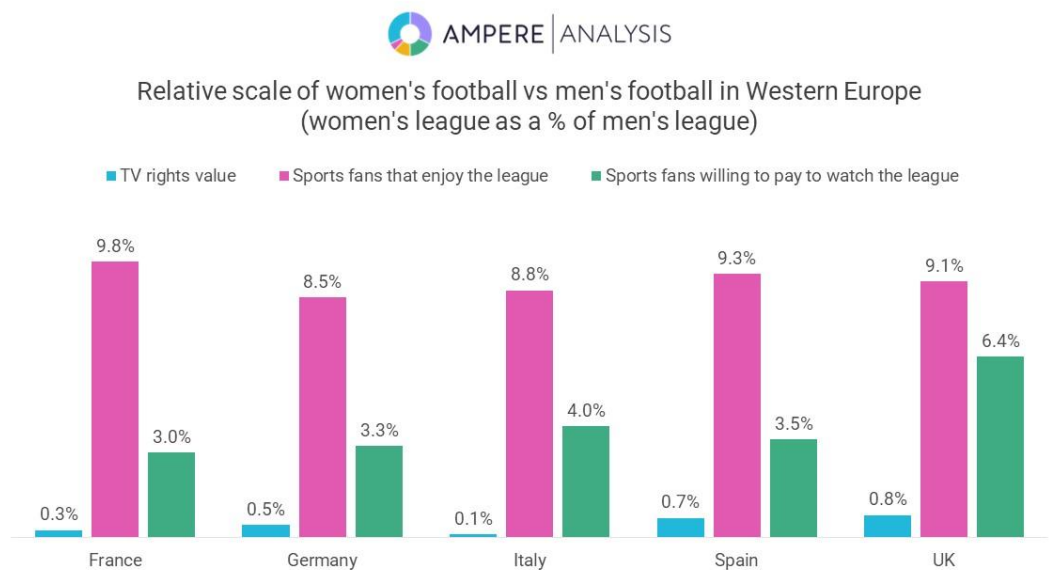


European women's football media rights remain undervalued as fans and viewership grow

The gap in media rights value is now much larger than the differences in the fanbase, and its willingness to pay

London, 23rd April 2025: Analysis from Ampere has revealed that the European women's football leagues continue to be undervalued, despite the growing popularity of the sport. With fans, TV audiences, and the willingness to pay for Europe's women's leagues increasing, their current rights valuation, which stands at approximately 0.5% of the value of the men's leagues, looks likely to increase when the rights are next negotiated.



Source: Ampere Sports – Media Rights, Ampere Sports – Consumer Q4 2024

Key findings: Closing the gap

- Across the big five European markets, the value of rights for each local women's football league is, on average, 0.5% of the value of the men's league
- The Women's Super League (WSL) has the highest rights value of the five largest domestic European leagues. Its new deal stands at £13m per season, 0.8% of the newest English Premier League deal, worth £1.6bn per season. In France, the Première Ligue is reported to be worth €1.3m per season, just 0.3% of the €479m value of the men's Ligue 1 rights
- However, the size of the domestic fanbase for each of the women's leagues averages at a much larger value, at 9% of the size of the men's league fanbase

- Part of the gap in rights values is because supporters of the men's leagues are typically more engaged with the coverage of the leagues. A higher number of men's football fans say they watch all or most of the competition
- Similarly, a higher proportion of supporters are willing to pay to watch men's leagues than women's. In each of the five markets, the men's football league is the top competition that followers say they will pay for. Between 19% and 41% of sports fans are willing to pay for the men's event, versus only 1% to 3% for the women's leagues
- However, the willing-to-pay fanbase for women's leagues is still 3%-6% the size of that for the men's leagues. This is a higher proportion than the gap in rights valuations suggests. Therefore, while media rights values for women's leagues are starting from a lower point, Ampere believes they have an opportunity to grow further.

Danni Moore, Senior Analyst at Ampere Analysis says: "Although followers of the women's leagues are less engaged with live coverage, and willingness to pay for the women's leagues may be low, the gap between the women's and men's fan bases and TV audiences is not as extreme as media rights values imply. Ampere's analysis indicates that the recent scaling of women's fan bases should drive upside for rights owners in the next round of negotiations. Growing audiences and increasing willingness to pay for access among supporters are likely to support increased deal values in the future, closing the gap a little between the men's and women's games. The lack of historic precedent, however, means that women's competitions will have to work hard to prove this value to prospective rights buyers. They will also have to continue to balance how they prioritise the benefits of the greater reach afforded by free-to-air coverage versus the opportunity to support higher fees through subscription-only access."

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About Ampere Analysis

Founded in January 2015, Ampere Analysis is a new breed of media analyst firm. The company's experienced team of sector-leading industry analysts specialises in sport, games, pay and multiscreen TV and next-generation content distribution. Our founders have more than 60 years combined experience of providing data, forecasts and consulting to the major film studios,

telecoms and pay TV operators, technology companies, TV channel groups and investment banks.
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