



GRASPING THE OPPORTUNITY



UEFA European Women's
Championship 2022
Pre-tournament Impact Report

May 2022



IN THIS REPORT

1. Forewords	1
2. Executive Summary	2
3. The Opportunity in Context	4
4. Activating the Tournament	9
5. Measuring Impact	13

DISCLAIMER

This Report was prepared by Ernst & Young LLP (EY) for The FA and using information provided by The FA and UEFA, and other primary and secondary data collected by EY.

Ernst & Young LLP does not accept or assume any responsibility in respect of the Report to any readers of the Report (Third Parties), other than The FA. To the fullest extent permitted by law, Ernst & Young LLP will accept no liability in respect of the Report to any Third Parties. Should any Third Parties choose to rely on the Report, then they do so at their own risk.

Ernst & Young LLP has not been instructed by its client, The FA, to respond to queries or requests for information from any Third Party and Ernst & Young LLP shall not respond to such queries or requests for information. Further Ernst & Young LLP is not instructed by The FA to update the Report for subsequent events or additional work (if any) performed by Ernst & Young LLP. Accordingly, without prejudice to the generality of the foregoing, Ernst & Young LLP accepts no responsibility to any Third Party to update the Report for such matters.

The FA/UEFA accept no responsibility to readers for the contents of the Report.



UEFA FOREWORD

Europe's biggest women's sporting event, UEFA Women's EURO 2022, is almost here! We have been laying the groundwork for some time to ensure that this tournament will not only break records but will be a thrilling spectacle of world-class talent, providing an unmissable fan experience, and truly unleashing the full potential of women's football.

The importance of UEFA Women's EURO 2022 in helping us achieve our bold goals outlined in UEFA's Time for Action women's football strategy (2019-2024) cannot be understated. Together with the English Football Association (The FA), our host cities and partners, we are confident of delivering a first-class tournament where world-class players and teams will attract global attention and media coverage, ultimately leaving a legacy which inspires more women and girls to be involved with our game.

This pre-tournament report proves that the impact won't stop with the final whistle at Wembley. UEFA Women's EURO 2022 has a unique chance to be a catalyst for change locally, nationally, across Europe and beyond. The tournament and our collective ambition will positively impact local economies and tourism, people and communities and the global visibility of the women's game, whilst providing valuable inspiration for the future. Let's make it happen.



Nadine Kessler
UEFA Chief of Women's Football

FA FOREWORD

It's understandably a year late, but our enthusiasm for hosting UEFA Women's EURO 2022 has not been affected. In fact, I believe the delay has energised us even further.

With under a year to go until the Tournament gets underway, this report highlights what we can achieve with a continued focus on capitalising on the opportunities offered by UEFA Women's EURO 2022 and importantly how we can measure our success.

Our aim is twofold: to deliver a record-breaking tournament and to leave a tangible legacy to grow the women's game. By inspiring fans at home and abroad, and by committing to provide playing opportunities to girls in every school and club across the country, I am confident we can deliver on both aims.

Our confidence is built on the passion with which our Host Cities are seizing the opportunity to shine a light on women's and girls' football and build a new generation of players, coaches, referees and fans. In turn, we want to see the amazing work of the Host Cities radiate nationwide as part of our wider strategy to ensure a positive and sustainable future for women's and girls' football in England.



Baroness Sue Campbell DBE
The FA's Director of Women's Football



2

EXECUTIVE SUMMARY

INTRODUCTION

This pre-event impact report focuses on the expected impact of the UEFA European Women's Championship 2022 (UEFA Women's EURO 2022). This report aims to highlight what the tournament can achieve with the continued support and effort of stakeholders from across football and wider society, and the key measures of success. This report will provide a reference point for the measurement of the impact of the tournament in the years ahead.







This report was commissioned by The FA, UEFA and UK Sport, and delivered by EY. The findings presented have been informed by a review of existing plans and budgets for UEFA Women's EURO 2022, evidence of the impacts of comparable events and discussions with Tournament stakeholders.

UEFA Women's EURO 2022 represents a huge opportunity to drive a further step change in women's football in Europe, England and beyond, from grassroots participation through to the highest levels of the professional game. UEFA Women's EURO 2022 brings the Tournament back to England for the first time since 2005, at a time when interest in the game is at an all time high and the nation has had limited opportunities to attend live sport.

There are many channels through which UEFA Women's EURO 2022 can drive positive impacts through football participation, wider society, and the economy. The key impact findings are summarised opposite.

KEY FINDINGS OF THIS REPORT

This report finds that UEFA Women's EURO 2022 is expected to:

-  1 Deliver a safe and engaging event, exceeding a total attendance of 480,000, with a stretch target of **525,000**
-  2 Promote positive perceptions of women's football in the UK, with **51%** of football fans planning to watch matches
-  3 Provide more than **500,000** inclusive opportunities for women and girls to participate and engage with football through focused efforts of the Legacy Groups within each of the Host Cities
-  4 Deliver **£54 million** of economic activity to the Host Cities and support 96,000 international fans to visit
-  5 Promote positive social impacts across the Host Cities, and England more broadly, through growth in participation, the activities of over **5,500** volunteers, and the power of sport to bring communities closer together
-  6 Promote positive perceptions of the Host Cities, England and the UK, as the Tournament ignites engagement with an expected live international broadcast audience of over **250 million** across 195 territories



3

THE OPPORTUNITY IN CONTEXT

TIME FOR ACTION: UEFA WOMEN'S FOOTBALL STRATEGY 2019-2024¹

In 2019, for the first time in its history, UEFA launched a dedicated women's football strategy. This plan commits UEFA to a five-year strategic framework with the aim of supporting, guiding and lifting women's football and the position of women in football across Europe.

"Women's football is the football of today. It is not the football of tomorrow. It is UEFA's duty as European football's governing body to empower the women's game. UEFA will put significant financial investment into the sport, underlining that it dares to aim high and make European football as great as it can be. The actions that we propose and commit to in 2019 will lead to a greater, more professional and more prosperous game by 2024. Time for action."

Aleksander Čeferin (2019)
UEFA president



The UEFA women's football strategy aims to reach the following goals by 2024:

- Double the number of women and girls playing football in UEFA's member associations to 2.5 million
- Change the perceptions of women's football across Europe
- Double the reach and value of UEFA Women's EURO and the UEFA Women's Champions League
- Improve player standards by reaching standard agreements for national team players and putting safeguarding policies in place in all 55 member associations
- Double female representation on all UEFA bodies

1. UEFA

UEFA want to ensure that they invest in important key projects which will help them strive towards achieving the achieving their goals by 2024. UEFA Women's EURO 2022, along with other major initiatives, such as changes to the UEFA Women's Champions League, a new format for international youth competitions, and the introduction of new grassroots programme UEFA Playmakers, is key to the success of the Time for Action strategy.

THE BEST AND BIGGEST EUROPEAN WOMEN'S FOOTBALL EVENT

Together, with The FA, UEFA have set out to host the biggest and best women's football event. UEFA Women's EURO 2022 provides a unique opportunity to be a catalyst for change, and to promote the evolution and prosperity of the women's game.

INCREASED TOURNAMENT STANDARDS

UEFA's collective vision puts the players at the heart of their ambitions for the tournament. Therefore, UEFA believes this will enable high quality operational delivery and the implementation of professional standards on and off the pitch. This environment will provide the players an opportunity to showcase the very best of their talent across the world through inspirational, competitive and engaging matches – setting a new benchmark for European women's sports events.

INCREASING PARTICIPATION

UEFA Women's EURO 2022 will build on the fantastic work of football associations, regions, clubs and other stakeholders that have all committed to developing the women's game and set it on the trajectory that it is currently on. UEFA Women's EURO 2022 will inspire future generations not only in the host country of England, but across Europe and worldwide to play football, thus contributing to the goal of driving participation, to reach 2.5 million female players across Europe.

DOUBLING REACH

With more eyes expected than ever before, UEFA Women's EURO 2022 takes centre stage as the showpiece summer sporting event of 2022. The visibility of women's football will be immense. More fans will have the opportunity to watch in the stadiums and on television and more broadcasters and media outlets will provide an unprecedented platform for European women's football to continue to attract a diverse and growing audience.

DOUBLING VALUE

As the prominence of the women's game increases backed by the work and activation of UEFA's dedicated sponsors and partners, the commercial value of women's football has already broken UEFA's 2019 targets. With increased promotion and visibility to amplify the game coming in 2022 and beyond, the commercial value of women's football is expected to continue to rise even further.

DISTRIBUTING MORE INTO THE GAME

UEFA is providing further financial and sporting incentive to the competition by doubling the prize pot on offer for participating teams and introducing compensation to clubs who release their players for the final tournament. This ensures that more money than ever before is redistributed into the sport to encourage its long-term development.



UEFA Women's EURO 2022 represents a huge opportunity to deliver a record-breaking tournament and also drive a boost to women's football in England and across Europe, from grassroots participation, through to growing the professional game.

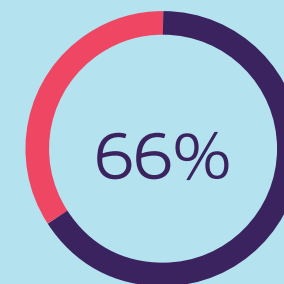
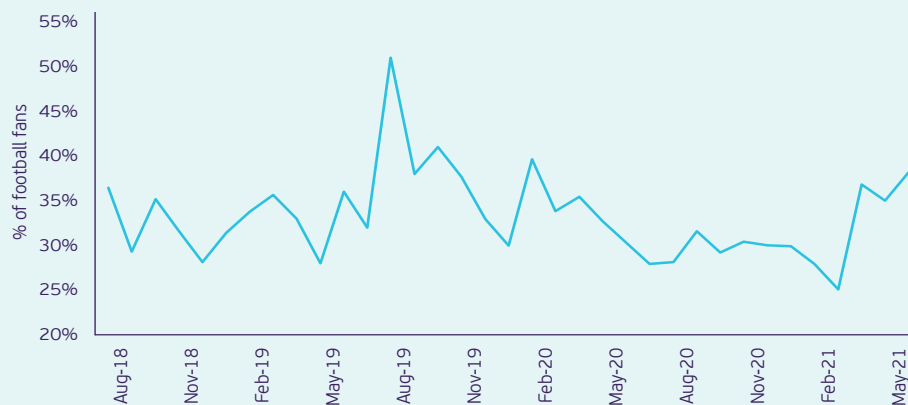
The Tournament will be back in England for the first time since 2005, at a time aligned with the growing status of women's competitions and the nation also returning to attend live sporting events. With a focus on driving long term and inclusive growth in women's football, UEFA Women's EURO 2022 can achieve impacts on and off the pitch that extend far beyond the 26 days of competition.

GROWING THE PROFESSIONAL GAME

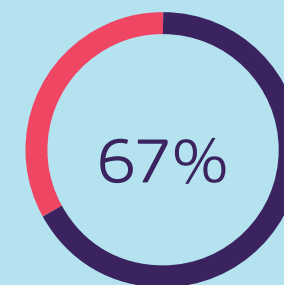
At the professional level of the game, women's football has strengthened remarkably in recent years. Attendance figures from Women's Super League (WSL) matches reached almost 270,000 in 2019-20.

Broadcast interest in women's football has likewise increased, with The FA WSL reaching a landmark agreement with the BBC and Sky that will result in WSL matches reaching greater audiences than ever before. This is reflected in the commitments to broadcast 22 live WSL matches, 18 of which on BBC1 or BBC2. UEFA Women's EURO 2022 can build on this momentum to showcase the best of women's football to new and existing fans across England. The BBC has secured rights to the Tournament in England, with live free to air broadcast of every game expected to engage new audiences and support growth in WSL attendance once fans are permitted to return in full.

Importance of the England women's football team to football fans²



of football fans have an interest in women's football³



of football fans are aware of the FA WSL and 15% plan to attend future games³

2. FA Fan-O-meter, July 2018 – May 2021 – monthly online survey run by The FA amongst a nationally representative sample of football fans (16+) in England.

3. FA Fan-O-meter, May 2021.

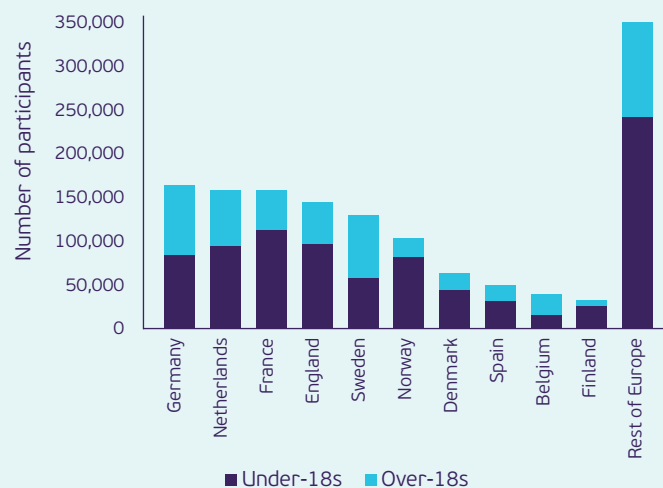
SUPPORTING GRASSROOTS PARTICIPATION

Football remains one of the most popular sporting activities amongst women and girls in England, with 3.5 million playing on a regular or casual basis.⁴ Nevertheless, there is significant potential for growth in participation, as shown by the difference between the comparable participation rates of men and boys versus women and girls. A similar difference is noted across Europe, with 14.2 million under-18 and over-18 men who are active registered club players, compared to 1.4 million under and over-18 women.⁵

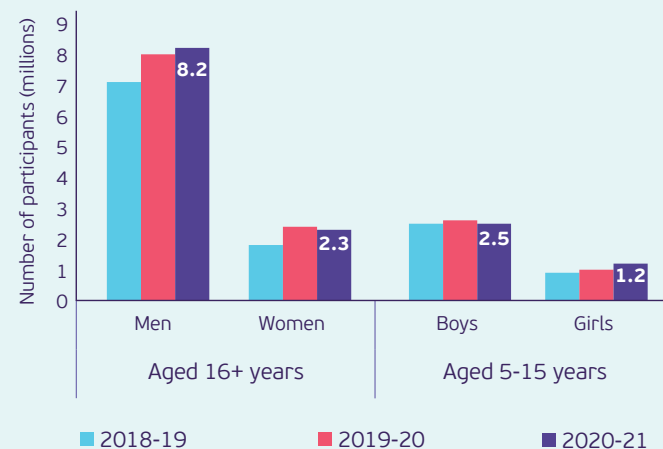
The FA has identified a range of activities and objectives to help boost participation rates amongst women and girls, promoting inclusive opportunities to engage with the game as part of The FA's Women's and Girls' Football Strategy (see on right). UEFA Women's EURO 2022 provides a platform to make substantial progress towards meeting the goals of this strategy, and building on previous targets set – such as doubling participation, with The FA's Gameplan for Growth strategy.



Formal football participation for women in Europe (2019/20)⁶



All football participation amongst adults and young people in England, by gender⁷



INSPIRING POSITIVE CHANGE – THE FA'S AMBITIOUS WOMEN'S AND GIRLS' FOOTBALL STRATEGY⁸

This four-year strategy pledges to create a sustainable future for women's and girls' football in England. The strategy outlines eight transformational objectives to be achieved by 2024:

- **Early participation** – Every primary school-aged girl to have equal access to football in school and in clubs.
- **Development participation** – Every girl to have equal access to participate for fun, for competition and for excellence.
- **Club player pathway** – Collaborate with clubs to develop an effective high-performance, inclusive player-centred pathway.
- **Elite domestic leagues and competitions** – Create the best professional women's sports leagues and competitions in the world.
- **England** – Win a major tournament.
- **Football for all** – Recruit and support a motivated, diverse range of local leaders organising football for their communities.
- **Coaching** – Support the development of exceptional coaches at every level of the game who are representative of our society.
- **Refereeing** – Ensure that every female referee afforded high-quality bespoke learning and development opportunities from grassroots through to the elite game.

4. FA participation data, 2020-21.

5. UEFA participation data: data is based on active registered club players. Registered club player: An individual who is registered with a national association or an affiliated club, league or regional association and who plays regularly. 'Regularly' means in at least one official club match or at least ten events during the last complete season. No individual may be counted more than once.

6. UEFA participation data, data includes active registered club players.

7. FA Participation Tracker Survey, capturing formal and casual football participation (monthly online survey run by The FA amongst a nationally representative sample of adults (16+) in England).

8. <https://www.thefa.com/news/2020/oct/19/new-fa-womens-strategy-launched-191020>.



4

ACTIVATING THE TOURNAMENT

TOURNAMENT OVERVIEW⁹

UEFA Women's EURO 2022 will be hosted across 10 venues in nine different towns and cities (the 'Host Cities'), from Brighton & Hove and Southampton on the South Coast to Manchester and Wigan & Leigh in the North of England. This geographic coverage provides football fans across the country with accessible venues to support their team and engage with the Tournament. This helps to ensure that the economic and social benefits are broadly dispersed across England.



9. The FA, UEFA

PARTICIPATING NATIONS – 16 COUNTRIES ACROSS EUROPE¹⁰



10. At the time of publication, the Russian national team has been suspended until further notice as per the UEFA Executive Committee decision made on 28th February 2022.

ACTIVATING UEFA WOMEN'S EURO 2022

The Tournament aims to leave a lasting legacy by inspiring the next generation of players and fans of women's football. Eight Legacy Groups¹¹ have been formed from stakeholders from across the Host Cities, including representation from community football organisations, schools and local authorities. These Legacy Groups have the potential to strengthen local networks to drive sustainable change beyond UEFA Women's EURO 2022 and thereby provide an example for future tournaments to follow.

To support their ambitions, grassroots football in and around the nine Host Cities has received c.£2.4 million through a combination of local funding and value in kind from The FA, UEFA, commercial partners, Sport England, the Department of Culture, Media and Sport (DCMS) and host cities. This funding will be used to support a range of activities across the Host Cities, from existing FA programmes to new initiatives tailored to local needs.



11. Eight Legacy Groups combine Manchester & Trafford.

12. This £2.4m includes a combination of cash funding and value in kind support.

13. The FA, National Legacy Programme.

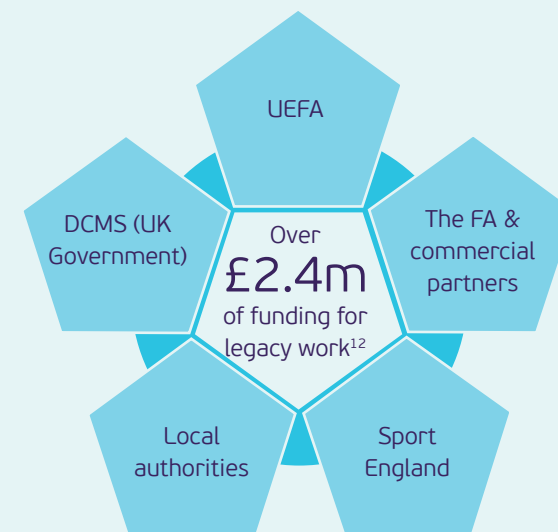
14. Wildcats – non-competitive football centres for girls aged 5-11.

INSPIRING POSITIVE CHANGE

The participation-focused activities around UEFA Women's EURO 2022 spans across all age groups and aims to promote participation by achieving three primary goals:

- **Equal access** for all girls to play football in school and clubs.
- **Diverse workforce** of coaches, referees and local leaders delivering and organising football for their communities.
- **Inclusive, safe and welcoming environments** for every woman and girl to play competitive or recreational grassroots football, irrespective of ability, disability, age or ambition.

In achieving these goals, the activation activities seek to create 500,000 new opportunities for women and girls to engage with football, and also contribute towards achieving The FA's broader strategy and targets for 2024.



FA WOMEN'S AND GIRLS' FOOTBALL STRATEGY: KEY 2024 TARGETS¹³



75%

of schools providing equal access for girls to play football in PE lessons.



75%

of all grassroots football clubs offering a complete accredited pathway for girls.



3,000

Wildcats¹⁴ providers delivering recreational football opportunities within travelling distance of their home for every girl aged 5 to 11.



2,777

registered female referees across England.



5,400

female coaches developed by 2024 across recreational football.



5

MEASURING IMPACT

MEASURING IMPACT

The breadth of ambitions of UEFA Women's EURO 2022 requires a range of impact measures to be captured to fully understand the achievements of the Tournament. These measures help to frame the expectations for UEFA Women's EURO 2022 with one year to go to the Tournament and provide a basis of measuring the success after its completion. This section summarises the main categories of impact measures, and presents pre-event expectations within each of these categories.

Each of the impact categories are summarised in turn:

- 1. Deliver operational success:** to deliver a safe, engaging event, with record breaking attendance and viewership, received positively by spectators and wider audiences.
- 2. Grow the professional game:** to enhance perceptions of women's football, strengthen interest and attract new audiences to the game.
- 3. Drive inclusive grassroots participation:** to be a game-changer for women's football in England, inspiring greater participation and driving inclusive and sustainable access to participation opportunities for women and girls of all ages through football in schools and communities, engaging with under-represented groups.
- 4. Support host economies and tourism:** to support the England and Host City economies, by attracting international and domestic tourism, promoting England and Host Cities as visitor destinations, driving high street footfall.
- 5. Promote positive social impact:** to promote social impacts through greater participation in grassroots football, through legacy initiatives targeted at local needs and by encouraging greater community engagement through the Tournament.

6. Enhance international perceptions of England and the UK:

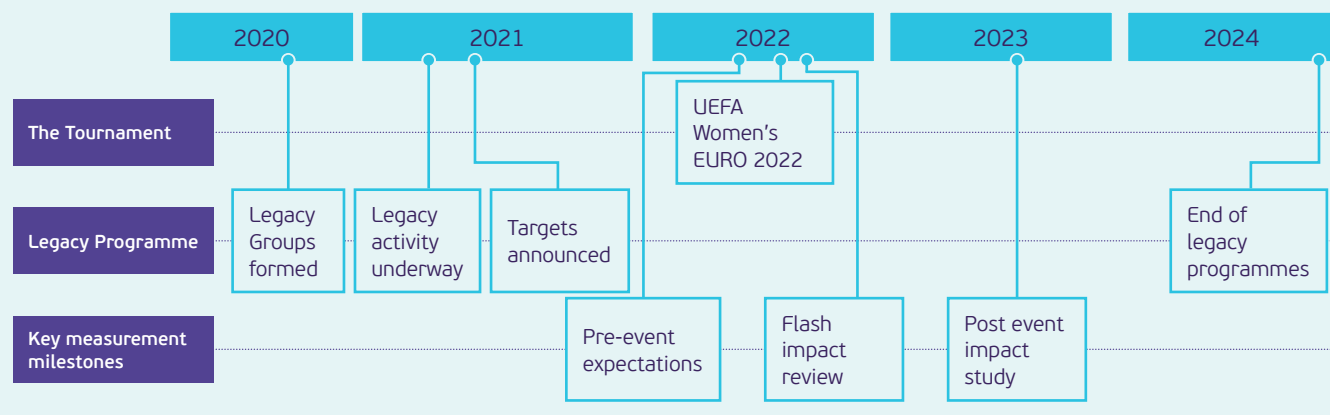
to set a positive example for future tournaments to follow and make positive impressions on international visitors and audiences.

The timeline over which the impacts take place and can be measured varies across categories. For example, the operational success of UEFA Women's EURO 2022 will be largely apparent by the end of the tournament, while growth in the professional game and participation will take longer to measure robustly. For this reason, a full impact study will be published in the summer of 2023, with legacy activities continuing to monitor impacts until the end of their planned activity timeline in 2024 and beyond. The timeline below summarises key milestones of the tournament, Legacy Group activities, and impact measurement.

The remainder of this section presents impact expectations for the Tournament, seeking to isolate the impacts that would not materialise had the Tournament taken place elsewhere. In the case of economic impacts in particular, a range of potential outcomes are considered based upon scenarios for match attendance and international visitor numbers, as well as other factors which are difficult to accurately quantify but nonetheless influence total impacts.



TIMELINE OF IMPACT



1. OPERATIONAL SUCCESS

At its core, UEFA Women's EURO 2022 is about showcasing the best of women's football and providing fans with an engaging and entertaining sporting spectacle. The more easily fans are able to access Tournament information, purchase tickets, and find their way to the game, the more that the action on the pitch can take centre stage. The operational success impact category aims to assess these outcomes, based on the level of attendance achieved and the feedback of fans in the lead up to and during their matchday experience.

Total attendance across the Tournament is expected to range between 435,000 to 525,000. The Central case scenario anticipates total attendance across the Tournament of 480,000, an average of over 15,000 per match. These potential attendance outcomes are based on the assumption that all COVID-19 related international travel restrictions and stadium capacity constraints will no longer be in effect at the time of the Tournament.

Wembley expected to attract substantial crowds. The current record attendance for a UEFA Women's EURO fixture is 41,301 (at the 2013 Final in Sweden), while the record attendance for a EURO match (Men's or Women's) currently stands at 79,115 (Madrid, 1964).

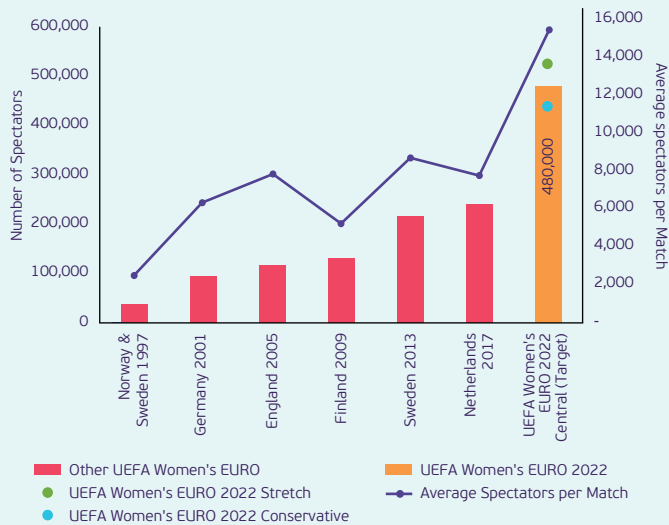
There are over 700,000 tickets available, making this the largest UEFA Women's European Championship to date. To encourage attendance, tickets are priced from £5-£50, with over half a million tickets available for £25 or less, while a family of four will be able to attend from £30. A schools and communities programme is planned for 2022 that will help to boost attendance and provide opportunities for girls and boys to engage with the game. Tickets were offered through a pre-sale window for the first time, with strong demand surpassing sales targets at this early stage.

Comparing attendances across competitions is challenging, as each event takes place in its own time and context, with its own objectives and differing constraints on stadium capacity. Nevertheless, overall attendance is an important driver of impact. On the headline measure of total attendance, the Tournament is expected to represent a substantial increase compared to the previous UEFA Women's EURO, held in the Netherlands in 2017, which reached a total attendance of 240,055 fans.

The Tournament has ambitions to break attendance records, with the opening match at Old Trafford and the final at

Fan zones are expected to be set up throughout the Tournament to provide areas for greater fan engagement, for both ticket holders and non-ticket holders. In total, these fan zones are expected to host 300,000 fans.

UEFA Women's EURO 2022 attendance scenarios compared to recent women's football tournaments held in Europe¹⁵

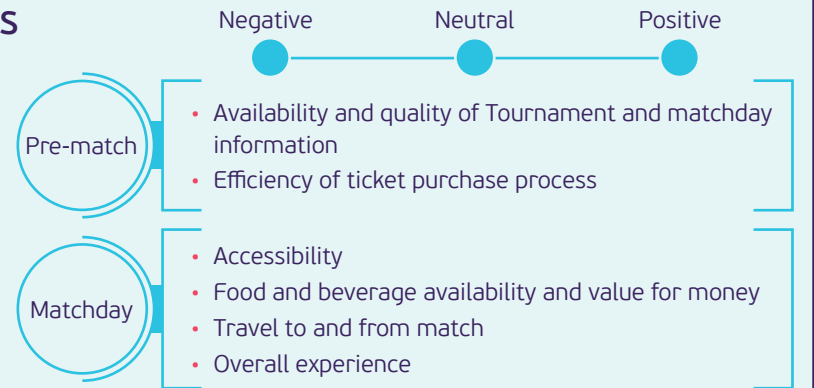


OBTAINING FEEDBACK FROM FANS

Fans will be given the opportunity to provide feedback on their UEFA Women's EURO 2022 experience.

This will include compiling fan profiles to understand how fan experience differs according to different characteristics.

This will support learnings across each of the host venues and for future Tournaments.



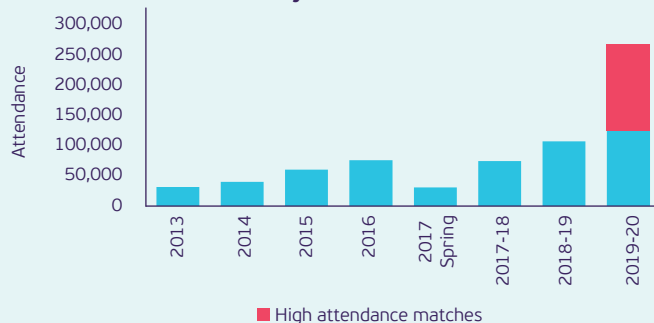
15. UEFA Women's EURO 2022 scenarios include VIP, sponsor and all other ticket allocations. Sources: The FA, UEFA.

2. THE PROFESSIONAL GAME

UEFA Women's EURO 2022 will shine a spotlight on women's football in England like never before. The introduction of new audiences to women's football, and showcasing of the best the sport has to offer, has the potential to broaden the appeal of women's football and provide a platform for further growth in the professional game.

The professional game impact category will measure the influence that the tournament has on attitudes towards elite women's football. This will include measurement of the broadcast audiences reached, feedback of tournament audiences on their attitudes towards the game, and the evolution of attendances at WSL matches. Recent trends and evidence in relation to these areas of the professional game is summarised below.

Total match attendance by WSL season¹⁶



16. The 2017 Spring Series was an interim edition of The FA WSL between the sixth and seventh full seasons. It bridged the gap between the 2016 season (March-September 2016) and the 2017-18 season, which started in September 2017. Source: UEFA.
17. <https://womenscompetitions.thefa.com/Article/Broadcast-announcement-20210322>.
18. Sky Sports & BBC secure Women's Super League rights – Sport On The Box (sport-onthebox.com).
19. Rugby Football League, These Girls Can, March 2021.
20. FA Women's Tracker, April 2021 - quarterly survey run by The FA amongst a representative sample of fans of women's football (16+) in England.
21. FA Fan-O-meter, April 2021 - monthly online survey run by The FA amongst a nationally representative sample of football fans (16+) in England.
22. FA Girls' Participation Tracker, March 2021 - quarterly survey run by The FA amongst a nationally representative sample of girls aged 5-13 in England.

ATTENDANCE

Attendance at FA WSL matches has risen substantially within the past decade, as the format of the league has changed and interest in the game has increased. In 2019-20 in particular, total attendance reached almost 270,000. While 2019-20 attendance was boosted by five particularly high attendances for matches held at high capacity stadia, 2019-20 represented a record season for WSL attendance even excluding these matches.

BROADCASTING

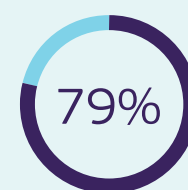
The growing popularity of popularity women's football is reflected in increased demand from broadcasters. A rights deal that will see more access to live women's football than ever before from the 2021-22 season was signed by The FA, Sky Sports and the BBC, allowing broadcast rights to FA Women's Super League football.

Under the terms of the deal, the BBC has the right to show up to 44 matches, with a minimum of 35 being screened

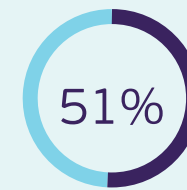
across key Sky Sports channels. The BBC has also made a commitment to bring the league to even more viewers by showcasing 22 live games per season, with a minimum of 18 matches on mainstream, free-to-air channels, BBC One and BBC Two. Previously, games have been shown live on BBC iPlayer and Red Button.¹⁷ UEFA Women's EURO 2022 will see coverage of women's football continue to grow on the BBC, as the BBC secured exclusive rights to UEFA Women's EURO 2022 in England, where every game will be broadcast live on BBC TV.¹⁸

SPONSORSHIP

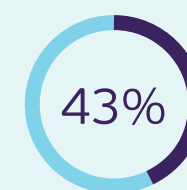
Another key measure associated with the professional game is the commercial interest in women's football, and the growth in commercial revenues associated with the game, which will largely come from sponsorship deals. Between 2013 and 2017, the number of sponsorship deals in women's sport increased by 37%, whilst the revenue created through these deals increased by 49%.¹⁹



of women's football followers in England are aware of UEFA Women's EURO 2022²⁰



of football fans in England plan to watch UEFA Women's EURO 2022 matches²¹



of girls aged 5-13 are interested in professional women's football²²

3. INCLUSIVE GRASSROOTS PARTICIPATION

A range of participation-focused initiatives are running nationally and within Host Cities to capitalise on the Tournament and provide opportunities for sustainable growth in grassroots football participation amongst women and girls from all backgrounds. This impact category will assess the extent to which the Tournament and the wider activation activities achieve this growth, focusing on the targeted outcomes.

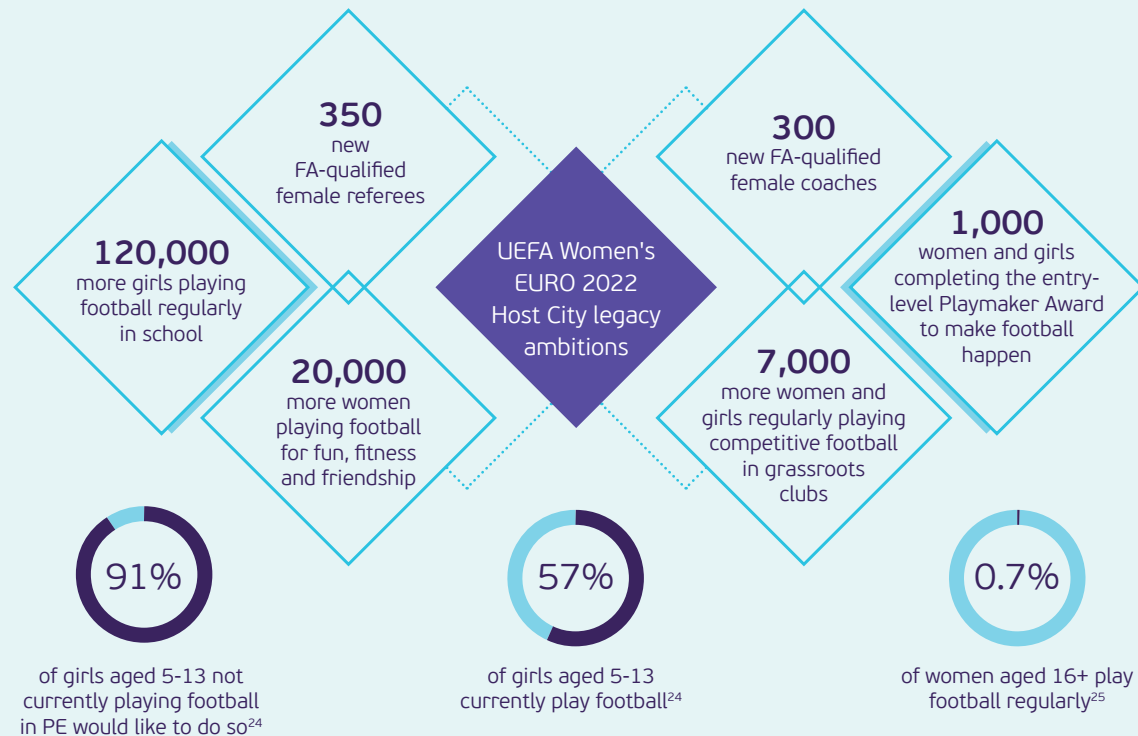


NATIONAL LEGACY PLAN

The UEFA Women's EURO 2022 Legacy Plan aims to increase participation and volunteering opportunities in women's football, both in Host Cities and on a national level. The Legacy Groups themselves are seeking to create more than 500,000 new opportunities to engage women and girls across UEFA Women's EURO 2022 by 2024, with the potential to deliver the outcomes highlighted below.²³

The legacy strategies are supported by strong evidence of the appetite amongst women and girls to play more football. Research undertaken by The FA suggests that that 57% of

girls aged 5-13 years currently play football, and that the vast majority of girls not currently playing football would like to do so. By promoting football as a sport for girls within schools, UEFA Women's EURO 2022 can provide a platform for greater participation. Amongst adult women, the potential for participation growth may be even greater, with just 0.7% of women aged 16+ playing some form of football regularly, compared to 5.2% of men.²⁵ The legacy ambitions focus on recreational football, and aims to raise these participation rates amongst adult women.



23. The FA, National Legacy Programme.

24. FA Girls' Participation Tracker, March 2021 - quarterly survey run by The FA amongst a nationally representative sample of girls aged 5-13 in England.

25. Sport England (2021) Active Lives Survey; percentages represent individuals who had taken part in football at least twice in the last 28 days.

The Legacy Groups have developed plans targeted at addressing the specific needs within their target areas. A selection of the key objectives of the Legacy Groups within each of the Host Cities are summarised below:²⁶

BRIGHTON & HOVE

- Allow 90% of primary and secondary school girls to access girls' football within the curriculum in Sussex through Girls' Football School Partnerships by 2024.
- Reach 2,000 women and girls aged 15+ playing affiliated football.
- Double the number of FA-qualified female coaches and referees to take the game forward across Sussex.

LONDON

- Offer more than 600 opportunities for girls to take part in football through 24 Wildcats providers.
- Double the number of female referees and train 175 new female coaches.
- Achieve at least 20 new playing opportunities for women aged 16+ across competitive, recreational and disability football.

MANCHESTER AND TRAFFORD

- Increase the number of female coaches registered and actively coaching female teams across Manchester and Trafford, from 42 to 63 active coaches.
- Double the number of FA-qualified and registered female referees from 22 to 44.
- Increase the number of clubs in Manchester and Trafford providing affiliated female football by 25%.
- Encourage 600 more women to play football through a programme of new affiliated and recreational football opportunities.

MILTON KEYNES

- Double the number of FA-qualified female coaches and referees.
- Include an inclusive football offer, with a minimum of 26% of participants, coaches and referees from ethnically diverse communities.
- Establish 22 new female-friendly school-club links by 2024.

ROTHERHAM

- Double the number of FA-qualified women coaches and referees.
- Increase in the number of football opportunities for women and girls by 50%.
- Engage 1,000 women on a digital programme to create awareness of playing opportunities.

SHEFFIELD

- Engage 140 primary schools in the Girls' Football School Partnership programme by 2024.
- Allow 50% more girls aged 5-16 to access a recreational opportunity within five miles of their homes.
- Double the number of female coaches and referees by 2024, from 76 to 152.

SOUTHAMPTON

- Have 50 primary and secondary schools offering equal access to football for girls in PE lessons by 2022.
- Double the number of FA-qualified female coaches and referees.
- Achieve 500 more women playing football in Southampton's most deprived wards by creating sustainable recreational football opportunities.

WIGAN & LEIGH

- Have 11,500 more women and girls regularly playing football in schools and clubs by 2024.
- Achieve 40 FA-qualified female referees and 40 female coaches by 2024.
- Increase the number of Wildcats providers from four to 15 by 2024.

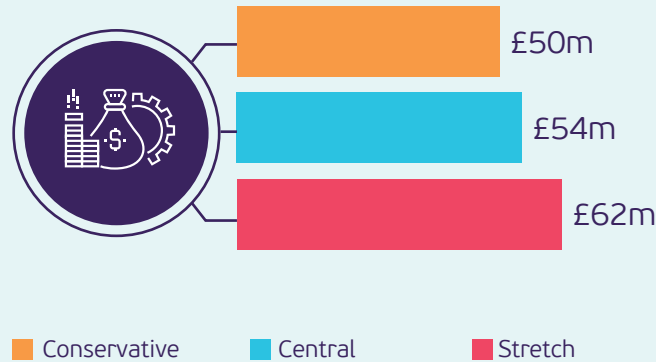
26. The FA, Legacy Programme in Host Cities booklets.

4. ECONOMY AND TOURISM

The economic benefits of hosting UEFA Women's EURO 2022 are driven by a number of elements, ranging from the expenditure incurred to deliver the Tournament, to the number of match attendees, the proportion of international visitors amongst these attendees and the spending patterns of visitors during their stay. A range of potential impacts under the economy and tourism category are presented opposite, alongside a Central case.



GVA impacts across Host Cities, £m

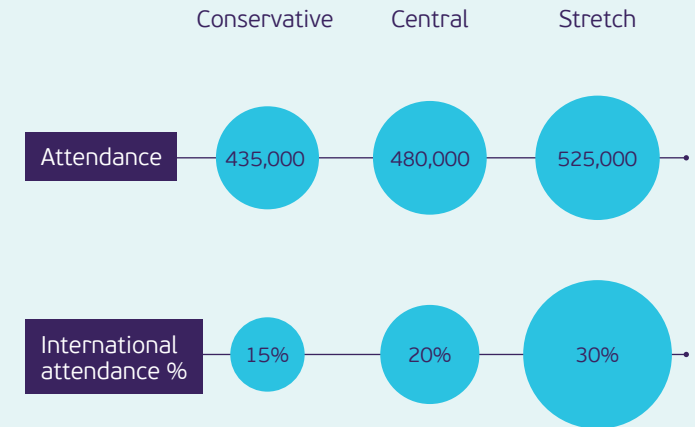


There are many factors which underpin the ultimate economic impact of UEFA Women's EURO 2022. Key among these are the level of attendance at the Tournament and the origin of the spectators in attendance, assumptions for which are shown above.

For the purposes of the economic impact analysis, Conservative, Central and Stretch match attendance scenarios are used to present impact ranges, with higher attendance driving greater economic impacts.

Higher representation of international visitors amongst match attendees also drives greater economic impacts. This is because their expenditure during their visit is considered wholly additional to the Host City, and to England more broadly. International visitors also generally tend to have higher levels of spending per match attended, in part due to greater spend on accommodation.

Key drivers of economic impact ranges



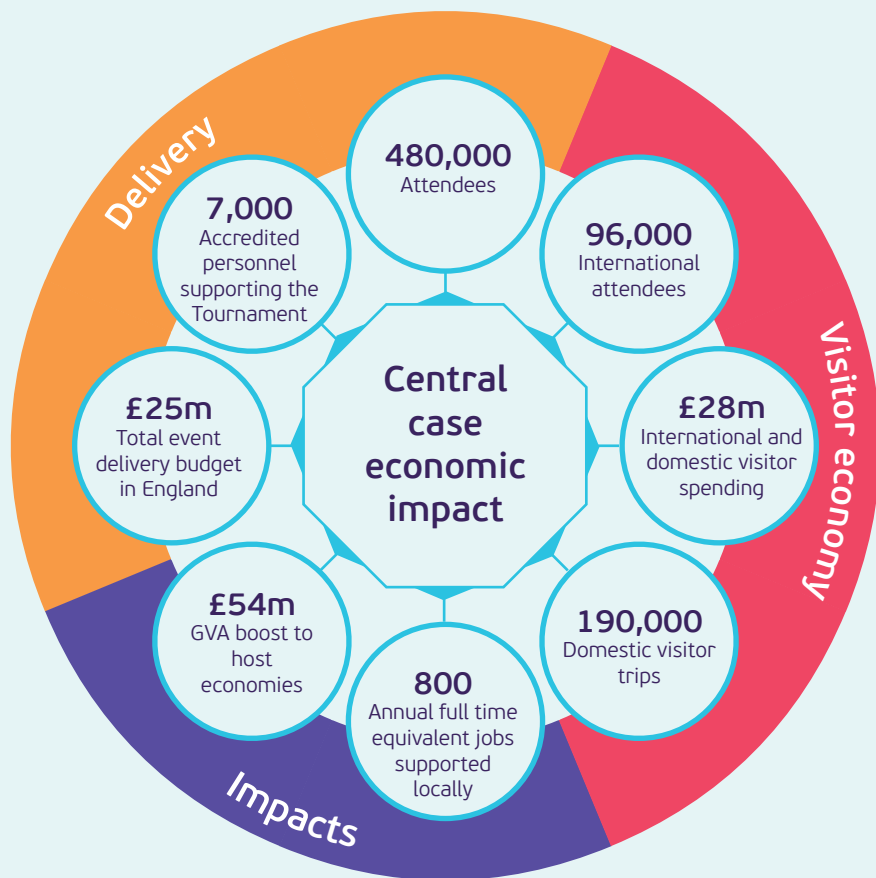
Varying the drivers of economic impact under different scenarios provides an indication of the potential economic impact of UEFA Women's EURO 2022. This can be illustrated through expected Gross Value Added (GVA) across the Host Cities, which captures the direct impacts of visitor and event delivery spending, but also further impacts supported through local supply chains and by employment incomes.

Under Central case assumptions, the total GVA impact of UEFA Women's EURO 2022 across all Host Cities reaches £54m. This falls to £50m under the Conservative scenario, and rises to £62m under the Stretch scenario.²⁷

For individual Host Cities, relatively greater impact can be achieved where visitors (both international and domestic) from outside of their area have opportunities to spend more time within the local area as part of their matchday visit, benefitting local businesses and driving economic activity.

27. EY economic impact methodology is consistent with eventIMPACTS.

Key elements of the economic impact of UEFA Women's EURO 2022 under the Central scenario are summarised below:

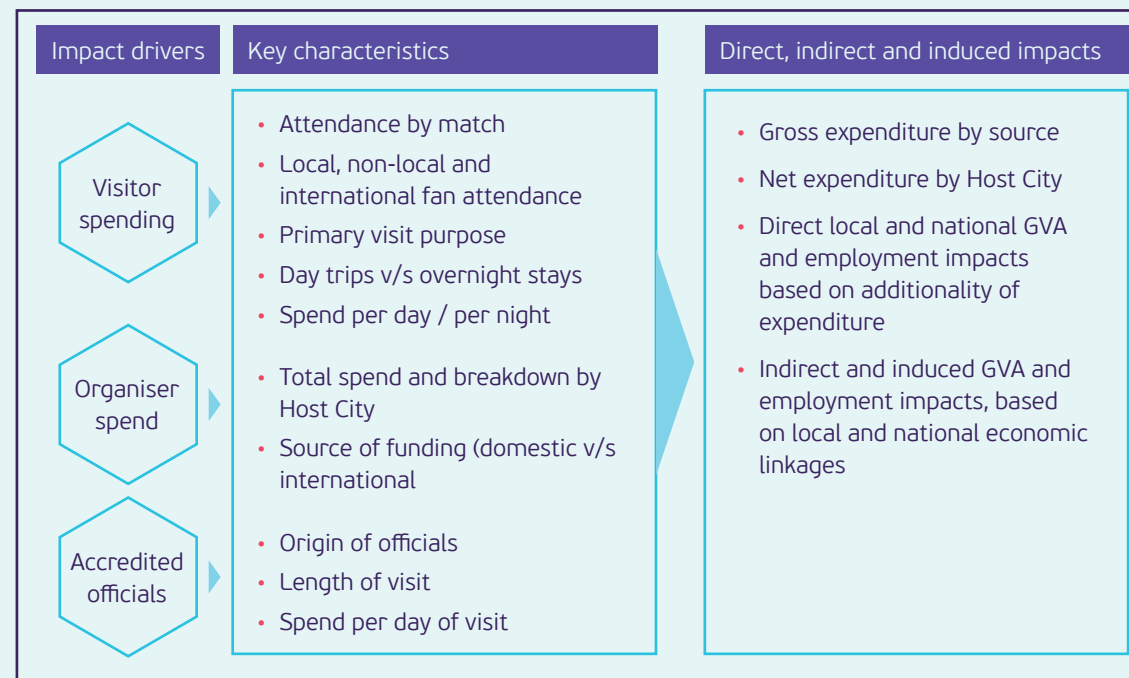


ATTRIBUTING IMPACT TO UEFA WOMEN'S EURO 2022

The interactions through which UEFA Women's EURO 2022 drives economic impact are summarised in the diagram below. The impact assessment seeks to identify impacts that can reasonably be considered to be caused by the Tournament. There are three primary adjustments which influence the estimated impacts from this perspective:

- **Visitor origin:** only expenditure of people who live outside of the Host City ("visitors") is included within the impact assessment. This is based on the assumption that local residents would likely have purchased goods and services locally in the absence of the Tournament.

- **Visitor purpose:** in order for visitor spending to be attributed to UEFA Women's EURO 2022 the visitor must view their Tournament as the primary reason for their visit.
- **Delivery expenditure:** adjustments are made to reflect the additionality of revenue and funding that enables delivery. For example, international ticket revenues are considered additional to England, whereas central government funding is not.



5. SOCIAL CONTRIBUTION

Increases in football participation, the scope of volunteering in relation to the Tournament, and the power of sport to bring communities closer together each present opportunities for UEFA Women's EURO 2022 to deliver benefits to wider society. The social contribution impact category aims to capture evidence in relation to each of these forms of impact. Expectations and activities within this category are summarised opposite.



28. Sources: Sport England (2020). "Measuring the social and economic impact of Sport in England"; The FA (2019). "The social and economic value of adult grassroots football in England".

29. Dr P Wicker & Dr L Davies, UEFA, (2021). "The value of volunteering in grassroots football".

Social contribution of UEFA Women's EURO 2022

Participation impacts

500,000 participation and engagement opportunities

Participation in sport in general and football in particular has been shown to lead to a range of positive wellbeing outcomes.²⁸ These include:

- Physical & mental health benefits – reduced risk of heart disease, stroke, cancer, dementia, depression, back pain and hip fractures; resulting in fewer GP visits and reduced use of psychotherapy services;
- Mental wellbeing – improved life satisfaction;
- Individual development – improved educational attainment, driving increased lifetime earnings.

Volunteering benefits

5,500+ volunteers

There will be over 2,800 volunteers across the legacy programmes across the Host Cities. A further 2,700 volunteers will be needed to help deliver UEFA Women's EURO 2022, and to support wider activities within the Host Cities.

Research into the value of volunteering in grassroots football has shown that volunteering provides opportunities for volunteers to:²⁹

- Explore different career options develop relevant skills and experience for work;
- Learn through direct hands on experience;
- Contribute to the local community;
- Positively impact their own children's well-being and upbringing;
- Learn more about decision making.

Community engagement

8 Legacy Groups to engage local communities

By bringing people together around a shared purpose, UEFA Women's EURO 2022 has the potential to promote a sense of greater belonging within communities, to foster a sense of civic pride and to strengthen community networks that can pave the way for sustained improvements in community outcomes.

These improvements in social and community development may include:

- Engaging school children ages 5-16;
- Increasing participation in grassroots football;
- Working with community groups, local businesses, traders' associations and neighbourhood wards;
- Supporting deprived and isolated communities;
- Enhanced social capital derived from enhanced social networks, trust and reciprocity.

6. INTERNATIONAL PERCEPTIONS

UEFA Women's EURO 2022 will showcase the Host Cities to an international audience of millions, with thousands of international visitors set to travel to England and many more expected to follow the tournament via media broadcasts and social channels. This provides a platform to build new connections, and to make positive impressions with these audiences. The economic, political and social benefits of these connections may take years to fully materialise, but indicators of this potential are summarised on the right.



BUILDING CONNECTIONS WITH VISITING FANS

UEFA Women's EURO 2022 is expected to attract around 96,000 international attendees to the Host Cities.³⁰ In addition to the tourism expenditure immediately surrounding the tournament, hosts can leave a lasting impression on these visitors to encourage return visits in future, particularly at a time when tourism has been dramatically curtailed by the Covid-19 pandemic.

REACHING INTERNATIONAL BROADCAST AUDIENCES

In addition to the international fans that travel to England for the tournament, UEFA Women's EURO 2022 is expected to reach a significant international audience through broadcast and social media channels. The tournament will be broadcast in 195 territories, including 52 countries across Europe, the USA, China, Latin America, Australia, India, the Middle East and Northern Africa.³⁰

The growing interest in women's football suggests that UEFA Women's EURO 2022 may surpass the broadcast audiences reached by UEFA Women's EURO 2017 in the Netherlands, which reached a total live audience of 178 million people across the world.³¹

SHOWCASING THE BEST OF ENGLAND

Audiences of the scale of UEFA Women's EURO 2022 can ignite global conversations. As noted by the British Council, "Sport is universally accessible in a way many other cultural exports are not, as it does not require translation."³² By delivering a high-quality sporting spectacle, UEFA Women's EURO 2022 can help to promote positive perceptions of England and the Host Cities. Sharing the positive values of the Tournament – particularly with respect to diversity, inclusiveness and gender equality – across the world can set an example for future events and other nations to follow.



96,000
Expected international fan attendance at UEFA Women's EURO 2022³⁰



178 million
Live international broadcast audience for previous UEFA Women's EURO (Netherlands 2017)³¹



195
Territories receiving broadcast coverage³⁰

30. EY analysis informed by consultation with the FA and UEFA.

31. UEFA Women's EURO 2017, The Netherlands — Tournament Review.

32. British Council All Party Parliamentary Group — Influence and the Integrated Review: Opportunities for Britain's Global Vision.

EY CONTACTS



Peter Arnold

Partner | Economic Advisory

Direct Tel: +44 20 7951 5587

Email: parnold@uk.ey.com



Tal Hewitt

Partner | EY-Parthenon Strategy

Direct Tel: +44 20 7951 7733

Email: tal.hewitt@parthenon.ey.com



Tom Kingsley

Associate Partner | Sport Industry Group Leader

Direct Tel: +44 20 7951 2009

Email: tkingsley@uk.ey.com



Colin Edwards

Assistant Director | Economic Advisory

Direct Tel: +44 20 7760 9469

Email: cedwards2@uk.ey.com



Zaina Hussein

Manager | Economic Advisory

Direct Tel: +44 20 7197 7548

Email: zhussein@uk.ey.com

EY | Building a better working world

EY exists to build a better working world, helping to create long-term value for clients, people and society and build trust in the capital markets.

Enabled by data and technology, diverse EY teams in over 150 countries provide trust through assurance and help clients grow, transform and operate.

Working across assurance, consulting, law, strategy, tax and transactions, EY teams ask better questions to find new answers for the complex issues facing our world today.

EY refers to the global organization, and may refer to one or more, of the member firms of Ernst & Young Global Limited, each of which is a separate legal entity. Ernst & Young Global Limited, a UK company limited by guarantee, does not provide services to clients. Information about how EY collects and uses personal data and a description of the rights individuals have under data protection legislation are available via ey.com/privacy. EY member firms do not practice law where prohibited by local laws. For more information about our organization, please visit ey.com.

Ernst & Young LLP

The UK firm Ernst & Young LLP is a limited liability partnership registered in England and Wales with registered number OC300001 and is a member firm of Ernst & Young Global Limited.

Ernst & Young LLP, 1 More London Place, London, SE1 2AF.

© 2022 Ernst & Young LLP. Published in the UK. All Rights Reserved.

Information in this publication is intended to provide only a general outline of the subjects covered. It should neither be regarded as comprehensive nor sufficient for making decisions, nor should it be used in place of professional advice. Ernst & Young LLP accepts no responsibility for any loss arising from any action taken or not taken by anyone using this material.

ey.com/uk

The background features a dark purple area at the bottom with a repeating pattern of white sports-related icons, including soccer balls, goalposts, a person with arms raised, a stadium, and various architectural structures. Above this patterned area are large, overlapping abstract shapes in light blue, red, and orange. The text is located in the bottom left corner of the purple area.

www.thefa.com

www.uefa.com

www.uefa.com/womenseuro