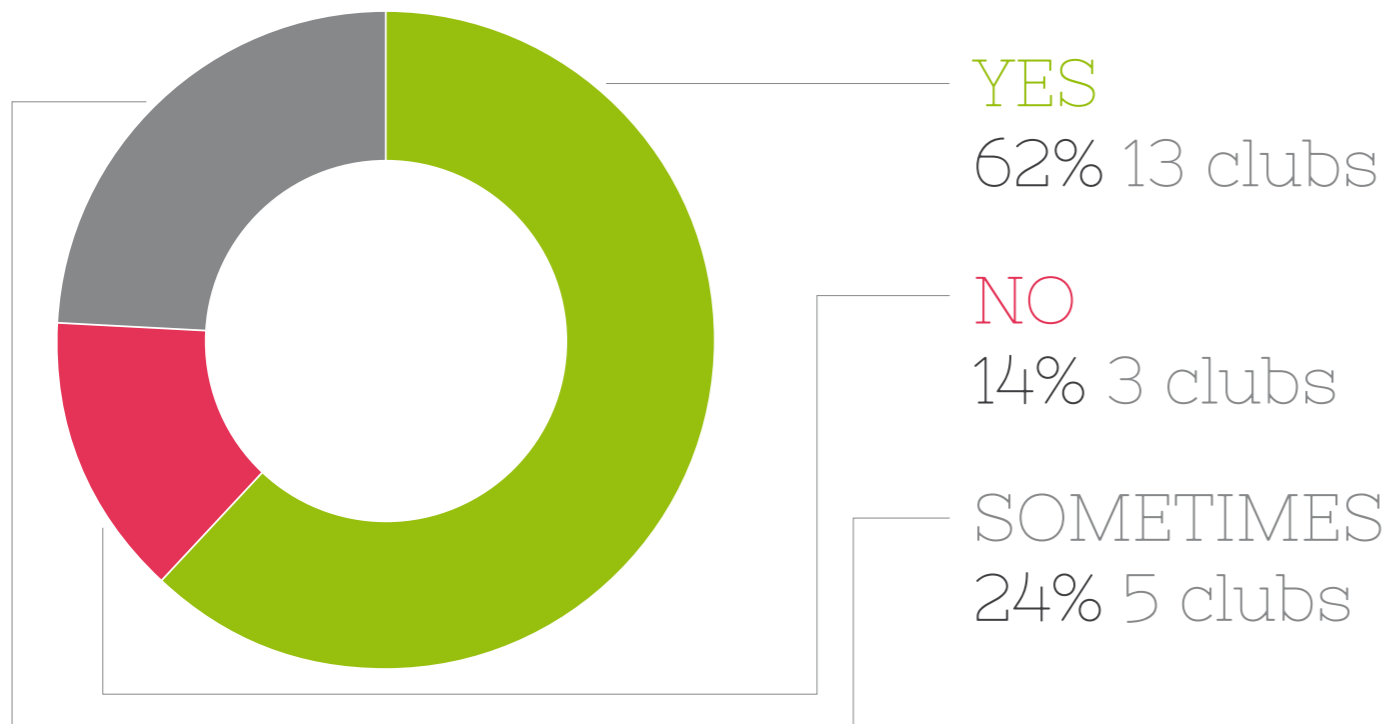


Chart 16 illustrates that the majority of clubs admitted to being consulted by their NA in decisions concerning women's football. Unfortunately, a little over a third of clubs (38%), expressed their frustration in this matter. Good governance is essential in football and as seen in **Chart 8** (MoU), six clubs mentioned good governance as one of their priority issues to tackle in the future. If essential, relations between stakeholders could be improved but remain correct.

As an example to follow, the German NA has a specific committee including four club representatives to discuss women's football issues concerning the league and the DFB.

Good
governance
is essential
in women's
football.



Success and Constraint Factors

CHART 17

How important are the following critical success factors for your club?

[Ranked by order of importance top 3]

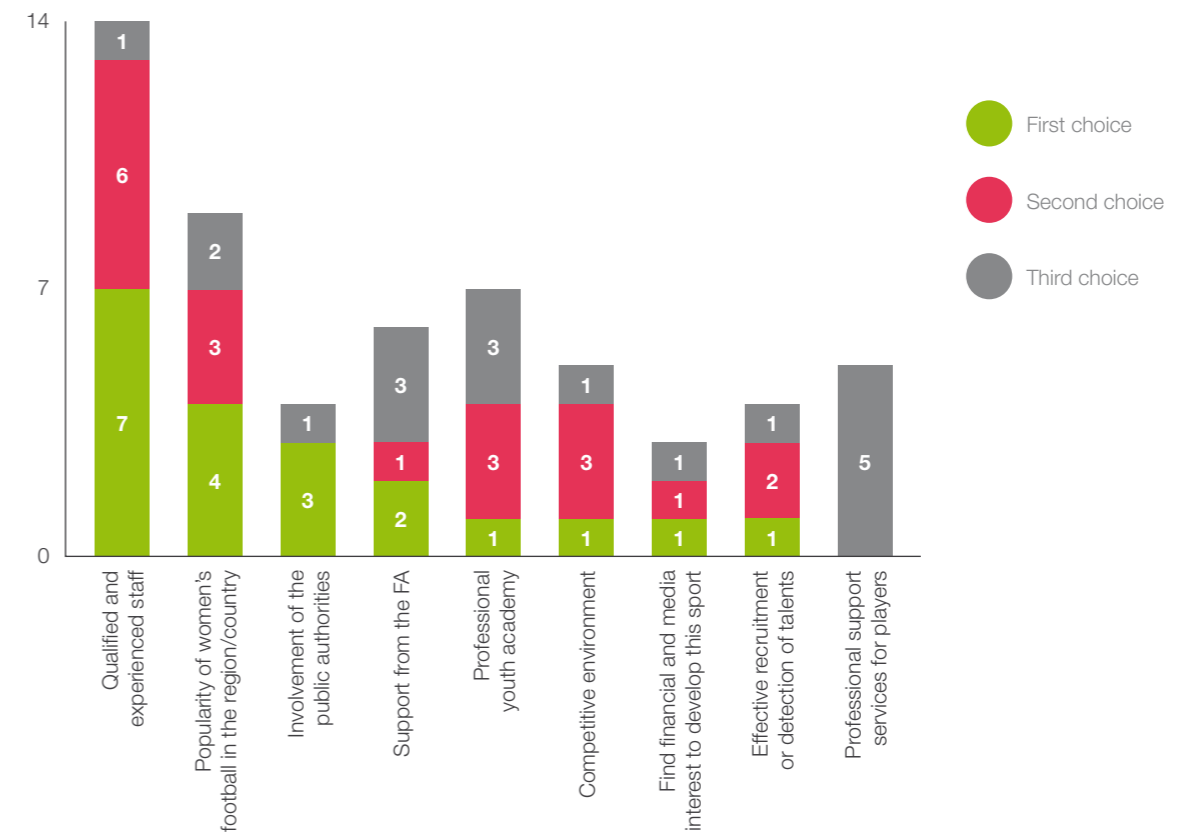


Chart 17 shows that for fourteen clubs, employing professional and qualified staff is one of the most important critical success factors. For clubs with both a professional men's and women's team, financial support from the men's squad is most certainly crucial as well.

Even though it remains challenging to run a self-sustainable women's section in the long term, clubs request more support concerning media work, public relations and sponsoring. These clubs should reward the women's division for their part in the promotion of the club by underlining the social aspects of the club.

CHART 18

How important are the following constraint factors for your club?

[Top 3 ranked by order of importance]

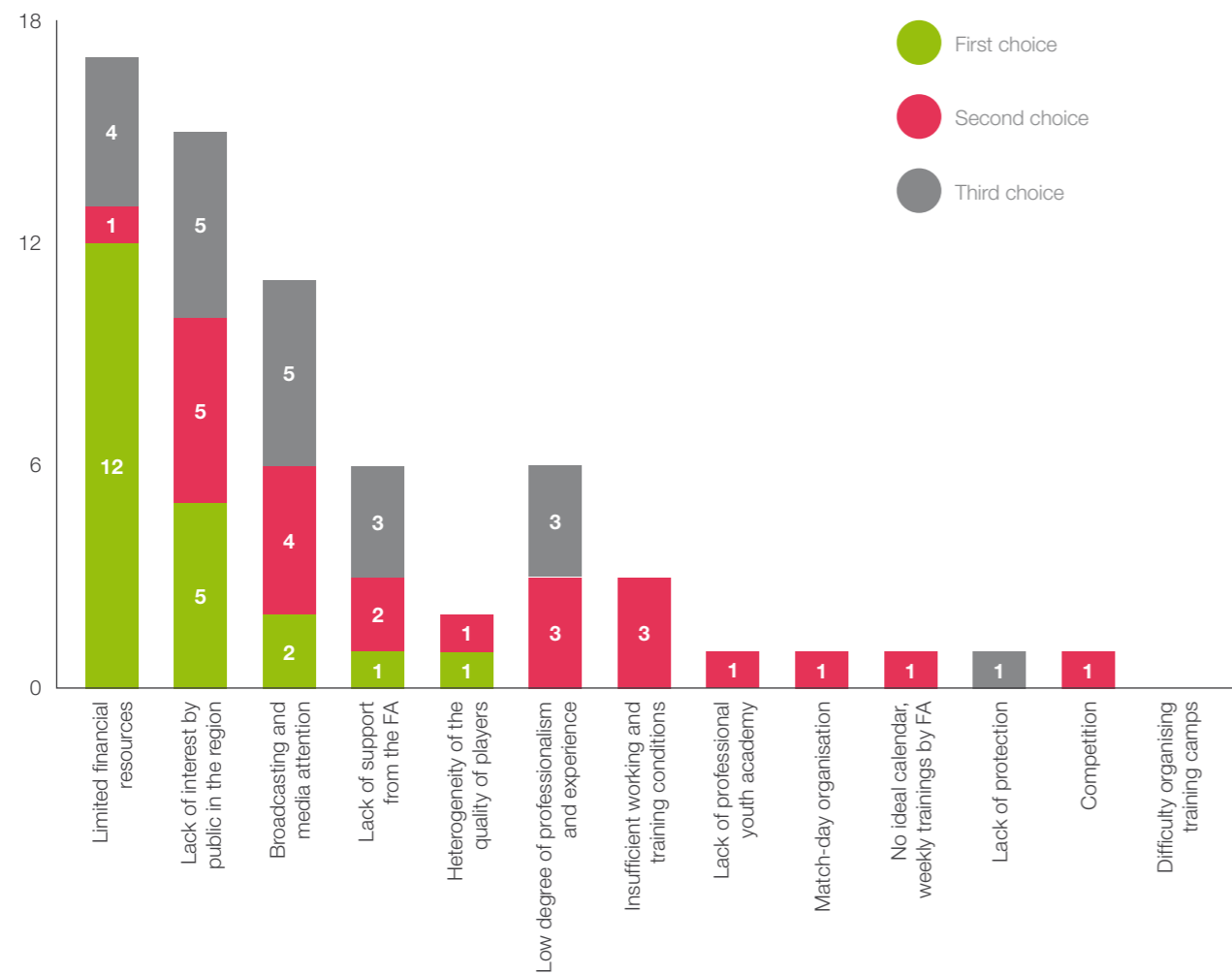


Chart 18 demonstrates that for more than half of the clubs, a limited amount of financial resources to work with and develop are the main constraint factors in women's club football. Finding steady and reliable financial backing from marketing and sponsors in order to develop the sport is a recurring challenge. Without effective quality on the pitch it is difficult to have recognition by the public and the media.

In your opinion, how could the ECA Women's Football Committee better promote women's football?

All clubs naturally welcome the creation of the ECA Women's Football Committee to represent their interests. According to the clubs, ECA should continue to encourage clubs to promote and deal with women's football.

ECA is widely seen as the voice of European football clubs and the WFC will strive to become the voice of European women's football clubs. The new Committee should become a strong and innovative partner for the top women's clubs in Europe. The Committee as such should raise awareness on topics related to women's football as well as formulate new standards and new perspectives for the UWCL.



Concluding Remarks

In conclusion the WFC recommend UEFA and ECA to take the following steps.

UEFA

- The ECA WFC and its member clubs should invite UEFA to ask its National Associations to increase their focus on women's football, directly improving the structure of women's football domestically.
- Clubs welcome UEFA's commitment to promote women's football and should continue to work closely with their NA in order to support and improve local competitions and help establish global alliances for sponsorships. However, clubs request UEFA to carefully follow work done by its member associations. UEFA should establish clear regulations in the organisation of women's football clubs, not to restrict but rather to help clubs understand best practices. Establishing support programs for clubs with good initiatives and Youth Academies, instead of simply having hat trick programs for national associations, is crucial.
- Clubs are strongly committed to open the discussion about regulations and payments connected with international transfers. Higher provisions for former clubs of semi-professional/amateur players (solidarity payments) should be in place.
- UEFA have strengthened the position of the Women's Champions League product overall and should strongly advocate for an improved media coverage of the UWCL. An idea could be to propose a marketing agency to help with the positioning of the group stages with external investors and in cooperation with the ECA WFC.
- In obtaining the much needed assistance at grass roots level from UEFA, clubs can benefit directly. UEFA should organise courses for female coaches, increase the amount of youth tournaments and pressure the national FAs to increase their financial support to the clubs.
- A club mentioned that the organisation of the Women's Euro in Sweden was a landmark in terms of media coverage and advertising. It should ideally be reproduced at UWCL level.

ECA

- Women's football needs to develop itself from a club and league point of view. The ECA WFC should promote the professionalisation of the sport and convince the authorities, especially the leagues, to allocate further human resources.
- The ECA WFC should support the inclusion of female/women's football specialists into the decision-making bodies and have women's football represented in all areas.
- ECA should convince clubs not involved in the women's game to use a larger portion of their resources to develop women's football. ECA should encourage UEFA to allocate funds to women's club football in order to send the message to all national associations that women's club football is the best area to promote social and equality values.
- ECA should intervene in the Club Licensing regulations and use the Financial Fair Play rule to allow a much more systematic restatement of amounts allocated to women's football as it is the case for Youth development.
- Clubs' men's section should provide communication support and be their advocates. The men's football sector can be a very powerful vehicle for communication, and if those persons talk in a positive way about women's football it will certainly draw attention and influence the public's opinion in a very positive way.
- Similarly to what ECA did with the Report on Youth Academies in Europe, ECA will establish a best practice report bringing together examples from several top women's football clubs on how to improve the structure and internal operations of a women's football club.

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