

**THE
NEXT
WAVES
VOL.1**

**GEN Z FOOTBALL MANUAL
AUG 2023**

RISING BALLERS

THE NEXT WAVE VOL. 1
AUG 2023

RB



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PRE- FACE

“Young people are no longer interested in football. They have other platforms on which to distract themselves... 16 to 24 year olds, 40% of them aren't interested in football. It's a reality... we have to change something if we want football to stay alive” – Florentino Perez, President of Real Madrid, 2021 via El Chiringuito de Jugones. As the shift from traditional TV to digital rages on across all sports, an array of commentary has entered the public sphere, prophesying where football will be in the years to come. With social media fully integrated now as the primary platform of choice for young “ballers” (footballers, shortened), football has become more than just that. Football culture means more than football. Music, fashion, gaming and so, so much more. These young consumers are intrinsic to football's business model – in addition to brands, marketers, clubs, federations and leagues - and therefore it is imperative we understand their DNA. So where does Perez's controversial statement stand in

today's world? Are there trends that are a distinctive cause for concern, or is this an exaggerated quote taken out of context, with younger consumers now using other ways to tap in and engage with the sport they love? Our report covers this and many other areas surrounding it. The answer to the question is a complex one, with multiple arguments – including brand new data via Rising Ballers – on both sides. Rising Ballers is the voice of Gen Z for football. Created by footballers, for footballers, our digital media channels reach 110M+ consumers globally each month. Alongside our established media presence, we have several successful grassroots initiatives, which have led to players going pro and even going on to play at the World Cup. Our insights and experience is unparalleled. Leveraging this alongside the community we have, we were primed to produce this brand new report, to help the industry understand young ballers better and how we can continue to push the beautiful game forward.

INTRODUCTION

Football was always bound to change, especially in today's climate with the rapid development of technology. The power of social presence has grown exponentially. As it stands, the most followed football club in the world, Real Madrid, is on the verge of surpassing 150M followers on Instagram. Cristiano Ronaldo, the most followed pro footballer, exceeded 500M followers some time ago. We are witnessing how the bidirectional relationship between fans and players are shaping the game as it is today: fans are determining who the 'hot ones' are in football and players are influencing fans' consumption habits. This in turn is dictating how football functions as an industry - with decision makers adopting a bottom-up approach. The influence of fans and players is stronger than it has ever been before, with the core reason attributable to social media - a platform the young gen call home.

Gen Z prefer bitesize content, consuming all things football at the tip of their fingertips. In this research report we've explored key overarching topics that are at the forefront of football now. As a reader, you'll learn about the young gen of today and their unique needs and demands.

So, what are these topics? We first present a brief snapshot of the Gen Z football consumer. We then delve deeper into the key topics - namely, Convergence of Cultures, Inauthenticity and Monetisation of Football, Discrimination, Mental Health and Women's Football - with each heavily situated on the freshest data and insights, gathered directly from the target market itself.

How did we achieve this? To create this issue of The Next Wave Vol 1, we conducted qualitative, quantitative and first-party data analysis. Following extensive literature review, we identified gaps in the current research and pointed to areas in need of further exploration. Our preliminary hypotheses shaped the research that followed which included asking over 1,000 young individuals close to 100 detailed questions. Supporting this is insights from our interviews with young Gen Z ballers from non-league to academy level as well as with key voices within football, including current and ex pro athletes. We are at the frontline of football insights. Our continuous research explores football and its changing landscape - here's a taste. We feel it's our duty for the culture to provide this handbook to help make the future of football a better place.



SNAPSHOT OF KEY STATS FROM OUR FINDINGS

This year, we learned that Gen Z football consumers turn to social media more than ever before to satisfy their football wants and needs, with **Instagram** being the biggest platform for football news and content (66%). It is therefore not surprising that pro baller x brand collab ads are seen most on Instagram (78%).

69% of Gen Z football consumers catch up on a missed 90-min game by watching highlights on YouTube. Established younger pros like Saka and Haaland have the greatest influential power (56%) over established older pros (39%) and academy players (5%).

FASHION

92% of Gen Z football consumers believe pro ballers should be able to express themselves through fashion.

83% believe authenticity is important when following a baller on socials, and 61% would not buy a luxury football collab item like the adidas x Prada football boot.

MUSIC

85% of Gen Z subscribe to a music platform like Spotify and 84% of them include music in their pre-match ritual. Even more, 70% have discovered a song or artist through the FIFA soundtrack.

WEB3 AND BEYOND

81% of Gen Z football consumers do not follow their club's esports team and 76% would watch a live game in the metaverse.

MONETISATION

49% of Gen Z football consumers did not attend any live men's pro games last season and 79% believe PL season tickets are too expensive.

86% of Gen Z football consumers believe football streaming services subscription fees are priced too high. More than half (56%) of Gen Z football consumers support a second team (i.e., local non-league team).

LONG FORM

95% of Gen Z football consumers have watched football documentaries in the last 2 years and 68% listen to football podcasts.

DISCRIMINATION

Gen Z football consumers believe discrimination is still overwhelmingly present in the game: 99% believe racism is still a problem, 92% sexism, and 83% homophobia.

92% of Gen Z football consumers believe anti-discrimination campaigns and initiatives raise awareness but do not solve the problem.

MENTAL HEALTH

73% of Gen Z football consumers believe there is bullying between ballers.

93% of Gen Z football consumers believe ballers struggle to speak up about how they feel.

83% believe ballers are at risk of being released after taking time off to take care of their mental health.

Of those who have been let go in the past, 73% shared they received little to no support from their team club and/or manager.

WOMEN'S FOOTBALL

86% of Gen Z football consumers feel positively about women's football.

33% of Gen Z football consumers believe there are better ways beyond female commentators to increase representation in the game.

67% want to see more investment in women's football across the board.

80% believe 23 WWC will be popular.

A shocking 63% of male Gen Z football consumers didn't know which countries are hosting the 23 WWC.

57% of male Gen Z football consumers will not be tuning in to live 23 WWC games.

THE GEN Z FOOT- BALL FAN

Gen Z prefer bitesize, snackable content delivered quickly and in a constant stream that grabs their attention immediately before they lose interest and scroll on. Want to have a better understanding of Gen Z social media consumption habits? Here's an overview.

Gen Z football consumers mainly turn to social media to consume football news and opinions. Instagram is a clear winner for this currently, notching up 66% of the answers, followed by Twitter (14%) and TikTok (12%). YouTube comes in at 7%, whereas Snapchat and Facebook sit at 1% respectively - showing these platforms have lost relevance when it comes to this area.

HERE ARE THE TOP 8 MOST FOLLOWED SOCIAL MEDIA ACCOUNTS

- | | |
|---|-------------------------------------|
| 1. Favourite club's channel (83%) | 5. Favourite sportswear brand (55%) |
| 2. Favourite footballer's channel (72%) | 6. Barclays WSL (47%) |
| 3. Premier League (70%) | 7. BBC Football (45%) |
| 4. Sky Sports (69%) | 8. BT Sport (36%) |

Gen Z form habits with their social media usage, highlighted by Gregorio:

"I feel like I'm more of someone that has habits, and my habit is to go and spend time on Instagram and scroll through my Reel pages. It wouldn't feel the same to do it on another app as I'm not really used to it."

BALLER TALK WITH REBECCA ON WHO SHE FOLLOWS ON SOCIALS AND WHY:

"So Rising Ballers, She's a Baller, obviously. Fan channels, sometimes. I like to see people's opinions, even if they're wrong, I like to see their opinions. In my opinion, they're wrong, I should say. And the Premier League, because I like watching a lot of the clips and things, and WSL."

When it comes to YouTube, Gen Z ballers use this app differently to Instagram.

BALLER TALK WITH KEVIN:

"Watching highlights and different types of videos too - from highlights to specific player videos to old football games - YouTube has everything."

BALLER TALK WITH OJ:

"YouTube is the king for football specific content, but for viral stuff, it would be Instagram."

Our data confirmed what Kevin and OJ shared, with 69% of Gen Z football consumers saying they catch up on a missed 90-min game mainly by watching highlights on YouTube.

BALLER TALK WITH MUKHTAAR ON USING SOCIALS TO SEE OFF PITCH PLAYER PERSONALITY.

MUKHTAAR: *"I think, was it a Reiss Nelson interview? I saw that. I think it had Nketiah in it as well. I'm not too sure. But yeah, I watched that one. It was quite interesting because you could see a bit of their personality as well. They were joking about a bit, so it wasn't as rigid as it normally is."*

RB: *"And on Instagram, for example, is there much personality shown by football players?"*

MUKHTAAR: *"I think sometimes. Recently, there's been a bit more. I think, was it a couple of weeks ago, last week? With Chelsea and Armando Broja, Felix and Madueke. You saw them laughing a bit and it showed a bit of their personality."*

RB: *"Does that make you want to look for more content like that?"*

MUKHTAAR: *"Yeah, it does, because it's quite funny. It's not as formal as, for example, post-match interviews or whatever, so they can be a bit informal."*

RB: *"Yeah, that definitely makes sense. It makes them a bit more personable."*

BALLER TALK ON BRAND INITIATIVES HAVING AN ENDURING INFLUENCE.

DYLAN: *"adidas goes down to non-league, adidas goes down to Sunday League but obviously we see adidas show a lot more attention to the bigger clubs, for example, Arsenal. We've [Arsenal] got something new out every week with adidas. There's a new drop of merch or a new something basically every week and some are for good causes. We had a TFL one that came out last year. They've got some stuff that relates back to the train lines of London or locally. It is small things, nothing overly powerful, but it's just nice things that the fans can connect with the club."*

OJ: *"The marketing does help, because I remember growing up, if you see the Nike Academy, you see the campaigns they do... People, kids from a range of ages would watch their videos and be gassed. There's a lot of iconic Nike adverts that people won't forget. So it really sucks you in and you just want to buy it. That's why until this day I still wear loads of Nike boots. Most of my clothes are Nike - my training wear, my running wear... all of it is Nike."*

Gen Z football consumers are extremely susceptible to brand initiatives and collabs - so much so that it creates brand affinities and emotional brand attachments that have lasting impact. Here are some snippets of our conversations with Gen Z ballers talking about notable brand impressions.

BALLER TALK WITH COMFORT ON WHY BRAND COLLABS ARE APPEALING:

"You're seeing all of these huge football figures, just having fun outside of their teams and stuff like that. And it's just fun to watch that content. They're actually humans as well, they're not just footballers. So I just enjoy watching stuff like that as well."

BALLER TALK WITH OJ ON BRAND COLLABS WITH PLAYERS BEING GOOD MARKETING FOR THE BRAND.

RB: *"What did you think of the Declan Rice video Rising Ballers did? Did you see the adidas one on YouTube?"*

OJ: *"I feel like it's really good marketing. And the level of detail, the way it's edited, it is really attractive. So I feel like all of those little details add up to just make really good content"*

RB: *"When you say marketing, do you mean for Declan or for adidas?"*

OJ: *"For adidas. Seeing videos like that makes me want to buy the boots, the kit. It's more than just Declan being in it, it's the level of detail and quality."*

BALLER TALK ON PRO FOOTBALL PLAYERS INFLUENCING CONSUMER BEHAVIOUR.

GREGORIO: "I would say that I would be more inclined to look into a brand's product and actually pay attention to it if I see someone that I admire wearing it, than someone that I don't [admire]."

KEVIN: "Even with goalie gloves. Lehmann wore Nike. I was just like, 'oh, I want Nike like him'... when you see your favourite players wearing certain things, you just want to wear it as well, you know what I mean?"

BALLER TALK WITH KEVIN ON FOOTBALL AS A WAY TO CONNECT WITH OTHERS:

"Because obviously when I was younger, playing my friends, making new friends as well, not just from my area but from other areas as well, playing as different players, different schools, different teams... you really connect with other people"

Bobby spoke about football being a saving grace for many young hopefuls living in deprived areas in London surrounded by bad influences: "Growing up in Peckham, you see violence when you're 14, 15, and that's when it really all becomes a reality to you. My brother was getting arrested every now and then, and then just naturally, because he was someone I really looked up to, I started following in his footsteps because he was popular. Whatever he would've been, I would've followed. He was a really good footballer but started to not take it seriously and got involved in gangs, so I started to sway myself that way as well."

BALLER TALK WITH MUKHTAAR ON GOVERNMENT INTERVENTION IN FOOTBALL.

RB: "So funding wise, do you think the government should do more?"

MUKHTAAR: "I'm not sure, because the government wouldn't really say it's their duty. But then again, I think with a lot of funding, it'd keep a lot of people off the streets as well. So it would benefit the government in a way, as well."

THE GEN Z FOOTBALL FAN

Bobby further explained how football helped him change his perception of life and his future - acting as a powerful tool that provided him purpose after prison: "I always said football is a very powerful tool. If I take it back to when I was in prison - there was a lot of violence, right. Alarm bells would go off, every minute, incidents are happening. On a Friday, when football was on, everything would go quiet, everyone would go 'oh football is on tomorrow, let me behave myself'. Football had the power to regulate behaviours. Upon release, I see so many talented footballers in prison, 'how did you not make it?', they said 'oh we didn't know how to make it', and I said 'no you can go semi pro routes'. So I used all that, coming out, to create Hackney Wick FC."

So where are we at?

Football seems to have a huge influence on peoples' lives. This can also be attributed to the inspirational figures who play the beautiful game. Let's put on our rose-tinted glasses and step back in time.

Young stars are The Next Wave's new role models. Who remembers being in secondary school and there'd be that one kid who played for Arsenal or Spurs or whichever academy? By definition, they were cool. Wake up, go to school, learn, then head off to kick ball at training grounds shared with the pros (the ultimate inspirational figures). They made football fans and casual players

alike raging with jealousy and envy. Now they are established. The same kids you shared a classroom with are now playing at the top flight. These ballers on the rise have socials, and as they are from the young gen, they know how to use it and they use it well. They resonate, amaze, inspire and motivate - being close in age makes them more relatable. They are, after all, the ultimate window into the football world from the Gen Z POV. This goes beyond football but extends to the trendy fits they're wearing, the new creps they're rocking, the latest tunes they're listening to... they're cool and so whatever they do is cool.

So just how influential are they? 56% of Gen Z football consumers look up to established younger pros like Bukayo Saka and Erling Haaland the most. Not far behind are established older pros like Harry Kane and Lucy Bronze (39%). Academy players seem to have the least influence power, sitting at just 5%.

Gen Z football consumers are at the mercy of their heroes, who have shaped them into the player they are today. Our survey data showed that for all but two player positions (LM and RM), Gen Z ballers' own position is the same as the position play of their most inspirational pro baller.

THE GEN Z FOOTBALL FAN

BALLER TALK ON POSITION PLAY.

COMFORT: "Because I'm a goalkeeper, I mainly follow goalkeepers, Megan Walsh from Brighton obviously, Mackenzie Arnold from West Ham. Just them type of goalkeepers, just people I can look up to, I want to be like, 'oh, I want to be in their position one day'."

ELIKEM: "Defender compilations. How they slide tackle, how they track the ball, stuff like that... all of the types of footballers in my position basically."

MUKHTAAR: "Yeah, he plays the same position as me as well, so I look up to him. I think he's a great defender as well."

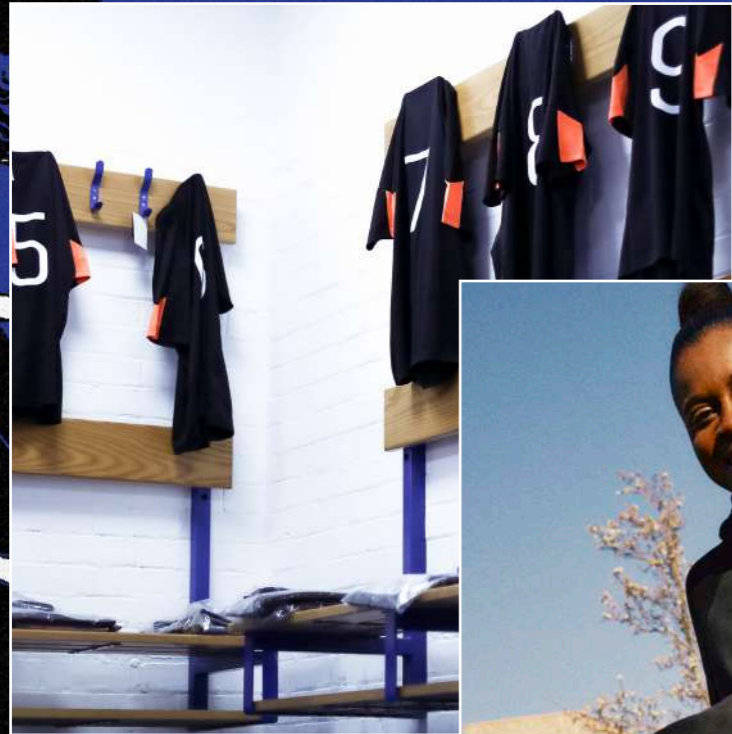
KEVIN: "It's probably Jens Lehmann, ex German goalkeeper... his aggressive style of play and his charisma, his character on and off the pitch has really inspired me to be a goalkeeper. Even to this day, I know he's retired now, but I still go on YouTube, I still watch his old clips."



We asked Mukhtaar about his thoughts on how New Balance successfully entered the football market. He responded with: "I think that they've done well with their sponsors. They've got quite a few young players, like Saka for example, and then got people like Sterling who've got presence on social media and influence, so it pushes their brand a bit."
Brands - take note!

Balancing football and education also has a strong influence on the young gen looking to play the game without jeopardising their studies. Mukhtaar spoke about how he looks up to Chris Smalling for this very reason: "I look up to Chris Smalling the most, because he's got his masters and stuff, so he's mastered his education and he's playing football at a good level as well, so I look up to him."

THE GEN Z FOOTBALL FAN



TYPES OF BALLERS
GEN Z FOOTBALL
CONSUMERS LOOK UP
TO THE MOST

Established Younger Pros
56%

Established Older Pros
39%

Academy Players
5%

Snapchat
1%

TikTok
12%

SOCIALS USED
MOST FOR
FOOTBALL CONTENT
CONSUMPTION

Twitter
14%

Instagram
65%

YouTube
7%

Facebook
1%

CONVERGENCE OF CULTURES

Football and fashion used to be thought of as two opposite niches with very little in common, but the way Gen Z consume content now via socials has largely put an end to this perception. With football players' influence stronger than ever before, we're seeing the younger established pros (Gen Z themselves) at the forefront of social media usage and doing this all on their own - without the help of their management teams. Their authentic posts, beyond just matchday content but also featuring off pitch lifestyle content, have attracted big media accounts who want to tap into this culture. An example of a platform who capitalised on this is Footballer Fits, which has become the new home of football x fashion and have garnered a following of close to 2M+ across their channels - regularly engaged with by the likes of Karim Benzema amongst many others. This coupled with algorithmically curated feeds, which allows Gen Z to scroll through content they're genuinely interested in, we're seeing the rise of a new and exciting trend.

One of the early pioneers of this trend was Virgil Abloh. After building his reputation as the founder of Off-White, Abloh took the reins as the first Black Creative Director at Louis Vuitton - a huge

CONVERGENCE OF CULTURES

moment for the culture. Not only were we seeing the brand embrace diversity at the top of its business but longtime fans were hoping the designer would blend his love for the game with his passion for fashion, like he had done so at Off-White.

During his time at Off-White, Abloh worked on a number of collabs with Nike, dropping a limited edition collection of football shirts as well as the Nike Mercurial 360 - a boot worn by Mbappé on pitch. At Louis Vuitton, he was known for having people outside the fashion world walk for the label at shows and famously invited Hector Bellerin to walk at PFW in 2019.

From the obsession with what ballers are wearing to the rise of #blokecore and exclusive collabs between adidas and Wales Bonner, we've seen the gap between football and fashion get smaller each year. Kim K's been walking around in vintage Roma shirts, adi Sambas are the go-to sneakers and everyone's Instagram feed is full of influencers wearing football inspired bootlegs - a sign of how football culture has broken into the mainstream.

It's something Venezia has tapped into effectively. Having spent most of their history playing in Italy's top

two tiers, Venezia underwent an off-pitch transformation led by former Chief Brand Officer Ted Philipakos. During his three years with the club, Ted turned Venezia into the city's number one cultural ambassador, gaining international recognition for the fashion forward pieces released and disrupting Italian football culture for the better. Coinciding with Venezia's rise to the top of Italian football, the focus on fashionable kits that had streetwear appeal helped contribute to a 15x increase in revenue in just over two years.

Motivated by savvy Gen Z football fans, streetwear brands and luxury fashion houses are catching on and keeping up with this rapidly evolving trend. The rise of the fashion forward footballer has fuelled what's become a highly valued social currency. While there's been plenty of stylish players over the years, in the social media era, Hector Bellerin walked so others could run. During his time with Arsenal, the right-back gained a reputation for steeze and led the way when it came to self expression off-pitch. Now, fashion conscious players are the norm, not the exception. Serge Gnabry and Leroy Sane, among many others, can be seen at Paris Fashion Week, while Barcelona's tunnel fits have popped off on Instagram.

Despite the attempts by a few dinosaurs in the media to rail against the individualism displayed by some ballers, the future of football and fashion lies together. With Gen Z poised to become the biggest football audience, progressive views around self expression and individualism are set to stay.

Comfort spoke about her excitement in seeing fashion enter the football world:

“You see them in their travel outfits, starting to collaborate with adidas and D-Squared or Nike and Off-White, just stuff like that. And I’m someone who really likes fashion anyways, so it’s fun to see that make an entrance into the football world and players expressing themselves how they want to express themselves. It’s nice and refreshing to see.”



This is true amongst young pro ballers too. **Tyrhys** spoke about his own love for fashion and the way it allows him to express himself out of football ‘uniform’. Fashion acts as an expressive outlet, and with this comes individuality. In an industry where ballers are viewed as commodities and lose a part of their identity, being able to speak through what they wear reveals personality and shows what they’re truly about.

“Some fans don’t like it [football entering the world of fashion] but I think it’s good man. It’s individuality. If someone wants to dress how they want to dress then let them do it. It’s accepting people with style and bringing people into fashion and I think it’s good. Some people speak through what they wear so I think that’s real important. And I want to see more of it man. So I think that’s good they’re opening that gate.”

Social media has made our ballers more accessible and most fans enjoy getting behind the scenes access to a player’s life off pitch. Fashion brands looking to capitalise on this trend should look to build relationships with individual players that actually give Gen Z fans the **authenticity** and value they crave.

Let’s take Jack Grealish for example. A maverick on and off the pitch, there’s a huge appreciation from fans for Jack’s humour, honesty about drinking alcohol and ‘Jack the lad’ relatability that you don’t get from many elite pros. Having become one of the PL’s cult icons, brands like Gucci and boohooMan are tapping in. His large audience of young and aspirational football fans fit the profile that the brands mentioned are trying to attract. When Jack is seen in a Manchester bar wearing his pieces from his latest boohoo edit, many are likely to head out and do the same.



Jack’s authentic presence on social media attracts followers and interest. This is supported by our findings which showed that 83% of Gen Z football consumers believe authenticity is important when following a footballer on social media. The main reason for following pro ballers on socials comes down to personality and seeing what these athletes get up to in their personal life, off the pitch (56%).

Jack Grealish isn't the only baller that's reaping the rewards of a closer relationship between football and fashion. The likes of Son Heung-Min, Marcus Rashford and Kylian Mbappé have also had similar opportunities.

With a clear understanding that Gen Z can smell inauthenticity a mile off, luxury fashion labels like Burberry have been linking up with a series of footballers that speak directly to the markets they're trying to break into. Burberry's AW20 collab with Marcus Rashford saw the label build on the baller's work to combat child poverty by announcing their investment in youth centres in Manchester, London and around the world. This is an example of how CSR helped strengthen Burberry's brand image not only with existing customers but with Rashford's audience too. The collab also increased support for Rashford's campaigns against poverty as well as a growth in Instagram followers.

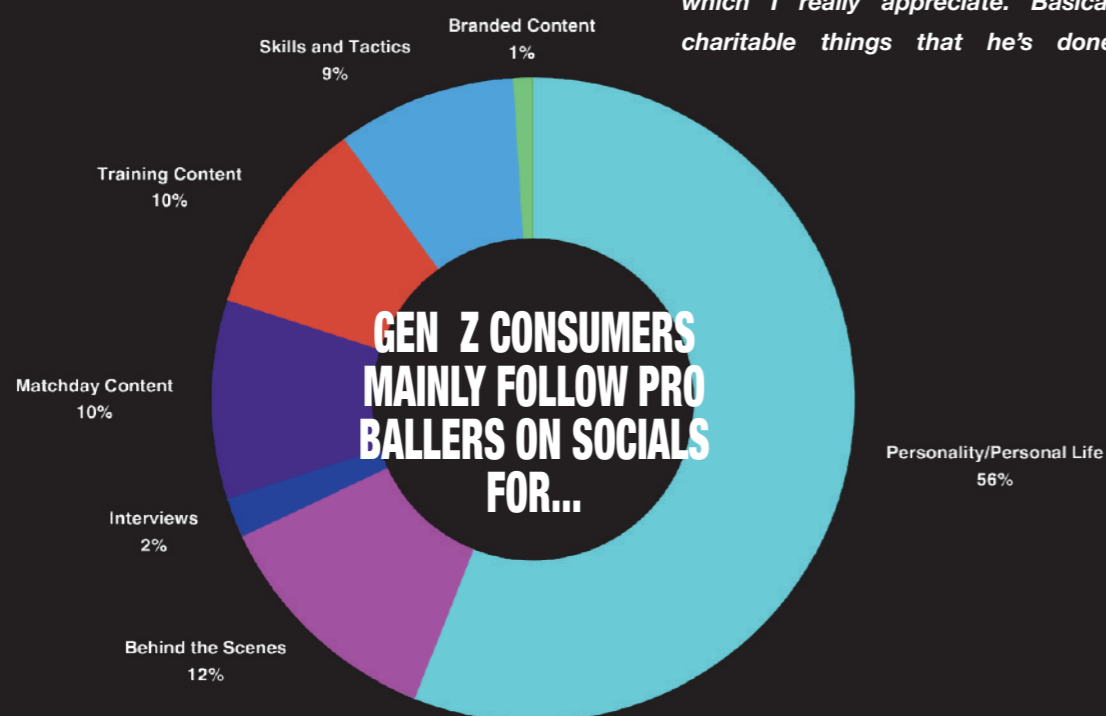
BALLER TALK WITH ELIKEM ON RASHFORD'S PHILANTHROPY.

RB: "And from the team, is there a particular professional football player that you look up to?"

Elikem: "Probably Rashford. He's just a very good role model for youngsters, and what he's done this season has been really good. There's been a clear change in how he's brought himself, carried himself, and football-wise, he's more technical."

RB: "And when you said 'what he's done so far', what kind of stuff?"

Elikem: "He's done a lot of charity work that I've seen. And he's really about supporting the younger generation, which I really appreciate. Basically charitable things that he's done."



Keen to build on their reputation as an impactful brand, Burberry connected with Son Heung-Min last summer to consolidate their position in Asia. South Korea is home to a huge middle class of young, aspirational professionals who place core values like hard work and perseverance at the centre of their lifestyles and Burberry are interested in building brand loyalty amongst this group. By working with a baller like Son, who's own story shows how believing in one's purpose and never backing down can take you to the top of football, Burberry are able to speak directly to the audience they want to attract.

Real recognise real and so when Dior linked up with Mbappé in

2021, the deal just made sense. By signing up the PSG forward as a global ambassador, Dior as one of Paris' heritage fashion labels have been able to speak to a new generation of fans that blend their love of football with luxury lifestyle. With 105M Instagram followers and a large reach that hits almost all demographics, making him the global face of new luxury transforms Dior's reputation worldwide.

2023 has seen football-fashion collabs continue to dominate our headlines. Recently we've seen Martine Rose x Nike drop a women's football collection, Kid Super design Barnsley's 23/24 kit and Filling Pieces celebrate Surinamese football heritage with a special

limited edition football shirt. Earlier this year one particular collab that caught our eye saw adidas and Prada announce a game changing collab on a boot pack, co-creating 3 high-performance football boots, finished with the look and feel synonymous with high fashion. The limited edition drop included the X Crazyfast, Copa Pure and Predator Accuracy, all reimaged with Prada's signature sleek look and finished off with premium Italian leather. While big name crossovers involving football and fashion make headlines and generate conversation online, how the products are received is questionable. Based on the responses we received from our survey, there seems to be issues in taking trends from URL to IRL.

80% of Gen Z football consumers have never bought any items from clothing labels started by pro ballers, while 61% would not buy an item from a football x luxury fashion collab.



The same goes from Gen Z footballers, with most saying they admire luxury football-fashion items but explained they were mostly impractical. It's a sentiment backed up by **MUKHTAAR** who spoke to us about his views on the adidas x Prada collab: *"I think it's a nice boot, but I don't think I'd play football in them. Because it's Prada. I just wouldn't want to mess them up. So I think they'd be nice to have, but I wouldn't play football with them."*

A similar view was shared by **OJ** and **Kevin** who explained that brand-designer collabs are impressive but not accessible.

RB: *"Was it Nike x Virgil collaboration on the Mbappé boot that he wore? Do you know about that one? The Off-White..."*

OJ: *"Yeah. But they're not really accessible though, so if you can't really access it, it's just, 'oh wow'. They're basically going to get dirty anyways."*

KEVIN: *"The marketing is peng though, do you know what I mean, just putting it out there."*

OJ: *"If they actually did some numbers, especially because football boots aren't like trainers. These, I've had these for years, but boots if I'm actually going to wear them a season or season half at most. So if they make collaboration like that more accessible... people would care more about them."*

But maybe that's the intention? To maintain the hierarchy of exclusivity and luxury present in the fashion world and to mirror this in football too. With unattainability comes FOMO, and despite not influencing purchasing behaviour, it does add value to the product. This marketability also feeds into the hype around the collaborating brands. In the adidas x Prada context, adidas ranks up in popularity due to linking with Prada but maintains its accessibility with their other products being affordable, and Prada enters the football industry by gaining new customers from the football market who are able to afford their luxe products.

This is evident in our findings where, despite the high number of Gen Z football consumers not tapping into this culture, there are some who have and do. **39%** of Gen Z football consumers would buy an item from a football x luxury fashion collab - showing there is supply and demand but on a smaller scale due to the nature and cost of the product and target market.

What's more, **1 in 5** Gen Z football consumers

have bought an item from clothing brands started by pro ballers such as Carsicko, Manière De Voir, Fresh Ego Kid and Beautiful Struggles. Though this is still a niche area, there is room to grow, and at the rate football is evolving and the new celebrity status of footballers, this is an area bound to develop and expand.

Now let's revisit football streetwear. Kit tops are the new trendy pieces you see the young gen

wearing to complete their fits. Our data showed that Gen Z football consumers wear kit tops casually, as fashion statements (**73%**) - marked by **39%** who only wear them casually and **34%** who wear them to stadiums as well as casually. Only **15%** wear kit tops strictly to stadiums to watch games. These stats are not surprising given the rise in football-fashion and the high prices of PL tickets. A small number don't wear kit tops at all (**12%**).

Age differences between Gen Z and 25+ in wearing kit tops behaviour.

- Majority of participants aged 16-22 wear kits only weekly/casually or to stadiums as well as weekly/casually.
- In contrast, majority of participants aged 23 or older wear kits only to stadiums.

When it comes to clubs dropping new kits, 71% of Gen Z football consumers rate some extra kit drops – but this is split equally between Gen Z football consumers who rate them but wouldn't purchase and Gen Z football consumers who rate them and would purchase/have purchased. Only a small number want more (16%) with an even smaller number wanting clubs to stick to the normal amount of kits (7%) or release less kit drops (7%).

Dylan brought to light how kit prices are on the rise: *"Some of the prices are mental. I don't get it. I was having a debate with a few people I know from one of my football group chats this morning. We were talking about Arsenal and the amount they're charging us this season. Obviously they dropped the new home kit this morning, it's gone up another £10 since last year. Two years in a row now it's gone up £10 - two years straight."*

Does this mean clubs are at risk of losing buyers? Or will fans' love and support for their club and the game cause them to bite the bullet and pay the price every year?

We asked Meg what she thinks the football-fashion world can still do to further unite fans and strengthen football communities. She spoke on how *"capturing football's best moments, quirks and nuances and celebrating them with fashion through lifestyle pieces"* helps fans connect more with their clubs and the game overall.

Meg also emphasised how sustainability and eco-awareness will be the next major focal point within football-fashion: *"I feel brands over time will focus more resources on finding the perfect blend between fashion and sustainability but at an affordable price."*

This is in line with the revolutionary work of Forest Green Rovers who are leading the way towards eco-friendly football by transforming their approach to energy, transport and food - three areas responsible for 80% of our carbon footprint. The club installed solar panels to power the stadium and electric car charging points to promote and accommodate environmentally sustainable behaviours. All food and drink served - to fans, players and staff - are plant-based and the pitch is 100% organic. They also banned single-use plastics and achieved zero landfill and UN-certified zero carbon statuses.

It's valid to then predict that football will become more 'green', which will be reflected across collabs and crossovers with other industries like, as Meg mentioned, with fashion.

Football is a game full of sounds. On pitch, it's the sound of a ball pinging the crossbar, the gaffer barking orders or players celebrating a goal, while in the stands, it's the fans expressing themselves by chanting, crying or screaming their way through 90 minutes of action.

Clubs have long used music to foster connection between fans and players. Liverpool's 'You'll Never Walk Alone' never fails to get the crowd going, especially on Champions League nights under the lights; while Bayern Munich play the funny and annoying (if you're an opposition player) 'Can Can' after every goal - a powerful way to whip up the crowd while light heartedly poking fun at the opposition. *This is something OJ mentioned in our Baller Talk: "I think music and football have always been integrated, and if you look back at football history, you've got West Ham, their song, 'You'll Never Walk Alone'. 'Glory, Glory Man United'.*

After games if we win, we listen to 'Sweet Caroline'. Music and football have always been integrated."

Following the theme of kit tops making an appearance in other industries, West Ham's new 2023/24 home kit showcases this perfectly as it combines music, fashion and football to strengthen their already passionate fanbase. The Umbro kit design features soap details, referencing the club's anthem 'I'm Forever Blowing Bubbles'. For the players, the kit allows them to represent the club and connect with local communities in a stadium filled with chants about bubbles and literal floating bubbles. For the fans, they are able to relate to the game and players on a deeper level, essentially nourishing their loyalty to the club. This points to a future where three-way collabs will be more prevalent across the board, having a ripple effect on society and other industries out of the matchday experience.

As noted by an Elite Pro, football is already present across music and fashion as ballers have already started to dress like rappers – copying the vibe, style and overall attitude that is associated with rap music: *"Even the way rappers dress, you see footballers dress like rappers now."* The music, fashion and football crossover has already begun, and Gen Z ballers and football fans alike want in on this new trend.

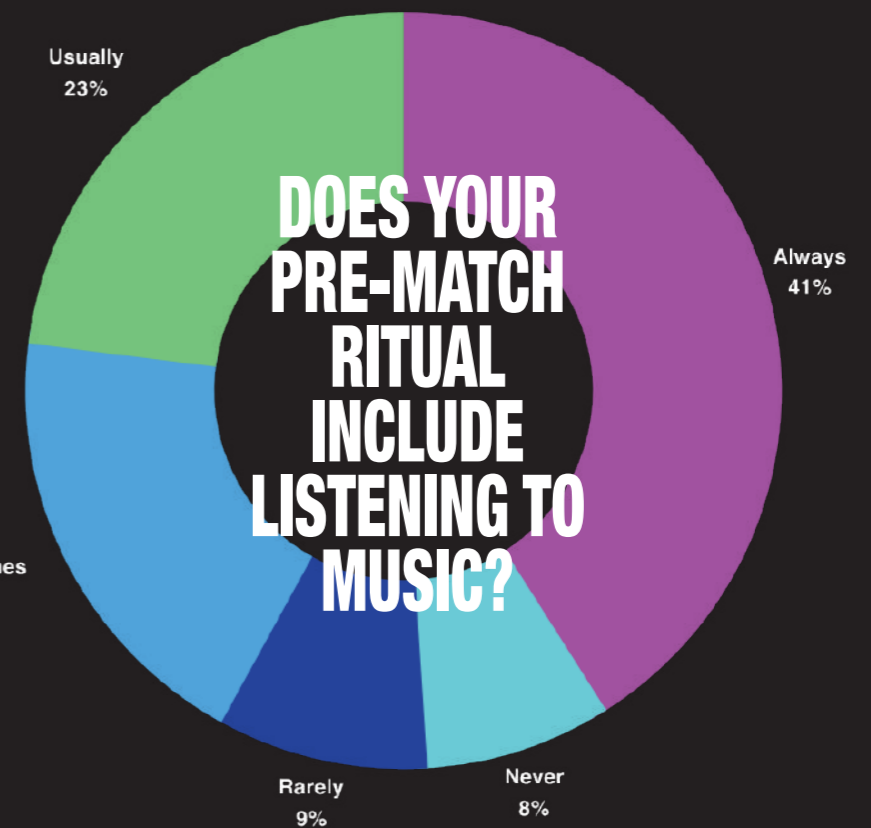
Our data showed that 84% of Gen Z football consumers listen to music before a match. With the majority also subscribing to a music platform like Spotify (85%).

While fans can come together around a particular song during a tournament, certain songs can have a very personal meaning for some. Speaking to us about the type of music that gets him in the mood for games, **Gregorio** explained that he needs upbeat tunes to get him in the zone: *“K-Trap Warm, NBA YoungBoy Green Dot. I need a powerful song to get me going, there’s different types of songs but I can’t listen to Adele before a game or I won’t even run with the intent to win the ball. But if I listen to a certain type of music, I wouldn’t say aggressive music, but jumpy music with hard beats, I’ll feel like I’ll be the first one to the ball as I’m excited, my adrenaline will have kicked in.”*

Interestingly, there is evidence to suggest that **Gregorio’s** song choices may benefit his performances on pitch. Music is known to stimulate the mood-related parts of the brain like the amygdala, helping ballers get in the zone and visualise what they need to do to perform at their best. The BPM of a track can also influence heart rate, having a direct impact on performance and exercise intensity level. An upbeat track before a game hypes ballers up, while something more chill calms the mind post-match.



The marketability of music within football has now evolved to have greater power than ever before, partially due to emerging research highlighting the biological effects music has on enhancing physical performance. Music x football convergence just makes sense, on all levels - from creating mems, to strengthening fanbases, to both industries leveraging each other’s followings, to tapping into science to draw ballers in further... the potential is vast.



BALLER TALK ON MUSIC TO HYPE UP BEFORE A GAME.

COMFORT: *“Probably Brazilian songs. Just the beat to it. When I’m playing football, it just makes me feel like I’m having my own edit made of me, so it’s quite fun.”*

MUKHTAAR: *“Me personally, it’s mainly Afrobeats or American music, for example, like Lil Baby and Young Thug. Just high tempo music, just to get me a bit hyped up.”*

BALLER TALK ON WORLD CUP SONGS ASSOCIATED WITH MEMORIES SPECIFIC TO THE EVENT/TIME.

GREGORIO: *“Me growing up, the first proper World Cup song that I remember is Shakira’s song, Waka Waka. That’s the first one that I proper remember and stuck with me as it was very catchy. And I think that’s the first time I actually got into football, properly.”*

REBECCA: *“The 2010 World Cup song, ‘Wavin’ Flag’. And then the official World Cup song, ‘Waka Waka’ by Shakira. That was the first World Cup I remember, and it was my favourite World Cup.”*

World Cup songs and anthems leave a lasting imprint on football fans: the memories they create will always strike a chord when reminiscing back to the happy times the tournaments brought. **Gregorio explained:** *“It brings a feeling of home because when you hear that song, you remember the first time you heard it, where you were, who you were with, and you get flashbacks of you singing it with certain people. It’s something - it’s a good memory.”*

Here is where brands enter the chat - how can they leverage these deep connections fans have formed with the sounds of football? Some suggestions include dropping shameless plugs. Are you a music platform looking to grow? Tap into hardcore football fandom by creating playlists in collab with pro ballers - mix it up with different playlists for different moods or vibes. Are you a record label looking to sign new talent? Reference football slang and phenomena in your emerging artist’s lyrics - immediately a new topic of convo

BALLER TALK WITH MUKHTAAR ON SONG DISCOVERY VIA FIFA SOUNDTRACK.

MUKHTAAR: *“Yes. I think every year, there’s at least one song from the soundtrack that ends up on my playlist.”*

RB: *“And is it normally a song by an artist that you didn’t know?”*

MUKHTAAR: *“Yeah, most of the time. Example, I can’t remember which FIFA it was, but the song ‘Heat Waves’. That song. I heard it and then I was like, ‘oh, damn’. And then I looked into them [the band] a bit more and found out they made good music.”*

amongst Gen Z football consumers. Main takeaway: capitalise on fans’ unique connections to this culture.

Now let’s talk about the influence of FIFA soundtracks on Gen Z football consumers. It’s often said that football reflects the societies it serves. FIFA tracks chosen for the game reflect real-world music trends, evolve with the culture and can predict future trends as well. The combo of placing high profile artists alongside rising talent has been a defining feature of FIFA’s soundtracks throughout the years. Having a song featured on the game has launched the careers of many artists, exposing their work to new audiences. In this way, these soundtracks connect the football and music communities, strengthening the beautiful game’s reputation for bringing people together. **This is reflected in our findings where 7 in 10 Gen Z football consumers have discovered a song or artist whilst playing FIFA.**

With 70% of Gen Z football consumers discovering a song or artist whilst playing FIFA, the opportunity for up-and-coming artists to capitalise on the football industry is appealing. This opens another revenue stream for football as it helps form ties with major entertainment giants, strengthen football communities and generate lasting memories through music.

Despite the early adoption of esports by pro football leagues (the Bundesliga was the first to set up an esports league in 2012) and the huge popularity of FIFA, we haven’t seen football lead the way in esports. Our survey revealed that **81% of Gen Z football consumers do not follow their club’s esports team**, suggesting development is needed before football can assume a dominant position in the esports sector.

What about the Metaverse? Whether you think it’s the future or just one of Zuck’s latest pipe dreams, if you work in social you will no doubt have heard about the Metaverse, its benefits and potential drawbacks. If it’s the first time you’re hearing this term and have no idea what we’re on about, the Metaverse essentially points to what the future of the internet looks like: an immersive and virtual 3D space where people can interact with one another in ways they currently can’t IRL.

Football is universal. The industry is growing exponentially and stadiums can only fit a certain number of fans on match-days. Taking the beautiful game into the Metaverse has been suggested as a way to satisfy growing demand by inviting millions of fans from across the world into the PL match-day experience. By overcoming the problem of limited stadium capacity through virtual solutions, the Metaverse can make the experience of watching a match more immersive in

ways TV is unable to. Teams will be able to reach more fans, extend their influence and make more money **Our survey revealed that 76% of Gen Z football consumers would watch a live game in the Metaverse.**

In addition to the obvious benefits for fans, the Metaverse also has the potential to transform the way people access FA coaching courses at the grassroots level. Due to the difficulties some face with accessing in-person training, there is a shortage of FA coaches. By making the courses virtual, coaches will be able to take part in sessions from anywhere through the use of VR headsets. By putting the power of education into the hands of young and tech native aspiring coaches, football will be positively impacted from the grassroots and up.

As with everything however, the Metaverse does have its drawbacks. Issues with broadcasting rights and revenue streams need to be overcome before football is to take its place in the Metaverse. Currently, broadcasters make substantial profit from holding exclusive rights to show live PL games on TV and it’s unlikely they would give that up in the name of making football more accessible. Keeping the impact this would have on stakeholders in mind, it’s probably too early to say that the Metaverse is ready to transform the match-day experience for fans. However, watch this space!

INAUTHENTICITY AND MONETISATION

BALLER TALK on football being money-driven.

COMFORT: "I feel like it's more commercialised. It's turned more into a business rather than pleasure, I would say. There's obviously a lot more money involved now and politics as well. Obviously I still see the enjoyment in it 'cause otherwise I wouldn't play."

DYLAN: "Football's a business and that's the honest truth of modern day football, especially in England, massively in England. It has become entirely a business for the clubs, for the league - for everyone. The amount of money in the game is ridiculous."

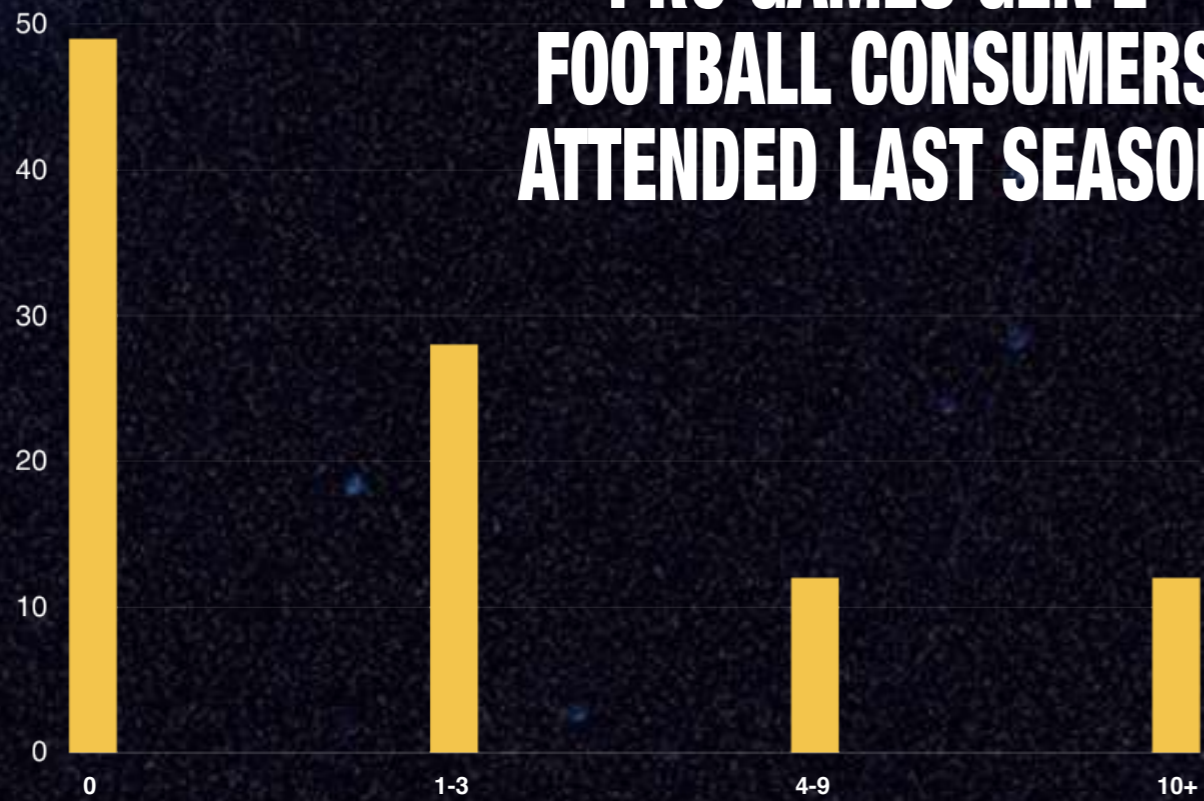
RB: "So do you think clubs are a lot more revenue/profit-focused?"

MUKHTAAR: "Yeah, definitely. I think a lot of the owners see it as more like a business, so their goal is profit."

OJ: "Football goes where the money goes sadly. So as long as there's money in it, football will go there."



NUMBER OF PL / MEN'S PRO GAMES GEN Z FOOTBALL CONSUMERS ATTENDED LAST SEASON

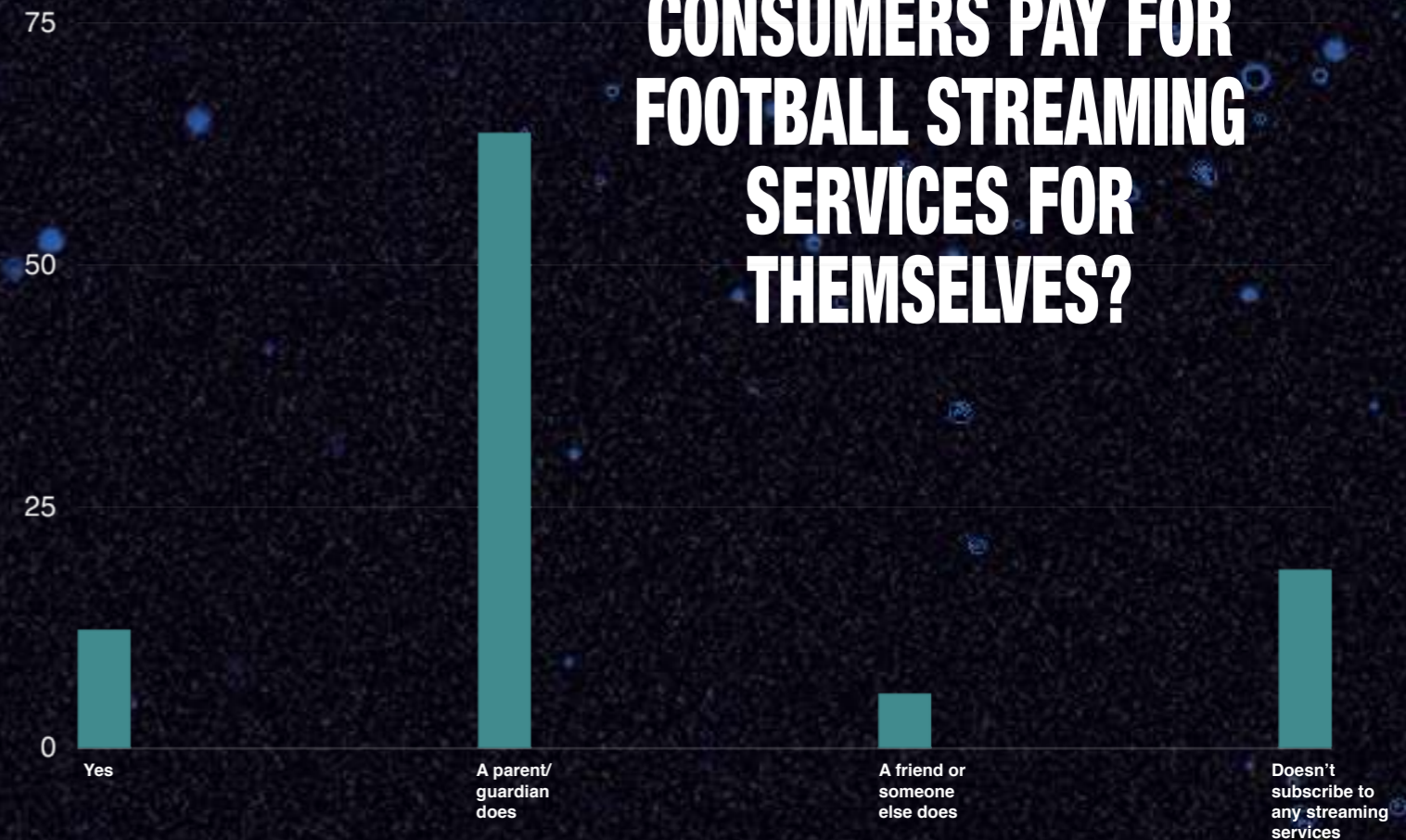


In terms of pro ballers' salaries, most Gen Z football consumers believe these are justified depending on the player and/or club (54%) with a third saying they are too high (33%) and 13% saying they are just right.

WHAT WOULD MAKE GEN Z FOOTBALL CONSUMERS ATTEND MORE PL GAMES NEXT SEASON?



DO GEN Z FOOTBALL CONSUMERS PAY FOR FOOTBALL STREAMING SERVICES FOR THEMSELVES?



Despite 84% of Gen Z football consumers being aware of how football has evolved to be more of a business than a sport, 75% believe football will always be authentic to the game. This paradox demonstrates that the power of football and the love for the sport trumps all else.

BALLER TALK ON COMMODITISATION.

GREGORIO: "But I wouldn't consider football a normal job because at the end of the day we're sharing the changing rooms, we're sharing moments, we're sharing memories together. You're building some sort of bond. Being released made me feel like there was never a true bond with the club - it's just like I was just another body running for you and training for you basically."

MUKHTAAR: "Yeah. They're [clubs] just looking to sell players. It's just investing in players and then selling them on for more. That's their main goal."

With the demands of football weighing heavy on ballers' shoulders, many have learnt how to control their emotions so the impact doesn't prevent them from doing what they're passionate about: playing football at the pro level. **An Elite Pro spoke about this:** "It's a results-based sport. It's a weird one - you learn how to deal with it as it comes. Just learn to control emotions and not letting it get to you."

Being called by their last name has become ballers' new norm. The adoption of a football identity is further solidified by having their last name and a number printed on the back of their kits. Marvin spoke in great detail about this and expressed how he wasn't even aware of this dehumanisation aspect until a friend outside of the football world brought it up. "I remember someone speaking about football players, like this was someone I know who doesn't know about football, and they were like 'why do they always call you by your last name? Like a fan or something'. And I said 'I don't know'. Obviously that's the name they see on

the back of my shirt. He was saying how it's almost a way of dehumanising you a bit more. Which I never thought about or saw it like that until that point - Marvin the person is different from Sordell the player. You know? Marvin has emotions, Sordell is just a football player who is supposed to run and score goals." It is evident that the football industry often describes and references pro ballers as commodities. **Meg** mentioned that fashion can help shift this perspective "by showing them as multi-dimensional and not just known in one industry."

Meg also raised the negative aspect of ballers entering the fashion world: "In some cases, however, players can often be perceived as 'not focused' or seen to dip in form as they put more effort into their fashion than on-pitch performance." The balance between showing interest in other subcultures beyond just playing football itself seems like a tough one to sustain and one that pros might need to consider in order to preserve their elite status as talented ballers.

Our data reflects this with **97% of Gen Z football consumers believing ballers, from academy to first team, experience a great deal of pressure that impacts their lives in and outside of the game.**

The pressure pros experience on and off the pitch is all encompassing - so despite the positives that comes with football's ties to other cultures and industries, the negative impacts that coincide can be profound and should be taken in consideration too.

COSTS OF STREAMING SERVICES

When taking into account the current cost of living, it's no surprise to us that teens and young adults still rely on the so-called 'Bank of Mum and Dad' for their subscriptions to football streaming services. The data shows, however, that despite not paying for the services themselves, the majority of Gen Z football consumers believe that the subscription fees are priced too high.

This means that once Gen Z football consumers are in a position where they will need to support their own consumption habits, they are less likely to pay for such subscriptions and are more likely to search for cheaper options. Our data shows the critical age to target is 20, with this being the turning point for when most Gen Z football consumers become self-sufficient with their football consumption habits.

With Gen Z set to step up and represent the next major client base for streaming services, companies should look to adjust or amend their business models to prevent any customer loss. Potential solutions include offering student discounts or special deals targeted to young people. This should, in turn, cut down the number of Gen Z football consumers turning to illegal streaming, for example, to satisfy their football needs.

Streaming football games throughout the season is expensive, with streaming services charging a significant amount for access to live games. The table below outlines which streaming services Gen Z football consumers subscribe to, ranked in order of popularity.

STREAMING SERVICE

1. Sky Sports (60%)
2. BBC (57%)
3. BT Sport (44%)
4. Amazon Prime (43%)
5. ITVX (42%)
6. FA Player (38%)
7. DAZN (34%)
8. None of the above (15%)
9. Viaplay (5%)

86% of Gen Z football consumers believe football streaming services subscription fees are priced too high, with 69% not paying for the subscriptions themselves (parent, guardian, a friend or someone else pays for it).

Age differences between Gen Z and 25+ in paying for football streaming services.

- Most of the participants aged 16-23 have their parent(s) / guardian(s) pay for football streaming services subscriptions.
 - o 20 seems to be the turning point where participants begin to pay for their own streaming services as this is when the proportion is less skewed towards parent(s) / guardian(s).
- Participants aged 24 or older pay for football streaming services subscriptions themselves.



PREMIER LEAGUE

The PL has been described as the biggest football league in the world, with many of the best and most talented pros transferring to play at clubs here, in the UK. Kevin spoke about how football has become a melting pot of cultures in our *Baller Talk*: "We're quite fortunate to, as a country, to have the Premier League as the best league in the world. Not just English players but French, Spanish, Italians... everyone's integrating into the Premier League. So yeah, not just players and fans but as a country, as the whole wide world comes together. It's great."



The steep prices for PL season tickets seems to have deterred Gen Z football consumers from attending live men's pro games in 2022/23 with 49% not attending any.

28% of Gen Z football consumers went to 1-3 live games, 12% went to 4-9 and 12% went to 10 or more matches. With more than half not watching live matches IRL last season, the probability of even less attending in 2023/24 given the increase in prices is high.

With such reach and massive fanbases, it makes sense that the PL is backed by money and continues to seek out new investment. Here is an overview of the PL's spending behaviour. In the 2021/22 season, PL clubs' revenue increased by 12% (£586 million) to the record height of £5.5 billion. 2022/23 is set to break another record with revenue predicted by Deloitte UK to reach close to £5.8 billion - largely attributable to the league's new international broadcasting rights deal introduced at the start of the season.

Last season saw a significant growth in comparison to 2020/21, with matchday revenue increasing to £764 million from

the previous £732 million. In terms of spending, PL clubs recorded an aggregate gross spend of £2.8 billion across the summer 2022 and January 2023 windows, setting all-time high records for both. Net spend also broke new records, exceeding £1 billion for the first time in the 22 summer transfer window.

More recently, we witnessed history in the making via the 2023 summer bid for former West Ham player Declan Rice. Arsenal's goal of capitalising on Rice's success and talent influenced the club to bid and secure a £105m transfer deal with West Ham - beating Man City (£90m) and setting a British-record.

Did your jaw drop? Yes, ours did too. Now let's look ahead to 2023/24. Below are the top 6 most expensive PL season tickets announced by PL clubs for the upcoming season.

1. Fulham: £3000
2. Tottenham: £2025
3. Arsenal: £1784
4. Newcastle: £1108
5. West Ham: £1105
6. Man City: £1030

The rest of the clubs start at £500 and extend just above the £1000 mark. The average cheapest price for a 2023/24 PL season ticket comes to £555 and the average most expensive is £1029.

Male vs female differences amongst Gen Z football consumers in PL game attendance.

- More than half of the female participants did not attend any PL games this season (56.19%) with a quarter attending 1 to 3 (25.46%).
- 10.09% of female participants attended 4 to 9 games and 8.25% attended 10 games or more.
- 41.29% of the male participants did not attend any PL games this season with 29.83% attending 1 to 3.
- 13.13% of male participants attended 4 to 9 and 15.75% attended 10 or more.

NON-LEAGUE

Non-league football is having its moment and we're all here for it. In 22/23 we saw the rivalry between Notts County and Wrexham provide us with one of Europe's most exciting title races while Hashtag United, a team set up using the power of social media, went on a 21 game winning run on their way to the Isthmian League North title. There are two main factors driving the growth in popularity of the lower tiers: non-league football is more **authentic** and, most importantly, it's a cheaper day out than the PL.

Regularly heading down to your local non-league club over the course of a

BALLER TALK ON SEASON TICKETS BEING OVERPRICED.

Our data showed that **79%** of Gen Z football consumers think PL season ticket prices are priced too high.

When asked to multi-select what would make them go to more PL games next season, **61%** of Gen Z football consumers said **cheaper tickets**, **51%** said better and/or easier access to tickets and **29%** said being closer to stadiums.

Other selections were 'more of my friends going' (17%), 'my team doing well' (9%) and 'more info on timings of games' (6%). A small number said they are not interested in going to more (9%).

MUKHTAAR: "I think tickets are so hard to get, especially for a reasonable price as well. So I don't know. I don't know if the Premier League can do much about that. It's just a demand thing. The more demand there is for something, the higher the price is going to be."

RB: "Does that make you not want to watch Premier League games?"

MUKHTAAR: "Yeah, especially in person. I'd love to see Arsenal play, but sometimes the ticket prices are ridiculous, so it demotivates you a bit."

season will cost significantly less than the average price for a PL season ticket, with individual match-day tickets for non-league games rarely priced higher than £15.

With Gen Z hot on authenticity, non-league football is seen as a world away from the slick and corporate PL. Fans heading down to see their local team can stand closer to the pitch, take their kids free of charge, access tickets at discounted prices and enjoy a pint (or two) in the stands. This is reflected in our data which showed that **56%** of Gen Z football consumers support a **second team** (i.e., local non-league team).

INAUTHENTICITY AND MONETISATION

AGE DIFFERENCES BETWEEN GEN Z AND 25+ IN SUPPORTING A SECOND TEAM.

- Majority of participants 16-21 support a second team – more than half, respectively.
- Majority of participants 16-21 support a second team – more than half, respectively.

Of those who do support a second team, **67%** attended 1 to 10 games or more last season with only **33%** who did not attend any.

When asked what appeals to them most about going to non-league games, **community feeling** was the most popular answer amongst Gen Z football consumers (**39%**). **Cheap tickets** was also up there (**24%**) as well as **non-league games being more real and authentic** than bigger games like the PL (**19%**). **8%** mentioned they go because their friends already go.

FROM THE 10% THAT WANTED TO ELABORATE FURTHER, THESE WERE THE MOST NOTABLE RESPONSES:

- "Been brought up around the club"; "Hometown team".
- "Nostalgia"; "Passion"; "Atmosphere and brutality".
 - "Another opportunity to watch a match – no better or worse, just more football".
- "Nicer experience and interaction with the players".

Investing in the lower leagues will provide positive outcomes in years to come, as demonstrated by the work of **Bobby** with Hackney Wick FC and those looking to do the same. **Bobby** mentioned: "Having more people like myself starting a football club. And having more funding, and sponsorship. Because it's very expensive running a football club, especially as you go up the ladder. Sunday league is alright, everyone pays their subs. As you go higher, some people might turn their eyes away from it."

The increase in fees as clubs progress may act as a barrier for those who can and want to develop their team but are unable to due to the costs. Talent isn't enough to propel teams up the ladder, money is the key factor backing this. Take a look at what the investment from Hollywood stars Ryan Reynolds and Rob McElhenney did for Wrexham AFC. Having started outside the professional system, Wrexham are now back in League 2 for the first time since 2008.

Despite the interest in non-league, there is still room to grow. **MUKHTAAR** highlighted how more opportunities are needed for this to happen: "A lot of players at the non-leagues and stuff, they don't really have the right opportunities, and a lot of young players don't get put on a platform where they can showcase their talents. A lot of them are better than a lot of people who are in there. But because they don't have the same amount of exposure, they don't really get seen and therefore they don't get opportunities. So, if we can get a lot more opportunities for unsigned players, that would be good."

DYLAN spoke about the importance of the 3pm blackout: "I understand that we need to support the whole football pyramid and if they just put all of the 3PM games on TV then the non-league clubs won't get as much support, which is much needed. One of my local teams, Dulwich Hamlet, wouldn't survive without the 3pm blackout, they've got one of the best fan bases, if not the best fan base, in non-league football."

DOCUMENTARIES

In a world where content is king, football clubs are more than just organisations fine tuned to deliver success on-pitch. With the way fans interact with the game changing, clubs long ago caught onto the fact that they needed to offer their supporters more than just 3 points on weekends. Middlesbrough FC and Manchester United are two clubs that saw the direction football was heading in early on. The sides both launched their own TV channels in 1997 and 1998 respectively; a time when, thanks to the creation of the PL a few years earlier, English football was taking off across the world. The football content landscape today is completely unrecognisable compared to what it was in the 90s; some of you reading this will remember having to rely on Teletext for the weekend's scores! Today, fans can tap into a 24 hour stream of content that ranges from the traditional live broadcasts on TV to post match analysis and skills videos on TikTok.

So, sure, they're a hit with fans, but how do football documentaries benefit the clubs being featured?

With many looking to increase brand engagement, documentaries are seen by clubs as a great way to keep fans hooked and they've proven to be a big hit by playing on two big emotional drivers:

1. A love for nostalgia and past glories
2. A craving for authenticity

Football docs place fans at the centre of football culture and strengthen their ties with the club. In the case of "Take Us Home: Leeds United", released in August 2019, the documentary focuses entirely on the club's previous successes and glory, tugging at the heartstrings with romanticism and nostalgia; while Netflix's "Sunderland 'Till I Die", which still ranks among the most watched series in the UK, gave SAFC fans unique BTS access to the club during what was a difficult time for the Black Cats on and off the pitch.

GREAT PR

BTS documentaries like "Sunderland 'Till I Die" or "All or Nothing Tottenham Hotspur" are a great opportunity for clubs to enhance their reputation. They take fans on a journey and give them an authentic all-access look at what goes on beyond the pitch. This contributes to an increase in brand trust and a respect for the hard work put in week in, week out by club staff to deliver for the fans.

REACHING GLOBAL FANS

Individual club documentaries have been on the rise since 2018 and streaming giants like Amazon and Netflix have played their part in helping clubs reach new audiences across the world. A club like Sunderland, which has strong ties to the working class communities of Tyne and Wear, has been able to tap into new audiences across the globe thanks to the 3 seasons of "Sunderland 'Till I Die" available on Netflix. Meanwhile FC Bayern's documentary series "Behind The Legend" on Amazon Prime, helped the club consolidate its global fan base during a time when travelling to games at the Allianz Arena was restricted due to COVID.

Reaching fans across the globe can translate to more revenue for clubs. By fostering a deeper connection with their fan bases through content like documentaries, clubs are more likely to see an increase in sales of merchandise, match day tickets and more.

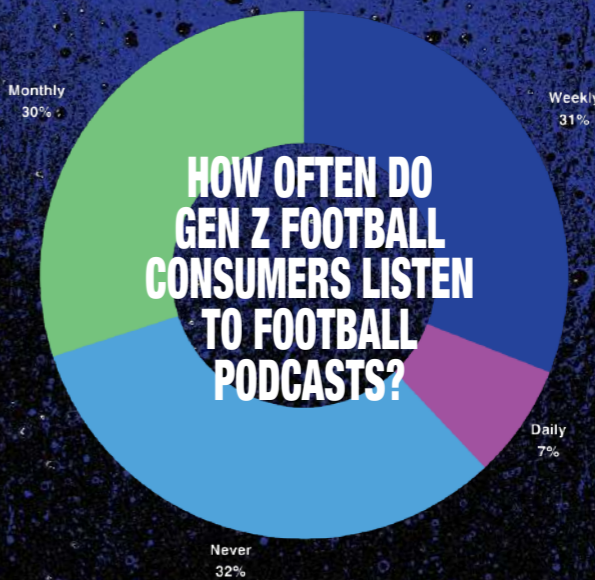
CURATED AUTHENTICITY?

While documentaries show what goes on behind the scenes at football clubs, the clubs often get to decide what is shown. In the case of FC Bayern's "Behind The Legend" documentary, the German giants had full editorial control over the content and produced the series themselves, allowing a particular version of events to be presented to fans. This "curated authenticity" portrays a narrative that only reflects certain snippets of reality.

95% of Gen Z football consumers have watched a football documentary in the past 2 years. That's a huge majority! Interestingly, 84% believe football documentaries are authentic and truly reveal what goes on BTS at clubs - seems like this "curated authenticity" approach works wonders.

With Ted Lasso charming the hearts of many fans, the interest in football-related films and series is on the rise. The American sports industry is ahead of the trend having already invested in fashion and music crossovers and collaborations as well as featuring athlete cameos in films. The UK is

bound to follow by example, and football is not far behind, as Marvin pointed out: *"We'll have our Space Jam at some point, with someone who is a big star who will be the lead in something big. I think that will happen for football at some point and that will be of interest down the line for players as well."*



FOOTBALL PODCASTS

Spotify research and insights found that 61% of Gen Z's believe audio formats like podcasts are one of the best methods for storytelling. Big streaming platforms have the influence to shape how Gen Z discover and connect with different cultures, and brands have the

power to create or build on existing communities. With the tribal nature of football fandom, football podcasts can act as a great way to satisfy Gen Z football consumers' demand for football content as well as strengthen passion and love for the game - not to mention hands-free and on-the-go.

68% of Gen Z football consumers listen to football podcasts. In terms of frequency, 31% listen weekly, 30% monthly and only 7% daily - 32% never tune in. So, the appeal is there with room to grow via targeting consumers who are yet to be enticed.

Our data revealed that 85% of Gen Z football consumers already subscribe to a music platform. The potential to develop engagement with football podcasts (which largely feature on such platforms) is an opportunity too good to turn down. Football teams can consolidate support, while brands can cash in on the commercial opportunities through advertising and sale of merchandise.

LEVERAGING
PRO
BALLERS'
SOCIAL
MEDIA
PRESENCE

In a world where many Gen Z fans now support players rather than just a single team, signing one of the world's best can benefit a club in more ways than just on-pitch success.

Following the transfer of Cristiano Ronaldo to Italian giants Juventus, the Italian record champions saw a huge boost in followers across their social platforms as a result of Ronaldo's loyal fan base "joining" him in his move to Serie A. As a result, Juventus saw a 25% increase in stadium revenues during Ronaldo's first season, with the club able to charge fans more for coming to see the Portuguese forward play at home. Ronaldo's recent move to Saudi club Al Nassr saw a similar situation unfold. Since signing Ronaldo, Al Nassr have witnessed their Instagram following jump from 800k to over 16M. Ronaldo's move has not only raised the club's rep, but Saudi football as a whole, with a number of high profile players from the PL following in his footsteps.

Gen Z football consumers mainly see football brand collabs with pro ballers advertised the most on Instagram (78%). Less see these on other social media platforms: TikTok (9%); YouTube (8%); Facebook (1%); Twitter (1%); Snapchat (1%). Very few mentioned they barely see these types of collabs advertised on socials (2%). When it comes to thoughts on pro ballers having their socials run by their management (posts and captions), Gen Z football consumers are pretty split - 54% don't mind, sharing the player can do what they want, and 46% don't like it, sharing they follow the player to hear from the real them.

As our data has highlighted, fans are easily influenced by implicit or subliminal brand marketing promoted by athletes, making them incognito influencers with

a big impact. By buying into products and lifestyles promoted by pro ballers, Gen Z fans are deepening the connection with their heroes. It's a recipe for

success and with the growth of the women's game, female ballers are on track to claim a large part of the "influence pie" currently dominated by the men's game.

Our survey revealed that Instagram is the number 1 app for all things football, with most of our Gen Z respondents seeing pro baller brand collabs feature there the most.

Level of influence can therefore be measured through Instagram following. Here are 10 examples of some of the most influential pro female ballers ranked based on respective following count:

1. **Alisha Lehmann** (Aston Villa) - Swiss - 14.5M
2. **Alex Morgan** (San Diego Wave) - American - 10.2M
3. **Alexia Putellas** (FC Barcelona) - Spanish - 2.9M
4. **Marta Silva** (Orlando Pride) - Brazilian - 2.9M
5. **Megan Rapinoe** (OL Reign) - American - 2.1M
6. **Jordyn Huitema** (OL Reign) - American - 1.6M
7. **Sam Kerr** (Chelsea) - Australian - 1.3M
8. **Leah Williamson** (Arsenal) - English - 908K
9. **Sakina Karchaoui** (PSG) - French - 762K
10. **Alessia Russo** (Arsenal)-English - 539K

* These figures continue to climb as we speak!

A new opportunity is on the horizon, and the potential is big especially as females hold great purchasing power - within football and beyond. This in combination with brands committing to push women's football forward through partnerships and initiatives will enhance trust and loyalty. So brands... stay tuned!

DISCRIMI- NATION

Football has made great progress in recent years. As our society has become more inclusive, so has the sport. We've seen teams walk off in response to racism, punditry teams on TV are more diverse and representative of the audiences that watch them while the barriers to entry many girls used to face when trying to play football are being broken down.

On an annual basis, Kick It Out publishes summaries of discrimination reports the organisation receives every season. Here's a snapshot of the findings:

- The 22/23 season saw a record number of reports of discriminatory behaviour across the game, increasing 65% on the previous year with a total of 1,007 reports.
- Online abuse rose significantly. 207 more reports were received in the past year, marking a 279% increase. Twitter leads the way here, exhibiting 100 more discriminatory tweets this season.
- Compared to last season, reports related to pro football rose by 27% and complaints from grassroots/non-league football increased by 55%.
- Racism complaints were most common, accounting for 49% of all reports across both pro and grassroots football.
- Reports of sexism and misogyny represented the biggest rise with figures showing a 400% increase in complaints - which has been enhanced by online abuse aimed at female footballers and fans.
- Kick It Out received 11% more reports of abuse regarding sexual orientation this season in contrast to last, across the board. This accounted for 16% of the total.
- Discriminatory abuse aimed at footballers amounted to 55% of the reports received at the pro level. In contrast to 21/22, this season saw 10x more complaints aimed at match officials. Of those responsible for discriminatory abuse, fans made up 94%.

Whether these figures reflect an increase in discriminatory behaviour or an increase in the number of people reporting is uncertain. Not to mention, these stats still don't reflect actuality... with the number of unreported abuse not accounted for. Either way, this paints us a sad picture of the beautiful game and demonstrates a serious need for change and immediate action. This is especially important with socials being a major outlet that is only set to expand and develop alongside technological innovation and advancement.

Responding to our survey asking whether fans thought if in comparison to 10 years ago, football has become more inclusive, diverse and accepting; nearly 92% responded saying they agreed.

BALLER TALK ON FOOTBALL PROGRESSING IN A POSITIVE WAY.

AMI: "I think it's progressed in a good way, especially for the youth. Football's everywhere, it's in schools, you can play after school, you can watch football, play PS4 with your friends and stuff. So I like that aspect of it."

MUKHTAAR: "I think it's progressed quite a lot in terms of inclusivity and things like that. A couple of years ago, for example, you wouldn't see as many Asian players in the top leagues, but now they're starting to come through a bit more, and stuff."



In an **Elite Pro's** experience, discriminatory abuse in football mainly comes from fans: *"Me personally, I've never come across racism from the clubs I've been at. From fans and the media – I have experienced. We lose a game and obviously I've had racist abuse on Instagram. I've had some nasty DMs. From when I first got it, it was like 'oh my days, how am I getting this'... but now, I'm used to it. As bad as it sounds, I'm actually used to it. It's just normal."*

Tyrhys shared this perspective: *"I feel like it [discriminatory abuse] mostly comes from fans, with fans I feel like sometimes they feel like because there's so many of them, that their voice ain't heard. Often I feel like they can say whatever they want. They get so wrapped up in it they feel like the only way to hurt a player is to be racist to him whether that be skin colour, religion. Even sometimes you get people who say it's banter and that but it's not banter. Someone might laugh about it but deep down they're hurting from it. Someone might laugh it off out of awkwardness or too afraid to speak up but they might go home and it's hurting them."*

Our survey revealed that **87%** of Gen Z ballers shared they have **not received** any form of discriminatory abuse (e.g. racist, sexist, homophobic) from **club staff**. However, almost a **quarter** of Gen Z ballers have received discriminatory abuse from **teammates (24%)** and **39%** from **spectators**.

BALLER TALK WITH GREGORIO ON FOOTBALL AS A GATEWAY FOR DISCRIMINATORY BEHAVIOUR:

"I don't understand why people think that it's acceptable to say certain things in a football ground when they know in the outside world it's not acceptable. It's like if they treat football as an area where everything is allowed, there's no rules, no regulations, just everything is allowed. I would say it's just a lot of ignorance and people using football as an excuse, as an escape from all these rules that have been put."

Referees are also on the receiving end of discrimination. In 2021 there was an estimated 20-30% decrease in referee registrations. Abusive and aggressive behaviour during games has been reported to be the main reason behind referees deciding to leave the profession. Examples of such behaviour include being sworn at directly, being

BALLER TALK WITH REBECCA ON DISCRIMINATORY ABUSE AFFECTING PRO PLAYERS:

"But as a player, if you hear something horrible, that's going to upset you, and then throw your head off the game. You want to be completely focused on what you're doing. And you're hearing these horrible chants at you, or these horrible words spout at you, that is going to distract you. That will affect your performance. And then that'll affect a lot of other things going on from that."

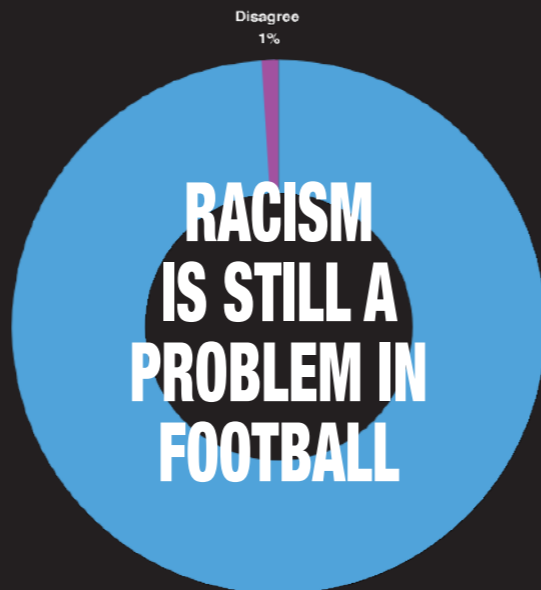
threatened or intimidated and being accused of cheating or exploitation. Referees play a vital role in the game and the pressure they are under is often overlooked. Moving forward, it is important to bring this topic to light to open up discussion and raise awareness as well as educate fans, footballers, club staff and other football figures.

RACISM

BALLER TALK ON RACISM STILL BEING AN ISSUE.

COMFORT: “Yeah, I would definitely say that that’s still a problem. For example, last week with Vinicius Jr, at his game, he obviously received some racist comments for no reason. So I would definitely say that racism and discrimination is still a big part of football, which is a shame.”

GREGORIO: “A hundred percent. I wouldn’t say only the Premier League. I would say all around the world. We’ve seen it the other day with Vinicius Jr that he got booed and called a monkey, and no one done anything about it.”



BALLER TALK WITH MUKHTAAR ON PUNISHMENTS FOR DISCRIMINATORY ABUSE:

“I think the punishments aren’t severe enough. The punishments are a bit light, so I think it makes people just repeat it, so they’re not learning from their mistakes.”

In focus: Vini Jr 2023

Brazil and Real Madrid baller Vini Jr had a tough time dealing with racist abuse in 22/23. During Real Madrid’s La Liga matchup with Valencia on 21 May 2023, Vini Jr attempted to bring the referee’s attention to the racist chants directed at him from the stands. The game was halted for 10 minutes as the Brazilian pointed out fans who he said were abusing him with Vini threatening to walk off if action was not taken. The scandal was met with outrage worldwide after Vini was then sent off late in the game for getting into an altercation with an opposition player. On 19 June 2023, in support of Vini Jr, an all-black kit was worn for the first time in the Brazil’s national football team’s history to raise awareness about, and stand against, racism in football. The slogan of the campaign was displayed on the front of the kit which read ‘com racismo nao tem jogo’, translating to, ‘with racism, there is no game’.

The persistent fight against racism by the Brazilian national team sparked by Vini Jr has brought about change within Brazil’s sports ecosystem. The Rio de Janeiro government unanimously approved the ‘Vini Jr law’, which has the power to halt or suspend sporting events in the case of racial abuse. The law also includes a practical component on how to process reports of racism and compulsory educational campaigns. This demonstrates how government x football collabs are essential in driving positive change within football, particularly in regard to discrimination.

Our data showed that 99% of Gen Z football consumers believe racism is still a problem within football. This may seem obvious, but upon reading, you can’t help but still feel disappointed.

Here is a snippet of a convo we had with an elite pro about whether racism will ever leave football.

RB: “Do you think it will ever stop?”

ELITE PRO: “Me, personally, I don’t think it’ll ever stop. I think it’ll be very hard to. I don’t think it will stop. Of course we had BLM, the fist thing.”

RB: “Do you think that did much?”

ELITE PRO: “It did a lot in the first month, but then you’re just doing it for the sake of doing it. For me personally, I don’t think it’s done that much. And it’s no one to blame specifically, individually, it’s just how it is. You can’t control how many men and women and people who love football and watch football. It’s one of them things.”

DEESE shared a similar view: “In terms of the BLM campaigns, it works to a certain extent. But things like discrimination, racism and that, it’s a deeper issue innit. It’s so massive bro. How would you attack it? Where would you attack it from? It’s everywhere all the time.”

BOBBY elaborated further: “I don’t think racism will ever be stamped out. I think there will always be someone who can’t control their true feelings, who will blurt it out somehow. For me, I don’t think the taking the knee thing was that worthwhile. I think it had its moment, in regard to education, like ‘what are they taking the knee for?’, then researching it and trying to understand it. I think it has passed its sell-by-date, because how often can you take the knee? What are you actually going to do about it?”

SEXISM

BALLER TALK ON SEXISM IN FOOTBALL:

“Yeah, I would say sexism is still a big problem in football. For example, you hear when a woman makes a mistake in football, people are like, “oh yeah, that’s why she needs to get back in the kitchen,” or something like that. Whereas if a man was to make the same mistake, you wouldn’t hear comments like that. So I would definitely say that there is still sexism in football. People still look down on women. I do feel like people are starting to fight it a bit more. But it’s definitely still an issue.”

Our findings revealed 92% of Gen Z football consumers believe sexism is still a problem within football.



Within social psychology, there is a term referred to as schema: a mental representation of an idea or concept that usually leads to stigma and stereotypes. The formation of schemata is largely influenced by past experiences and early life events.

Football is typically associated with aggression and dominance, attributes which deviate from the schema of what a female should embody.

Social stigmas related to women's football and female footballers tend

to include: being labelled as gay/lesbian; 'playing like a girl'; feminine or delicate. Such stigmas have shown to negatively impact self-esteem amongst female football players and disrupts the ambition and motivation of young females trying to engage with the sport. Stigmas and stereotypes related to women's football can also lead to poor mental health and a conflict of identity (aggressive vs feminine on the pitch vs off the pitch) – both of which can hamper performance.

In 2017, Norwegian FA became the first of a growing number of

associations to commit to equal gender pay for their national teams. This has yet to be reflected across other nations and leagues, with strong arguments against this approach as many believe the talent is not the same, and therefore female footballers should not be paid the same.

There is little understanding regarding equal pay in the football context – which is something that needs to garner further consideration and attention.

CHANGING ROOM/BULLYING

A survey conducted by the PFA showed that, out of 843 pro footballers, almost 10% experienced bullying during their careers and almost 5% had experienced suicidal thoughts. The survey also revealed that around 22% had experienced severe anxiety – reflective of the negative impacts football 'lad culture' can have on players' mental wellbeing.

We asked Gen Z football consumers if they believe the changing room is a 'safe' place for ballers and 69% said yes but almost a third said no (31%).

BALLER TALK WITH GREGORIO ON THE CHANGING ROOM NOT BEING A SAFE SPACE:

"No, the changing room, I would say it's not a safe place because the changing room is meant to be a place where you just change from your work clothes or your normal clothes to your football clothes and then you switch on. But a lot of the time the conversations that go on in the changing room, yeah, they may be fun, but other times it may make other players feel uncomfortable, and some players just want to rush to get out of there and get on the pitch."

73% of Gen Z football consumers believe there is bullying between footballers – whether that be in the changing room, on the training ground or off the pitch is unknown. There is little revealed about what exactly happens behind closed doors, especially in the changing rooms. When brought up in conversation throughout our Baller Talks and expert interviews, little was shared but a lot was alluded to.

With toxic masculinity and 'lad culture' often attributed to football, the effects this has on ballers is bound to cumulate and impact their experiences engaging with the sport. This offers some explanation as to why ballers struggle to open up about their mental health and emotional struggles.

BALLER TALK WITH GREGORIO ON 'LAD CULTURE' IN MEN'S FOOTBALL:

"I would say that men's culture, not only football but in society, there's a lot more toxic energy and a lot of people have to pretend that they're someone they're not. For example, in the changing rooms, you'll hear certain people say stuff that you will never hear them say if you're just talking to them one-to-one. But I feel like they just do it to impress others and just build up their reputation and their popularity, I would say."

HOMOPHOBIA

Our survey demonstrated that 83% of Gen Z football consumers believe homophobia is still a problem within football.

When asked how Gen Z football consumers would respond to seeing two men kissing at a football game (in the stadium), 79% said it wouldn't affect or bother them with almost a quarter saying it would make them feel uncomfortable (21%)

Despite this, our data showed that 93% of Gen Z football consumers would react positively to a pro baller coming out as gay. This shows that Gen Z football consumers are at the cutting edge of shaping a more accepting and progressive future.



Campaigns like Rainbow Laces aim to educate fans to help mitigate homophobia in football. Football authorities should do more to eradicate homophobic abuse, especially at stadiums in real time.

The common consensus of 'what happens in the changing room, stays in the changing room' was confirmed by DEESE: "There's a fine line, you get it, between banter and discrimination bro. If you're going to go into the waters, you've got to know to not cross the line. But as long as you're on the right side of the line, then you're fine."

Beyond discrimination portrayed as banter, there seems to be a whole host of wild shenanigans and behaviours that prevail in the changing room. This is bound

to happen, particularly after defeating opponents and bagging points - adrenaline is high, endorphins have entered the chat, testosterone is floating about...

Both Deese and Tyrhys pointed to this when asked directly to share stories about events that have taken place in the changing room. Obviously, this wasn't disclosed, and the unspoken agreement amongst ballers to never tell was crystal clear. DEESE: "Things that happen in the changing room, you don't take it outside."

The bants is hilarious. Changing rooms are some of the funniest places in the world, like, flipping hilarious, proper funny place to be, 100. You've got to be in the changing room to understand the changing room. Thick-skinned bro to last in the changing room."

TYRHYS: "Bro, changing room stuff you can't even speak of. Changing rooms are crazy bro, crazy. Just stuff you can't even speak about bro. Changing rooms are crazy."

WHAT MORE CAN BE DONE?

BALLER TALK WITH GREGORIO ON CAMPAIGNS NOT BEING EFFECTIVE:

"I feel like campaigns against racism and supporting the LGBT community, I feel like they are public stunts. I don't truly believe that... Actually, no, let me rephrase. I believe that there is good behind them. But the good is more to appear good to others. A lot of people, I remember, they'll put BLM in their bio, they'll put the LGBT flag in their bio. But putting this in your bio, it's not really stopping the problem. At the end of the day, you're just showing that you are there for others, but you're not tackling the problem. I feel like if we really want to do something about it, we have to tackle the problem if we really want to campaign for these things."

When asked about whether anti-discrimination campaigns and initiatives are effective, Gen Z football consumers were split - with 50% believing they are effective and 50% believing they are not.

Our data revealed that 92% believe campaigns and initiatives against discrimination in football raise awareness (surface-level) but do not solve the problem (outcome-focused).

BALLER TALK WITH OJ ON MORAL-BEHAVIOUR INCONGRUENCE.

RB: "So you think it's more surface level to show that they're supporting it rather than an actual thing that they follow through with?"

OJ: "Yeah, it's just to look moral, but at the end of the day, most people in football don't back up their morals with their behaviour."

Bobby pointed to how campaigns and initiatives like taking the knee do raise short-term awareness but don't tackle the problem on a deeper, wider scale. It becomes monotonous and loses its impact with time, until it fizzles out of the game. **Bobby** shared there is a need for workshops to help mitigate bias and prejudice and to eradicate discriminatory abuse from the bottom-up through the

younger generation (the future of football). Additionally, **Bobby** highlighted how workshops for ballers providing tools on what to do in the moment when experiencing discriminatory abuse (i.e. what the procedures are, who to turn to, how to keep safe) is important to implement - especially to ensure ballers are safe and feel safe in and outside of football, across all levels of the player pathway.

BALLER TALK WITH GREGORIO ON SOLUTIONS TO TACKLE DISCRIMINATION WITHIN FOOTBALL:

"I remember one incident when someone racially abused Raheem Sterling when he was still playing for City and it was a Chelsea fan and he got banned from the stadiums, he couldn't access normal facilities. And I think that was great because I think since that incident, racial abuse, it's still there, but it has diminished a bit, it's lower. I feel like if you put more care, more attention, maybe more cameras or microphones directly on fans, if a player complains about racial abuse, then you can directly see who done it. And by facial recognition you can just ban them from a stadium and use them as an example for other people. But I feel like we've tried with normal procedures saying, 'stop racism, everyone is equal,' and that. But some people just don't comprehend certain messages. You have to use hard measurements and punishments."



Surely big media companies can better mediate this by having users link their ID to their accounts? This would help identify those behind hate comments and better regulate discriminatory behaviours. But these platforms will claim implementing such measures infringes on their privacy regulations and data protections rules. So what is the solution? Do we need these rules to change? Or do we need external intervention from governments when social media users breach community guidelines?

Just how we saw what government intervention did for football in Brazil, more of this type of action needs to be seen across the board. **Marvin** spoke passionately about this: "It sounds very wild and an extreme thing to say. But if you said something about terrorism or certain governments, you'd probably be arrested very quickly, and they'd find you very quickly, by your IP address and they'd probably pin you down before you know it. So it's not like it's not possible. It's just where the priority lies. It's not a priority

and quite frankly, why is it football's problem? They'll say 'this is happening in football, it's football's problem'. And then football will say 'this is part of society, you deal with it'. But if no one really wants to take responsibility - if someone cares that much, they'd take responsibility. And if it was that big of an issue, it would've been solved to them, clearly it's not. Because we've seen, infamously, if there is an issue, particularly regarding money, and it impacts their financial matters, it will get resolved really quickly."

Discussing this further, **Marvin** offered some reassurance about the future of discrimination in football, explaining how the youths' progressive views on society will be reflected in the beautiful game - helping to change the structure in a positive way: "I think one thing we do have on our side is a generation of people who are wanting to do things differently. I think they're wanting to do things slightly differently, and approach things differently. So we have an opportunity. And how we implement change is changing the structure."

MENTAL HEALTH

It's been reported that globally, Gen Z are more likely than other generations to report having a mental health problem, with 21% expressing being prone to anxiety.

Roughly a third of Gen Z are worried they spend too much time on socials and a fifth say it is a major source of anxiety - this translates to 25% more likely than other generations. Gen Z are also uncomfortable with sharing how they feel and being emotionally vulnerable. With the already existing stigma and stereotypes associated with mental health, this is a problem exacerbated in the football world where

footballers are less likely to speak up about their mental struggles, especially under the watchful eye of fans.

According to Mind, a mental health charity in the UK, 1 in 4 people will experience a mental health problem each year (25%). An additional 1 in 5 will experience suicidal thoughts (20%) and 1 in 14 will engage in self-harm (7%). Men are 3 times more likely than women to commit suicide and are less likely to open up about their mental health. Mind emphasise the importance of talking to someone, opening up and reaching out for help before it's too late.



MENTAL HEALTH WITHIN FOOTBALL

The PL's Inside Matters campaign has recently collaborated with Shout UK, a free 24/7 mental health support texting service, to help tackle mental health stigma in football by providing support to players, fans and others within the football community. The campaign encourages individuals to text 'TeamTalk' to 85258 to speak to trained volunteers supervised by clinicians. As the theme of this year's Mental Health Awareness Week (15-21 May 2023) was anxiety, the PL and Shout focused on providing tips and advice for managing the physical and mental symptoms of anxiety (made accessible via their Inside Matters Handbook).

Harry Kane, who has a strong track record of advocating for mental wellbeing, worked with Shout by representing the brand in the campaign.

This coincided with the work Kane has already been doing with the charity under the Harry Kane Foundation (HKF), which aims to help promote positive thinking, self-belief and resilience.

The PL have included mental health and wellbeing requirements in their EDI standards. They have also introduced mental and emotional wellbeing sessions administered by first team and academy player care leads throughout the season. Through the PL, the Primary Stars school programme is delivered to more than 18,700 primary schools across England and Wales. Teachers and other school staff have free access to 8 resource packs which address resilience and wellbeing topics, including self-esteem and emotions. The PL reported there have been more than 42,000 downloads so far.

BALLER TALK ON BEING SCARED OF SPEAKING UP ABOUT MENTAL HEALTH.

SHAYLA: "I think a lot of players out there hide how they feel. And the club won't know about it. And then say for example, they're acting differently, then the club might just think, 'oh yeah, she's got an attitude, or he's got an attitude'. When really and truly there's something going on."

MUKHTAAR: "I think there's a lot of players who are scared to open up. I feel like, especially with men, I don't know if it's their ego, but they're sometimes scared to speak out. So I feel like a lot of players should speak out more. Because it's quite prominent. Everyone struggles with mental health at some point, but it's just about speaking up."

BALLER TALK WITH OJ ON THE HARSH REALITY OF LACK OF MENTAL HEALTH CARE IN FOOTBALL:

"Unless there's an extreme issue, no one cares, but no one genuinely cares. Football's a results-based industry. People are more invested in getting what they need out of the game than other people's mental health, and it's not going to change overnight. I think mental health awareness is there, but no one actually cares. So even with what... the example I brought up earlier, with my friend not being able to find a new club because of compensation, that club is literally toying with someone's life up from 18 to 24 because they want a payout. Do they care about his mental health? No, but they'll repost stuff from the EFL talking about mental health. They'll have Mind on their kits promoting mental health charities, but when it comes down to it, they want the paycheck. So really and truly, it just doesn't matter, and results matter more and that's the reality of the game."

MENTAL HEALTH AMONGST BALLERS

Our data revealed that 93% of Gen Z football consumers believe ballers struggle to speak up about how they feel. Only a quarter believe clubs do enough to support their players' mental health, with 73% of Gen Z football consumers believing they do not.

An Elite Pro shared how the impact of getting rejected numerous times throughout his career left him feeling confused, unable to process what was happening and why. *“Football is all I ever wanted to do. And when I was getting rejected I couldn’t understand it, I couldn’t process it. You’re just so sad you know. It just builds up frustration as well.”*

Upon reflection, an elite pro acknowledged that he would’ve had a better experience mentally throughout his career if he spoke up: *“Everyone needs to get things off their chest, and I feel like that would’ve helped me. I feel like it would’ve helped more if I had someone to speak to. To have more people to speak to about it [mental health struggles].”*

Of the 12,000 players selected into academies, the probability of making it pro is less than 0.5%.

When asked further about why an **Elite Pro** found it hard to open up, he explained that his upbringing played a role: *“When you talk about others, like Deese and stuff. We all have one thing in common. We all come from areas with a lot of violence. We wouldn’t share those things. So for us, it’s normal to not share.”*

Similarly, **Deese** shared that because he didn’t learn how to talk about his feelings growing up, he didn’t really know how to when he needed to: *“But I never really opened up. I didn’t really know how to open up. You don’t really get taught how to open up, you get it bro?”*

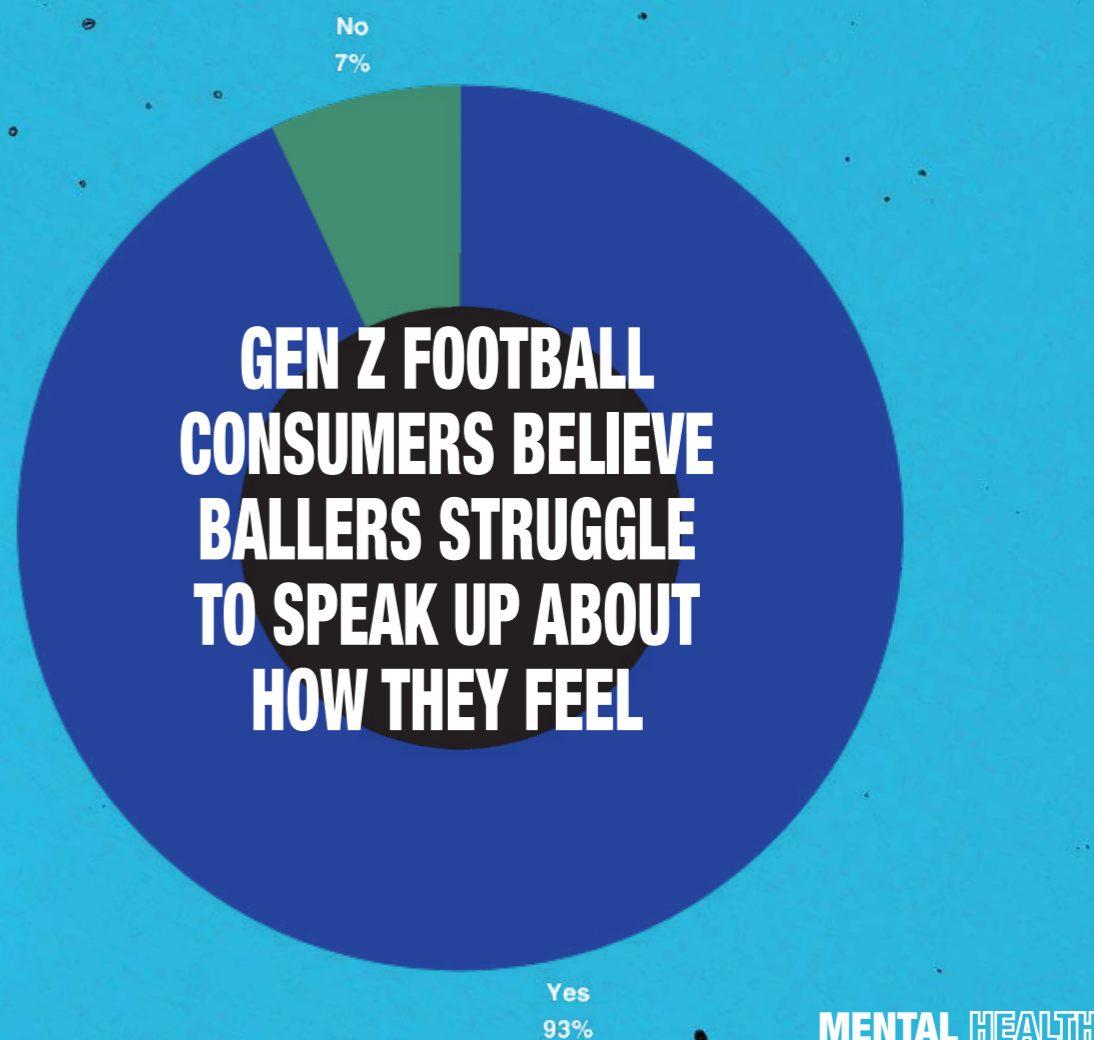
Ballers come from all walks of life and many turn to football as an opportunity to change the cards they were dealt with.

Deese elaborated on this explaining how the lack of relatability from club staff or others in the club was a barrier to sharing.

RB: *“Do you think part of you ain’t opening up as well because the person who you’re opening up to hasn’t come from where you’ve come from and hasn’t experienced what you’ve experienced. Do you think part of you is protecting yourself and protecting your area?”*

DEESE: *“Yeah maybe that plays a subconscious part. That maybe does play a part because you can’t really relate like I’m going to tell you whatever it is I’m going to tell you, like, it’s not going to change nothing, do you get it? That’s how I look at most situations. So yeah, maybe that does play a part.”*

As a young player trying to navigate their career in a high risk environment, the prospect of being misunderstood is something ballers are wary about. It’s essential for clubs to create an accepting culture and environment that will make players feel comfortable to share. Mental health should be given the same respect as physical health - as, afterall, the two are interconnected and both hold significant impact on performance.



Football is a fast-paced sport that requires an immense amount of time, effort, adaptability and mental resilience to succeed. The tunnel vision ballers adopt leaves little room to digest everything that is going on around them. **DEESE:** *"It's harder to deep stuff when you're in it, when you're living it. It's just way harder to deep because you're in it. My bredrin were deeping it more than I was you get it? Me in my head, I'm just like 'this is step 1, I'm nowhere I need to be, I just got to keep going'."*

When players get injured and are required to take time off, it seems that's when the dust starts to settle. Everything they were previously suppressing comes creeping up and the sudden flood of emotions and realisations can be extremely overwhelming. Here is a snippet of our conversation with **Deese** reflecting this: **RB:** *"What about when times were tough? When you're going through injuries and stuff?"*

DEESE: *"That's when you clock. Because when you're going through injuries and that, now all of a sudden you have bare time. Because you're just spending all your time in rehab and that. In the*

gym, the physio beds, just walking around the clubs and that. Then you start clocking 'I'm actually like 5 hours from home'. When time kind of stops you kind of start to deep certain things and things of that nature. That's like the only time you actually clock, and you start missing home and that, and you start missing family and friends and that yeah."

Deese: *"Towards the back end of it, it was like 'I can't do this man'. Like I'm a mentally strong person but it was like, you start to realise things. Things you weren't clocking, you start to clock."*

RB: *"Do you think if clubs were actively going to their injured players and just like asking them how they're feeling, do you think they'd open up?"*

DEESE: *"I don't think they would, because you never get taught how to open up, you get it? Like, coming from where we come from, we don't get taught how to open up. So even if someone were to sit down and have that conversation with me, especially at like 17, I ain't opening up, why would I open up? I'm just telling you I'm cool and that and deal with it."*

When football is all you've ever done and known, it becomes your whole world.

DEESE: *"There was a point where it was football football football. The mandem even joke about that till now, like why is the conversation you always have football-related?"*

Having a career in football therefore becomes a player's whole identity - it's a big part of who they are - and leaving the game is also leaving a major part of themselves behind.

Marvin shared his own experience of retiring from football: *"I spoke to a therapist and we spoke about football and she was asking me about my thought processes. Because at that point I was 26 and I was talking about potentially retiring. And she was talking about how I'd be able to deal with that emotionally, and to be honest I thought I'd always be okay, emotionally, dealing with it. It was more so, what I was going to do. She said retiring from football is akin to mourning a death."*

It's like grieving. And at that point, I never thought about it like that. This is the first thing that you've ever loved that's been ever-present in your life and that you've loved, always. And then one day it's gone. It's just like losing a loved one. Because it's not there in the physical sense. It's part of you that will never be there again. You're having to grieve and leave behind a version of yourself that is just never going to be there again and you have to try and find a way to move on."

RISK OF BEING LET GO

83% of Gen Z football consumers believe footballers are at risk of being released after taking time off to take care of their mental health.

Of those who treat football as their career, more than a third (39%) did not initially consider what they would do in the chance it would not work out.

Within football, these discussions remain under the radar. As a reader, were you aware of any of this? It's amazing just how listening to the experiences of footballers really enables important conversations to be had and exposes realities that need addressing. How are we, as fans, able to support the beautiful game without supporting the players that make it all possible?

When asked about why this is the case, **Deese** shared: *"I don't think you can have a plan B when you're trying to go pro. Because it's such a difficult thing to do, it's gotta be like tunnel vision. As much as you can innit."*

Our data revealed that **73%** of ballers who have been let go in the past received little to no support from their team, club and/or manager.

BALLER TALK ON HOW SPEAKING UP ABOUT MENTAL HEALTH RISKS BEING LET GO.

AMI: "I feel like because in football, especially at the professional level, it's cut-throat, so everyone feels like you have to go a hundred percent and be the best or someone else is going to replace you. Even in academy level too. So I feel like it's quite hard for people to come forward and say they're not doing okay, because they're worried that if they show weakness, then someone else is going to step in and take their place. So I feel like in general in football it's quite hard to speak up about how you feel. But it definitely should change... coming from personal experience."

OJ: "And it gets worse the lower level you are at because a non-league team's not going to really... If you tell them you've got an issue, they might be like, 'take some time off, you'll be alright'. But you come back a month later and there's two new players that are being brought in when you were gone."



BALLER TALK WITH OJ AND KEVIN ON HOW QUICK THE PROCESS OF BEING LET GO CAN BE.

OJ: "There are players who have been let go after one game, and then at a pro level, obviously when you're playing full-time and you're contracted, you might not get let go after one game, but very quickly they can think, 'yeah, we know who we're going to bring in next. Let's run down his contract. Someone else is coming in'. So even though it might not happen at the same speed, decisions can be made that fast."

RB: "So as a player, once you get let go, what happens?"

OJ: "Find a new club or maybe you've got someone to support you to help find a new team, or you've got to do it yourself..."

KEVIN: "Yeah, it's a lonely journey."

BALLER TALK WITH GREGORIO ON BEING LET GO WITH LITTLE TO NO REMORSE.

RB: "Did you receive much support from your team or manager after being released?"

GREGORIO: "Nope. I received no support whatsoever. I just got a meeting, just got told, 'you got released, good luck'. And then that's it. I haven't heard from anyone else. Nothing else. Nothing."

Mental health problems can arise following injury, with pro footballers who suffer three or more severe injuries during their career becoming 2 to 4 times more prone to report poor mental health.

BALLER TALK WITH GREGORIO ON INJURY AFFECTING MENTAL HEALTH:.

"I started this season very well as I got offered my scholarship, but a month later I suffered an injury where I tore my ligament in my ankle and I broke my heel at the same time. And that resulted in me being sidelined for the majority of the season. As I was sidelined, I didn't manage to get my contract renewed and I didn't get offered my professional contract. I got released and that was a bit hard to take because I worked so hard for one moment, I put my whole energy, I put a lot of time in it and then for it to be taken away from me for something that was out of my control because it's not my fault, it's not the club's fault, it's no one's fault that I got injured. It's just something that happens. And everything I worked for just got taken away from me. It was a bit upsetting honestly."



This was certainly the case for former Fulham player Max Noble who, after being diagnosed with Osgood-Schlatter disease and experiencing intense pain, partook in self-harm and attempted suicide. He shared in an interview in 2021 that this was a common theme prevalent amongst footballers.

In 2020, former Man City footballer Jeremy Wisten committed suicide after experiencing a severe injury and subsequent release from the team – he had just turned 18. With Jeremy not receiving care and support after being let go, matters escalated quickly causing him to take his own life

Tyrhys witnessed firsthand the impact being let go can have on a young player: "Losing my best friend [Jeremy Wisten] has been the hardest thing in my career and in life, like I've never been through anything as painful as that. And still balancing that with trying to stay consistent with your football is even more mentally draining. Yeah, that was a time in my life where I experienced a different type of pain."

Tyrhys shared the effect it had on him trying to balance grieving and football: "At times I don't even know how I done it myself. The first season, when I heard the news that he passed away. I literally didn't speak to no one. I'd finish training, run straight in, get showered, changed, and be gone before people even see me. Like I felt like I was putting the room down a little bit, maybe I was just in my head but I felt like if I'm in a room people might feel sorry for me and stuff and I didn't like that feeling so I just tried and swerve it at the start. I was just getting changed quickly and getting out. I wouldn't eat in the canteen. I'd get my food and just eat in my car and go home. And that was tough man because no one should go through that and especially so young, 18, and to deal with it was hard. I think having the actual team around me like the boys and family say 'we're here for you, and if you need anything, I've got you'. My manager, the fans as well, constant messages."

The shared experience of poor mental health support following release is evident, with most ballers wanting to see systemic change. **Deese** shared he didn't actively seek help during his dark times. This suggests that clubs need to put in more effort to encourage players to speak up and provide the tools that will promote this type of behaviour.

RB: *“Do you think you, someone who isn't ever going to open-up or ever opened up during your career, do you think if there was something out there you'd go out and seek it?”*

Deese: *“Probably not at the time, a year later, probably, when you sit down and start to deep things. But at the time, probably not. Not at the time.”*

Marvin spoke further on systemic change and reframing the approach: *“I mean the system does need a complete fix. And just even thinking about the fact that we frame this as after care... it's like we're waiting until after the fact to then do something. We should be doing something throughout.”*

Molly pointed to needing psychologists present across the football pyramid, with an emphasis at grassroots where players are going through crucial development stages. Providing these young aspiring ballers with the knowledge, awareness and tools on how to cope with mental health struggles and where to seek

help will better prepare them for the hardships they may encounter further down the line. These resources should also be provided to parents as well as coaches and other team staff to ensure they have the capability to help and support young footballers - at home and at training grounds. Accessibility and knowledge seem to be the two main factors to drive positive change, as noted by **Molly:** *“Psychologists that are there and easily accessible. The other thing is the knowledge that's gotta be sent through the whole cycle of football, I'm not even just talking senior level. It needs to go even lower to grassroots. I'm hearing coaches say they struggle with under fifteens and I'm like 'OK, this is an issue, we need to do something'.”*

Additionally, when it comes to plan Bs, **Bobby** highlighted the importance of educating footballers on the different ways they can still be involved in football outside of playing. Backed by what we mentioned earlier, under Convergence of Cultures, football has planted its roots across different industries that players can explore following release. **Bobby** shared: *“Well that's where you get them into coaching, that's how you get them to become content creators, kit people, and so on. So trying to nurture their talent in a different way which might not necessarily be playing football.”*



WOMEN'S FOOTBALL

Despite its recent growth in popularity, women's football is not a trend, neither is it new. Female footballers have spent decades to gain the recognition they deserve and the funding they need to grow the game. While a lot of progress has been made in recent years, a lot more work remains if we're to see the game reach an equal footing with men's football. That's not to say the discussion needs to take a negative turn where one side of football is beaten down to raise the other up. Women's football is unique and doesn't need to follow the blueprint that has seen the men's game grow into what it is. Instead, there is an opportunity to take women's football in a different direction and show fans across the world that a fair and equal game can be built from the ground up.

When asked their thoughts, 86% of Gen Z football consumers shared they feel positively about women's football.

To get an understanding of where we are at currently, let's take a look at the top line stats that define the women's game today.

The 2023 Women's FA Cup Final was the first to sell out Wembley stadium, marked by the 77,390 attendees who came from all over the country to watch Chelsea beat Man Utd 1-0 (14 May 2023). This also broke the record for largest crowd at a women's domestic football fixture.

The highest ever attendance for a women's game saw 91,648 turn out for Barcelona's Champions League semi-final clash vs Wolfsburg (5-1) in 2022. Similarly, the final went on to sell out.

A breakthrough moment was made recently with Spurs hosting the first PL and WSL double-header on 20 May 2023. Hopefully this is something we'll continue to see next season!

Women's game: Spurs Women vs Reading Women (4-1)
Brentford (1-3)
Attendance: 61,514
Spurs stadium capacity: 62,850

Much of football culture and fandom is based on being part of a collective tribe: there is a strong sense of belonging and community within the culture. Watching and engaging with the game is about the collective experience, and with the passion and devotion of women's football shining through, it makes sense that its popularity continues to grow following every live event with filled out seats.

An example of this includes the Women's Euros in 2022, which sold 574,875 tickets across the tournament. Affordability is a key factor to consider when assessing the increased attendance at live women's matches. From group stage to the final, concession tickets

pricing ranged from £5 to £25, meaning an adult and child could watch a group stage game for as little as £15 (and £30 at most) and the final for as little as £22.50 (£75 at most). The final had an attendance of 87,192 at Wembley Stadium on 31 July 2022, breaking the record as the most attended at any European Championship.

The Lionesses' triumphant 2-1 win against Germany generated large attention not only on a domestic level in England but also globally, with many international fans now tuning in. The team also broke two records en route to winning the trophy - achieving most goals scored at a women's Euros and the highest margin of victory in a women's Euros match.

Our data confirms this, with 80% of Gen Z football consumers being able to recall the winning score between England vs Germany at the 22 Euro final (2-1).

BALLER TALK ON 22 EUROS BEING THE TURNING POINT FOR WOMEN'S FOOTBALL.

DYLAN: "I genuinely think, the England women winning that Euros was huge and I think... I've personally noticed the massive rise in women's football since that and the interest it brought to the sport 'cause we all saw how high the level was in that final, I mean I was watching that final live... it was a great game."

AMI: "Especially how England just won the Euros. So, I think that definitely got a lot of people into watching women's football. So, seeing how they get on with a strong squad in the World Cup is going to be quite good for women's football."

Even more, when asked what's driven the growth of women's football recently, both **Molly** and **Katie** spoke about England's win against Germany in the Euros final last summer. Nearly a year on after that famous night, the enthusiasm and excitement with which the two recalled the match was clear to see. Those 90 minutes on 31st July changed women's football in this country forever.

Molly: "I think what the Lionesses did last summer has just made it go [sky rocket noise]. Do you know why? Because as a nation, when you're from England, football is everything for most people. And when all of a sudden we see success in a team, everyone jumps on it. If the men were able to have won the Euros, it would have been exactly the same. Although it's already far more advanced than the women's game. As a nation we do love success especially when it hasn't been done in a really long time. Like, naturally, everyone's now talking about these women saying 'they are incredible'."

While the game itself brought home a first trophy for England since '66, Chloe Kelly's iconic celebration seems to have had just as much cultural impact, with **Molly** recalling it as a watershed moment: "Chloe Kelly taking her shirt off and running down the pitch. It's those moments... incredible... what they did, did change the game in this country."



DEVELOPING THE WOMEN'S GAME

The women's 22 Euros demonstrates how with success comes greater attention, visibility and support from the football industry as a whole. But to understand why this has only come about recently in the women's game, we need to understand how its long history of little investment and devotion to developing the game has prevented women's football from reaching this turning point sooner.

The main barriers to growth seem to have come down to:

1. Little investment in girl's school PE and the female player pathway
2. Limited investment from the football industry
3. Lack of visibility on mainstream broadcasting

Let's discuss barrier number 1

Through experience, **Katie** spoke about the lack of opportunity to develop a keen interest in football through school PE. With the youth spending the majority of their waking hours at school, it is important to nourish talent and involvement early on and to do this equally for both girls and boys: "I think in the women's game it's really hard because I think we have to build from the top. We have to give these girls something to aspire to. To aim to be a professional and have these role models, these female role models they can look up to. But then it needs to start to filter down. I still see it in primary schools. I still have girls coming up to me saying, 'I'm not accepted to play football'. 'We don't get the opportunity to play'."

Equal access to football in schools requires government intervention if we want to see actual change. The Lionesses wrote an open letter to former PM contenders Rishi Sunak and Liz Truss last year. On 8 March 2023 the government announced that schools will be expected to deliver at least 2 hours of PE lessons per week to ensure that girls are provided with equal access across all school sports, including football. This is backed by a multi-million pound investment with a £600 million fund for the next two upcoming academic years for PE and Sports Premium as well as

£22 million for the School Games Organisers network. We look forward to the effect this will have on the game and nurturing female talent that will shape the future of women's football.

There is a lot we, the UK, can learn from the US in their approach to player development. The US optimises talent development by accommodating individual needs such as commute, play and study and financial support. Currently, the UK does not cater for these factors to the same degree, especially in deprived boroughs.

OJ pointed to this when speaking about the future of women's football in our Baller Talk: "But I feel like there's blood on the hands of the infrastructure of just sport in general in the UK and where there's not money in things... For example, there's not money in women's football. And it's hard to get girls interested if there's little to support them, little to push them. And if you look at the US, they're heavy on athletic development, whereas here you are on your own. So until those wider changes happen and you get people doing things properly, women's football is never going to go as far, because if people aren't invested in sport from early, there's no real emphasis on athletic development. They can't catch up and it won't be interesting. So they won't bring people in and they won't make money."

Now onto barrier number 2

Our data showed that out of the mainstream sports brands - namely Nike, adidas, Puma, Under Armour and New Balance - Gen Z football consumers believe Nike has done the most to support women's football (53%).

67% of Gen Z football consumers want to see more investment from brands to push the women's game further. Our data further revealed that 51% want to see more brand collabs that will help develop women's football and 47% want more grassroots initiatives to foster young talent.



This is reflected in Nike's active efforts in increasing awareness on female-specific issues such as periods and body confidence and by catering to female-specific needs through producing female kits and boots.

Katie spoke about how body image workshops help prevent losing girls in football due to hormone and developmental changes. Young girls face different issues compared to young boys through the developmental period. Addressing these barriers can help girls feel more comfortable to partake in sports *"We lose a lot of girls through sport and football because of that period in their lives where their body changes. Hormones start to change. They don't feel comfortable with themselves. And I think it's important that we have that conversation. Athletic doesn't mean tall and skinny. We're all different shapes and sizes. And I think that's a really important message to put across to girls. That it's not one size fits all."*

Delivering these through the baller pathway – from grassroots to pro level – will help females build self-confidence and make them feel more secure in their ability to perform and succeed.

Finally, let's explore barrier number 3

Women's football isn't broadcasted to the same degree as the men's game, and with little visibility comes little advancement. Our data highlights that there is demand - 59% of Gen Z football consumers said they want to see more TV exposure to help the women's game grow.

Katie mentioned how everyone sees that the women's game is growing - the opportunity to invest is clear: *"Because it's not prime time TV and they're not gonna get the numbers watching and the money back in, they've sort of held back a little bit and said we're not gonna pay that much money. Sometimes you have to invest and have a little bit of loss. You can't reap the rewards all of the time. And I think that's what we've come to ahead with, obviously, with this World Cup. And we've eventually got there, that they're gonna show the games, because I think there would have been uproar if it wasn't shown because people will watch it"*.

This summer, in the run up to the Women's World Cup in Australia and New Zealand, many European broadcasters ran the risk of scoring an own goal when they were accused by FIFA of failing to provide enough investment to secure broadcasting rights for the tournament. FIFA were disappointed by the money being offered by broadcasters like the BBC and ITV, feeling that they were undervaluing women's football. Only after FIFA threatened to enforce a blackout of games in the UK, did the BBC and ITV give in to the demands for more investment. The disagreement between the parties did nothing to convince Gen Z fans that British broadcasters genuinely care about the women's game.

If brands want to gain trust among Gen Z fans, investments made must be genuine and the reasons for them beyond just the obvious commercial benefits; investments should have tangible impact and be seen to shift culture in a positive way.

Barclays, a long time investor in football with heritage links to the PL, secured a multi-million sponsorship deal with the FA WSL from the start of the 2019/20 season, while Visa signed a weighty

seven-year women's football deal with UEFA at the end of 2018.

Both companies, with a long history of football sponsorship and ties to football's biggest competitions,

recognised the ability to capitalise on the dedicated and growing fanbase in women's football as well as the increased participation seen in the game globally to inspire the next generation of female football fans.

We left an open-ended question in our survey to collect more detailed insight into what else can be done to help the women's game grow. Here are some of the most productive responses we received that address all 3 barriers.

- **Grassroots**

"More involvement with the community"; "Investment in grassroots"; "More lower ranked teams given an outlet".

- **Female-specific gear**

"More products designed for women"; "Specific kit for women especially boots"; "Manufacture women's football kit, I've worn men's kits that are too big my entire career".

- **More exposure**

"More exposure and proof to the ones that don't believe women can play", "I really do want to see a lot more to expose the women's game more and more, the men's game is heavily exposed to the mainstream media unlike the women. When a male pro footballer scores a crazy goal it goes everywhere and if a female does the same there isn't the same publicity".

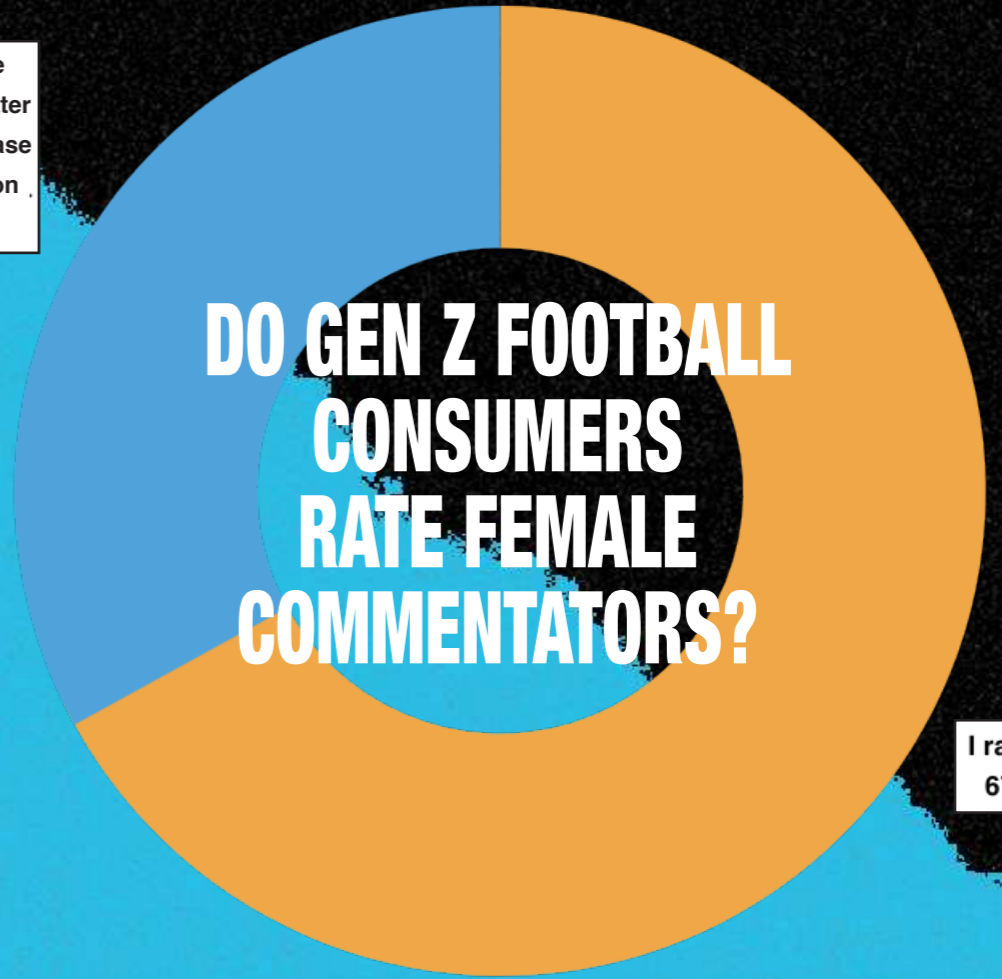
- **More knowledge on female-specific health**

"More research on women specific injury, health and body awareness", "More funding, better research for things such as ACL injuries"; "Better support such as aiding them with injuries which men don't get as much (ACL for example) and making more equipment specialised to women players".

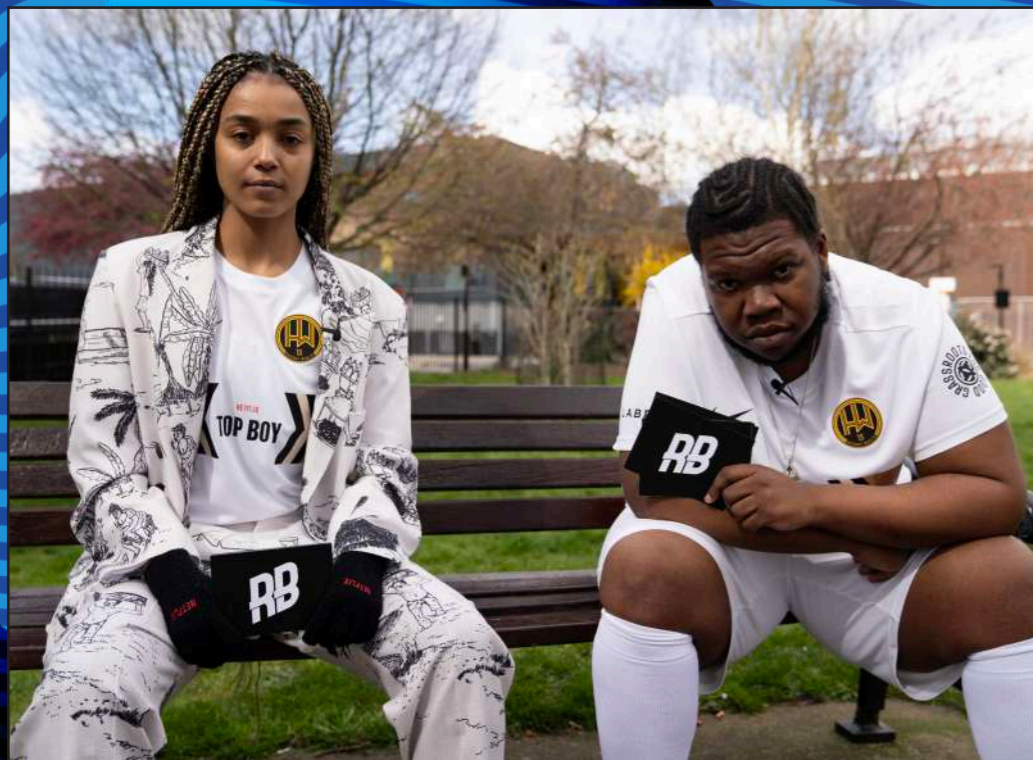


MAIN REASON FOR SUPPORTING A PARTICULAR TEAM AT THE WWC

More for the sake of it / better ways to increase representation
33%



I rate it
67%



MAINSTREAM SPORTS BRAND BELIEVED TO HAVE DONE THE MOST TO SUPPORT WOMEN'S FOOTBALL AMONGST GEN Z FOOTBALL CONSUMERS



WSL IN THE LIMELIGHT

BALLER TALK WITH SHAYLA ON WSL BEING THE MOST POPULAR WOMEN'S LEAGUE:

"Well the WSL then, because we are in England, we obviously have the WSLs, which I see around the most. So, I would say that that's probably the league that I follow the most."

The TV deal between the WSL with both the BBC and Sky Sports in 2021 has made a huge difference to the growth of the women's league. It was reported that throughout the first 3 months of the 2021/22 WSL season, viewership was up more than 500% per match under the new broadcast deal, with data analytics proving that when women's football is made easily accessible, fans will tune in to live matches shown on TV which has a knock on effect on accelerating the growth of the game.

BALLER TALK WITH MUKHTAAR ON THE IMPORTANCE OF TV BROADCASTING:

RB: "So do you think if the other leagues were shown on TV, that would help boost them up?"

MUKHTAAR: "Yeah, it would give them more exposure. For example, I don't think I've ever seen an overseas women's game. I only see the WSL. But with men's, you see the men's Serie A, Bundesliga, the Liga, the Ligue 1 and things like that."

Our Baller Talk with Rebecca confirmed what Mukhtaar shared: "It's getting better. I see a lot of WSL games on Sky now, which is good. But Champions League games and stuff should be, I think, shown more than just WSL. Because the Champion League, in the women's and in the men's, it's supposed to be the best league. So why wouldn't you want to watch it?"



When looking at male vs female differences, males are at the frontline of not attending live WSL or women's pro games (85%). 73% of female Gen Z football consumers attended between 1 to 10.

We asked what would make them go to more WSL or women's pro games next season, and 40% of Gen Z football consumers said being closer to stadiums.

In terms of attending live WSL or women's pro games, 57% of Gen Z football consumers went to watch 0 games last season. Less than a quarter attended 1-3 live games (22%) and even less attended between 4 to 10 (21%).

Even with TV viewership on the rise, it seems that attendance to regular WSL matches throughout the season remains low.

The average attendance for WSL matches in 2022/23 was 5,616. In comparison to the PL, which saw an average attendance this season of 40,267, it is significantly small. However, when compared to last season's average attendance of 1,923, we're seeing a 192% increase.

So despite the low number, there is greater interest in attending live women's football games which is promising as this will likely continue to increase next season. The effect this will have on annual revenue is also exciting, with the rise in in-person game attendance boosting matchday revenue.

Arsenal hosted 3 WSL games at their main Emirates stadium this season and saw a significant growth in their ticket sales and

attendance for their women's club. Arsenal have confirmed they will be hosting 5 WSL games at the Emirates, recognising the need to expand their matchday offerings to a growing fanbase.

Currently, each WSL club receives financial support from their associated men's club via revenue and/or loans and equity funding to cover annual losses.

As seen by our data, Gen Z football consumers are likely to attend more WSL games next season if they are closer to stadiums where matches are held. By PL clubs hosting some women's league games at their main stadium they are directly helping the women's game grow and indirectly reaping the rewards of increased revenue as a result. It is therefore in the men's club's best interest to support their associated women's club in any way they can - with one way being hosting a few WSL matches at their main stadium.

This will not only help increase attendance, but also garner greater attention from male fans too, and with greater support comes greater revenue. The key factors the football industry should address in order to support the women's game are:

1. Audience and growth
2. Financial sustainability and longevity
3. Structures and governance

2023 WOMEN'S WORLD CUP

The 2023 Women's World Cup is taking place from 20 July to 20 August across Australia and New Zealand. It's the first time in a Women's World Cup that we're seeing 32 teams taking part, adding fuel to the growth of the tournament.

More than 1.5 million tickets have been sold for the 23 WWC - breaking a new record in WWC history and making this tournament the most attended standalone women's sporting event ever. Fans from more than 180 countries have bought tickets, demonstrating the global reach women's football has now.

The US is the tournament's most successful team having won four titles, while Germany are not too far behind in 2nd with two titles. With that in mind it makes sense that both countries are ranked in the top ten in ticket sales. Both nations also have strong domestic viewership ratings, highlighting how with a team's success comes growth, development and (most importantly) attention.

With England's triumph last year in the Euros, there's no doubt the Lionesses will do us proud this time round too - and the impact this will have on the women's game will be something brands and fans are not going to want to miss.

Based on our trend analysis, Gen Z football consumers will likely head to Instagram first to engage with the tournament. As the Lionesses progress through the stages, they will jump onto YouTube for highlights then make their way to BBC and ITV to watch the games live once the knockouts begin.

Let's take a look at what Gen Z football consumers are saying about the 23 WWC. 80% predict the 23 WWC will be popular. That's a big show of confidence. Looking further, less know where it's held (67%), with this stat carried by the male respondents - a shocking 63% of males reported not knowing where the tournament is being held, which is a sharp contrast to the figure for females (95%).

In terms of consumption behaviour, 68% of Gen Z football consumers said they will be watching the 23 WWC live and 74% said they will be watching highlights.

But wait, let's analyse gender differences. Almost all of female Gen Z football consumers said they will be watching the tournament live (92%) with 57% of males saying they will not be tuning in to live games. The stats for highlights are more promising, however, with more than half of male Gen Z football consumers saying they will be watching WWC highlights (53%). Of course, almost all of the females said they will be watching highlights (95%).

The main reason for supporting a particular team at the 23 WWC was 'national team' (67%). @Lionesses, we're rooting for you!

Unilever personal care brands (Rexona, Dove, Lifebuoy and Lux) are the official sponsors of the 2023 Women's World Cup and are set to extend their deal to 2027 which will also include the 2026 Men's World Cup and the FIFAE Finals. This is the first partnership to feature personal care brands across both women's and men's football as well as esports.

The main agenda behind the FIFA x Unilever collab is to work together on initiatives that promote women's football on a global scale. An example of one of their initiatives is the Women's Development Programme, which provides human resources, funding and support for female-tailored development programmes with the aim of accelerating the growth of the women's game. Another example includes the Dove's Self-Esteem Project, an initiative situated on inspiring and promoting body confidence in the younger gen of girls.



THE FLIPSIDE

Despite the promising stats showcasing the growth of the women's game, let's play devil's advocate and look at the other POV.

Women's football seems to be lacking in terms of representation and diversity. This is partially due to lack of investment, as outlined above, but also due to lack of accessibility to grassroots football/adequate training. As the quality of the female player pathway is already low in comparison to the male's, these factors have a more significant impact on the women's game than they do on the men's - especially in terms of EDI.

To support the growth of the women's game and to ensure it grows to be a more representative game, there needs to be a continuous emphasis on funding grassroots

girls football that targets socioeconomically deprived areas in London (and across the UK). Having scouts visiting different boroughs in London, especially ones that are not as white-dominated, will help spotlight talent that would otherwise be neglected due to girls not being able to travel to events where scouts are present. The same approach should be mirrored in increasing representation amongst football coaches, where training courses and resources are made available across different areas in London. This will enable girls who play grassroots football access high quality training and help them picture a career in the game.

We suggest introducing initiatives that provide football training sessions for young girls after school hours on weekdays, free of

charge and with modes of transport provided to and from training grounds. Including female role models that are representative of the wider community and having them partake in such initiatives will help demonstrate that it is possible to be successful in football - regardless of sociodemographic background. This goes beyond pro female footballers but also extends to club staff, coaches, referees, managers and other influential figures in the football industry.

Moving forward, it is important for the WSL and prominent football figures to consider cultural differences, socioeconomic factors and implicit racial prejudices when shaping the future of women's football.

Our data showed that 45% of Gen Z football consumers think it's very important to see female commentators on channels like Sky, with 31% thinking it's kind of important. A quarter shared they don't think it's important (24%). Following up on this, we asked whether they believe featuring female commentators is 'just for show' and a third of Gen Z football consumers responded by saying there are better ways to increase representation in football (33%). 67%, however, support the recent rise in female commentators.

In terms of interest in women's football, our Baller Talks and data demonstrate this remains an issue. OJ's honesty about his disinterest highlights this:

"I know that if there's a Women's World Cup game at 4:00 AM, I'm not going to stay up for it. If it was the Men's World Cup, I would stay up at 2:00 AM even if I had work the next day. Do you get what I mean? So for me the interest isn't there that much. Whereas at a club level, yeah I'd watch the Champion League games or certain FA Women's League games, but I'm just not going to pretend there's a demand that isn't there, from my side at least."

Though Dylan did show an interest in the 23 WWC, it seemed that there was a lack of credibility in his claims.

RB: "Do you think you'll watch the Women's World Cup?"

DYLAN: "Yeah, I'll definitely be able to. I don't know what - do you know what country?"

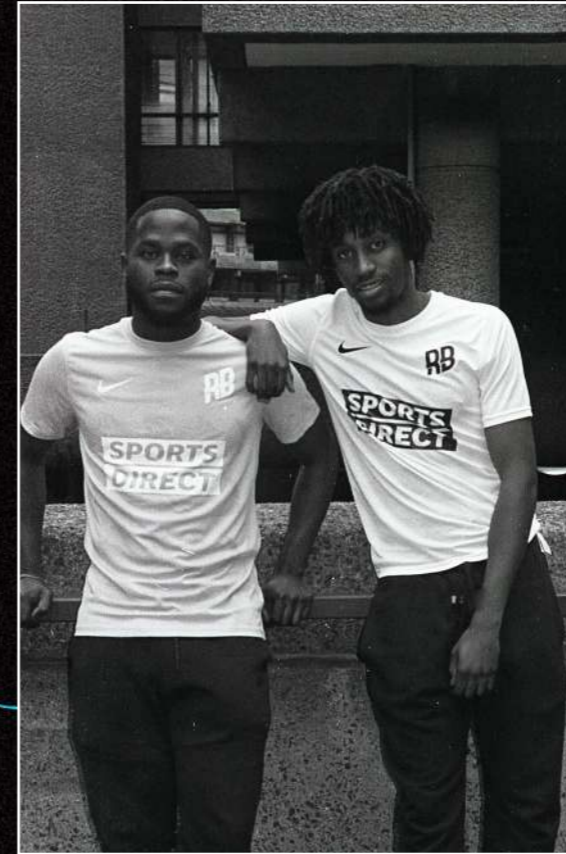
This was further supported by Mukhtaar who didn't know much about the 23 WWC when asked about it:

"I don't know much about it. I just know about the England team. That's about it."

Here are some of the responses we received from our survey from male Gen Z football consumers about women's football.

- "Respectfully, I am not so interested in women's football. Partly because I spend too much time consumed on men's football (I haven't got time for it), partly because the level isn't as high. I do support its growth though and think the NLD this year was a great indication of where it could go".
- "I'm not bothered to be honest"; "Nobody really likes women's football"; "No one cares".

It is obvious that the game is growing, but this seems to be primarily driven by the support from young female fans. As the PL dominates the UK, which is heavily saturated by male fans, it is important to attract all fans of football and challenge misconceptions to develop women's football to its full potential.



what next?

Well, there you have it, we've come to the end of this journey. We've covered where our game is at culturally, outlined Gen Z fan behaviour, discussed where we think football is headed and highlighted the opportunities that brands can tap into now and in the future.

Let's look back at the key findings that shape the Gen Z football consumer.

It's clear that Instagram is still the go-to platform for football consumption - it's part of a mix that allows content for purpose to be consumed. TikTok isn't far behind, although we note that this doesn't feel as social and conversational as Instagram. So, it makes sense that baller x fashion collabs naturally sit on the gram. The key to connecting with Gen Z and strengthening their ties to young pros lies in **authenticity** and relatability. It's that simple... and if you need to know, players like Saka and Haaland tend to score high on the favourites list.

The young gen want to see ballers express themselves through their passions and hobbies and understand that they are not media-controlled robots unable to relax away from the game. This is something unlike generations that came before.

Beyond culture, the young gen tap into a wide range of media outlets to satisfy their football cravings. From more traditional methods, like lean-back podcasts and commentary, to more modern avenues, like scrolling through feeds - fans *crave* football.

Are these new consumption habits their solution to not having to pay the high prices of subscription services and PL season tickets? Perhaps this explains why non-league football attracts this group of consumers... It is real, **authentic** (there's that word again!) and inexpensive with a community feel which is different to the perfectly crafted world of the PL. Low and behold, we've already started to see this play out. Stormzy has just headed up a consortium to take over his local club AFC Croydon.

Inevitably, with more clubs reaching billion pound valuations, global marketing has become a key part of their growth strategies. This approach holds the key to attracting more fans and thus increased commercial revenues. The pre-season tours abroad have been around for some time, but now that digital media is a big part of Gen Z's day-to-day, this global marketing approach is more noticeable. For fans back home, already paying increased fees all round (season tickets, kits, etc.), will this start to leave a sour taste? At what point will Perez' prediction start to become a reality?

Moving on, a heartbreaking discovery was the persistent prevalence of discriminatory abuse in football - with virtually all Gen Z football consumers agreeing that racism, sexism and homophobia remain a big problem in the game. It's clear that current campaigns and initiatives, with the best intentions in the world, sadly haven't done enough, and whilst awareness is good, the time for talking is over and the time for action is now.

The pressure young ballers are under trying to fulfil their dreams of making it pro has caused them to adopt a 'tunnel vision' mentality in order to adapt and build resilience. However, mental health remains a stigmatised and taboo topic in the football world. As we found, practically all of Gen Z football consumers believe that ballers struggle to speak up about how they feel. This is reflective of football culture, which through our Baller Talks we discovered is situated on 'lad culture' and toxic masculinity.

We've explored the growth of women's football and the exciting future this holds. Gen Z football consumers feel positively about women's football and this is a shared view when discussing the 23 WWC. The reason for watching the 23 WWC seems to come down to supporting the Lionesses - especially following their triumphant win last Euros. On the flipside, women's football still lacks representation, investment, broadcasting visibility and support from *all* fans of football. A shocking majority of male Gen Z football consumers have yet to support the women's game fully. If WFB is to reach its potential then widespread support is essential.

So, what does this all mean?

Gen Z fans are plugged into the digital matrix. Their behaviours and habits fuel social media platforms, which are now at the mercy of the user. In order to maintain engagement, brands need to utilise implicit marketing techniques to not deter potential consumers. By featuring a more in-your-face marketing message you're at risk of being scrolled right past. Let's throw young ballers into the equation - they play a huge role in helping brands connect with Gen Z... main reasons being they're relatable, close in age and **authentic** (who's keeping count of how many times we reference this word?).

Pro ballers now hold huge influence over the young football fan, more so than the conventional celeb, and this is something that can be tapped into. Yes, for marketing efforts, but also for bringing more niche culture and passions into the mainstream. Football culture needs to shift to be a more accepting and inclusive environment where ballers feel they can open up and not be concerned about encountering discrimination. Having a more empathetic approach would not only benefit football but society as a whole. When it comes to mental health, effective intervention methods are yet to feature in the game and this is especially important given the toxic environment that changing rooms can foster.

We want to see real change. As an industry, we can no longer cruise by with virtue signalling endeavours that clearly are no longer having an effect as discriminatory abuse is still prevalent and on the rise. We need to challenge social platforms more to regulate and punish. We need to self-police and call out the BS. Above all, we need new ideas to make effective steps to drive change... *"A man with new ideas is a madman, until his ideas triumph"* (Marcelo Bielsa).

Football seems to be at odds with itself. On one hand, it's a money-generating industry but on the other, it's the fans that are the lifeblood. As a collective we need to protect the essence of what football is before it becomes completely commercialised to favour regimes, organisations and sponsors. Remember, Gen Z are hot on **authenticity** (fourth time's a charm), and so football needs to retain that to protect its future.

Gen Z are the future, and more so, the now! They have more progressive views and strong motivation to push for positive change, so give them the tools to continue to do so.

Closing Remarks

As the voice of youth culture, we have a keen understanding of how the next generation will shape the beautiful game. Through the platform we've built, we know that sharing a passion can build an engaged community that can have a positive impact within the industry.

So, it seems like Florentino Perez may be onto something... but is wrong on one major front: Gen Z *are* interested in football and *will* drive change within the game. Their motivation in creating a more empathic and safe environment as well as pushing for change around discrimination, mental health and equality will keep football alive. The sport is already evolving, away from traditional modes of consumption and naturally moulding to accommodate the behaviours and habits of the younger generations. And then let's not forget about Gen Alpha... that's a whole different story.

We hope that you've enjoyed this report. It's only the tip of the iceberg of what we've uncovered over the years, but important nevertheless to get out to the masses. Watch this space.

methodology

SURVEY

1,008 participants (47.12% male; 51.39% female; 1.48% did not disclose) participated in an online survey consisting of 96 questions utilising multiple-choice and close-ended questions as well as Likert scales. Of these, 867 were Gen Z, aged 16-24 (48.33% male; 50.29% female; 0.81% did not disclose; 0.58% 'other').

ETHNICITY

	%	n
1. Asian or Asian British	6.69%	58
2. Black, Black British, Caribbean, or African	14.30%	124
3. Mixed or multiple	6.92%	60
4. White	68.28%	592
5. Other (e.g. Arab)	3.81%	33

Majority of the gen z sample were heterosexual (75.89%) with 10.27% bisexual, 8.19% homosexual and 5.65% who did not disclose. Almost half of the sample reside outside of London (48.10%) with a quarter residing in London (25.95%) and a quarter outside of the UK (25.95%). Participants were evenly distributed across North, East, South and West London.

*Gen Z baller profile (football team support, level, days a week play football)

The top three most followed football teams amongst Gen Z football consumers are Arsenal (28.72%), Man U (18.45%) and Chelsea (12.23%). Most of the respondents play grassroots level football (34.83%), with almost a quarter playing casually (22.72%), 18.34% at academy level, 11.53% at pro level and only 10.61% who don't play at all. In terms of frequency of playing football a week: 14% selected 0; 25% selected 1-2; 36% selected 3-4; 20% selected 5-6; 5% selected 7.

INTERVIEWS

Secondary research (focus groups, survey & expert interviews) conducted throughout May, June and July 2023. 10 participants (6 male; 4 female) participated in in-person semi-structured interviews, either 1:1 or in pairs, utilising open-ended questions addressing the six main topics referenced in this report. Thematic analysis was conducted on the resulting transcripts using NVivo 12.

EXPERT INSIGHTS

We spoke to 8 experts who shared their personal experiences with, and knowledge on, football: Molly Bartrip, Katie Chapman, Marvin Sordell, Bobby Kasanga, Deese Kasinga, Tyrhys Dolan, Megalie Mendes and an elite pro who requested to remain anonymous. These conversations took the form of semi-structured interviews either in-person at RB office or online. Thematic analysis was conducted and key quotes were collated.

QR CODE FOR REFERENCES

*Numerous third party white papers, research papers and articles



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