

Premier League

Economic and social impact

January 2019



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Introduction

This report explores the economic and social contribution of the Premier League and its Clubs to the UK. It is an independent EY study, which has been commissioned by the Premier League. The report focuses largely on the 2016/17 season and includes evidence of how the League's impacts have evolved over time.

The Premier League is the elite professional league for English and Welsh football, consisting of 20 Clubs and 1,500 registered professional players.

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Executive summary

Premier League football generates a wide range of economic and social returns

Since its inception in the 1992/93 season, the Premier League and its Clubs (the 'League') have achieved considerable success, establishing a strong global reputation for high quality and entertaining football. This is evidenced by the Premier League consistently achieving the highest stadium utilisation figures of any major European League, along with substantial growth in broadcasting revenue.

2007/08

the last time the winning club retained the title the following season

520,000

season ticket holders

96.5% stadium utilisation – the highest rate in Europe

43m people watched the Premier League on TV in the UK

One billion homes globally had access to Premier League coverage



Economic benefits

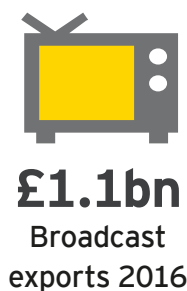
The Premier League and its Clubs generate impacts in a variety of ways. This ranges from the people they employ to the community work they undertake, as well as the tourism activity they encourage and platforms they provide to towns, cities and business to engage with the rest of the world.



From local to global

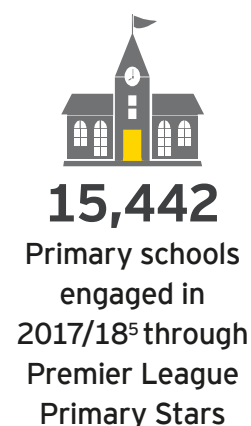
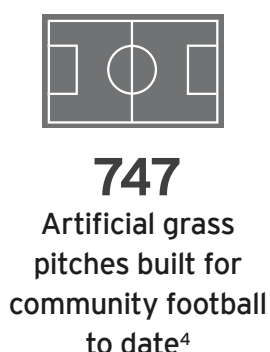
The Premier League is a globally recognised brand, built upon high quality football. The League's global success feeds into its capacity to generate economic and social returns within the UK.

The strength of the Premier League broadcast offering, which is based on a committed global fanbase, is key to its success. In turn, the Premier League has become an active member of the global community, presenting political and commercial opportunities for the UK.



Supporting the wider game

Premier League support for the wider game extends across the football pyramid and communities in England and Wales, including all levels of the EFL and into non-League and community football. Parachute or solidarity payments (linked to Premier League broadcast revenues) go to all 72 EFL clubs, as well as further funding for their Academies. The Premier League supports the Football Foundation to build community football facilities and the Football Stadia Improvement Fund which issues grants to clubs down to lower levels of the FA National League System.



Community initiatives

The Premier League delivers and supports a wide range of community programmes that aim to promote improvements in schools and communities through sport and education.

Funding for these programmes has risen substantially as the League has realised greater success. This has provided life-changing opportunities to thousands of individuals. In 2016/17 alone, over 500,000 young people took part in Premier League funded programmes. Community football facilities delivered via the Football Foundation also saw over one million people participate regularly.

¹ Unless otherwise stated, all statistics on both pages relate to 2016/17.

² Gross Value Added (GVA) is a measure of economic activity which can be viewed as the incremental contribution to Gross Domestic Product (GDP). It therefore provides a useful measure for understanding the economic contribution made by particular industries, or businesses, such as the Premier League and its Clubs.

³ Elite Player Performance Programme.

⁴ Delivered via the Football Foundation – figures correct to Oct 2018.

⁵ Compared to 20,925 primary schools across the UK in 2016/17, according to the British Education Suppliers Association: <https://www.besa.org.uk/key-uk-education-statistics/>



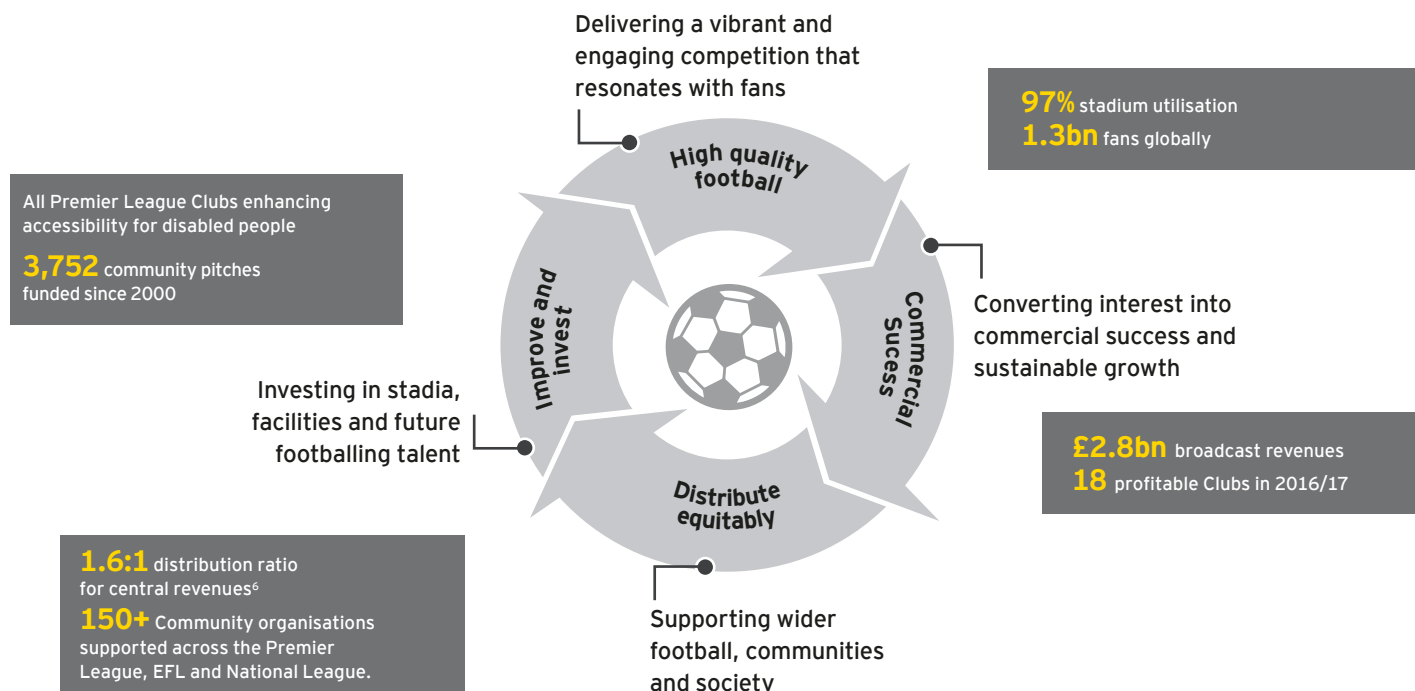
The growth of the Premier League

Football is of considerable social, cultural and economic significance to the UK – football has often been seen as a ‘universal language’ which has the ability to inspire and engage communities. During the football season, hundreds of thousands of fans travel the country to follow their team whilst millions more watch live games and highlights on television and, increasingly, online.

At the pinnacle of the English football pyramid, the activities of the Premier League affect all aspects of the game; from supporting the ability of Premier League teams to compete with the best in Europe, to encouraging participation in school and community football.

Premier League success is part of a cycle of growth

Delivering high quality football is crucial to the success of the League and is at the core of its activities. This drives engagement with fans, and therefore supports commercial performance. In turn, this allows the League to invest in the future of the game to ensure competitive and engaging football is delivered to fans for years to come. The cycle of growth (below) summarises this process using data examples from this report.

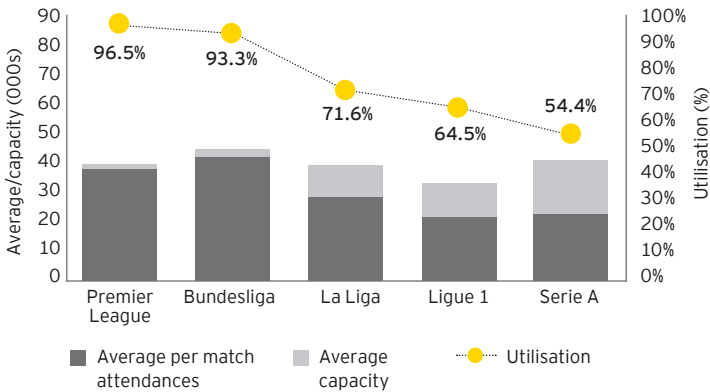


⁶ The highest-earning Club received 1.6 times the amount received by the lowest-earning Club in 2016/17. In 2018 this ratio was fixed at 1.8:1. Compared to a ratio of 3.7:1 in La Liga and 3.2:1 in the Bundesliga.

Full stadiums, engaged fans and world-class talent

Since its inception in the 1992/93 season, the Premier League has achieved considerable success and is now widely regarded as the most popular football league in the world.

Stadium utilisation of major European leagues, 2016/17



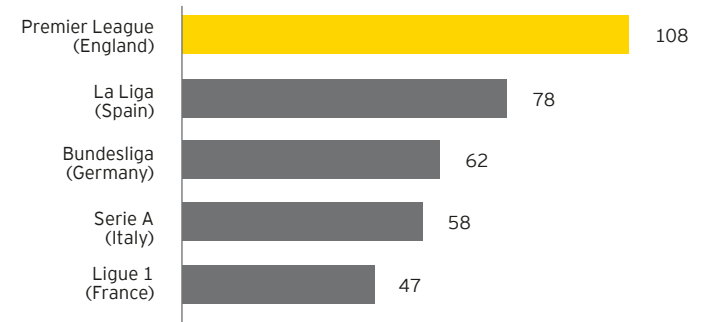
Source: Premier League

The League regularly has more players represented in international tournaments than any other league; for example, at the 2018 FIFA World Cup, 108 of the 736 players selected by the competing national teams were Premier League players, 38% more than from La Liga. The four nations in the semi-finals of the competition were all European and 39 of the 91 players were from Premier League Clubs (including 23 from the England team).

During the 25 seasons since it was formed, 49 different clubs have participated in the Premier League, with six different Clubs being crowned champions. Premier League stadiums have the highest utilisation rates of the major European football leagues (expressed as the percentage sold of the overall available tickets).

In 2016/17, Premier League grounds operated at close to full capacity with a new record average utilisation across 380 matches of 96.5%, compared to 93.3% in the Bundesliga (from 306 matches).

Domestic football leagues with the most players at the 2018 FIFA World Cup



Source: Various

Premier League ticketing

Premier League Clubs have taken a range of steps to reward loyal fans and promote the match day experience to fans of all ages. This ensures that Clubs have an engaged, sustainable fan base who generate the match day atmosphere.

Clubs make tickets available at different price points and offer a variety of discounts, including loyalty reward schemes and age-based concessions. In addition, many Clubs opt to freeze their ticket prices from season to season. The system of discounts means that more than half of attending supporters pay less than the full listed price.

In 2018/19, the average (mean) price paid for a ticket across all Premier League Clubs is £31 per match (including season tickets calculated at a per match price); a quarter of fans pay £20 or less. For junior ticket holders, the average cost is £12 per match. For away fans specifically, the League has placed a £30 cap on away ticket prices in recognition of their loyalty; a three-season agreement in place since 2016/17. The average away ticket price is £28 in 2018/19.

Source: Premier League, EY analysis



800,000
Total seating capacity



520,000
Season tickets



26%
Of tickets purchased at £20 or less



£31
Average ticket price



£12
Average junior ticket price



The Premier League's economic contribution

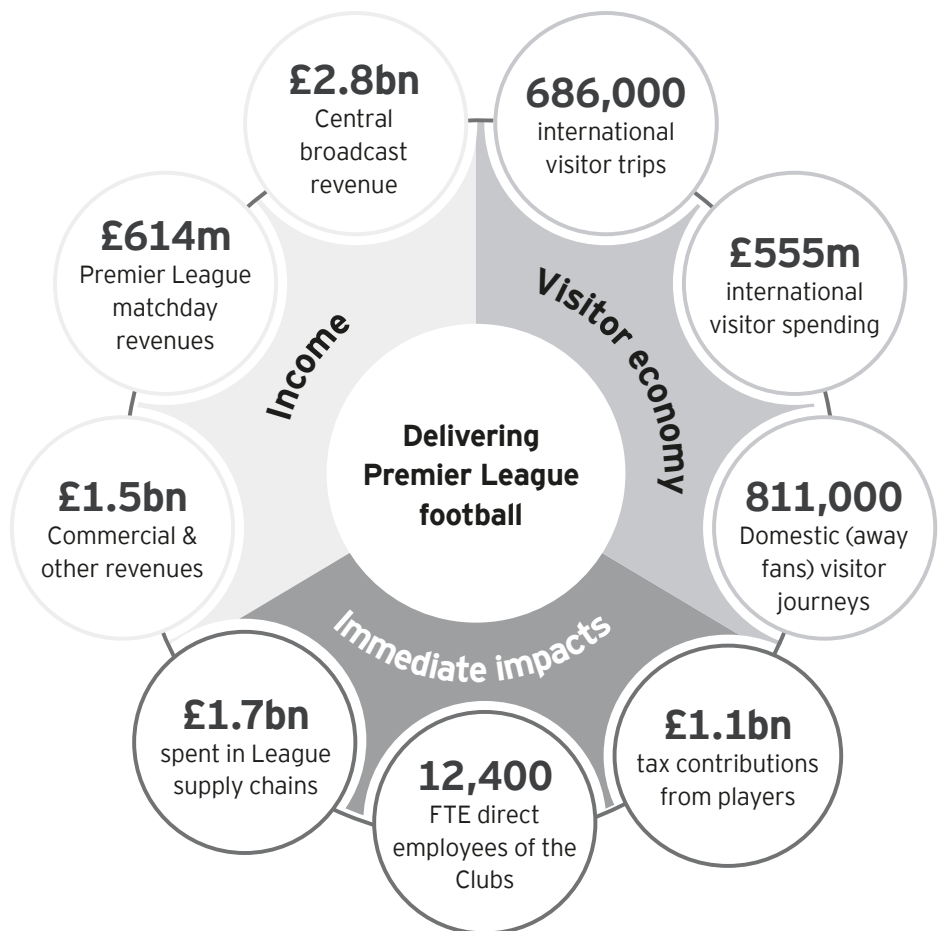
The popularity of Premier League football drives substantial economic activity across the UK. This is supported by the commercial relationships and supply chains that underpin the League, the visitor economy it sustains and the fiscal contributions it makes. This section explores this contribution, including the economic returns generated at the national and regional level.

Drivers of impact⁷

Club and Premier League operations contribute to economic activity across the UK.

The chart opposite highlights some of the key statistics which feed into the economic impact analysis.

These interactions between the League and the wider economy drive considerable economic activity. These can be captured through direct impacts, which take place within the League itself (such as Club employment), indirect impacts, through the League's supply chains, and induced impacts, which are driven by the employment income supported by the League and its supply chain.



Clubs have made continued investment in their stadium facilities. This ranges from entirely new facilities to upgrades – including new stands, refurbishments and improved accessibility and facilities for disabled people. Stadium development represents a substantial programme of private-sector capital investment.

⁷ EY figures: based on analysis of Premier League information, UK national accounts data and various other sources.

£3.3 billion generated in tax revenues

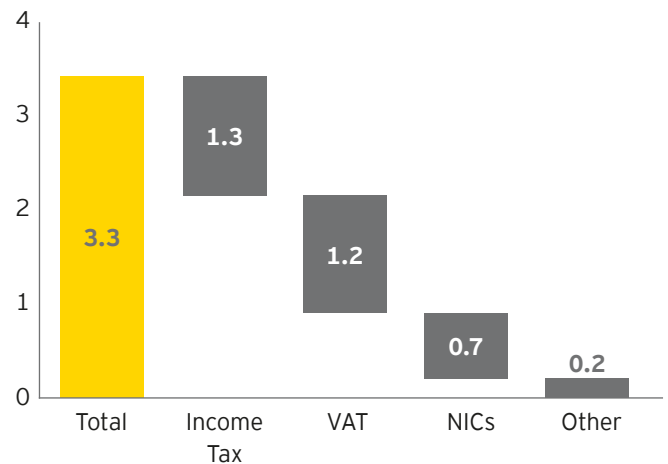
The economic activity stimulated by the League resulted in an estimated £3.3 billion total contribution to the Exchequer in 2016/17. This represents a 50% increase since 2013/14. Of the total contribution, £2.1 billion was a direct impact of the League itself, with the remainder raised through activity supported indirectly by the League.

This £3.3 billion is a substantial contribution to the UK's public finances. Based on current estimates of hiring and recruitment costs, this is equivalent to the annual salaries of over 86,000 police constables or would fund the training of more than 42,000 new NHS nurses.^{8,9}

The diagram opposite illustrates how this tax contribution is broken down between major tax revenue sources. Players themselves accounted for a sizeable proportion of the League's tax contribution. In total, players are estimated to support a tax contribution of £1.1 billion, or 34% of the 2016/17 total; the vast majority of this contribution was made through players' income-related taxes, which consist of income tax and national insurance contributions.¹⁰

Net VAT payments make up the next largest tax revenue channel, supported to a large extent by the VAT-applicable revenues of Clubs, including that applied to broadcast rights agreements.

Total fiscal impact of the League, 2016/17, £ billions

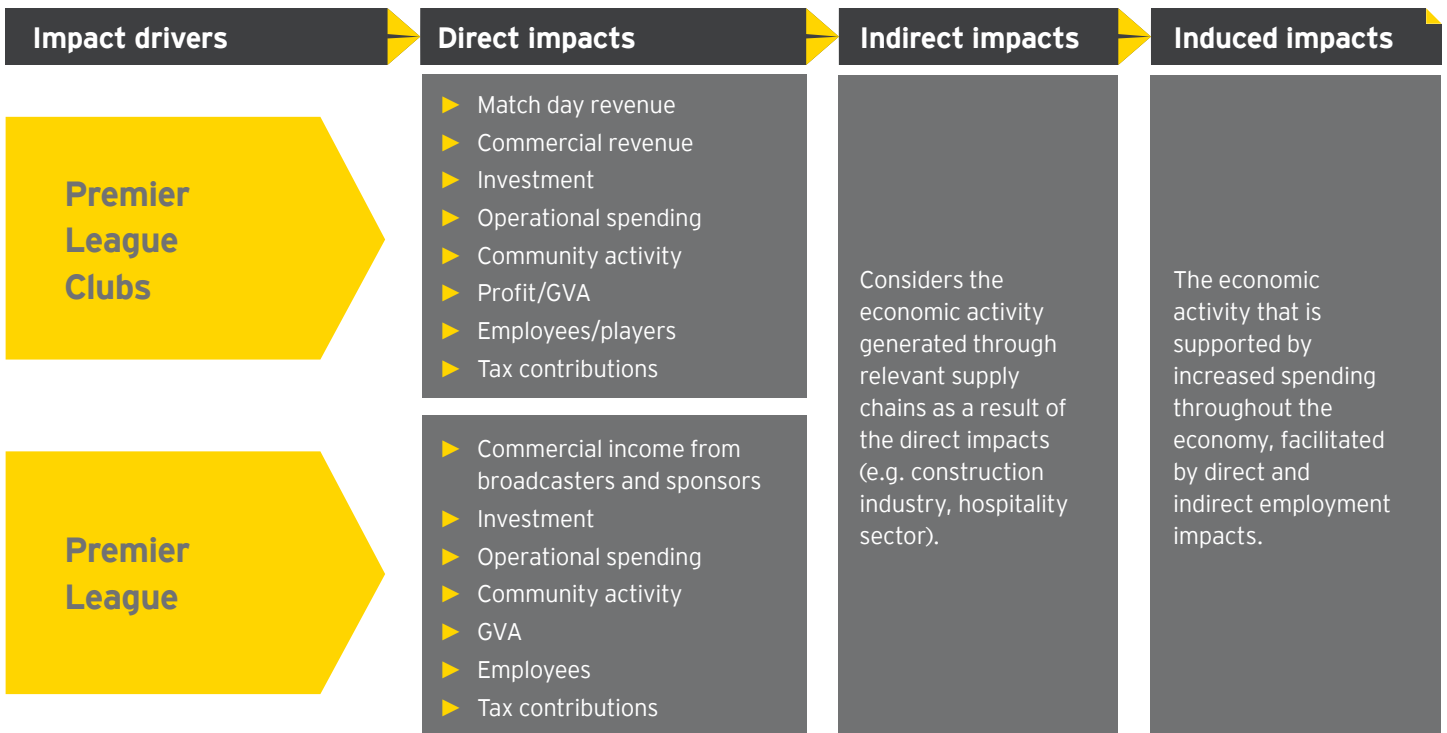


Numbers do not sum due to rounding
Source: EY analysis



Premier League players paid
£1.1 billion
in taxes in 2016/17

Overview of impact measurement



⁸ Experienced Police constable salary of £38,533 taken from Prospects: <https://www.prospects.ac.uk/job-profiles/police-officer>.

⁹ Nursing training costs of £78,000 per nurse taken from Department of Health (2016). Managing the supply of NHS clinical staff in England.

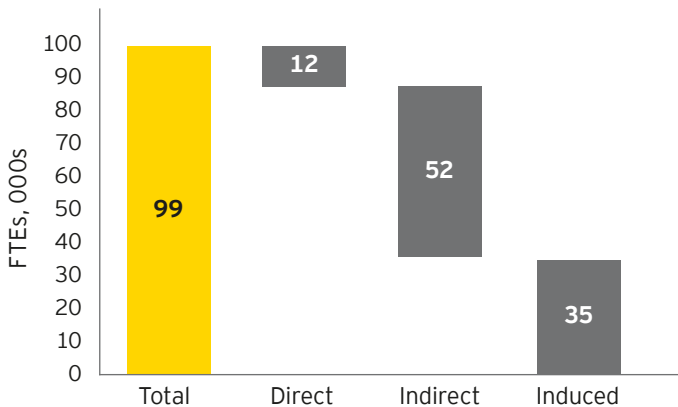
¹⁰ Player tax contributions include PAYE income tax and national insurance contributions and VAT, but exclude those paid on other earnings, such as image rights. These calculations are based on average player salaries.

£7.6 billion contribution to UK GDP

The League's contribution to UK Gross Domestic Product (GDP) can be estimated through the Gross Value Added (GVA) it generates.¹¹ In 2016/17 this reached £7.6 billion, with the majority (£7.2 billion) resulting from Clubs' operations. This represents a 50% increase since 2013/14.¹² The chart opposite illustrates how this GVA contribution is generated through direct, indirect and induced impacts.

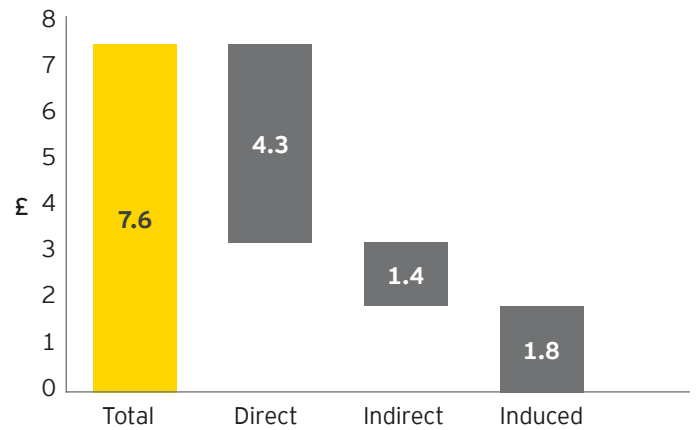
In 2016/17, the League directly contributed a total of £4.3 billion in GVA to the UK economy, representing 57% of the total GVA impact. A further £3.2 billion was generated via indirect (£1.4 billion) and induced (£1.8 billion) impacts. A substantial level of economic activity is therefore supported through the supply chains of the League, as other businesses contribute to, and share in the success of Premier League football.

Total employment impact of the League, 2016/17, FTE jobs



Source: EY analysis

Total GVA impact of the League, 2016/17, £ billions



Numbers do not sum due to rounding
Source: EY analysis

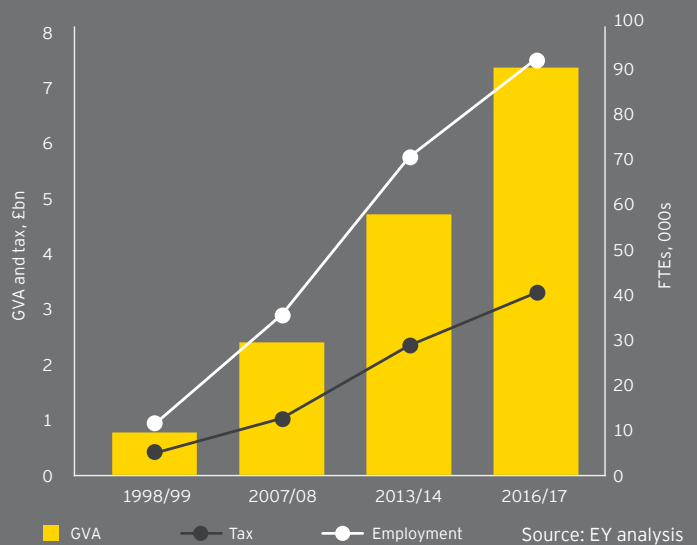
Close to 100,000 UK jobs supported

The activity of the League supported almost 100,000 full-time equivalent (FTE) jobs across the UK in 2016/17. This represents a 30% increase since 2013/14. The majority of these jobs were underpinned by the League's substantial supply chains, which accounted for 87,000 jobs both through indirect (52,000) and induced (35,000) impacts. Of the total employment impact, 90,300 was supported by Clubs, with the remainder supported by the Premier League (8,800).

Clubs' economic impact has risen 800% since 1998/99¹³

The Premier League's positive financial performance has led to an increased contribution from the League to the UK economy. The GVA impact from the Clubs has grown from £0.7 billion in 1998/99, to £7.2 billion by 2016/17 – an increase of over 800% in cash terms, at a compound average annual growth rate of 13%.

The increase in revenues has resulted in significant growth in employment supported by the Clubs (excluding the central activities of the Premier League itself). This is illustrated by the number of FTEs rising from 11,300 in 1998/99 to almost 90,000 in 2016/17, a rise of 700%. Meanwhile the total tax contribution underpinned by the Clubs has increased by £2.8 billion over the same period, rising by 700% in cash terms.

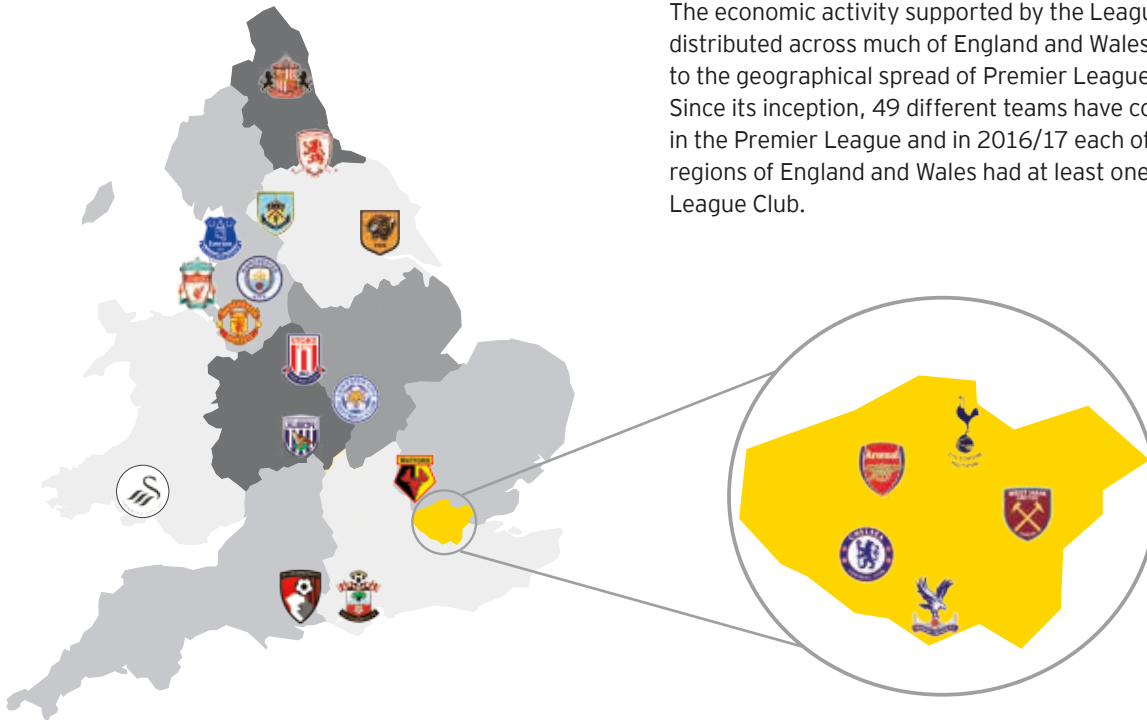


¹¹ Gross Value Added (GVA) is a measure of economic activity which can be viewed as the incremental contribution to Gross Domestic Product (GDP). It therefore provides a useful measure for understanding the economic contribution made by particular industries, or businesses, such as the Premier League and its Clubs.

¹² Note that improvements in the understanding of Premier League supply chains has produced revised economic impact estimates for 2013/14. Previously the GVA and employment impacts were estimated at £3.3bn (revised to £4.7bn) and 95,000 (revised to 71,000).

¹³ Changes over time are presented in cash terms. For comparison, ONS data suggest that nominal GDP growth in the UK increased by 98% between 1999 and 2017 and by 11% between 2014 and 2017.

Regional distribution of Premier League Clubs, 2016/17



Substantial local contributions

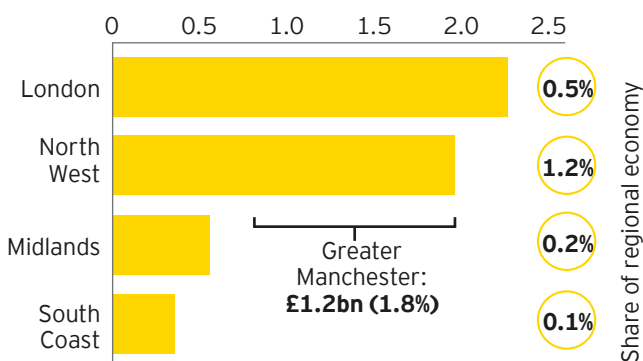
The economic activity supported by the League is distributed across much of England and Wales, due to the geographical spread of Premier League Clubs. Since its inception, 49 different teams have competed in the Premier League and in 2016/17 each of the major regions of England and Wales had at least one Premier League Club.

The greatest impact is felt within London, where a total GVA impact of £2.3 billion and an employment impact of 27,000 FTEs were underpinned by the activities of the Premier League and the five London Clubs (Arsenal, Chelsea, Crystal Palace, Tottenham Hotspur and West Ham United).

The next largest impact was generated in the North West (Burnley, Everton, Liverpool, Manchester City and Manchester United),

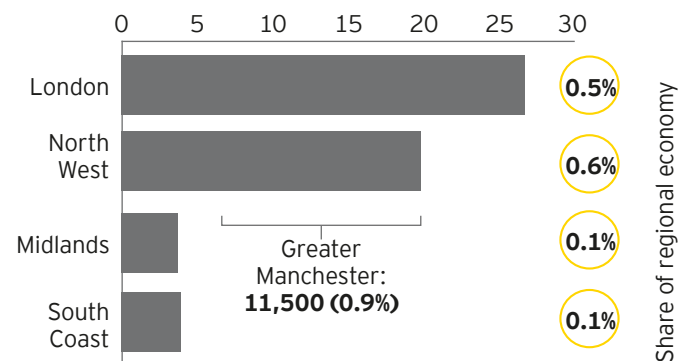
with £2.0 billion GVA and 20,000 FTEs. A large proportion of the impact in the North West is felt in Greater Manchester (Manchester City and Manchester United), which accounted for £1.2 billion in GVA and employment of 11,500 FTEs. The Midlands (Leicester City, Stoke City and West Bromwich Albion) and the South Coast (Bournemouth and Southampton) generated GVA of £0.6 billion and £0.4 billion respectively.

GVA contribution of Premier League football, selected regions, £ billions, 2016/17



Source: EY analysis

Employment impact of Premier League football, selected regions, FTE thousands, 2016/17



Source: EY analysis

“The Manchester Clubs are one of, if not our most significant brand ambassadors and therefore a vital element of city promotion as we look to create positive perceptions of Manchester as a place to live, study, visit and invest.”





Tim Newns, CEO, MIDAS (Manchester's inward investment agency)



From local to global

The Premier League is a globally recognised brand, built upon high quality football. The League's success at the global level enables it to generate local economic and social returns within the UK.

The strength of the Premier League's broadcast proposition is key to its global success, which is reinforced by effective engagement with fans across the world. In turn, the Premier League has become an active member of the global community, presenting political and economic opportunities for the UK.

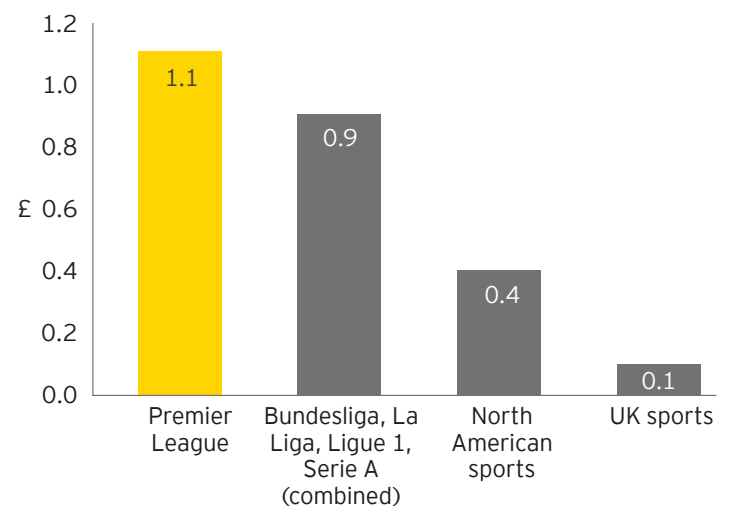
 <p>£1.1bn Value of broadcast rights exports 2016/17</p>	 <p>Ranked first in the Populus British Icon Index 2017/18¹⁴</p>
 <p>108 of the 736 players at the 2018 FIFA World Cup from the Premier League</p>	 <p>£1.5bn commercial partnerships</p>

£1.1 billion in annual broadcast exports

The value of a sports competition's broadcast rights outside of its domestic market provides the most tangible measure of its international appeal. It reflects the attractiveness of the competition to broadcasters, based on the number and profile of viewers who are interested in the competition, their willingness to pay to watch it, and the value that advertisers, broadcast sponsors and partners place on being associated with it.

In 2016/17, Premier League international revenues were higher than the combined total of the other four major European leagues, despite a 160% increase for La Liga in its latest broadcast cycle. Furthermore, based on available evidence, in 2016/2017 Premier League overseas rights were estimated to be substantially higher than all major North American sports leagues – in total, they were more than twice the combined value of the broadcast exports of the NBA, NFL, MLB and NHL (excluding Canada). In the UK, Premier League broadcast exports are around 10 times the equivalent combined total for cricket, rugby and tennis.

Overseas rights of major sports leagues, 2016/17, £ billions



Source: Premier League analysis estimates

The Premier League's broadcasting exports represent a substantial proportion of the UK's total TV exports. In 2016/17 alone, the League accounted for broadcast exports of £1.1 billion, surpassing the £0.9 billion achieved in exports of other UK television productions in 2016/17, as measured by PACT (more than the BBC, ITV, Channel 4, Channel 5, Sky and the independent sector combined). To support such broadcasting exports, the Premier League invests in Premier League Productions (PLP) to distribute and create content for international rights holders (see case study on the following page).

¹⁴ Populus research in 2018 covering 20 markets saw the Premier League top their British Icon Index, with Rolls Royce second and Jaguar Land Rover third.

Enabling success

Premier League Productions

Premier League Productions (PLP) is a partnership between the Premier League and IMG (a global sports, events and talent management company). Based in West London's Stockley Park, PLP's primary objective is to distribute match content to the Premier League's 120 international broadcasters. It also creates original Premier League TV content.

PLP is home to the largest single football production, distribution and service team in UK broadcasting, employing 242 people. It is also one of the most advanced and highly-connected television hubs in Europe, with IMG having invested £50 million in a technical fit-out of the studios. This facility enables the Premier League to offer a high-quality service to its broadcasters.

The studio distributes all 380 Premier League matches each season globally, using the match footage provided by UK broadcasters Sky Sports, BT Sport and the BBC. It also produces a variety of other programming, including a daily magazine programme and a phone-in show. In total, PLP produces 3,950 hours' or 165 days' worth of unique content each season.

Individual broadcasters are able to tailor the service that they receive, choosing between the 'world feed' (only the match action), commentary and half-time analysis, or alternatively coming to the UK to present from pitch-side.

The PLP broadcasting service allows broadcasters to showcase Premier League football globally by supplying innovative content which is underpinned by a high quality, reliable service. This supports the Premier League's significant overseas broadcast rights earnings and makes a positive contribution to production standards within the sports market.

Intellectual property protection

Online piracy has become increasingly prevalent over time as technology has changed the way in which we live. Increased internet speeds, technological advancements in both hardware and software, and a legal process which finds it difficult to keep up with the speed of the problem, have resulted in the ability to stream illegal audio-visual content in real time with relative ease.

This is not just an issue facing football, but all producers of creative content and owners of intellectual property. In an increasingly globalised economy, companies and individuals trying to protect their original ideas and creations face complex challenges. Overcoming these challenges is a key part of ensuring that the UK, and the rest of the world, has the right incentives in place to reward innovation and entrepreneurial activity.

Illegal Streaming Devices (ISDs) in particular have made piracy easier and the Premier League was responsible for the first successful sentencing of an ISD supplier in 2016. **In 2017, the Premier League was awarded a High Court Blocking Order which requires UK Internet Service Providers to block servers that are hosting illegal streams of its matches. This was the first of its kind in the world. Such precedents are helping creative sectors to better protect their content and ensure creators are rewarded fairly for their work.**

The Premier League has operated its anti-piracy programme since 2006 and has invested in market-leading solutions for detection and verification of infringements. It has adopted a wide-ranging enforcement strategy which has put the League at the forefront of the global fight against piracy.



Engaging with a global fan base

Premier League Clubs have an increasingly international fan base, as technological advancements allow fans around the world to feel closer to Clubs and players than ever before. TV coverage of the League can be viewed in every corner of the world and is now widely available online.

Social media has allowed the Premier League and its Clubs to connect with fans in new ways, with content available in a variety of languages. In 2016/17, 16 Premier League Clubs recorded over one million interactions on Facebook (e.g. likes, comments, shares), compared to only five clubs in LaLiga.

During pre-season, Clubs take the opportunity to tour other countries to engage with their international fans. The Premier League also hosts accessible fan events, including trophy tours, fan parks and pre-season tournaments, to bring the Premier League experience to fans around the world. In 2016/17 clubs visited 18 overseas markets during pre-season tours.

Premier League and Nike

Partnerships between the Premier League and its Clubs and major sports brands generate economic activity both in the UK and overseas. Specialised sports retailers alone employ around 86,000 people in the UK, even before accounting for the marketing activity and supply chain that supports this activity.

Nike's partnership with the Premier League is among the brand's longest running business relationships. Nike has been the Official Ball Supplier to the Premier League since the 2000/01 season and will remain so until at least 2025.

Nike has a strong global presence, turning over \$36 billion in sales, annually. This helps raise the profile of both the Premier League and Nike brands. For example, Nike's official Premier League football can be purchased in each of the 188 countries in which the Premier League is broadcast.

63

nationalities
represented on the
pitch

350m

social media
followers

4m

Fantasy Premier
League managers
outside the UK

188

countries receive
Premier League
football broadcasts

Note: All figures in the graphics above refer to 2016/17.



An active member of the global community

The Premier League undertakes a considerable amount of work internationally, focussing on developing partnerships with football stakeholders and government organisations. This work supports the global development of football and promotes the Premier League as a force for good and a valuable 'soft power' asset. As noted in Portland's Soft Power 30 Report, the UK claimed top spot in large part due to the strength of its cultural institutions, including the Premier League, which it states 'is clearly a boon for British soft power'.

Business and government networks

The Premier League helps facilitate and channel partnerships between the Clubs, private sector organisations and UK and local government organisations. It also supports UK Government initiatives to develop trade and investment opportunities for the UK.



Mutual Cooperation Agreements

Through Mutual Cooperation Agreements, the Premier League shares best practice on its operations and development with foreign leagues and clubs through study visits, conferences and workshops to help improve local standards in all areas of the game. Agreements are in place with organisations such as the Asian Football Confederation, Indian Super League and Chinese Super League.



Premier Skills

Premier Skills is a longstanding programme with the British Council, delivered by Premier League Club coaches, to build coaching and referee expertise. Since its launch in 2007, over 20,000 coaches have been trained in 29 countries, who have in turn reached more than 1.5 million young people.



“The Premier League is more than one of the world's greatest sporting competitions. **It is a hugely successful British brand and export** that helps to promote this country and our values around the globe.”

Department for Digital, Culture, Media and Sport



Supporting the wider game

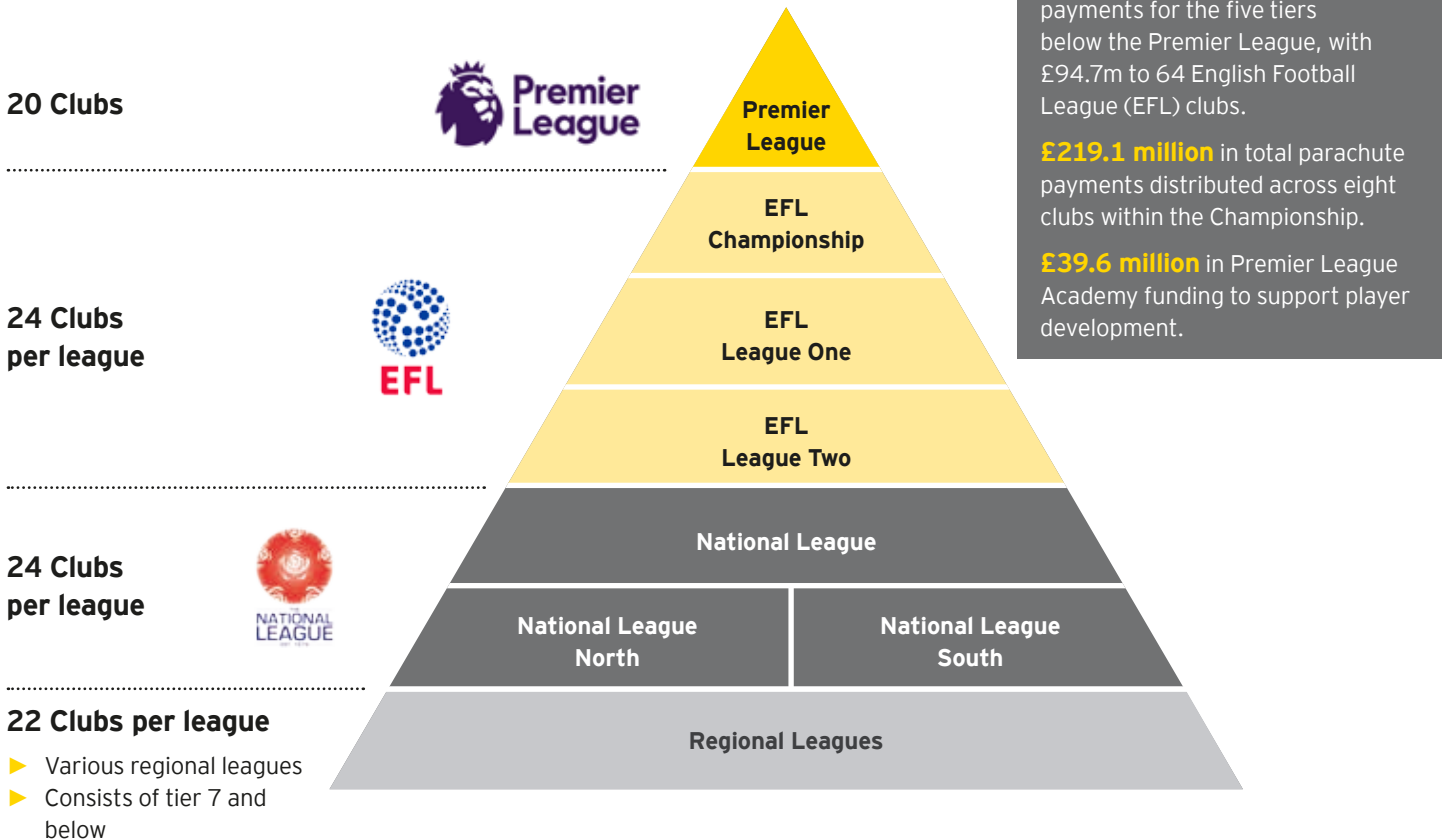
The Premier League aims to promote the continuing development of football by supporting the sport at all levels. This includes a model which ensures that clubs across the football pyramid share in the League's success and are able to invest in talent and infrastructure.

The Premier League's commitment to support the wider game extends across the football pyramid and communities in England and Wales. This includes all levels of the English Football League (EFL), the National League, Regional Leagues and community football. The men's football pyramid (illustrated below) shows the interconnected league system with promotion and relegation between different levels.

Parachute payments or solidarity payments (linked to Premier League broadcast revenues) go to all 72 EFL clubs, plus further funding to support sustainable Academies. The Premier League has funded the Football Foundation to develop community football facilities since 2000. The League is also the sole funder of the Football Stadia Improvement Fund, which issues capital grants to clubs from the EFL down to the lower levels of the FA National League System.

Significant support is also given to fan initiatives/campaign groups and, via the Premier League Charitable Fund, clubs across the Premier League, EFL and National League are supported to deliver programmes in schools and communities.

English Football Pyramid



Investment in player development – delivering home-grown talent

In 2012 the Premier League launched the Elite Player Performance Plan (EPPP), a revamp of elite player development that has seen significant investment from clubs in their Academies.

The main aim of the EPPP is to develop better home-grown players and over the last six years the clubs and the League have invested over £800m to enhance facilities, raise coaching provision and quality and introduce higher standards of education and welfare.

The Premier League is the main contributor of grant funding for Academies at clubs in the Premier League and EFL – which totalled £66.3 million in 2016/17. The League provided £39.6 million of funding from a variety of sources, including through the transfer fee levy.

Increased investment has led to a major increase in the number of full-time coaches working in academies since 2012 (from 250 to around 800 today), with PL support seeing 80 Elite Heads of Coaching employed across the PL and EFL. Age-specialist coaches have also been introduced, with a focus on greater access time for players to play and be coached. An extensive games programme has seen matches double to over 10,000 per season.

An early sign of EPPP success was the England age groups' '2017 Summer of Success'. England became the first nation

in history to win three age group titles in the same year: the under-17 and under-20 FIFA World Cups, and the under-19 UEFA European Championship. English players were voted 'player of the tournament' in all three competitions:

- ▶ Phil Foden at the U-17 World Cup who appeared 10 times for Premier League champions Manchester City during the 2017/18 season
- ▶ Dominic Solanke at the U-20 World Cup who subsequently made 21 Premier League appearances for Liverpool in 2017/18
- ▶ Mason Mount at the U-19 European Championship who scored 14 goals in 39 appearances and was voted player of the season whilst on loan from Chelsea at Dutch club Vitesse in 2017/18

In 2017, a total of 250 players graduated through the professional development phase of the youth academy system. Over 85% of academy graduates went on to be involved in the sport through professional football, semi-professional football, wider trials or scholarships abroad.

The positive results for the younger age England teams were followed up in 2018 with the men's senior team reaching the semi-finals of the FIFA World Cup in Russia.



England winning the FIFA Under-20 World Cup in 2017

Football Stadia Improvement Fund

The Premier League is the sole funder of The Football Stadia Improvement Fund (FSIF), which provides financial support to football clubs' ground improvement projects. With an annual budget of £6.5 million, the FSIF awards capital grants to clubs across England and Wales, from the EFL down to the lower levels of the FA National League System. Examples of projects include the construction of new stands, installation of floodlights, turnstiles, provision for disabled supporters, safety improvements or even relocating to an entirely new ground. In 12 months, over 105 non-league grounds were upgraded with FSIF grants.

Premier League Fans Fund

The Premier League Fans Fund is a commitment from the Premier League to fund projects and organisations which improve the relationship between fans and their clubs, the way football supporters engage with each other and fans' experience of the game.

In addition to a small grants scheme, the Premier League Fans Fund provides funding for the core operational costs of organisations including:

- ▶ **Kick it Out:** football's equality and inclusion organisation. In addition to funding, the Premier League works with the organisation to deliver inclusion and anti-discrimination programmes in professional and community football.
- ▶ **Level Playing Field:** an organisation working to support and advocate for disabled sports fans so that all fans have an equal experience.
- ▶ **Football Supporters' Federation** and **Supporters Direct:** two of football's largest national fan groups. The groups are merging in 2018/19 to form a unified body.



Stonewall case study

The Premier League's partnership with Stonewall aims to improve lesbian, gay, bisexual and transgender (LGBT) inclusion in football.

The partnership covers all elements of football – on and off the pitch – from education for players and Club staff to the Rainbow Laces campaign and work on public policy around hate crime. As part of the Rainbow Laces campaign, two rounds of Premier League matches feature rainbow-coloured captain's armbands, laces, ball plinths, pitch flags, perimeter advertising and handshake boards.

The Premier League has also joined Stonewall's Global Diversity Champions programme, becoming one of 750 organisations that work to improve the lives of the LGBT community in the UK and abroad.

"The Premier League have stepped up and demonstrated how committed they are to helping make football inclusive and welcoming of LGBT people."

Ruth Hunt, Chief Executive of Stonewall



Support for the FA and EFL Cups

Premier League Clubs participate in a number of football tournaments outside of the Premier League. Domestically this includes The FA Cup (currently The Emirates FA Cup) and EFL Cup (currently the Carabao Cup), which generate significant value to all clubs participating (Premier League and non-Premier League alike), including:

- ▶ Extra ticket revenues, divided between home and away clubs
- ▶ Broadcast revenues
- ▶ Prize money based upon progression through the tournament

In both the EFL and FA cups, the home and away teams each receive at least 40% of the net gate receipts which can be substantial revenues for clubs outside of the Premier League.

The broadcast rights values associated with the EFL Cup and The FA Cup have risen substantially over the last decade. The cup competitions are the main draw for broadcasters purchasing the organisations' rights and the participation of Premier League Clubs in the cups is a key factor in this.



Argyle Community Trust Engage 350 participants in PL Girls Football



Plymouth and the Premier League

This case study gives an example of the ways in which lower league clubs across the country and their surrounding communities, benefit from Premier League investment on an annual basis.

In 2016/17 Plymouth Argyle were competing in EFL League 2. The club and its surrounding community received a wide range of support from the Premier League, including solidarity payments' of £430,000.

The Premier League also supported the clubs academy through a grant of £340,000 and the Argyle Community Trust received £250,000 in funding from the Premier League Charitable Fund. The total funding to the club, including to its

Academy and community operations, came to over £1 million in 2016/17.

In addition to this, through the Football Foundation and Premier League Fans Fund (part of the FSIF), the Premier League provided further grants totalling £860,000 to develop facilities and support communities, football clubs and schools in and around Plymouth.

Following Plymouth Argyle's promotion to League 1, funding for the 2017/18 season had increased to £690,000 in solidarity payments and an Academy grant of £380,000 – a combined increase of £300,000.

Source: Premier League



Community initiatives

Charitable and community-focused activities have become a significant part of the Premier League. The League now supports a range of initiatives aimed at improving sports participation, physical and mental health, educational attainment, employment opportunities and community cohesion.

The scale of community provision and support undertaken by the Premier League and Clubs has grown significantly, correlating with the League's broader success. For instance, the number of community staff employed by Premier League Clubs grew from 440 in 2007 to 2,150 in 2016. In addition, the League not only supports the 20 Premier League Clubs, but also all 72 English Football League and 68 National League clubs to deliver community programmes, which gives geographical reach across England and Wales.

Through these initiatives over 500,000 young people participated in Premier League funded projects in 2016/17, of which 38% were female and 26% were BAME. In 2016/17 a new national programme was also launched to help engage disabled participants in sport, with 27,000 individuals taking part to date.



150+ football clubs in England and Wales supported to deliver community programmes
2016/17 engaging over 500,000 participants

Premier League Primary Stars

The Premier League engages with schools across the country to deliver programmes targeted at improving the educational attainment and skills of children and young people.

Officially launched in April 2017, Premier League Primary Stars aims to inspire children to learn, be active and develop important life skills. Within 12 months, the programme had engaged with 15,442 primary schools in England and Wales, exceeding the League's three-year target of 10,000 schools.

Free curriculum-linked teaching resources for PE, PSHE, English and Maths are provided for teachers and use the appeal of the Premier League and its Clubs to engage pupils in the classroom, playground and at home. A range of popular national competitions also form part of the programme. This includes the Primary Stars Football Tournament, which saw 1,600 school teams from across England & Wales take part in 2017/18, and the Writing Stars poetry writing competition, which received 25,000 entries.

The programme also provides free football kit and equipment with £2 million worth of kit and equipment packs awarded to 3,663 schools across England and Wales in 2016/17. Half of these packs went to schools in the 20% most deprived communities in the UK.



15,442
primary schools engaged
2017/18



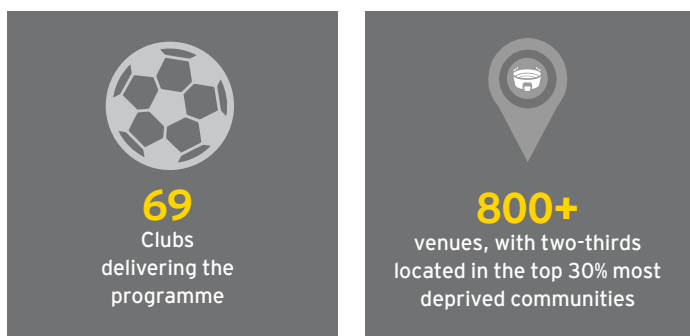
101
Clubs deliver sessions in schools



8,732
free kit and equipment packs given to schools by April 2018

Premier League Kicks

The Premier League supports a range of programmes which encourage young people to play football, and other sports, and develop life skills to set them up for future success. One of the most established is Premier League Kicks, which started in 2006 with four clubs, using the power of football to help hard-to-reach youngsters in some of the most disadvantaged areas of the country. Over ten years of Premier League investment has seen the programme grow to become a pillar of the Premier League's community work, with 69 football clubs supported to deliver the programme in hundreds of venues across the country.



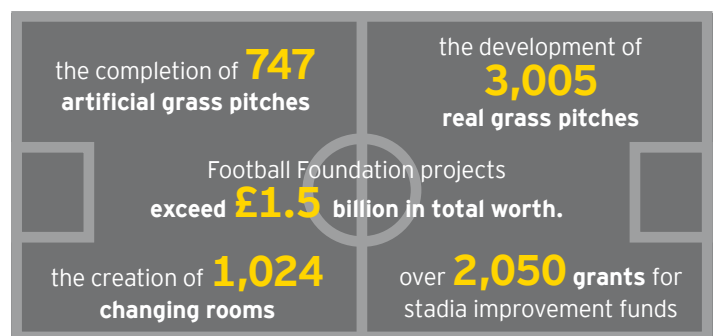
Close to 70,000 young people participate in Premier League Kicks per annum, including just under 12,500 females. To add to this, the Premier League support 88 professional clubs to deliver specific girls football sessions at hundreds more venues – this sees approximately 23,000 more girls take part each year. By engaging hard-to-reach young people in constructive activities, authorities have also reported significant reductions in anti-social behaviour in the areas in which Premier League Kicks is delivered.

Delivering community facilities

In 2000 the Premier League was a founding partner in establishing the Football Foundation. The Premier League is committed to supporting investment in facilities across the football pyramid. As the largest sporting charity in the UK, the Football Foundation aims to improve the grassroots sports infrastructure each year with money provided by its funding partners: the Premier League, The FA and the Government (via Sport England).

Over one million people regularly participate on community football facilities delivered via the Football Foundation.

In 2018, the Football Foundation's activities had resulted in:



The funding for the construction and renovation of facilities is spread widely across England including areas without a Premier League Club. For example, in 2016/17, Lincolnshire received 11 grants worth a combined £406,142 for facilities (partly funded by the Premier League, along with the county and The FA).

Since its formation in 2000, the Football Foundation has seen funding into community football projects across the country, including those summarised above, exceed £1.5 billion in total worth.







Contacts

The Sports Industry Group

The EY Sport Industry Group delivers rigour, measures impact and unlocks potential for our clients across the business of sport.

The UK team consists of more than 30 professional advisers, works with clubs, leagues, governing bodies and major event organisers as well as investors, commercial rights holders, sponsors and start-ups to help them with all their business needs.

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