



NEOM

PIONEERING CHANGE: WOMEN'S FOOTBALL IN SAUDI ARABIA



NEOM



OFFICIAL GLOBAL PARTNER

FOREWORD



At NEOM, sport and physical wellness are placed at the center of our vision to redefine livability. As the most popular sport in Saudi Arabia, football captures the hearts of millions and inspires communities nationwide. Through our partnership with the Asian Football Confederation (AFC), we're proud to be a part of a significant movement that is making a real difference for men's and women's football, not only here in Saudi Arabia but across the wider Middle East and Asia.

As the Presenting Partner of the inaugural AFC Women's Champions League, we've created a report that highlights where women's football is today in Saudi Arabia and the promising pathways for continued growth.

The story is new, the story is inspirational and the story is real, however many female footballers in Saudi Arabia have lived a longer footballing history than many will realize. Our hope is that this report continues important conversations, informs players, fans, communities and businesses and drives further investment and support as a result. It's not just about changing perceptions, but about championing real progress for women's football.

This report, created in collaboration with our contributors, is our way of truly understanding the landscape – where we are, what obstacles lie ahead and how the future could look. But it's about more than just football. It's about providing more opportunities for women and demonstrating the far-reaching impact that sport can have on individuals and communities.

At NEOM, we're committed to forging partnerships that align with our ambitions for progress. Alongside the AFC, we aim to play our part in unlocking the full potential of women's sport, by telling the story of how key stakeholders are redefining football and empowering women across the Kingdom.

JAN PATERSON

Managing Director, NEOM Sport

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EXECUTIVE SUMMARY

Building on a rich history of women's football in Saudi Arabia, the sport is experiencing a resurgence and rapidly emerging as a transformative force. Aligning with the national ambitions of Saudi Vision 2030, it is helping to redefine sports culture and societal norms for the future. Fueled by significant government investment and endorsement, stakeholders across the football ecosystem have driven positive performance, commercial and societal change. This strategic and collaborative effort, from grassroots to elite levels, has created a powerful momentum that is propelling the sport and its communities forward.

- **Significant strides:** Since women began attending football matches in 2018, Saudi Arabia has achieved remarkable milestones in women's football. These include the successful launch of four Saudi Women's National Teams, six domestic competitions—highlighted by the Saudi Arabian Football Federation (SAFF)'s Women's Premier League—the establishment of six youth regional training centers and climbing up the official FIFA Ranking.
- **It all starts with grassroots:** Initiatives such as the Girls' Schools League are drastically increasing youth participation (over 70,000 female players participated in 2023, +46% year on year), which will help to feed development pipelines for community and professional clubs for generations to come.
- **Social impact:** Women's football is quickly becoming a catalyst for social change worldwide; promoting gender equality, healthier lifestyles and national pride. As the nation's favorite sport, football provides a powerful platform for storytelling. Campaigns like #SeeUsPlay effectively encourage engagement by inviting people to experience the excitement of women's football firsthand, driving viewership both in stadiums and through broadcast or online platforms.
- **Setting up for global success:** The establishment of elite leagues and player development pathways is rapidly professionalizing women's football in the Kingdom. This is evidenced by the 195% increase in professional players and the overall growth to over 1,500 registered players, of which over 940 are Saudi nationals.
- **The importance of role models and coaching:** The contributions of high-profile international coaches like Monika Staab and Lluís Cortes, combined with the inspiring examples of successful female Saudi coaches like Dona Rajab, are crucial in demonstrating to young girls that coaching careers in football are attainable. Investment in training and development programs, including 50+ SAFF coaching courses, has helped to develop 1,000+ coaches and 35+ female referees.
- **Investment in infrastructure and accessibility:** Despite the vast geography of Saudi Arabia, there has been substantial growth and distribution of dedicated sports facilities and competitions. As of January 2025, six Regional Training Centres, four national events and one regional event. Additionally, the SAFF Women's Cup Tournament is now in the Round of 16 stage, providing participation opportunities for all ages across Saudi Arabia.
- **Commercialization:** Partnerships with large local and global brands such as Lay's and Rexona, along with increased broadcast coverage across SSC and DAZN, are driving the rapid commercial growth by generating revenue as well as enhancing visibility and create relatable connections for current and new audiences.

"NEOM Sport's strategic approach creates an innovative hub that provides opportunities for all. The AFC partnership empowers and advances Saudi women by increasing the profile of women's football and encouraging more Saudi women to pursue sport."

Jan Paterson

Managing Director, NEOM Sport

A look to the future

The future of women's football in Saudi Arabia is a truly promising one. The Kingdom has the rare opportunity to establish a new, innovative commercial model for women's football, free from the constraints of legacy structures that hinder growth in other countries. Leveraging the momentum gained thus far, it has the potential to become a leading nation in women's football. The journey is just beginning, but the opportunities are vast and deeply impactful.

METHODOLOGY

To gain an aggregated view of the women's football landscape in Saudi Arabia, we employed a multifaceted research approach.

First, we conducted in-depth interviews with key stakeholders, including leaders from grassroots football, influential media figures, ex-players and representatives from elite and professional clubs and federations.

Second, we leveraged extensive desktop research, including proprietary data sources, analysis of global trends and best practices in women's football.

Third, we conducted a targeted digital campaign to gather firsthand insights from football fans within the Kingdom of Saudi Arabia.

By combining expert insights, industry data and direct fan feedback, we were able to develop a nuanced and informed analysis of the current state of women's football in Saudi Arabia, drawing valuable lessons from both domestic and international contexts.



Source: Saudi Arabian Football Federation

01





INTRODUCTION: THE STORY SO FAR

INTRODUCTION: THE STORY SO FAR



Source: Saudi Arabian Football Federation

Saudi Arabia's transformation in women's football over the past few years has been a story of remarkable transformation. Since 2018 when women started attending football matches, the landscape has changed dramatically; from the launch of the SAFF Women's Premier League to the official recognition of the Saudi Women's National Team in FIFA's world rankings for the first time. Through government backing, what was once an underdeveloped field has grown into a thriving ecosystem which aligns with Saudi Vision 2030 – the Saudi Arabian government's transformative and ambitious national blueprint to unlock the potential of its people and create a diversified, innovative and world-leading nation.

This shift has impacted women's football on multiple levels, beyond just the professional. It has developed leadership, encouraged grassroots participation and helped infrastructural and cultural attitudes towards women in sports. Shaima AlHusseini, Managing Director, Saudi Sports For All Federation (SFA), describes the current landscape of women's football in Saudi Arabia as a "full transformation" over the last five years, highlighting the rapid progress made thus far as well as inspiring further aspirations for the sport's growth.

With Saudi Vision 2030 as the catalyst, women's football is breaking new ground, challenging social norms and creating new pathways for female athletes in a country of over 32 million people. As the nation builds on this momentum, there is a unique

opportunity to capitalize on the emerging cultural shift, using football's growing visibility to inspire future generations and reshape the possibilities for women in sport across Saudi Arabia.

"Women's football in the Kingdom is growing at a truly unprecedented pace, with new grounds being broken each day.

Since we launched our first Women's National Team in 2021, that trajectory has only been upwards as we introduce new ways to inspire the next generation into the game and provide them with a pathway to the top of the sport.

The participation results in such a short space of time are remarkable and only going to continue growing, supporting our focus of providing opportunities and inspiration to the generations to come."

Aalia Abdulaziz AlRasheed

Head of Women's Football, Saudi Arabian Football Federation (SAFF)

A SHORT YET IMPRESSIVE HISTORY

2008:

Launch of the first amateur women's league.

2016:

Launch of Saudi Vision 2030 and sector reform.

2018:

Saudi women started attending football matches.

Appointment of the first female, Adwa AlArifi, to the SAFF¹ board.

2021:

Launch of the Senior Women's National Team.

Launch of the first Girls Regional Training Center in Riyadh.

Over 700 women participated in scouting tryouts.

2020:

Launch of the first Women's Community Football League.

Launch of the Saudi Futsal Women's National Team.

2019:

Establishment of SAFF Women's Football Department.

2022:

Saudi Arabia hosted its first women's football tournament, WAFF² Women's Futsal Championship.

Launch of the SAFF Women's Premier League and First Division League.

Launch of the nationwide School's League.

Debut match for the Women's National Team.

A 2-0 victory against the Seychelles

2023:

SAFF Women's Premier League Women's Premier League inaugural global broadcast deal with DAZN and first title partnership with Lay's.

First FIFA ranking for the Saudi Women's National Team.

Establishment of the U17 and the U20 National Team.

Launch of the U17 Clubs Tournament.

Appointment of Saudi Arabia's first female referee by FIFA, Anoud Al-Asmari, and A-licensed female Saudi coach, Dona Rajab.

2024:

SAFF has 35+ female referees, more than 1,000 qualified coaches and 50 international players from 20 countries participating in the Saudi Women's Premier League.

Rexona announced as official partner of the Saudi Women's National Team program.

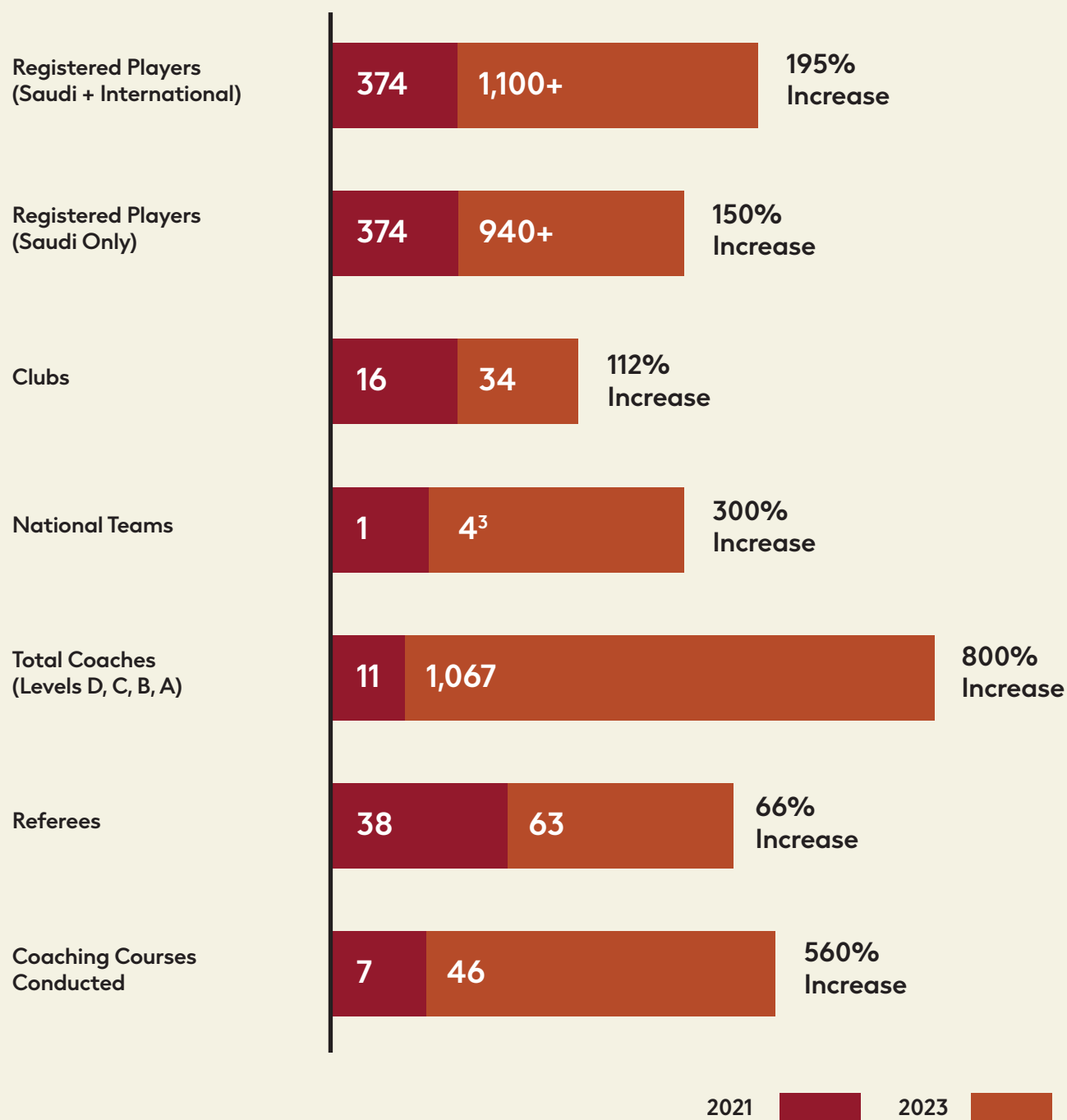
Launch of the Saudi Women's Second Division League.



Source: Saudi Arabian Football Federation

1. Saudi Arabian Football Federation
2. West Asian Football Federation

Incredible Progress Across All Areas of the Game (2021-2023)



3. Senior, U20, U17 and Futsal

Regional Training Centers
(6-17-year-olds)

1

6

300%
Increase

Players Attending Regional
Training Centers
(6-17-year-olds)

22

192

773%
Increase

Players in Schools League

0

70,000+

Domestic Competitions

1

5

400%
Increase

Total Women's National
Team Tournament
Participations

1

3

200%
Increase

Women's Football
Department Staff Members

15

23

53%
Increase

Source: Women's Football Report 2023, Saudi Arabian Football Federation

02



INVESTING IN GRASSROOTS



Source: Saudi Arabian Football Federation

BREAKING BARRIERS AND BUILDING FUTURES

Whilst global attention often focuses on Saudi Arabia's elite women's teams, there has been remarkable progress made at both the grassroots and community levels—the essential foundations for long-term success. These efforts are weaving women's football into the fabric of Saudi Arabia's sports culture, paving the way for the next generation of athletes.

Aalia Abdulaziz AlRasheed, Head of Women's Football Department, SAFF, reminisced on when she first played football in school at break time. She had no idea that she needed specialized shoes to play "we started at zero, and today we have a growing ecosystem that includes developing competitive leagues, advancing the Women's National Team, and building relationships with stakeholders to ensure sustained growth and success." The Saudi population is young, therefore, integrating football into daily life requires strong talent development pathways in schools, in the community and at the club level.

The 2022/2023 SAFF Girls' Schools League featured over 48,000 players from 3,660 teams. This number soared to over 70,000 players in the league's second season (a 46% increase year on year), mirroring the rapid rise of women's football both nationally and globally that year.

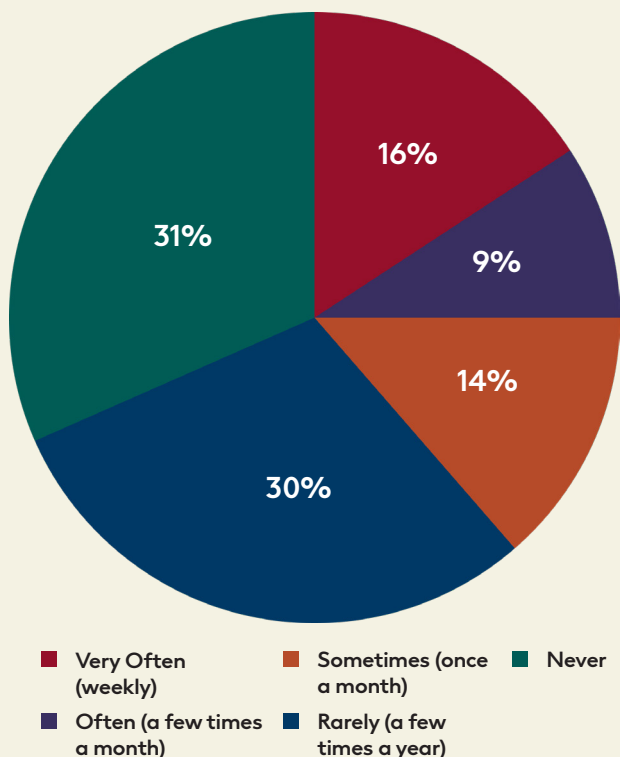
Over the same two years, the number of regional training centers (RTCs) – dedicated facilities and programs for 6-17 year olds outside of the school system – has increased (from one to six). This has enabled the number of players in attendance to skyrocket from 22 to 192 (a 773% increase from 2021 to 2023). Nurturing interest at the grassroots level both in and out of school environments will help towards developing a sustainable pipeline of talented female footballers who will contribute to the future success of both the Clubs and National Teams.

Beyond RTCs, community and grassroots clubs are also on the rise, giving female players of all ages the chance to stay engaged with the sport and continue developing their skills. The establishment of the U17 Women's Tournament highlights the success of the foundations put in place to develop the game from an early age.

"SFA has hosted international events like the Global Goals World Cup, emphasizing the Kingdom's growing role in the global women's football ecosystem and its association with the UN Sustainable Development Goals. [Transitioning] from women's football being a taboo to being accepted was easier when it was associated with a cause such as the UN SDGs."

Shaima AlHusseini
Managing Director, SFA

Female Football Participation in Saudi Arabia



Source: Women's Football Survey, NEOM in partnership with the AFC, 2024

As the largest country in the Middle East, spanning 2.15 million square kilometers, Saudi Arabia's sheer size presents logistical challenges for sports development. This includes efforts to increase the number of dedicated women's facilities as well as making sport (and therefore football) both affordable and accessible.

Initiatives such as The Quality of Life Program and the Ministry of Education have played a pivotal role in increasing the number of sports halls in girls' schools across the Kingdom from 170 to 560 - a vital step forward - over just a few years. "I think the most important thing we can do for any female athlete, or any female interested in doing sport, is giving them the [option] to do things in their own time and in their own pace", said AlHusseini, Managing Director, SFA.

The success of this initiative, however, will depend on equitable distribution across the Kingdom. As highlighted by the Women's Sports Foundation, rural areas often lack access to adequate playing facilities near homes, which limits women's and girls' participation in football, globally. Ensuring nationwide access to these facilities will be essential for equitable and sustainable growth. As Peter Hutton, SPL board of directors and chair SPL media, noted, efforts to promote women's football must be national in scope and reach to assure equal opportunities. "Progress [seen] in isolated areas isn't enough. Every region, including the more remote ones, must provide opportunities for girls to play football."

THE IMPORTANCE OF ROLE MODELS

Female coaches are especially important in the development of women's football, extending their impact beyond training to build confidence and develop commitment and passion for the game. They not only mentor players on the pitch but stand as powerful role models, in societies where perceptions of women's sports are still evolving.

As Aalia Abdulaziz AlRasheed, Head of Women's Football Department, SAFF, shared, "When we started, I expected more pushback from families, but the numbers proved us wrong. On occasion, we might get one player whose family has concerns around balancing playing sports with schoolwork. Getting that right balance between football and schoolwork has always been a priority for us, because we understand that sport is about more than just playing the game—it's about building character for the future. We always ensure parents

that schoolwork will never be compromised. For example, for the U20 and U17 training camps, we always allocate a specific time for studies. Once I explain this to families, they're all in, 100%."

Female Saudi coaches, such as Dona Rajab (the first Saudi woman to earn an AFC A-coaching license), are enablers and trailblazers in equal measure. They are front and center of this transformation, inspiring female players, opening doors and ensuring the sport is accessible to all.

Football is more than just a sport - it's a powerful tool for developing character, teaching resilience and preparing young people for life's challenges. When families recognize these benefits, they fully support their daughters' participation, knowing that the lessons learned on the pitch will guide them in all aspects of life. Peter Hutton, SPL board of directors and chair SPL media, added, "Having female role models who can communicate effectively in the local context is crucial. These coaches can guide families and players on this journey, helping them see the broader benefits of sports beyond the immediate rewards of participation." By connecting with

families and earning their trust, coaches create deeper appreciation for the game and its values at a household and community level.

The influence of a coach during a player's formative years is profound. That first interaction can shape a player's entire experience and development. Coaching must be tailored to the needs of the players, taking into account their age and level of skill. Andy Jackson, SVP Middle East, FootballCo, candidly identifies the multiplier effect; "For every coach, you can reach 20 to 40 players. That individual can fundamentally impact their lives."

A DRIVING FORCE FOR SOCIAL CHANGE

As Saudi Arabia continues to pursue its Vision 2030 sports objectives, including women's football has emerged as a catalyst for social transformation, promoting healthier lifestyles, encouraging participation and advancing gender equality.

Beyond the game, investing in grassroots football delivers benefits far beyond athletic performance. For many young girls, football is a way to build confidence, leadership skills and a sense of belonging. These life skills are invaluable, empowering young athletes and helping them take on leadership roles across other sectors and in other areas of their lives in the future.

Ahead of the FIFA Women's World Cup 2023, FootballCo released a report which revealed that 84% of Saudi football fans were interested in following the tournament. And while there is still work to be done, the rising visibility of female athletes and teams is developing a growing sense of national pride.

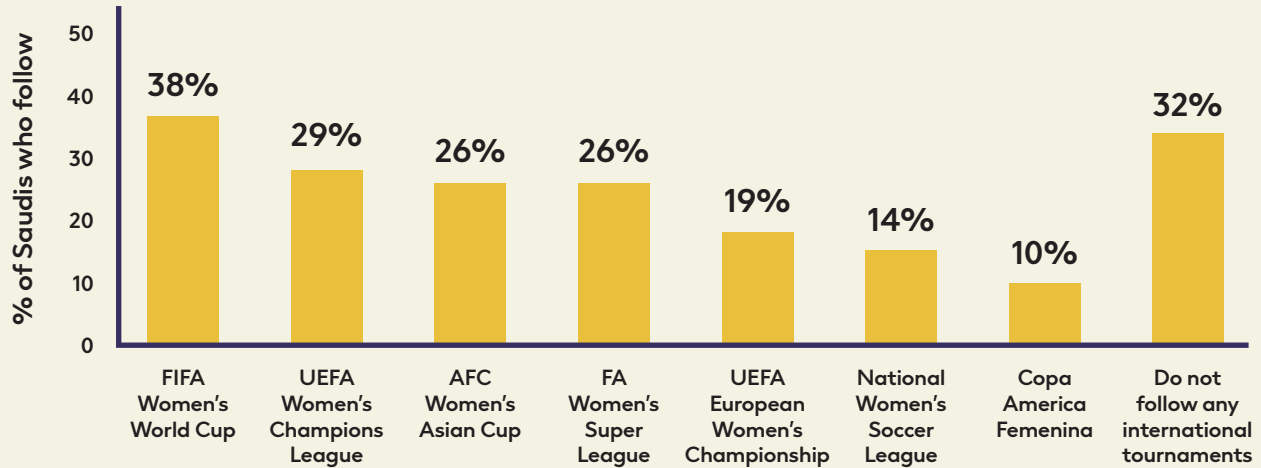
By tapping into national pride and creating narratives that show the importance of inclusivity, Saudi Arabia can inspire even greater support for women's football. As Andy Jackson, SVP Middle East, FootballCo, adds, "One of the best things for the Saudi Women's National Team would be to qualify for competitions and win [more] games. [Success] will draw attention and build support, driven by national pride."

"It has nothing to do with your socio-economic background, or your income, or education. It proves that being physically active gives you better mental health and enhances happiness in your life."

Shaima AlHusseini
Managing Director, SFA

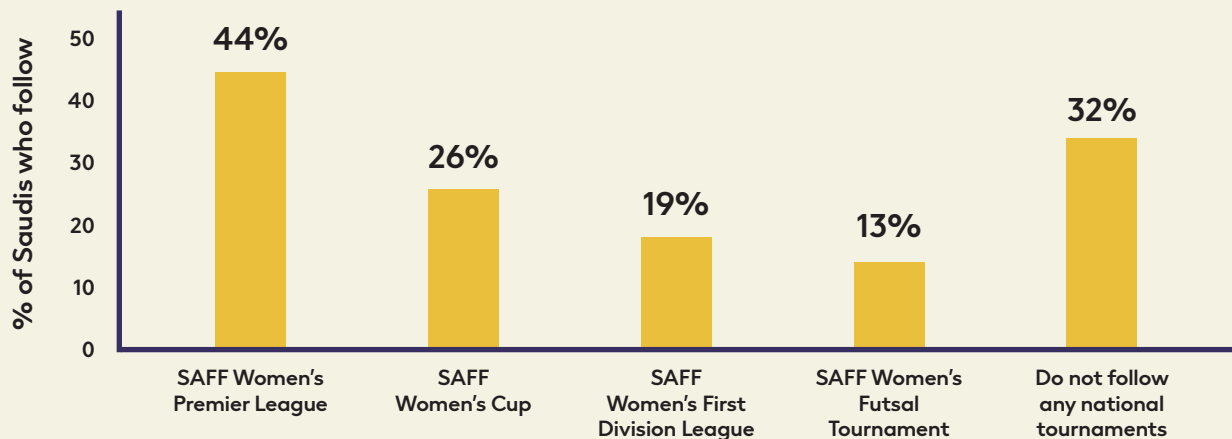
Saudi Arabian Fandom: Women's Football Leagues and Competitions

International



Source: Women's Football Survey, NEOM in partnership with the AFC, 2024

National



Source: Women's Football Survey, NEOM in partnership with the AFC, 2024

Opportunities

- Building partnerships with governing bodies and other nations could foster collaborative international peer coaching programs tailored to the specific needs of Saudi women.
- Showcasing prominent athletes and role models both on and off the pitch can inspire increased participation and demonstrate the benefits of prioritizing well-being and active lifestyles.
- Programs that promote sustainable athlete development, supporting young girls from school age onward, can help encourage girls to continue their sporting journey during their teenage years.

03



PROFESSIONALIZATION OF THE ELITE WOMEN'S GAME



Source: Saudi Arabian Football Federation

INVESTING IN THE NEXT GENERATION OF STARS

Talent development lies at the heart of any sport's success, and Saudi Arabia is building pathways to ensure women's football achieves a similar trajectory of growth. Over the last few years significant progress has been made, and establishing structured pathways for identifying and developing female talent remains a priority.

Al Ittihad Club in Jeddah and NEOM Sports Club are amongst those leading the way, with a defined development system that includes shared pitches with the men's teams, ensuring young female players receive the same access to high-quality training. While investment in young female players has increased, further financial and infrastructure investment is essential to ensure long-term success. This includes developing youth academies for girls thereby closing a critical gap in the talent identification process.

SAFF has already accredited 33 private academies and two clubs, in addition to the existing government and commercial academies and clubs eligible to participate in SAFF's official competitions, bringing the total number of accredited clubs and academies to 103. Government-funded academies like the Regional Training Centers (RTC) program in Riyadh are making huge strides in beginning to close this developmental gap, however, there is a continued need for fully integrated talent pathways to help young girls progress from grassroots to professional football.

Dr. Mezna AlMarzooqi, Director General of the Leaders Development Institute, Ministry of Sport of Saudi Arabia, reflects on the significance of this: "Saudi Arabia is building a great system - a top-down approach. It's a unique opportunity

to build something from scratch, not just for the Kingdom, but as a benchmark for others. They're building it for their nation, but also for the world."

As in many other markets who are investing in professionalization of the women's game, youth academies are the cornerstone of creating a continuous stream of talent. Without adequate infrastructure, many young girls face limited opportunities to hone their skills, leaving a significant gap in the talent pool and thus miss potential opportunities in producing the future stars of the sport.

Investment in these areas has already begun as SAFF's focus grows with the development of building competitive leagues, regional training centers (in Riyadh, Jeddah, Dammam, Madinah and Makkah) and youth tournaments. These initiatives are starting to create a formal structure for women's football, providing young players with opportunities to develop their skills and expanding opportunities for women's football across the Kingdom.

Connie Heng, Head of Media Rights, AFC, notes that there is an established pipeline in Saudi Arabia, creating a clear pathway for girls to become professional athletes that will have a positive trickledown effect for commercial and broadcast opportunities in the future.

Key competitions such as the domestic leagues (SAFF Women's Premier League, SAFF Women's First Division League and SAFF Women's Second Division League) and the SAFF Women's Cup are vital platforms for emerging talent, while SAFF U17 Women's Tournament specifically targets younger players. This competition, featuring 18 teams across five groups, marks an important step in early talent identification and development, giving young players structured opportunities to enhance their skills.

Helping to fuel this growth is the Women's Clubs Development Fund Program which has risen to SAR 60 million (USD\$16M) for the 2024-25 season – a SAR 10 million (USD\$2.6M) increase year on year.

This sizeable commitment to developing women's football talent in Saudi Arabia is comparable to that seen by women's football powerhouses around the globe, such as the £30 million (USD\$38M) joint investment by the UK's Department of Culture, Media and Sport and The FA into The Lionesses Futures Fund following their

recent success at the UEFA Women's EURO 2022 and the FIFA Women's World Cup 2023, and the recent commitment of AUS\$ 15 million (USD\$9.6M) from the Australian government towards hosting the upcoming AFC Women's Asian Cup 2026, following the economic success of the same World Cup tournament in 2023.

The approach mirrors that seen in the development of men's football globally, to build strong club teams by supporting development of national talent and attracting international players to promote awareness and growth of the women's game on a global scale.

This blend of developing local talent alongside attracting international experience aims to establish a strong foundation for the women's game in Saudi Arabia, with players from the Olympics and the World Cup sharing their expertise to inspire and mentor local athletes. By learning from some of the best in the world, local athletes will not only develop faster but also contribute towards a stronger, more competitive environment that can drive long-term success.

LEVELLING THE LITERAL PLAYING FIELD

Access to localized world-class facilities for women's football remains a significant hurdle in most markets, particularly for second tier clubs, such as those in the Saudi Women's First Division. Clubs with an affiliated men's team, such as Al Ittihad and Al Shabab, have made strides by sharing their playing facilities with their women's teams, offering natural grass surfaces, state-of-the-art gyms and stadium access to all. In contrast, teams like Al Nassr have invested in training facilities dedicated to their women's team and the needs of female players, but are at a natural disadvantage as they are currently located in Khobar, over 400km from where they play their matches in Riyadh.

This disparity in facility access between clubs is seen worldwide, across both men's and women's football, and remains a defining factor in on-field success. Kyriakos Dourekas, Sports Director, NEOM Sports Club, adds to this by highlighting the importance of long-term development,

noting that providing the best facilities must be combined with academy systems and creating pathways for women as a priority. This includes scouting and developing local talent while ensuring highly qualified coaches are available before identifying future players. By educating local coaches, the foundations continue to be laid for sustainable growth in women's football.



Source: Saudi Arabian Football Federation

THE PROMISING PATH TO PROFESSIONALIZATION



Source: Saudi Arabian Football Federation

In just three years, Saudi women's football has achieved remarkable milestones with the formation of two elite leagues and more than 1,000 elite players registered with SAFF. The National Senior Women's Team earned its FIFA ranking in 2023 and won its first trophy at SAFF Women's International Friendly Tournament in the same year. According to SAFF, the number of professional female players has surged by 195% and the number of women's football clubs has grown by 56% since 2021.

Historically, many female players have balanced professional football with other careers due to limited financial opportunities. However, the increasing commercialization of women's football is changing this dynamic.

As players transition to full-time professional careers, it's crucial to provide comprehensive support systems, including financial security, mental health resources and career development programs. Many players become public figures with increased responsibilities and expectations overnight, thus making mentorship from experienced international players and staff even more important to guide young athletes through this transition.

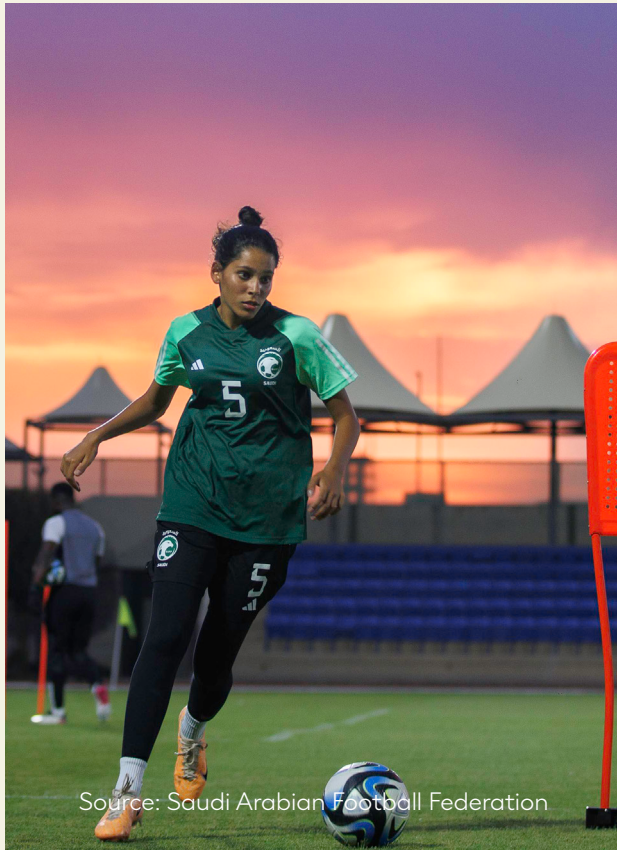
Newly professionalized women's teams worldwide face the challenge of competing with the success of their male counterparts, despite receiving far fewer resources with which to do so.

SAFF demonstrates its commitment to gender parity by standardizing the resources provided to both the Men's and Women's National Teams. Both receive an equal daily allowance and quality of accommodation whilst representing their country, as well as accessing the same training pitches and equipment.

"There's a lot that can be done with the National Team players to create stories that inspire young players to take up the sport."

Peter Hutton

SPL board of directors and chair SPL media



Source: Saudi Arabian Football Federation

Standout figures like Princess Reem Abdullah, President of Al Shabab Women's Club, fulfil a pivotal role in inspiring a new generation of female athletes. Add to that Farah Jefry serves as a brand ambassador to adidas and is now one of the most popular Saudi footballers on social media.

As women's football evolves, so too must the skills of those coaching. Through their Future Falcons Program, SAFF are investing in the continuous development of Saudi technical staff and players through regular certified training, mentorship

"What has been achieved in this region is amazing. In Germany, it took us 33 years to get a professional [women's football] league. Here they've done it in three years."

Monika Staab

Former Women's Department Technical Director, SAFF

programs and international exposure to ensure the longevity of the sport within the Kingdom. As part of this program, shortly after Ahod Alamari was appointed to Assistant Coach for Saudi Arabia's Women's National Teams, she spent a six-week training period with Sevilla FC Women's team in Spain, gaining invaluable experience from one of Liga F's most prestigious and well-respected clubs.

Influential figures such as these have rich and inspiring stories to tell, however, this cannot distract from the immense pressures that come with the incredible and unique opportunity of being the 'first'.

Their stories resonate locally and globally, highlighting the progress and development of Saudi Arabia as a country on a global football stage. The importance of not only creating heroines but also providing them with the fundamental tools to share their stories cannot be overstated. These stories, and their legacy, will live on throughout time and inspire future generations.

Opportunities

- Leveraging international players as mentors and providing targeted support systems can help alleviate the pressure faced by newly professionalized players, providing them with the tools that they need to balance their public profiles and private lives.
- Investing in dedicated female-specific facilities will create a more inclusive environment and set the benchmarks for other markets. However, accessibility and localization are important to reduce the burden, time and cost of travel.
- Addressing the investment gap at club-level between men's and women's football is crucial for ensuring the long-term growth and sustainability of women's football in Saudi Arabia.
- Joint efforts to increase the number of academies and development programs for both genders could develop stronger and more sustainable growth in the talent pool.

04





PRODUCTIZATION AND COMMERCIALIZATION

DRIVING CHANGE THROUGH INVESTMENT



Source: Saudi Arabian Football Federation

There's no doubting the astronomical global growth of women's sports over recent years, in particular that of football and the opportunities that are quickly arising as a result.

As the sport gains momentum, both multinational and local companies are increasingly recognizing its potential, not only as an investment and a source of revenue, but as a platform for driving social change and championing empowerment and inclusivity.

Nadim Nassar, Commercial and Marketing Advisor, SAFF, highlights this, stating: "The reality is, there is tremendous untapped commercial potential when it comes to women's football in Saudi Arabia. As women's football continues to grow, its potential to attract lucrative sponsorships will increase significantly. This growth is further fueled by the fact that women's football is a well-run and thriving ecosystem. We continue receiving serious intent from both multinational and local brands alike, who are interested in playing an impactful part in supporting the growth of the game and collaborating with women's football through our respective various competitions and National Teams."

This insight points to a future where women's football could surpass men's football in commercial value on a national level, driven by its alignment with broader social goals like gender equality and empowerment. As supported by Shaima AlHusseini, Managing Director, SFA, "we are not just breaking barriers with women playing football, we are also supporting UN Global Sustainable Development Goals."

In 2023, the international confectionary brand Lay's, a wholly owned subsidiary of PepsiCo, partnered

with the SAFF Women's Premier League, seeing it renamed to the SAFF Women's Premier League Powered by Lay's. Lay's have since been named as Official Sponsor of FIFA World Cup 2026 and FIFA Women's World Cup 2027, demonstrating their commitment to equitable investments in football even further.

Another powerhouse supporter of global women's football, Unilever's Rexona, was announced as the Official Partner of the Saudi Arabia Women's National Team in October 2024.

Transformational deals of this scale and nature mark an important step forward for the women's football landscape, highlighting the growing interest from international brands looking to align themselves with the transformative power of women's football in Saudi Arabia.

A recent Deloitte report projects that women's sports will surpass \$1 billion in global revenue for the first time in 2024. Although global broadcast revenues in women's football are somewhat smaller than in the men's game, they are growing steadily driven by new audiences, increased visibility and investment in the production product. Brands who want to target these new audiences will see women's football as a unique, more affordable and less crowded platform for direct brand amplification.

Historically, limited broadcast coverage has hindered global viewership figures, as highlighted by the Visa Women's Football Fan Survey, 2024. However, increased television exposure on mainstream and free-to-air channels has demonstrated the significant demand for women's football. This growing interest has encouraged early investments from broadcasters like DAZN and SSC in Saudi Arabia, which has positively impacted viewership and the overall growth of the sport.

In a recent Women's Sport Trust (WST) report, Tammy Parlour CEO and Co-Founder said: "Fans have more information and choice than ever before and women's sport has to compete with wider entertainment properties for visibility and cultural relevance." She continues "While the success of a country, team or player plays a huge role in keeping fans engaged, the industry needs to continue to drive interest through greater prominence, cross promotion and adapting marketing and activation strategies to appeal to the unique nature of the different fan behaviors within women's sport." Whether they are fans of both the men's and women's game or unique to the women's football ecosystem, it is these unique behaviors that need to be understood and catered for to help continue this growth well into the future.

As a result of this growth in fandom, commercial interest and broadcast reach across the global women's sport landscape, we are witnessing a surge in the valuation of women's sports teams and organizations, with the Women's National Basketball Association (WNBA) and National Women's Soccer League (NWSL) in the US leading the way. Women's football is proving an attractive investment proposition globally, as demonstrated by public commitments by Mercury 13, an investment group focused on acquiring women's football clubs in Europe and Latin America, and high net worth individuals such as Michelle Kang, owner of three football clubs and investor in the health and performance of elite female athletes. It's only a matter of time before further investment flows into markets where women's sport is developing at pace.

Women's football properties in Saudi Arabia are currently an untapped asset, primed for commercial investment, expertise and economies of scale. When combined with the top-down investment already received from national and regional governmental bodies, this could re-write traditional commercial models.

Given the lack of historical or legacy structures in women's football in Saudi Arabia, there's a rare opportunity to build a new, innovative commercial model to monopolize on this growing interest.

By taking this approach, the Kingdom has the potential to lead the way in tackling the limiting actions that other nations face with outdated frameworks and processes, meanwhile developing a commercial model that suits this unique developing market.

Bai Lili, Head of Women's Football, AFC, says women's football in Asia will attract more attention, investment and interest as standards improve. International women's events in the region are key to building awareness and participation. The launch of the AFC Women's Champions League is a turning point, boosting the game's profile by showcasing talent and competitiveness. It provides a platform for role models to inspire young girls and highlights a professional path in the sport.

The league can reshape women's football in Asia, driving growth, recognition and opportunity, as well as promoting equality. Jessie Dai, Head of Competitions Strategy Department, AFC, agrees with Lili, seeing the AFC Women's Champions League as full of potential but acknowledges the challenges of launching a new tournament.

Following pilot events, this first competition unites top teams, delivering promising matches that suggest a strong future. Involving big clubs and linking to tournaments like the FIFA Club World Cup could further professionalize the game.

"The growth of our game in recent years has generated significant interest from players, fans and entities both inside the game and from outside of football altogether. There's a desire to be a part of women's football, not only for the love of the game but also for what our game's growth represents. It's clear that supporting and providing women with opportunities to excel in sport and business are priorities, in line with Saudi Vision 2030... and we're seeing that interest first hand."

Aalia Abdulaziz AlRasheed

Head of Women's Football, Saudi Arabian Football Federation (SAFF)



Source: Saudi Arabian Football Federation

THE UNTAPPED POTENTIAL OF FEMALE FOOTBALL FANS

Women's sports fans are younger, more educated and more affluent than men's sports fans, as documented by The New Economy of Sports report by Wasserman's The Collective in partnership with RBC (Royal Bank of Canada). They are also 54% more aware of sponsors and 45% more willing to consider or purchase from sponsor brands. However, 36% of female fans feel that brands are not doing enough to support women's football clubs. This purchasing power and unprecedented consumer engagement is driving interest in women's sport as a valuable and efficient sponsorship opportunity worldwide.

As stated in a 2024 study on female fandom, 60% of female fans in the Middle East only started to engage with sports in the last five years. 43% of those women are avid fans of football and 22% of them participate. Saudi Arabia is no exception to this rule.

A recent women's football survey, conducted by NEOM in partnership with the AFC, revealed that 48% of female football fans in Saudi Arabia watch women's football regularly (at least once per month) and 28% participate regularly (at least once per month). This provides an exciting, ever-growing and truly unique opportunity, as well as a first-mover advantage, for those willing to invest.

When considering live attendance, 16% of football fans in Saudi Arabia claim to watch women's football in stadia regularly, according to the same survey conducted by NEOM in partnership with the AFC. A further 46% of survey respondents do not currently attend live matches but are planning to, a number that increases to 61% of fans when considering females only.

When asked what the influences are of live attendance, the most common drivers were fandom of specific teams, affordability of tickets and clear marketing of the fixtures. This reinforces the appetite for live women's football and the opportunity to reach new fans through increased engagement via live and in-person experiences, driving deeper connections with teams and players.

"[We] women love football and are being treated equally, which I really like to see. We need to share football with everyone."

Monika Staab

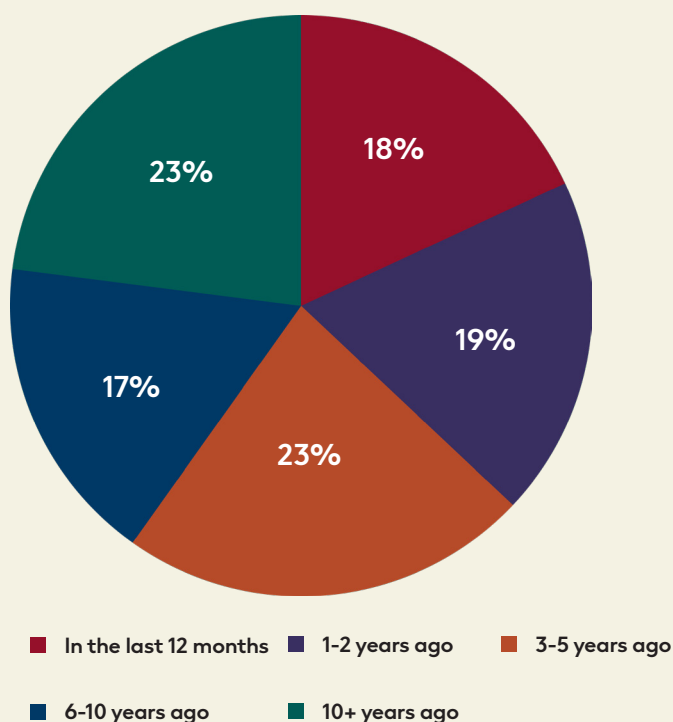
Former Women's Department Technical Director, SAFF



Source: Saudi Arabian Football Federation

Female Sports Fandom in the Middle East

When female respondents first identified as a fan of sports



Source: Her Love of the Game, Wasserman's The Collective, 2024

As with other nations, the effective marketing of live games is somewhat hindered by generally limited sports media coverage within the Middle East, necessitating substantial investment to reach and engage target audiences. Investing in these areas can create a virtuous cycle, leading to increased attendance, fandom, revenue, improved game-day experiences and ultimately further investment and growth.

As key decision makers, women are the driving force behind brand and spending choices within the home. The aforementioned female fandom report by Wasserman states that 63% of female fans in the region would like to see more brands engage in women's sport. Brands that connect with these fans have an opportunity to tap into their increasing purchasing power and loyalty.

It is important to note however that women's football fans cannot be viewed as a uniform group of people, as highlighted in a 2024 Women's Sport Trust Visibility Report. Each fan segment has distinct differences in behaviors - those who follow all football, specific leagues only, the National Teams only and those who currently reject women's football - and each will require a different engagement strategy.

THE POWER OF STORYTELLING

As women's football continues to gain visibility, focus should be put on creating relatable, powerful narratives that attract fans and deepen engagement, ultimately driving commercial value. Inspirational stories of players overcoming challenges can be as compelling as the live matches themselves, especially in the context of women's sports.

According to FootballCo's Indivisa's research in 2023, 43% of women's football fans choose their team based on their favorite players and 41% of them are more interested in content related to inspirational stories linked to individuals more than clubs. This connection between female athletes and fans results in high engagement levels across content posted by female athletes. By sharing these stories through media partnerships, campaigns and player-driven content, brands can create emotional connections with audiences that go beyond traditional sponsorships. Documentaries, such as 'Destined to Play: The Untold Story of Saudi Women's Football' which aired on FIFA+, provide additional opportunities for brands to engage with their target audiences in an emotive yet authentic manner whilst showing up in multiple places whereby fans consume the sport.

A 2024 report by VISA, entitled The Compound Effect in Women's Football, aptly advises that whilst "women footballers are uniquely relatable and powerful as a platform", partnerships with them must "deliver positive impact back to them and the game by: (1) driving visibility and fan

connection to players, (2) using your platform to elevate footballers' voices to solve issues and (3) considering the wider wellbeing of players as their role evolves."

This is reflected in SAFF's approach to the marketing of their women's teams and leagues as well as the success of their recent #SeeUsPlay campaign which was used to launch the third season of the SAFF Women's Premier League. Their campaign showcases and celebrates the skill & performance seen in the nation's top women's league and introduces new stars of Saudi football in an effort to inspire the next generation of girls.

The 2024-25 Season is seeing over 90 matches across 18 weeks, featuring 200 players of more than 20 nationalities playing for 10 teams. This offers a wealth of opportunities to showcase remarkable player-first moments and use their stories to inspire the next generation.

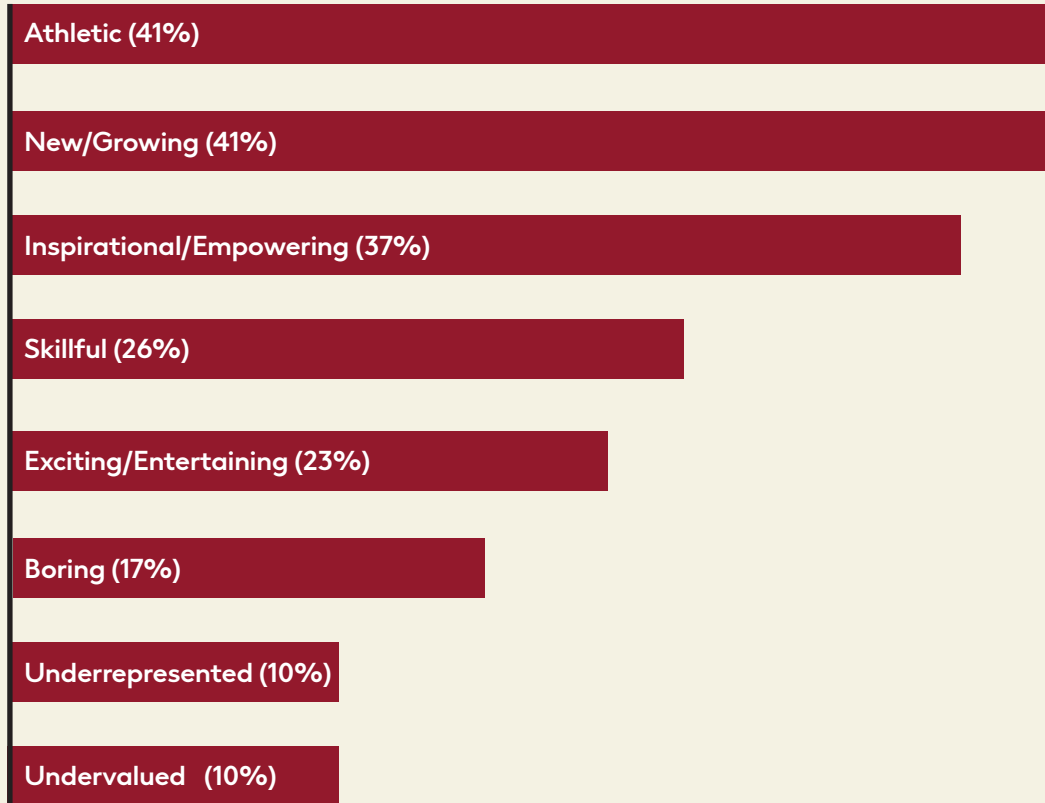
Against the backdrop of driving social change, promoting gender equality and contributing to the goals of Saudi Vision 2030, women's football in Saudi Arabia is a prime opportunity for brands that want to align with the wider positive social impact movement. With early brand involvement from companies like Lay's and Rexona, the stage is set for more multinationals to invest in women's football, driven not just by the desire for financial returns but also by the chance to be part of a larger movement toward social transformation, as part of Saudi Vision 2030.



Source: Saudi Arabian Football Federation

Perception of Women's Football Amongst Football Fans in Saudi Arabia

Percentage of respondents

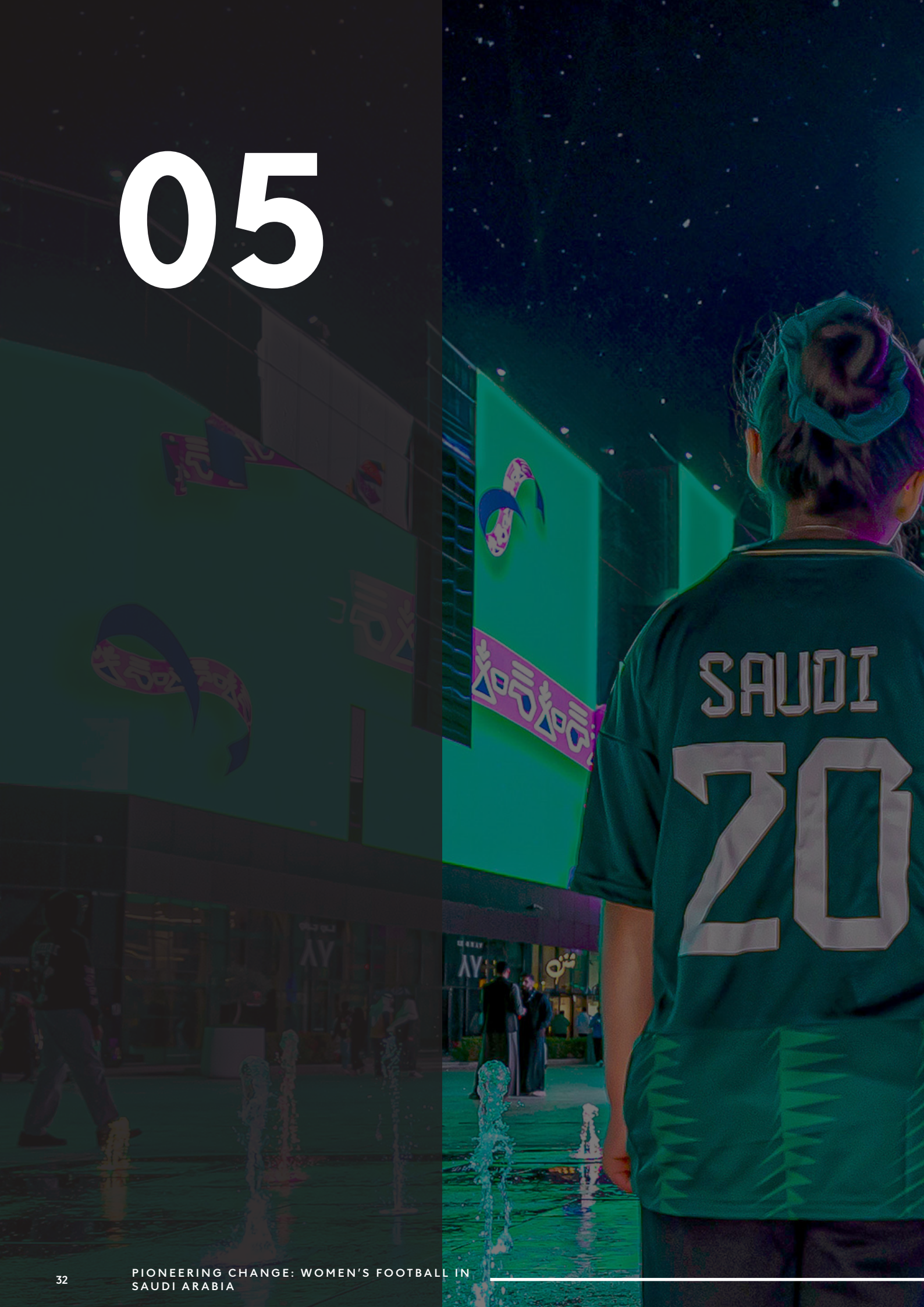


Source: Women's Football Survey, NEOM in partnership with the AFC, 2024

Opportunities

- Women's football (and women's sport more generally) has the opportunity to revitalize Middle Eastern sports culture by leaning into their unique offering of a more inclusive and family-friendly experience, for men and women, avid and casual fans.
- Inspirational player stories and growing social media engagement is accelerating the impact that individuals are having on the growing commercial potential of women's football.
- New fans, male and female, bring real purchasing power and intent, creating additional commercial opportunity for brands ready to invest in this growing audience.

05





BIDDING NATION
SAUDI ARABIA

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**A LOOK TO THE
FUTURE**



Source: Saudi Arabian Football Federation

AN AMBITIOUS VISION FOR WOMEN'S FOOTBALL

Saudi Arabia's significant investment in sports, particularly football, is evident in its successful bids to host major tournaments, including the 2024 WAFF Women's Championship, the 2027 AFC Asian Cup and the 2034 FIFA World Cup.

As Nelson Mandela once said, "Sport has the power to change the world. It has the power to inspire. It has the power to unite people in a way that little else does." Women's football in Saudi Arabia is no different. As the nation's most popular sport, it has the potential to be a powerful catalyst for positive change, not only within the athletic sphere but throughout Saudi society. By inspiring young girls and women, challenging stereotypes and fostering a sense of community, it can create a ripple effect that extends and is felt far beyond the pitch.

Women's football in Saudi Arabia has witnessed remarkable growth in recent years, both on and off the field. Key stakeholders are capitalizing on this momentum and building a strong foundation for the future.

By prioritizing equity from the outset, Saudi Arabia has a unique opportunity to avoid the pitfalls of other nations and create a truly sustainable and inclusive ecosystem for women's football.

The unwavering commitment to the women's game already seen from the top-down, as demonstrated by initiatives such as the AFC Financial Assistance Programme and the SAFF's Women's Football Clubs Development Fund Program, will help drive growth and long-term investment from grassroots through to the elite game. Both these organizations are actively supporting clubs through programs that incentivize specific actions and investments in women's football from a relatively early stage in their commercial and sporting development.

Despite the unavoidable disparity in investment between women's and men's football, it is essential to address this gap proactively to avoid the risk of it widening, which may hinder the long-term growth, as observed in other more developed football markets today.

Nevertheless, women's football in Saudi Arabia is flourishing and ripe for innovative commercial strategies and global partnerships. As Saudi football embarks on its global journey more broadly, it stands poised to set new global standards in women's football through continued investment and strategic collaboration, thus playing its part in building a sustainable and equitable future for all.

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- HRH Princess Nouf bint Khaled Al Saud, Ministry of Sport of Saudi Arabia
- Dr Mezna AlMarzooqi, Director General of the Leaders Development Institute, Ministry of Sport of Saudi Arabia
- Aalia Abdulaziz AlRasheed, Head of Women's Football, Saudi Arabian Football Federation
- Monika Staab, Former Women's Department Technical Director, Saudi Arabian Football Federation
- Nadim Nassar, Commercial and Marketing Advisor, Saudi Arabian Football Federation
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- Bai Lili, Head of Women's Football, Asian Football Confederation
- Connie Heng, Head of Media Rights, Asian Football Confederation
- Jessie Dai, Head of Competitions Strategy Department, Asian Football Confederation
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- Andy Jackson, SVP Middle East, FootballCo
- Jan Paterson, Managing Director, NEOM Sport
- Kyriakos Dourekas, Sports Director, NEOM Sports Club

GLOSSARY

Asian Football Confederation (AFC)

National Women's Soccer League (NWSL)

Saudi Arabian Football Federation (SAFF)

Saudi Pro League (SPL)

Saudi Sports Company (SSC)

Saudi Sports For All Federation (SFA)

West Asian Football Federation (WAFF)

Women's National Basketball Association (WNBA)

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