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Breaking Barriers:

Assessing Women's Sports, Betting and Integrity Challenges

Executive Summary
July 2023



Motivation and background information

Women's sports is increasing in popularity

Sharp growth in economic volume

Expansion of sports betting industry related to women's sports

Research required to understand true potential of the market



Motivation and background information

AIM OF THE STUDY:

- Examining the economic data related to the interest in women's sports
- Understanding the size and characteristics of the women's sports betting market
- Identifying the potential vulnerability of women's sports to match-fixing



Structure and Methodology

Overview of the 3 parts:

1. Analysis of Economic Data

- Outline of historical progression and current state of demand for women's sports
- Focus on basketball, cricket, soccer, tennis, volleyball
- Attendance data, TV-Ratings, prize money, sponsorships

2. Collection of Primary Data

- Exemplary sports betting data from 2017-2022 Basketball, cricket, soccer tennis, and other sports
- **Indicators:** Number of bettors, bets, betting volume
- Gender-specific analyses

3. Literature Review on Integrity in Women's Sports

- **Part 1:** Presentation of 10 case studies: Match-fixing occurrences in women's sports
- **Part 2:** Analysis of academic literature:
 - Identify determinants of corruption & match-fixing
 - Evaluation of empirical evidence and effect size

Part 1: Description of economic data

Key insights:



Unprecedented demand for **basketball, cricket, and soccer** with **record-breaking attendance** and **TV ratings**



Recent trend of forming financially **rewarding partnership** agreements in various sports



Growth of prize money appears to be proportional to the increase in demand for these sports



Across sports there still remains a **deficiency** in the **availability of broadcasting deals** and change is slow



Challenges persist in **acquiring data** on demand indicators for researchers in the field

1.12 billion

Viewership record of the 2019 Women's Soccer World Cup

2023

As of 2023 CVC will invest capital into the WTA via its managed funds, supporting WTA's growth

€16 million

Amount of total prize money for the UEFA Women's Euro

6

Number of matches of the FIBA Women's World Cup shown on ESPN

2014

Earliest year attendance data for the Volleyball World Cup is publicly available

Part 2: Analysis of sports betting data

Key insights on betting on women's sports:

- **Women's soccer is the leading sport in terms of the number of bettors and bets, particularly marked increase since 2020**



approx.

20%

CAGR



Growth for the period 2017-2022

- **The consistent growth across the three betting indicators in the 2017-2022 period indicates an increasing interest and investment from bettors on women's sports**



approx

10%

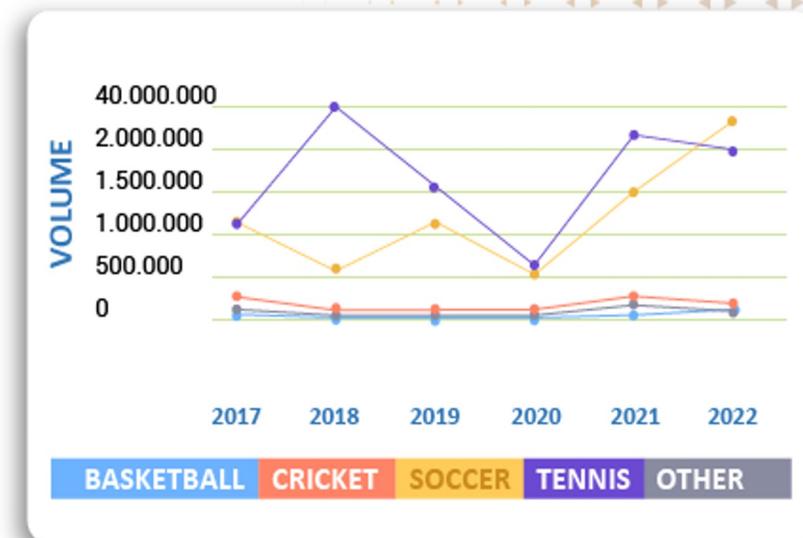
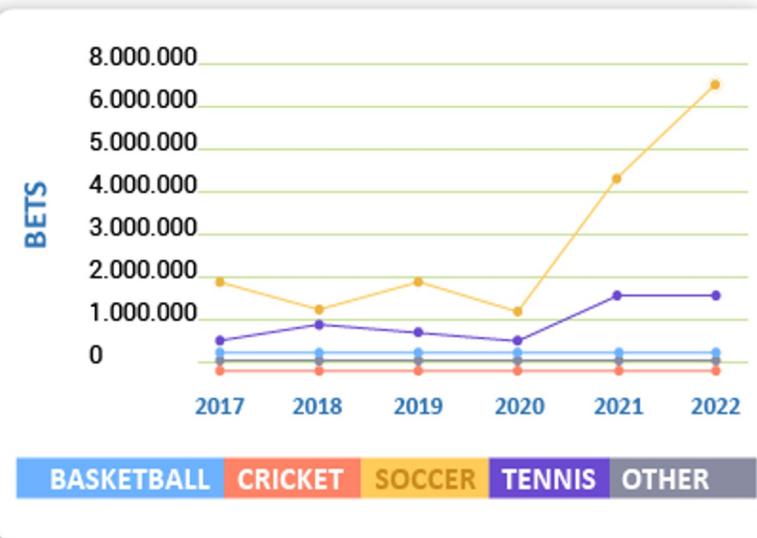
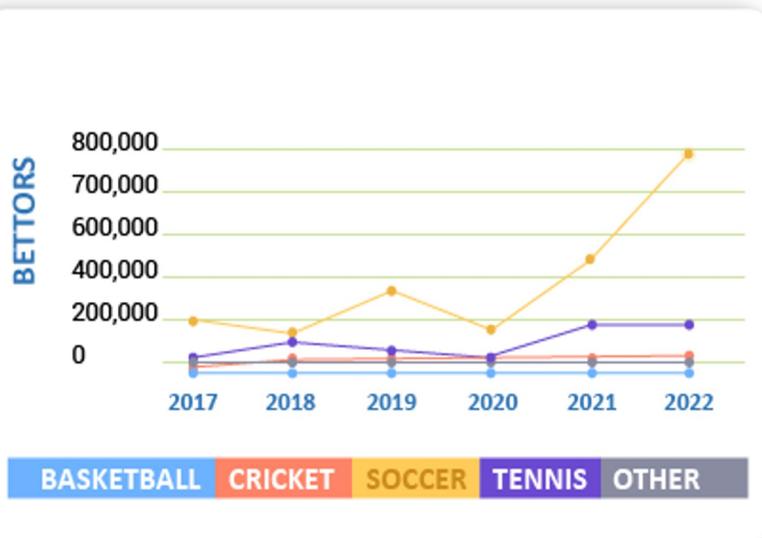
CAGR



Growth in the number of bettors, bets and total volume on women's basketball, cricket, soccer and tennis

Part 2: Analysis of sports betting data

Number of bettors, number of bets, and total volume of bets on women's sports



Part 2: Analysis of sports betting data

Key insights on women and betting trends:

- For women's soccer, basketball, and tennis, the **share of female betting** experienced **significant growth** across all betting indicators in the last 6 years



Growth of the female share in the number of bettors, bets and total volume (2017-2022)

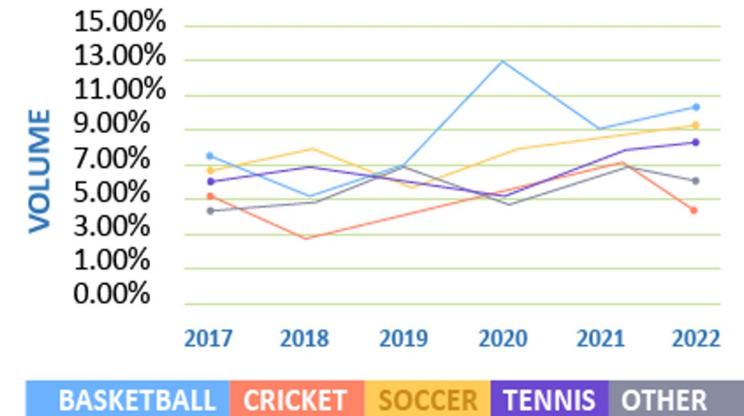
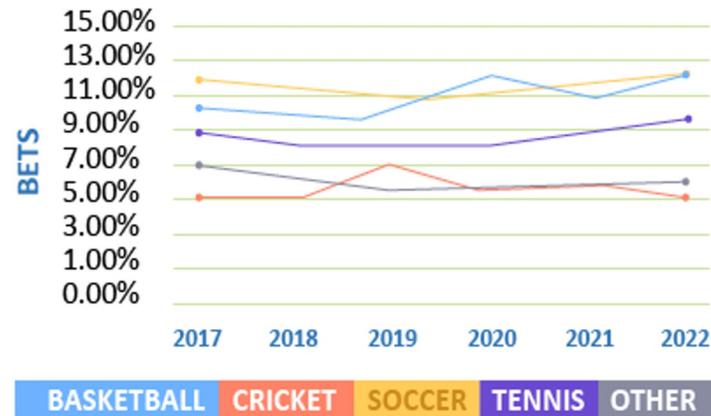
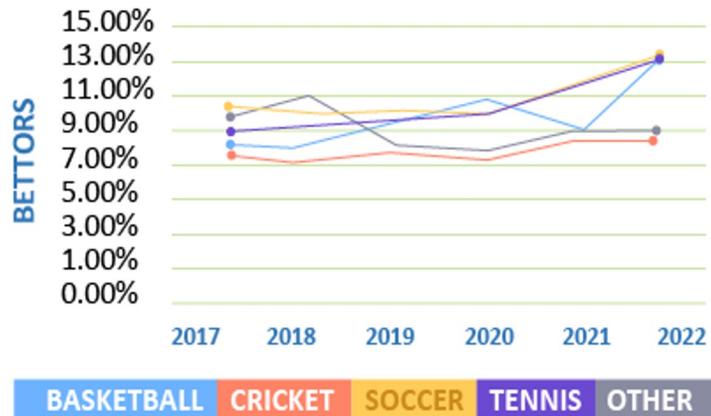
- Despite comparable growth rates for the number of male and female bettors and bets, **the men's betting volume lags**, highlighting potential untapped opportunities



The **total volume of bets on women's sports** has **grown more among women** than men over time (2017-2022)

Part 2: Analysis of sports betting data

Female share for bettors, number of bets, and total volume of bets:



Part 2: Analysis of sports betting data

Key insights on betting alerts and live data:

- The data pertaining to suspicious betting alerts reveals **no discernible trend for women's sports**, reflecting a potentially stable and reassuring environment in this domain
- The **growth of live data in women's sports** may serve as a precursor, signalling the **vast growth potential awaiting the women's sports betting market**



The number of IBIA's alerts for women's sports during the past 4 years is significantly lower than for men's sports, which can be attributed to the considerably larger market for men's sports



62%   

Growth of the data coverage by Stats Perform of women's sporting events (football, basketball, cricket) between 2019- 2020

Part 3: Review of case studies and literature on integrity in women's sports

Key highlights of the match-fixing cases review

- Match-fixing can occur in both betting-related and non-betting-related contexts
- While women's tennis is deemed more vulnerable to corruption, other women's sports are also susceptible to manipulation
- Financial stakes are substantially lower compared to men's sports, and imposed sanctions tend to be relatively mild
- Publicly available and confirmed match-fixing incidents in women's sports are significantly lower than in men's sports, creating the perception that women's sports may be less susceptible.



However, insufficient data to draw clear conclusions



Part 3: Review of case studies and literature on integrity in women's sports

Key highlights of the academic literature review:

- Younger, better educated females are less inclined to participate in corruption.
- Academic evidence of surveys, field and laboratory experiments:
- The study of factors influencing match-fixing in women's sports remains limited.



Determinants of Match-fixing	Effect*
Economic (e.g. Wages; Bribe size)	+ + +
Institutional factors (e.g. Regulations)	+ +
Social norms & values (e.g. Cultural)	+ + +

*Studies are evaluated at three levels (+; ++; +++)

Recommendations for the fight against match-fixing in women's sport

1

Strengthen monitoring and regulations

Given the rapid growth in women's sports and sports betting, it is crucial to implement comprehensive monitoring and regulatory systems to prevent match-fixing. Enhanced cooperation between sports governing bodies, betting operators, and law enforcement agencies can help mitigate risks.

2

Improve public perception of women's sports integrity

Stakeholders should actively challenge the misconception that women's sports are less susceptible to match-fixing. By raising awareness of the risks and promoting women's sports' integrity, they can help foster a more vigilant and responsible sports community.

Recommendations for the fight against match-fixing in women's sport

3

Develop targeted education and awareness programs

Targeted programs for athletes, coaches, and support staff can raise early awareness about the risks of corruption and match-fixing and emphasize social norms such as the importance of ethical conduct, fair play, and respect for the opponent. By focusing on factors specific to women's sports, these programs can help create a culture of integrity.

4

Promote fair wages and economic transparency

Ensuring equitable pay and economic transparency in women's sports can reduce the risk of corruption and match-fixing.

5

Improve data availability and research

Encourage transparency and data sharing among stakeholders and support research initiatives to better understand match-fixing dynamics in women's sports.