

ARSENAL FOOTBALL CLUB

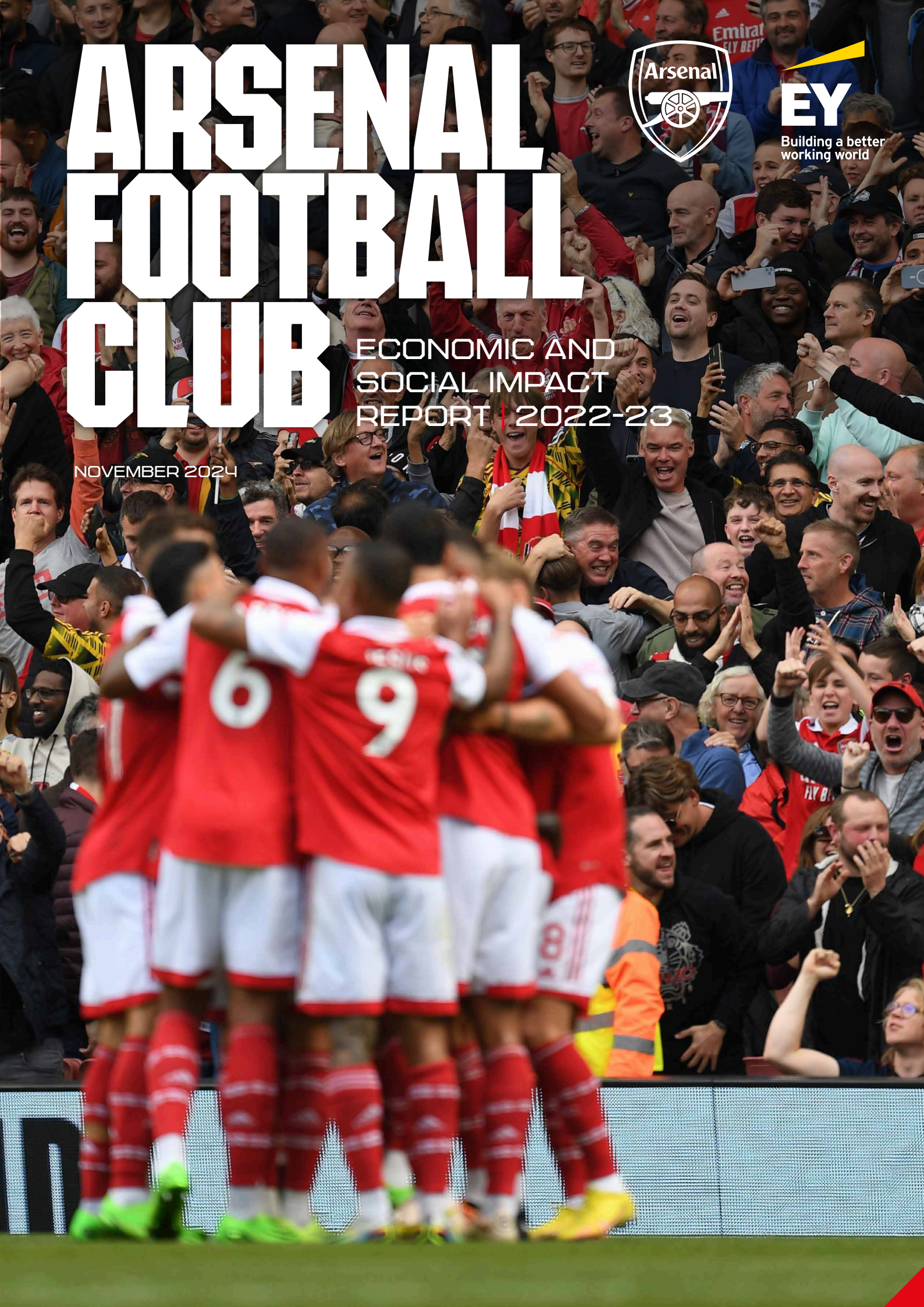


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ECONOMIC AND
SOCIAL IMPACT
REPORT | 2022-23

NOVEMBER 2024



ESG REPORT 2023

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FOREWORD

AT ARSENAL WE ARE UNIFIED BY OUR PURPOSE TO ACT FOR A WINNING TEAM, CULTURE, AND COMMUNITY.

Our belief is that when we do this, we bring pride, inspiration and belonging to our communities here in north London and around the world.

For us, this is about being proactive and acting to bring about progress, with a spirit of **'Always Forward'**. This spirit of constant progress and evolution is in our DNA. It is as true today as it was when we were formed in 1886. Whilst the world looks different more than 135 years later, our purpose remains constant.

This report, undertaken by EY, tells a story of the direct and indirect impact of our actions across Islington, London, and the UK.

I'm proud to see the extent of our impact across the country, but particularly in our local area in north London.

We delivered £616 million in economic value in total in the UK over the 2022-23 season, with £425 million contributed in our home borough of Islington. We supported almost 4,400 jobs in the UK economy, with more than 1,600 jobs supported in Islington. Our community programmes reached more than 14,000 people in the local area during the same time, the positive impact of which can be seen in some of the stories shared in this report. These findings reflect our impact across the 2022-23 season, but we never stop moving forward.

Since that season, we have broken more records and continued to compete for major trophies across our men's and women's teams. We delivered our record number of Premier League wins in the 2023-24 season, our record goals scored, our best Champions League finish in 14 years, and we retained our Women's Continental Tyres League Cup.

Emirates Stadium is our fortress, our home, transformed by a special winning connection between our teams, our supporters, and our community. We all fuel each other.

We've brought more matches to Emirates Stadium with six Women's Super League (WSL) games across the 2023-24 season, during which we saw an average attendance of more than 52,000, including three new WSL attendance records and back-to-back sell outs. Next season, we move forward again, as Emirates Stadium becomes the main home of our women's team.

Optimism and opportunity surround us today, and our future is incredibly exciting.

We want to channel that into more positive action that will deepen our impact across our communities. This report signifies the next stage of this journey.

It is a benchmark which we will use to move forward. We will continue our work to make a positive impact in our local and global communities, identify areas where we can make improvements, and continue to build an understanding of how we bring pride, inspiration and belonging to everyone connected to us.



RICHARD GARLICK
Managing Director, Arsenal





EXECUTIVE SUMMARY

BY SERVING AS A PILLAR OF THE COMMUNITY, ARSENAL PLAYS A PIVOTAL ROLE IN DRIVING SOCIO-ECONOMIC DEVELOPMENT IN ISLINGTON AND SURROUNDING AREAS. THE CLUB AIMS TO CREATE POSITIVE CHANGE AND IMPROVE THE LIVES OF THOSE WITHIN THE COMMUNITY.

1.1 IMPACT STUDY SUMMARY

This report explores the social and economic contribution made by Arsenal.¹ The report focuses on the impacts generated during the 2022-23 season.

Arsenal plays an important role in generating substantial economic benefits to the local and national economy through its direct operations, spending in supply chains and the wider economic spill-over effects. In the 2022-23 season, the Club contributed a total £616 million in GVA² and over 4,400 Full-Time Equivalent (FTE) jobs to the UK economy. Locally, £425 million in GVA was generated and over 1,600 jobs were supported in the London Borough of Islington. These achievements were largely driven by Arsenal's ability to attract 1.6 million supporters to Emirates Stadium and over 9,500 supporters to Meadow Park across the season on matchdays, resulting in positive economic effects on local businesses and the surrounding community.

2022-23 ARSENAL'S ECONOMIC IMPACT IN NUMBERS



£616m
UK GVA
contribution



Over
4,400
UK jobs
supported



1.6m
visitors to
Emirates
Stadium



£228m total UK tax revenue
generated



- ¹ This refers to the group of entities which form part of Arsenal Holdings Limited ('Arsenal Group'), and The Arsenal Foundation. This group of entities is henceforth referred to as 'Arsenal'.
- 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 Arsenal.

1.2 SUPPORTING THE LOCAL COMMUNITY

Arsenal also delivers substantial social benefits to the local community, guided by Arsenal's values and led by their in-house community team, Arsenal in the Community (AITC), as well as the Club's registered charity, The Arsenal Foundation. The Club also works with a number of official partners who help fund and deliver community activity.

The Arsenal Foundation was launched in January 2012 as a UK registered charity and through grant-giving, supports many local projects and initiatives. The local community is supported in a number of ways by The Arsenal Foundation through (i) a grant provided to official partner Islington Giving with a focus on local need, most notably mental health; (ii) a small grants fund, 'The Gunners Fund', where a wide range of local community projects

are encouraged to apply for support; and (iii) grants to run AITC programmes, such as an employability programme, a coach development programme and the Freedom from Torture project.

In each case, support creates a sense of belonging to the Arsenal family and the importance of impacting the lives of those in the local community. In 1985 Arsenal Football Club setup its in-house community department. With almost 40 years' experience of delivering important community projects, AITC is fully embedded in the local community and leads community programmes across Islington, Hackney and Camden. Using the unique connection to Arsenal, AITC engages with key social issues facing the local community — including unemployment, youth safety, education and health inequalities. In 2022-23, AITC has reached over 14,000 participants and delivered over 140,000 hours of programme activity.

2022-23 ARSENAL'S SOCIAL IMPACT IN NUMBERS



14,000 participants in AITC programmes



1,100 special days for young people with serious health conditions funded through The Arsenal Foundation for the Willow Foundation



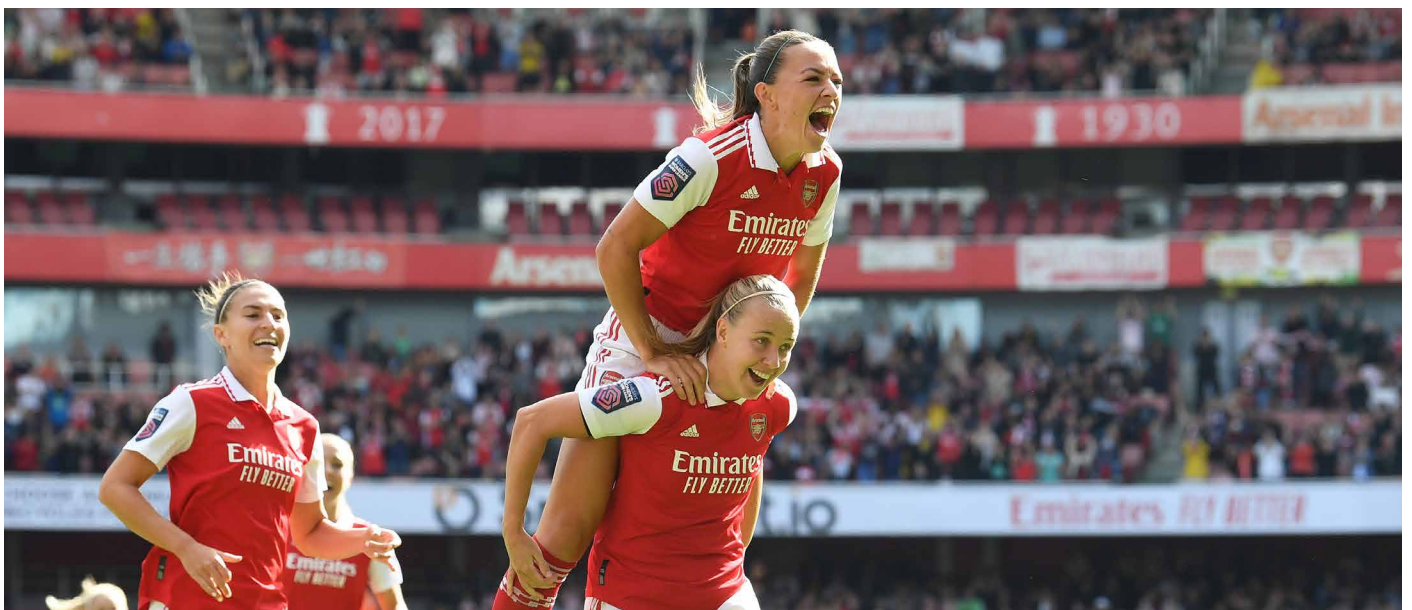
Over **140,000** AITC programme delivery hours



Over **4,700** volunteering hours



Over **3,700** children and young people engaged in the 'Coaching for Life' programme





1.3 WIDER IMPACTS

Beyond the quantified economic and social impacts, Arsenal generates wider value by driving social change through sustainability and its commitment to social responsibility; championing greater equality, diversity and inclusion (EDI) at the Club; as well as the Club's various initiatives to build a connection with supporters; and promoting growth of future sporting talent through the academies.

The Arsenal Foundation and Save the Children UK teamed up in 2011, united by the idea of a partnership that could improve the lives of thousands of children and young people growing up in some of the world's toughest places. Raising more than £4.6 million, including generous donations from players and supporters, The Arsenal Foundation and Save the Children have partnered on education projects in some of the toughest environments in Iraq, Somalia, Indonesia, and the Za'atari Refugee Camp in Jordan, giving children who have fled conflict a safe place to play freely. The Arsenal Foundation has also stood in solidarity with children across the globe in times of crisis, by donating generously to a number of Save the Children's emergency responses.

Arsenal is a leader in environmental sustainability, being the first Premier League club to endorse the UN Sport for Climate Action Framework.³ Through various initiatives like a reusable cup programme, and the use of 100% recycled material for match kits, Arsenal is actively reducing its carbon footprint to ensure a greener future for the Club, and to inspire other clubs to follow suit.

Arsenal places great emphasis on EDI through its various initiatives. In the 2022-23 season, the Club made substantial progress through the 'Arsenal for Everyone' programme, which aims to foster a sense of pride and belonging for all individuals associated with Arsenal. Notable initiatives include full British Sign Language (BSL) integration across the stadium, the Club's work to #stoponlineabuse, as well as welcoming Kick It Out's Raise Your Game Conference to Emirates Stadium for the sixth time.

Additionally, Arsenal provides pathways for the next generation of footballers, through their academy system for boys and girls, which develops not only the football skills of these future players, but also shapes their character into 'strong young gunners' prepared for a successful future in all aspects of their lives.

3 <https://www.arsenal.com/news/arsenal-joins-un-tackle-climate-change>





INTRODUCTION

THIS REPORT ASSESSES THE ECONOMIC AND SOCIAL IMPACT OF ARSENAL, FOCUSING ON THE LONDON BOROUGH OF ISLINGTON AND THE UK-WIDE IMPACTS. EY HAS CONDUCTED ANALYSIS USING DATA FROM THE 2022-23 SEASON DRAWING INSIGHTS FROM VARIOUS SOURCES, INCLUDING INFORMATION PROVIDED BY ARSENAL.

2.1 ARSENAL, ISLINGTON, AND THE UK

The aim of this report is to highlight the economic and social significance of Arsenal in the UK, with a specific focus on Islington, where the Club provides support in the face of some of the Borough's most challenging economic and social conditions.

The report relies on a combination of quantitative and qualitative analysis to assess the impact of Arsenal, using both economic modelling and case studies of community initiatives, to understand the impact of the Club's activities on the economy and society. A summary of the economic and social impact considerations is listed below.

2.2 SCOPE OF THE REPORT

Economic Impact:

- ▶ Arsenal and charitable operations: day-to-day operations of entities in the Arsenal Group and The Arsenal Foundation supports economic activity directly and through local supply chains.
- ▶ Tourism and hospitality: Arsenal attracts visitors from all over the UK and around the world to attend its high-profile football matches at Emirates Stadium.

Social Impact:

- ▶ Local community projects: a variety of programmes are implemented through 'Arsenal in the Community' to achieve improved health, education, and community outcomes.
- ▶ The Arsenal Foundation: through the Club's UK registered charity, Arsenal drives value in local communities through grant-giving initiatives; as well as driving positive social impact internationally through 'Coaching for Life.'





Arsenal employs **724 full-time staff** across four sites.

Meadow Park — Hertsmere District (owned by Borehamwood FC), the home venue for the Women's first team and senior academy team (U18 to U21).

Sobha Realty Training Centre — Based in Hertsmere District, the main training ground for the Men's and Women's first team and senior academy teams aged U18 to U21.

Highbury Campus — Based in the London Borough of Islington, including Emirates Stadium, Community Hub and Highbury House, Arsenal's Head Office.

Hale End — Based in the London Borough of Waltham Forest, home to Arsenal's Youth Academy for players aged U9 to U16.





2.3 ARSENAL'S HISTORY OF GIVING⁴

Arsenal Football Club was established in 1886⁵ and has grown into one of the most prominent football clubs in the world, touching millions of supporters.

Throughout its history, Arsenal has been at the forefront of football, leading the way in various aspects of the game. From the pioneering teams of the 1930s and 2000s, who won multiple titles (league championships, community shields and FA Cups), to the establishment of the women's team in 1987,⁶ which has gone on to become the most successful English women's football team in history, based on titles won.

The Club has a longstanding tradition of giving back to the community. The Club's history of charitable activities dates back to its early years. As early as 1886, matchday programme cards were sold to support 'Homes for Working Boys' at the Club's former home in Woolwich, south London. In 1912, Arsenal organised a special London derby charity game to raise funds for the Titanic relief fund.

In 1985, Arsenal established its in-house community department, in response to the social unrest prevalent in London during that time. The Club's value of 'doing the right thing, even when no one is looking' drove their determination to address issues in the local community related to racial tension and youth unrest, by establishing community focused programmes to engage youth in grassroots football.

Building upon their community efforts, Arsenal established a grant-giving arm in the early 1990s, which eventually led to the creation of The Arsenal Foundation in 2012. With a clear mission to

inspire and support young people across North London and around the world, the Foundation plays a vital role in supporting local projects and causes through small grants that make a difference to the lives of local people.



⁴ <https://www.arsenal.com/men/honours>

⁵ 'Arsenal Football Club was established in 1886 by a group of munitions workers looking to create a sense of community away from their challenging work in the Woolwich Armament factory.'

⁶ <https://www.arsenal.com/women/women-history>

ARSENAL'S TIMELINE



Arsenal Football Club was founded

1886

1985

Formation of Arsenal in the Community — Arsenal established its community department

1919

Promoted to the top-flight — Arsenal holds the English record for the longest unbroken stretch of top-flight football

1987*

Arsenal Women's Team was founded — Arsenal Women have gone on to become the most English successful women's football team in history

Arsenal Women sold out Emirates Stadium for the first time in May 2023 in the UEFA Women's Champions League against Wolfsburg. In the 2023-24 season, the Club went on to break the WSL attendance record three times, selling out the Emirates twice more.

2006**

1998

Arsenal Sports Centre — redeveloped at Highbury Stadium

1991

The Arsenal Charitable Trust established — initially adopting a charity of the season approach

The Home Office Positive Futures Programme begins — being delivered in Islington in partnership with Islington Housing

2004

1998

The Arsenal Double Club is established — providing football related education resources to Primary and Secondary Schools



Sources:
 * <https://www.itv.com/news/2023-05-01/arsenal-make-history-with-record-crowd-at-womens-champions-league-semi-final>
 ** <https://www.letsrecycle.com/news/arsenal-fc-hands-over-60m-recycling-centre-to-islington/>

2008

Elthorne Park is refurbished – with the new 'Cryuff Court' pitch supported with funds donated by Dennis Bergkamp from his testimonial match

2010

The Arsenal Gap Year Programme is launched – with coaches travelling internationally having gained practical coaching skills in the UK

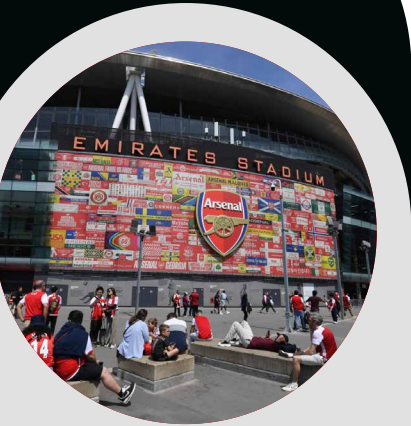
2023

Stadium artwork launched – Arsenal unveiled eight new pieces of artwork at Emirates Stadium, following over a year-long consultation with 100+ supporters, legends, and Club staff

Present Day

Emirates Stadium move

Move to a multi-purpose venue for sports, concerts, and other events



2012

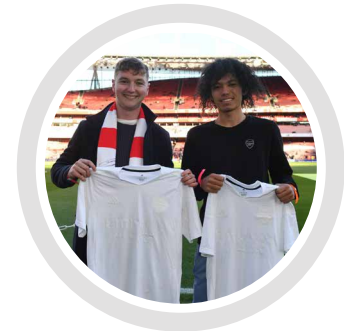
The Arsenal Foundation is registered as a UK Charity – with the aim to inspire and support young people in North London and across the world

2022

10 years of Gay Gooners – In 2022, GayGooners – the first and largest LGBTQ+ supporter group in England – celebrated 10 years since their inception

2015

The Arsenal Hub opened to mark 30 years of AITC – the Arsenal Hub opens to the local community providing a state-of-the-art indoor pitch and classroom facilities to expand the work of Arsenal in the Community



2016

Arsenal Legends take on Milan Glorie – with the funds being used to invest in local and global football pitches

2021

No More Red – No More Red is launched in partnership with adidas to help keep young people safe

2017

Coaching For Life – the Arsenal Foundation's flagship international programme in partnership with Save The Children, 'Coaching For Life' is established

2020

COVID outreach – during the global pandemic AITC continued to respond to local need by providing over 0.5 million meals, support for NHS staff, Covid testing, vaccination and food distribution facilities, as well as online support and education resources for local schools



As part of this move, Arsenal donated a newly constructed waste and recycling centre worth £60 million to the London Borough of Islington and the North London Waste Authority. In collaboration with construction contractors, Arsenal built a waste and recycling centre with a capacity of 401,500 tonnes at Hornsey Street. The facility processes household waste from Islington, half of the waste from Camden, and about 20% of the waste from Haringey. It includes waste transfer stations, recycling facilities for various materials, a re-use and recycling centre, and facilities for servicing and cleaning waste handling vehicles. The centre aims to recycle over 50% of the waste it receives and promote sustainable waste management practices.



CASE STUDY: EMIRATES STADIUM ARTWORK

The stories and data in this report are united by Emirates Stadium and what it represents to the Arsenal community. The Stadium is the Club's epicentre of pride, inspiration, and belonging, symbolising what it means to be part of Arsenal Football Club, both locally and globally.

Since opening, the walls of Emirates Stadium had remained largely bare, featuring the Club crest against exposed concrete. Arsenal wanted to upgrade this to tell a bigger story about the Club's history and community role. In April 2022, the Club launched an extensive consultation program with over 100 supporters, legends, staff, and community members. Workshops gathered insights on Arsenal's heritage, culture, and community.

Contributors included legends like Kelly Smith and descendants of past icons, such as George Armstrong, David Rocastle, Eddie Hapgood, Ted Drake and Reg Lewis's family. Collaborating with Turner Prize-winning artist Jeremy Deller, critically acclaimed artist Reuben Dangoor, and distinguished graphic designer David Rudnick, eight pieces of art were produced — representing the Club's values and history. Each piece has a unique theme but collectively celebrates Arsenal's rich heritage, community values, and pursuit of progress.

The artwork is a visual representation of the pride and sense of belonging that Arsenal instils in its community.

THE ARTWORK



Victoria Concordia Crescit — The story of the iconic players who embody the spirit of Arsenal.



Future Brilliance — Reflects Arsène Wenger's legacy and the Club's commitment to providing opportunities and developing young players.



Invincible — Immortalises the women's 2006/07 Champions League win and the men's 2003/04 invincible season.



Remember Who You Are — Pays homage to the memories and history of Highbury.



We All Follow The Arsenal — A rich tapestry inspired by supporters' deep connection to the Club, wherever they are in the world.



Eighteen Eighty-Six — Symbolises the constant pursuit of progress since the Club's founding in 1886.



Come to see The Arsenal — Celebrates Arsenal's community roots, visible to passengers on southbound trains arriving into London passing Emirates Stadium.



Found a Place Where We Belong — An illustrated crowd scene representing the importance of the Arsenal family, featuring over 700 supporters who have contributed to the Club's success.

2.4 ARSENAL'S PURPOSE AND VALUES

Today, Arsenal maintains a strong commitment to success and innovation, much like throughout their history. The Club has a clear purpose stated as **'Arsenal Acts for a winning team, culture and community'**.

Arsenal is guided by three core values that serve as the foundation of its operations and actions:

- ▶ **Always move forward** — being courageous in the pursuit of progress
- ▶ **Be together** — championing our community and each other
- ▶ **Actions that matter** — doing the right thing (even when no one is looking)

This report examines the economic and social impact resulting from the application of these values across the activities of Arsenal as a whole.



7 Based on ONS census data (2021).

8 Islington Together 2030 plan.

9 ONS — House prices (2022).

10 DCLG, The English Indices of Deprivation, 2019, based on each LSOA ranking compared to the rest of England — highest deprivation areas are in the most deprived 10% in England, while lowest deprivation areas are in the least deprived 10%. <https://www.gov.uk/government/collections/english-indices-of-deprivation>

11 <https://www.islington.gov.uk/about-the-council/islington-evidence-and-statistics/islington-population-evidence-and-statistics/deprivation>

12 <https://nclhealthandcare.org.uk/about/your-area/islington/#:~:text=Even%20before%20the%20pandemic%2C%20Islington,a%20diagnosed%20mental%20health%20condition>

13 <https://lginform.local.gov.uk/dataAndReports/search?text=sen>

2.5 THE LONDON BOROUGH OF ISLINGTON

Islington is a vibrant inner London Borough with a growing, culturally diverse, and relatively young population.⁷ In 2022, Islington was home to a population of over 210,000 people, making it one of the smallest boroughs in London.⁸ The area has a good supply of local jobs, access to the wider London economy, a rich cultural heritage, and some of the highest property prices in the country.⁹

While Islington may be perceived as a wealthy and affluent region, pockets of deprivation still exist within the Borough. Islington is ranked as the 53rd most deprived local authority area in England (out of 317 local authorities) and the 6th most deprived local authority in London. Islington also has the 10th highest level of income deprivation amongst children across all local authorities in England.^{10, 11}

Islington faces some unique health challenges, having the highest level of child poverty in London (28%) and the 4th highest level of poverty amongst older people in London. Social isolation and mental health has been a challenge in Islington — with the Borough having the 5th highest level in London for loneliness; and 1 in 6 adults in Islington having a diagnosed mental health condition.¹² In addition, in the 2022-23 academic year, 22.6% of Islington School pupils had Special Educational Needs, which is higher than the London (17.0%) and England (17.3%) average.¹³

Since its inception, AITC has remained closely attuned to the needs of the local community. In order to address the challenges of social isolation, inequality and mental health issues in Islington, Arsenal recognised the importance of establishing a strong relationship with Islington Council to maximise its impact on the local community, and has taken initiative to take a proactive role in engaging with the Council.

Arsenal members of staff sit on strategic boards within Islington Council, such as within the Youth Justice Management Board and the Health and Wellbeing Board. As part of this role, Arsenal has supported the Council with writing strategies (for example, the current youth offending strategy), which has enabled Arsenal to remain up to date with the priorities of the Council and ensure AITC's programmes are consistently guided by and shaped according to Islington's wider community objectives and aspirations for the Borough. These include ensuring children have the best start to life, fostering the prosperity of local jobs and businesses within the area's economy, promoting a cleaner, greener, and healthier Borough, and cultivating an environment where communities feel secure, connected, and inclusive.





Arsenal is also a representative on the Islington Anchor Institution Network, alongside other major Islington employers and key organisations, such as Whittington Health NHS Trust and the London Metropolitan University. This network aims to reduce inequalities and help towards building a thriving local economy, and focuses on big-ticket items such as environmental sustainability, procurement and local recruitment. By being part of this network, Arsenal is able to contribute to meaningful change in the community and leverage on its position as a leader in the community. For example — members in the network are committed to spending their money as locally and sustainably as

possible, in order to provide jobs for Islington residents. Members of the network are also jointly working towards shared net zero carbon objectives.¹⁴

Overall, Arsenal's activities in the local community have been implemented in the context of addressing challenges faced by the local community. The outcomes of Arsenal's activities are the focus of the remainder of this report.

¹⁴ <https://www.islington.media/news/new-network-of-major-islington-employers-and-key-organisations-to-reduce-inequalities-and-help-build-a-thriving-local-economy>

CASE STUDY: ARSENAL IN THE COMMUNITY'S WORK THROUGH THE ISLINGTON POSITIVE FUTURES PROGRAMME

Arsenal in the Community works in partnership with the London Borough of Islington on the 'Positive Futures Programme', a diverse programme designed to improve the lives of individuals living in local estates across the Borough.

The year 2024 will mark an important milestone for Positive Futures, as AITC celebrates 20 years of delivery within the Borough. Whilst the programme has evolved during that time, the approach and core values remain the same: using engagement through the Club to provide a sense of belonging and help individuals and communities thrive.

The Positive Futures Programme engages over 500 young people aged 7-16 through weekly football activity. These sessions take place five evenings a week, on seven estates throughout Islington, across 48 weeks of the year.

Combining football, sports activities, mentoring, and pathways into community volunteering and employment, the sessions provide young participants with valuable opportunities for personal development and access to broader avenues of growth.

The approach of the Positive Futures Programme has led to the development of wider AITC programmes with health-based initiatives being taken to local estates to engage with residents, the bowls programme designed to tackle social isolation and loneliness amongst the elderly — taking place in five community centres each week, as well as educational clubs for school children taking place after-school hours.

An important part of the work of AITC focusses on is the progression of participants onto other programmes delivered by the department, including Post-16 Education Provision and Employability Schemes.

Key participant feedback findings:

- ▶ **96%** of older youths and **100%** of parents/carers stated that attendance at the sessions helped them or their children to feel connected to their local community.
- ▶ **96%** of older and **93%** younger participants felt safe during activities.
- ▶ **100%** of older youths felt that they had improved or learned new skills.



Source: information provided by Arsenal

CASE STUDY: KAI'S EXPERIENCE WITH POSITIVE FUTURES

A key part of Arsenal in the Community's work is to ensure participants in their programmes have the opportunity to develop and take on coaching roles to enhance their personal growth and career prospects. Over 60% of AITC's sessional coaches today have previously been a participant on an Arsenal in the Community programme.

Kai is one of AITC's coaches, this case study highlights the journey he has been on with Arsenal.

"The first time I heard about Positive Futures, I was very little. I was about 7 years old. I remember walking through Harvist Estate with my mum and my twin. Knowing it was free was a huge relief. As I grew up my life was tough, I think that's where my challenging situation began. I didn't like education, so I didn't want to try and push for higher grades. I wasn't ambitious.

The first session I went to, I just remember being happy in the environment. The coaches were great, they were supportive, and they ensured that I was in a safe environment. It was like that for every session I attended. They also gave me a lot of advice and tips on progression pathways, which obviously worked as I now coach for the community department. The friendships/work relationships I have formed are with the best people. Personally for me, I think that's the best thing that's come out of my time at Arsenal. The coaches I work with are such great people, who I respect highly. The team I have behind me are just incredible.

Being part of social inclusion has changed me in a positive way, it's made me feel ambitious and it's given me a goal to push towards, which is to be a fully licensed football coach. I didn't have a path before Arsenal. I have never been excited to look forward to doing something every week. It helps you adapt to the world and in a working environment. It makes everything easier.

I think the thing that surprised me most is how much casual coaches are looked up to by our participants. They always ask where we are or how we are and that puts a smile on my face. I'd never thought I'd have to be a role model to these guys. But I had to step up as a person to do it. Being part of Arsenal is like being part of a family, you support each other no matter what. It also gives me the confidence to take on any challenges that come my way and to try new things whether it be within Arsenal or outside of Arsenal. I'm prouder of myself than I have ever been."



CASE STUDY: ARSENAL'S INVESTMENT AND ACTIVITY IN LOCAL PITCHES

Figure 1: Map of AITC Delivery Sites and Investment in Facilities across Islington



Arsenal in the Community has been investing in pitches and delivering activity in facilities across the Club's local area. To date, AITC has supported over 30 pitches across the Club's home borough of Islington and neighbouring boroughs of Camden and Hackney.

The map demonstrates the extent of AITC's programme delivery across Islington — through sites the Club has funded, part funded or supported, as well as other sites where AITC coaches deliver Arsenal in the Community programmes.

These facilities take many forms — whether it be pitches in parks on estates, delivery through school facilities, or even programmes run based in Arsenal's own Community Hub at

Emirates Stadium. Many are non-bookable and free to use, helping the local community who may be struggling with cost-of-living challenges.

Providing quality sports spaces and programmes delivers positive outcomes for the local community — whether that is improving health, helping vulnerable people become safe, delivering a sense of belonging, or supporting people in developing skills and confidence.

This reflects on Arsenal's long-term commitment to improving access to sport for people across the Borough, and in supporting Islington in its desire to increase the number of sports spaces for the local community.



ECONOMIC IMPACT

THE LONDON BOROUGH OF ISLINGTON AND THE UK ECONOMY BENEFIT FROM THE ECONOMIC CONTRIBUTIONS OF ARSENAL, THROUGH DIRECT, INDIRECT, AND INDUCED IMPACTS.

3.1 APPROACH TO MEASURING IMPACT

Arsenal makes a significant economic impact on both the London Borough of Islington and the wider UK economy. This impact arises from the day-to-day commercial operations of the Club and the influx of visitors to the local area on matchdays. The economic impacts of these activities can be divided into three main categories:

- ▶ **Direct impacts** — resulting from Arsenal's own activities, matchday tourism, and charitable initiatives.
- ▶ **Indirect impacts** — the additional economic activity in the region that occurs through Arsenal's supply chains.
- ▶ **Induced impacts** — the additional economic activity supported by the employment incomes received by Arsenal employees and those within the Club's supply chain.

This report aims to provide a comprehensive assessment of the economic footprint of Arsenal. It takes into account a range of activities carried out by Arsenal's entities, as well as the impact of visitor spending. The page overleaf provides an overview of the key drivers of Arsenal's impact, which informs the economic analysis presented in this report. In addition to the impacts quantified in this report, there are likely to be wider impacts resulting from the activities of Arsenal, such as through connections with the media and retail sectors, which are not fully captured within this analysis. This analysis is based on information provided by Arsenal regarding operational costs, tax liabilities, income, employment and event attendance.¹⁵

3.2 ECONOMIC CONTRIBUTION

This section assesses the economic returns at a local and national levels based on three key measures:

▶ GVA

Gross Value Added (GVA) reflects the additional value to the economy that is created from Arsenal's presence. This broadly equates to profits and employee salaries generated at each stage of the supply chain.

▶ Employment

The total number of full time equivalent (FTE) jobs created or supported by the total direct, indirect, and induced effects of Arsenal's presence.

▶ Tax Receipts

The revenue generated for the Exchequer as a result of the economic activity, including direct, indirect, and induced effects. This revenue includes taxes such as employee PAYE and National Insurance, VAT, and corporation tax.

¹⁵ Refer to the Appendix in page 60 for further detail on the economic impact methodology.



3.3 DRIVERS OF IMPACT

The economic impact of Arsenal's operations extends beyond the boundaries of Islington and London, where the Club is based, and spreads across the UK. The key drivers of the economic impact are highlighted below.

2022-23 ECONOMIC IMPACT DRIVERS



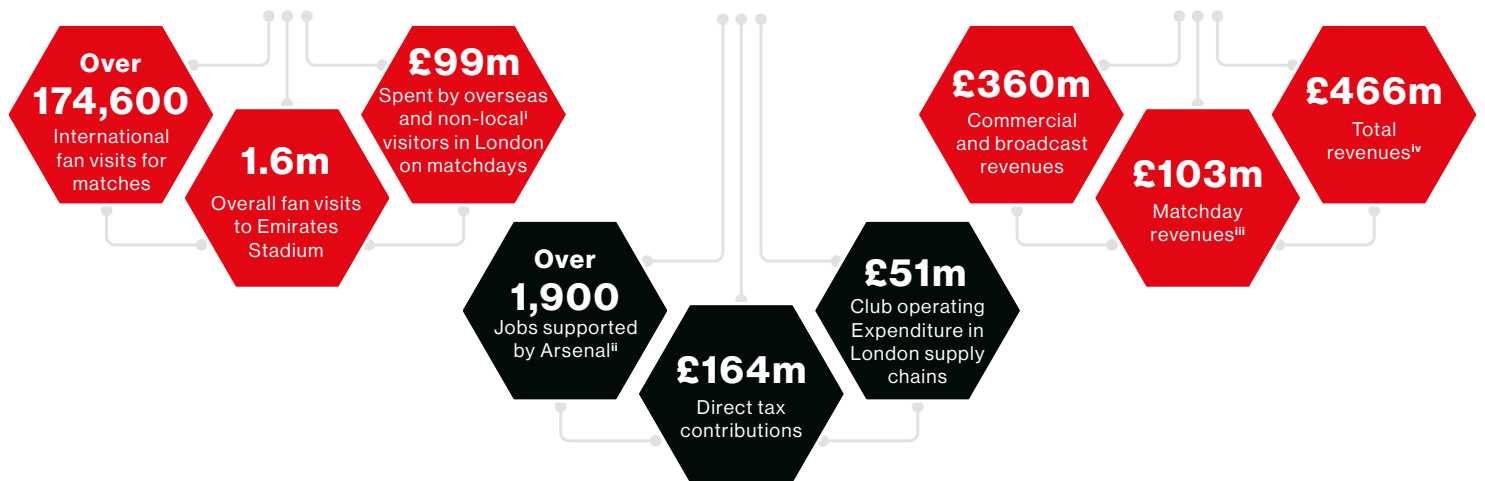
VISITOR ECONOMY



IMMEDIATE IMPACTS



INCOME



Source: EY analysis and Arsenal data

- Additional spend is undertaken by international visitors and 'non-local' visitors. Non-local being domestic visitors who reside in the UK, but outside of London.
- Figure relates to individual job roles supported including both part-time as well as full-time roles, this amounts to 724 FTEs directly employed by the Club and Foundation.
- Figure includes gate and other matchday income.
- This includes all revenue across all entities in the Arsenal Group and The Arsenal Foundation.



3.4 GVA

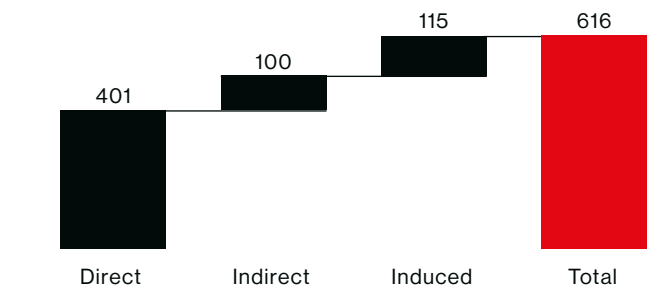
Arsenal and its wider activities generate revenues that make a significant contribution to the UK's gross domestic product. This can be measured through GVA, which captures the value generated at each stage of Arsenal's impact.

Arsenal generated a total GVA contribution of £616 million in the UK. There was a £534 million impact within London and £425 million within Islington specifically.

£397 million of the £425 million GVA contribution in Islington relates to the direct impact of Arsenal's activities and visitor spending on matchdays. An additional £11 million was stimulated through spending within the Club's local supply chains, and £17 million resulted from the spending of employment incomes.

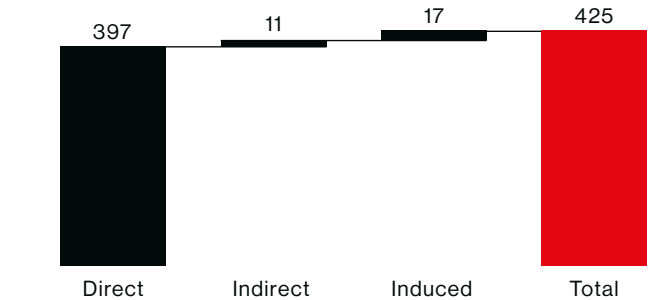
The direct impact within Islington is relatively large (compared to at a UK level), as there is a large proportion (97%) of supporters visiting Islington on matchdays who are not from the local area, and who therefore drive economic impacts in Islington through visitor spending, which contributes to the local economic impact. At a UK level, the economic impact only considers international visitors, who are additional to those already residing in the UK.

Figure 2: GVA contribution of Arsenal in the UK, £m



Source: EY analysis of Arsenal data

Figure 3: GVA contribution of Arsenal in Islington, £m



Source: EY analysis of Arsenal data

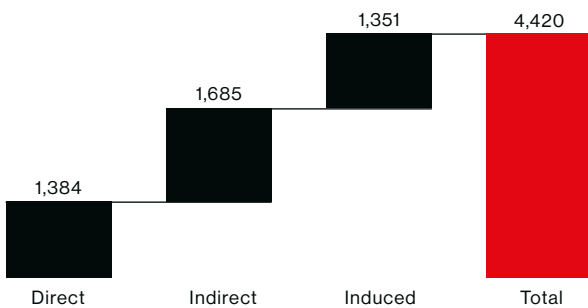




3.5 EMPLOYMENT

Arsenal supported 4,420 FTE jobs in the UK economy. 1,384 FTE jobs were directly employed by the Club or supported by direct visitor spending, with 1,685 FTE jobs supported throughout supply chains (the indirect effect) and a further 1,351, as a result of induced effects.

Figure 4: Total employment impact of Arsenal, FTE jobs in the UK

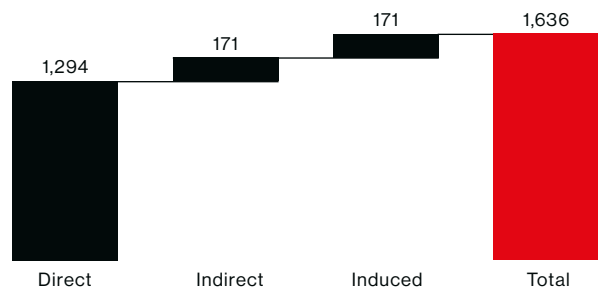


Source: EY analysis of Arsenal data
Numbers do not sum due to rounding

In Islington specifically, the Club supported 1,636 jobs in FTE terms. A large proportion of these jobs (65%) were driven by visitor spending on matchdays.

In total, Arsenal's operations and matchday activity created a total of 6 FTE jobs in the UK for every 1 FTE employed directly by the Club.¹⁶

Figure 5: Total employment impact of Arsenal, FTE jobs in Islington



Source: EY analysis of Arsenal data

¹⁶ This is based on the 724 FTEs which were directly employed across Arsenal in 2022-23, excluding direct jobs supported by visitor spending.

3.6 THE VISITOR ECONOMY

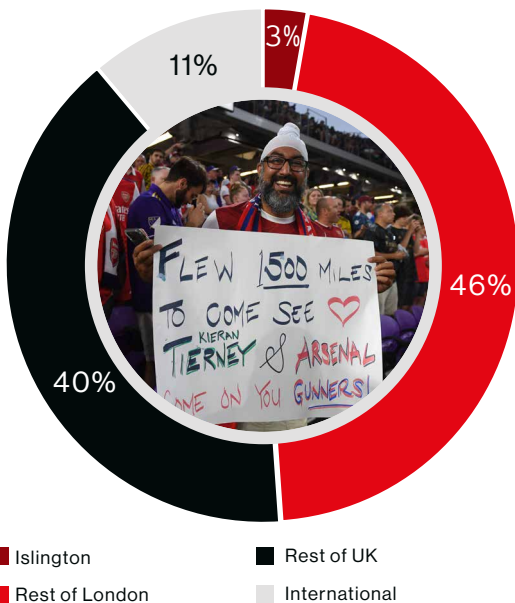
During the 2022-23 season, Arsenal's home games at Emirates Stadium and Meadow Park attracted an attendance of 1.6 million supporters. These matchdays brought significant economic benefits to the local area, particularly Islington, through visitor spending.

Out of these matchday attendees, 3% were local Islington residents, while the remaining 97% were visitors from outside of the London Borough of Islington, bringing benefits to the local visitor economy. Of these remaining visitors, 46% were from elsewhere in London, while 40% were from elsewhere in the UK, with 11% of supporters being international visitors from outside of the UK. These domestic and international visitors contributed to the local Islington visitor economy by spending on various goods and services such as food and beverage, merchandise and travel.

These visitor trips generated over £69 million in direct spending in Islington from day visits by non-local and international visitors on matchdays — boosting economic activity in the Borough, supporting local businesses, and stimulating growth in the area. It is estimated that visitor spending on matchdays, combined with the associated supply chain and induced impacts contributed a total £60 million of GVA in Islington, which supports over 1,000 jobs in the local economy. In addition, on matchdays the stadium attracts a myriad of local pop-up businesses, which supports in generating income for local businesses.

At a London level, it is estimated that there was £99 million in visitor spending generated related to matchdays, this was mainly driven by overnight and longer stays from domestic visitors (from outside of London) and international visitors attending matches at Emirates Stadium.

Figure 6: Origin of matchday visitors in Islington¹⁷



Source: EY analysis of Arsenal data

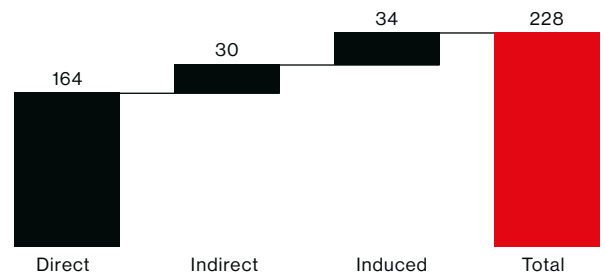
¹⁷ 'Rest of London' is defined as inner and outer London postcodes, excluding Islington. 'Rest of UK' excludes London.

3.7 TAX

The economic activity of Arsenal resulted in an estimated £228 million total tax contributions, which includes local and national contributions. This includes the tax generated from Arsenal's operations and employment as well as the tax impact stemming from visitor spending on matchdays.

The direct tax contribution generated a total of £164 million to public finances, while supply chain activities contributed £30 million and induced impacts a further £34 million.

Figure 7: Tax contributions stimulated by Arsenal, £m



Source: EY analysis of Arsenal data





SOCIAL IMPACT

ARSENAL HOLDS THE LOCAL COMMUNITY AS A PRIORITY IN EVERYTHING IT DOES, AND IS FOCUSED ON IMPROVING OUTCOMES FOR PEOPLE LIVING WITHIN ITS COMMUNITY.

4.1 ARSENAL'S UNIQUE BLUEPRINT FOR CREATING SOCIAL VALUE

Arsenal has a unique approach to delivering on its social commitments, with a community delivery team as a department within the Club — this enables social responsibility to hold a status within Arsenal's core business.¹⁸

Arsenal in the Community (AIRC) sits within Arsenal Football Club and delivers Arsenal's social and community programmes, with the aim of helping communities and individuals thrive.

The Arsenal Foundation, which operates as an independent registered charity, is the Club's grant-giving arm. The Arsenal Foundation is funded by donations from players, staff and supporters. The mission of the Foundation is to inspire and support young people in the

UK and overseas, nurturing their confidence and skills to help them achieve their full potential.

Arsenal works with a portfolio of external partners who play an incredible role in supporting the overall work of the Club. In addition the partners are also involved in the delivery of some of Arsenal's community initiatives and programmes, for example the 'No More Red' campaign with Adidas, and the employability programme with Lavazza.

This model, which combines both in-house and external delivery, enables Arsenal to leverage its own workforce to address some of the most pressing societal issues through AIRC, while also providing financial support to address broader social needs through grant-giving initiatives led by The Arsenal Foundation. Both entities prioritise the local community within three London Boroughs: Islington, Hackney and Camden. This section of the report explores the impact of these activities and the social return on investment generated.



¹⁸ Information provided by Arsenal.

ARSENAL'S DRIVERS OF SOCIAL VALUE

IN-HOUSE

Arsenal in the Community

Aims to create a sense of belonging to Arsenal and help communities and individuals thrive. The team delivers sport, social and education programmes to over 5,000 individuals each week.

Arsenal Hub

Centre of the Club's community operations and designed to be a fully accessible space for the wider community.

EXTERNAL

The Arsenal Foundation

Registered charity and grant-giving organisation. Official partners are Islington Giving, the Willow Foundation and Save the Children.

External Official Arsenal Partners

Arsenal works with lead partners (Adidas, Emirates and Visit Rwanda), in addition to a number of official and regional partners who support the work of the Club, and play a role in Arsenal's charitable programmes.

4.2 THE ARSENAL FOUNDATION AND ITS ACTIVITIES

The Arsenal Foundation plays a vital role in creating social value and driving a positive impact in society. The Foundation was launched in May 2012 as a grant-giving organisation, with the mission to help young people fulfil their potential. Save the Children, the Willow Foundation and Islington Giving are all official partners of The Arsenal Foundation, with a great number of other local projects also benefiting from grants and support. Each year, players, staff and supporters get involved in a range of activities to raise awareness and funds for the Foundation.



Image credit: Charlie Forgham-Bailey/Save the Children.

SUPPORTING LOCAL COMMUNITIES

The Arsenal Foundation has been able to reach a diverse range of organisations and projects within the local community.

The Foundation's relationship with Islington Giving continues to provide a partnership through which Arsenal can identify local needs and work together to address such needs — whether this is for young people or those in adulthood, including the elderly. The Foundation's combined local experience means it understands the level and complexity of need in the local Borough and can tailor projects and/or grants to these local needs whilst being flexible enough to adapt where needs change.

Smaller organisations and projects local to Arsenal Football Club continued to benefit from The Arsenal Foundation's Gunners Fund grants throughout the year. The Gunners Fund awards grants of up

to £2,500 per application, making a significant difference to smaller projects which benefit the local community in Islington, Camden, and Hackney. In 2022-2023, The Gunners Fund distributed to a variety of local initiatives. Some of the grants supported by The Gunners Fund include: online healthy eating classes, local history group for older people, defibrillators at local schools, basketball club for adults with learning disabilities, sensory rooms at Drayton Park and St Joan of Arc Primary Schools, Islington Girls District football team, swimming project for adults with special needs, disability cycling project, drama project for older people with dementia.

Many of these smaller organisations struggle with access to funding, underlining the important role of the Foundation in the local community.

The Arsenal Foundation — Grant Giving objectives

- ▶ To prioritise and address areas of need such as education, sports for health improvement, medical assistance, relief of suffering, disability support, poverty alleviation, and aid for individuals facing misfortune.
- ▶ To benefit the UK and overseas, with a particular focus locally on Islington, Camden, Hackney, Barnet, Walthamstow, and Hertsmere regions.
- ▶ To provide support to various entities associated with Arsenal F.C., community projects, staff-initiated and supporter-initiated projects, football-linked campaigns, active fundraisers, and projects that align with the Foundation's objectives.
- ▶ To ensure that all grants contribute to the public benefit as an overriding requirement.
- ▶ To select applicants who can effectively and efficiently utilise the granted funds while maintaining a prudent level of reserves for the sustainability of their projects.

WILLOW FOUNDATION

The Arsenal Foundation has partnered with the Willow Foundation (Willow) since 2013. Willow was founded in 1999 by former Arsenal goalkeeper and TV presenter, Bob Wilson and his wife, Megs, as a lasting memorial to their daughter, Anna, who died of cancer aged 31. Its mission is to provide 'Special Days' for young adults living with a life-threatening illness.

Willow received £30,000 from The Arsenal Foundation in 2022-23 which continued to help fund unique special days for young people with conditions such as motor neurone disease, muscular dystrophy, and Huntington's disease. Special days include family breaks, theatre shows, sightseeing trips and music concerts, as well as experiences with Arsenal Football Club principally around match days. Willow's special days offer great opportunities to create powerful memories in challenging times for sick young people and their families.



NORTH LONDON TO ZA'ATARI – COACHING FOR LIFE

The Arsenal Foundation's flagship programme Coaching for Life was launched in Za'atari refugee camp in Jordan in 2018, in partnership with Save the Children. The programme supports children and their families who fled their homes since the outbreak of the Syrian war in 2011. Save the Children, an international Non-Government Organisation (NGO), was founded over a hundred years ago, and currently operates in over 120 countries.

Using a blueprint combining Arsenal in the Community's 38 years of work in north London and Save the Children's experience in conflict and humanitarian crises, Coaching for Life uses the power of football to build a sense of belonging and improve the physical, mental and emotional wellbeing of children and their families. Not only has Coaching for Life supported the lives of people in the camp, it has also challenged gender stereotypes, offering equal opportunities for girls and boys to engage in football, fostering inclusivity and providing safe spaces for over 5,000 children and young people.

COACHING FOR LIFE: 2022-23

In 2022–2023, through the Foundation's partnership with Save the Children, Arsenal continued to co-design and deliver the Coaching for Life project, creating specialist modules that utilise football activities to provide participants with the opportunity to improve their physical and mental health and wellbeing and to further their life skills. This project continues to be developed and implemented in the Za'atari refugee camp in Jordan.

AITC has been delivering community programmes in Islington, Camden and Hackney since 1985 with over 30 programmes delivered on a weekly basis. The Arsenal Foundation supported AITC through the Arsenal Community Coach Development Programme, which provides training, qualifications, and experience to aspiring football coaches. Coaches are supported for up to twelve months, as part of the programme some of the coaches have then supported the Coaching for Life programme in Za'atari refugee camp.

COACHING FOR LIFE (CFL) IMPACT MARCH 2022 – FEBRUARY 2023¹⁹

- ▶ **3,178** children, parents, caregivers, and community members reached.
- ▶ **1,054** children (552 girls and 502 boys) took part in Football for Resilience sessions, with 960 children (480 girls and 480 boys) completing more than 80% of sessions and therefore graduating from the programme.
- ▶ An additional **927** children (510 boys and 417 girls) took part in themed tournaments and open sessions.
- ▶ **1,197** (558 females and 639 males) parents, caregivers, and community members participated in a variety of activities, including football tournaments and child rights advocacy sessions on topics such as access to education, access to health services, and living in an environment free from violence.
- ▶ **Gender Equity:** Since it launched in 2018, girls' participation in CFL has doubled. Both Arsenal and Save the Children are extremely proud of this achievement. CFL continues to challenge and influence gender norms through the participation of girls in football activities and the advocacy conducted by children and parents in the camp on issues that disproportionately affect girls, including child marriage, gender-based violence, and sexual harassment including cyber harassment.
- ▶ **Mini Leagues:** This evolved model of mini leagues placed a specific emphasis on nurturing mental and emotional resilience among the participants, aligning with the programme's overarching objectives related to six main themes: Identity, communication skills, emotions, interpersonal relationships, conflict management, and decision-making.
- ▶ **Coaches:** The Arsenal Community Coach Development Programme (CDP) coaches played a pivotal role in the programme by offering constructive feedback to local and junior coaches after each coaching session. This feedback helped coaches refine their techniques, ensuring that the sessions kept the children motivated, and engaged.



¹⁹ Data provided by The Arsenal Foundation.

CASE STUDY: COACHING FOR LIFE PARTICIPANT

Jana is a 13-year-old girl from Dar'a, Syria, who lives in Za'atari camp following the conflict in her hometown. Jana's commitment to Coaching for Life means she travels by bike across the camp to attend the sessions. A shy and quiet girl, before joining the programme, Jana found it hard to express her emotions and opinions.

"I have lived in Za'atari for 10 years. We came here after the war." Jana said. "Whenever there was aircraft, I would get scared by the noise. So we came here. My father got us here. I was so happy I signed up with Arsenal. When I play football, I feel happy. I feel full of energy and optimism."

Jana's mother spoke about arriving in Jordan and the impact of Coaching for Life on her daughter. "We had nothing at all. We just

Source: The Arsenal Foundation

escaped to save ourselves with our IDs only. We got here, we lived in tents, and we suffered. Coaching for Life changed Jana. 180 degrees, it changed my daughter. I think she started to love life again. It was like she had been dead, a body with no soul, but suddenly she started to love life, to love people."

AFC's communications and brand team visited Za'atari in March 2023 to gather content and case studies. A video of Jana's story was launched across the Club's social media channels on International Women's Day to highlight the impact Coaching for Life is having on girls' empowerment within the camp!



AITC SOCIAL RETURN ON INVESTMENT

The Social Return on Investment (SROI) measures the total value of benefits generated per £1 invested. When the SROI exceeds £1, it indicates that the social value created outweighs the costs incurred.

An SROI assessment was carried out for AITC activities in the 2021-22 season. AITC and its supporting volunteers committed £1.7 million to community investments in 2021-22. The SROI assessment focused on activities amounting to 66% of these costs (£1.12 million),²⁰ concentrating on initiatives with robust evidence of social impact.

AITC operates over 30 projects across the local community, spanning primary and secondary education, employment training, social inclusion, sport, and health. These programmes yield a range of outcomes, including improvements in physical health, mental well-being, education, employment skills, and community cohesion.

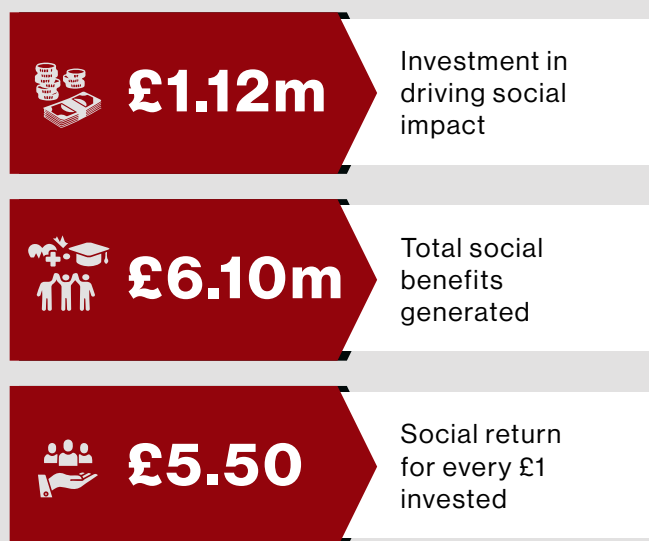
In total, across 2021-22, the activities evaluated generated £6.1 million in social impacts and a £5.50 social return for every £1 of delivery costs. This is significantly higher than the average SROI across sport as whole (estimated at £3.28).²¹

Considering that the 2021-22 season was partially disrupted by the COVID-19 pandemic, which had implications for some programmes not operating at full-scale, the total social impact is expected to have been higher in the 2022-23 season. This is due to the additional programmes offered during the season, as

well as a significant increase in the total number of participants who maintained sustained engagement with AITC.²² In 2022-23, AITC supported over 14,000 participants, with 6,500 regularly engaged in AITC programmes and activity.

The actual value delivered by AITC goes beyond the numbers, and there is significant social value that cannot fully be quantified, including the Club's natural connection with the community, as well as the value of the Arsenal brand and the platform Arsenal uses to positively engage with the community, to improve social outcomes.

2021-22 SROI ASSESSMENT FINDINGS



²⁰ This includes the estimated cost of volunteer time, financial costs of programmes through external funding, as well as cost allocations for support provided by Arsenal Football Club to AITC in 2021-22.

²¹ Sport England (2020), 'Measuring the Social and Economic Impact of Sport in England, Report 1: Social Return on Investment of Sport and Physical Activity in England'.

²² Based on data provided by AITC, there was a 53% increase in the number of participants with sustained engagement.



Value in Kind investments in the local community

Arsenal in the Community has made several donations in the local community, as part of a broader outreach to groups who would have otherwise not have been able to engage with the Club. This included providing free tickets, stadium tours and free Arsenal football kits.

In 2022-23 Arsenal...

- ▶ Conducted free stadium tours for over 3,000 individuals
- ▶ Provided over £130,000 worth of Arsenal kits to individuals
- ▶ Facilitated over 25 non-matchday events at Emirates Stadium in partnership with local organisations
- ▶ Provided 45 signed items to individuals, groups and charities to support fundraising efforts

CASE STUDY: SHAPE UP

AITC are committed to deliver programmes that respond to local need, focused on building resilient communities and creating a sense of belonging. AITC runs many programmes designed to support the mental and physical health of people in the local area. Shape Up was a recent addition to this, focusing on physical inactivity amongst adults in the local community.

Tommy's story illustrates the impact of Shape Up. Initially referred by his GP due to challenges with Type 2 diabetes, Tommy found previous fitness programs unappealing. However, Shape Up, run by the football Club, immediately resonated with him. The programme provided practical support and education on nutrition, fitness, and healthy habits in a straightforward manner.

Tommy set personal goals within the programme, like losing weight and improving his diet. Weekly sessions included varied exercises and team sports, which boosted Tommy's confidence and enjoyment of physical activity.

By the end of the programme, Tommy had transitioned from a sedentary lifestyle to participating in community sports like handball and walking football. His progress impressed his GP, leading to improved health outcomes and discussions about managing his diabetes through dietary changes.

"As the weeks progressed and I became fitter, I grew in confidence. I went from a sluggish beginning to running around Emirates Stadium on a cold December night before a handball game and then a walking football match. I have come a long way."

Tommy
Shape Up participant



CASE STUDY: BTEC LEVEL 3 PROGRAMME

AITC goes beyond just football coaching — it is a 100-club department that is made up of coaches, teachers, employment officers, healthcare professionals, and more. AITC is focused on raising aspirations of those that are struggling or disadvantaged across the Borough and beyond.

One way it supports young people in need is by giving them the qualifications they need to progress — both personally and in their studies and career.

AITC coordinates and teaches a BTEC Level 3 Extended Diploma in sport, with United Colleges Group, acting as an alternative to sixth form education and the equivalent of three A-Levels. The qualification is supported by AITC through coaching and various workshops.

Alongside the qualification itself, the students are also given valuable work experience through Arsenal's other community programmes, to set them up for life after education. The students also benefit from an enhanced Personal, Social, Health and Economic (PSHE) curriculum focussed on promoting equality and diversity, as well trips events and study visits.

In 2023:

- ▶ All students completed their two-year Extended Diploma and 100% of students achieved at least one distinction grade, an improvement from 85% in 2022.
- ▶ 67% per cent of students achieved the highest grade possible, a Triple Distinction Star, up from 43% in 2022.
- ▶ 10 students went on to apply for university, while three applied and were accepted for Arsenal's own Coach Development Programme.

To develop the study programmes further, a Level 2 programme has been developed to provide additional support for students that will benefit from the provision. Ellie, who started with Arsenal as part of the Ball Squad, joined this programme after Club members encouraged her to consider an alternative to traditional education.

Ellie will be staying with Arsenal to take the Level 3 course.

"During my time on the course I've attended numerous workshops and events. We have fun but also learn about important topics within football and society.

My favourite has to be the Arsenal No More Red workshop, where we had the opportunity to style adidas football shirts in the adidas store. Not only did this raise my awareness and understanding of the campaign, but it was also enjoyable, and we got the chance to socialise with other people who share an interest in Arsenal.

I feel that my skillset is continuously growing since joining the Level 2 course — something that may not have happened if I had chosen a standard college course.

Specifically, I believe I've improved my communication skills, perseverance, patience and the ability to motivate others. I've also gained independence and confidence, especially when socialising with new people and visiting new places."

Ellie

BTEC Level 2 Programme participant



CASE STUDY: COMMUNITY IFTAR

So much of Arsenal's community impact comes from creating a sense of belonging within those communities it serves. Inclusion is central to this, connecting with local communities and wider members of the Arsenal family.

One of Arsenal's major faith moments is its community Iftar, held for the last three years at Emirates Stadium. Led by AITC in collaboration with Finsbury Park Mosque, members of the local community, both Muslim and non-Muslim, are brought together in N5 to celebrate, learn and show mutual respect.

'Iftar' refers to the meal eaten by Muslims at sunset to break their fast during the holy month of Ramadan. It is the main meal of the day for those fasting.

Arsenal's Muslim players have also attended the event, most recently Mo Elneny in the 2023-24 season. Key local figures including Mohammed Kozbar, Chair of Finsbury Park Mosque, Rabbi Mendy of Islington's Jewish community, Elizabeth Chapel of the Islington Faiths Forum, local politicians, and Gary Heather, Mayor of Islington, also participated.

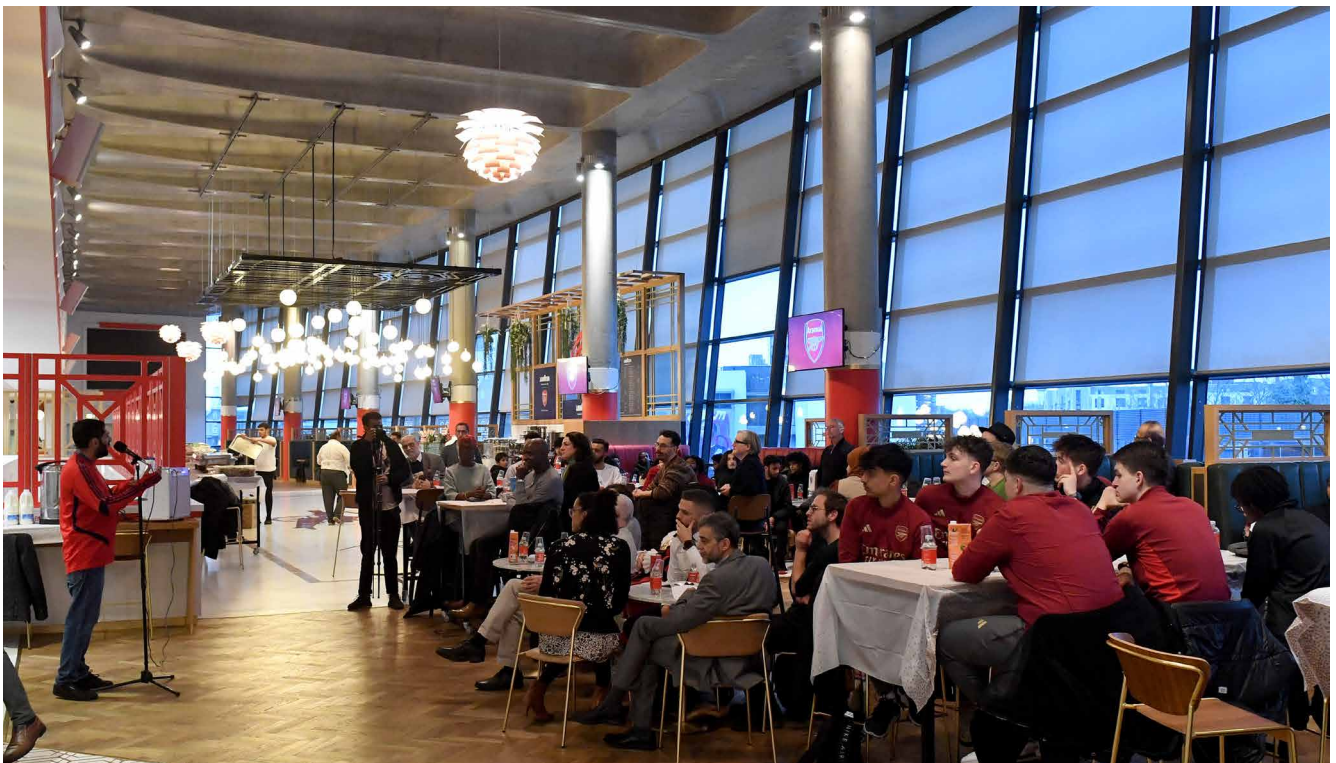
This year, local communities came together to share Egyptian cuisine and promote respect and harmony in the spirit of Ramadan, with young people from the area also taking part.

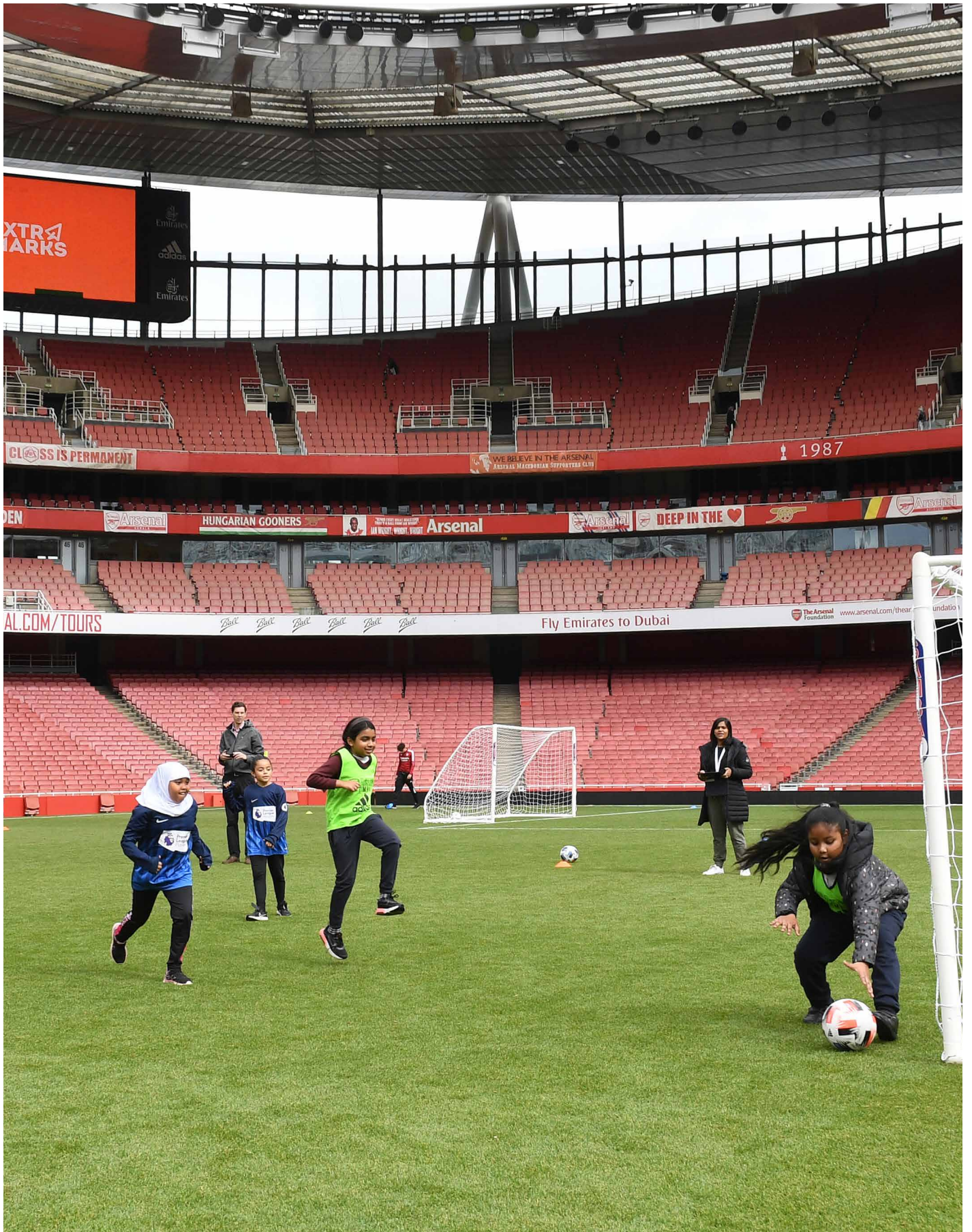
A highlight of the evening was the unveiling of the newly opened multi-faith prayer room for players at the Emirates Stadium. This addition reflects Arsenal's commitment to

providing inclusive spaces for individuals of all faiths to practice their beliefs.

The most recent community Iftar, hosted in March 2024, was captured as part of a 25-minute documentary for Premier League Productions titled 'Arsenal and Ramadan'. The documentary showcases Mo Elneny's journey from Egypt to North London and his routines and customs during the holy month.

It also features Dr Zafar Iqbal, Arsenal's Head of Sports Science and Performance, who explains how training and nutrition are tailored for Muslim footballers during Ramadan. Additionally, Samir Singh, Community Inclusion Manager, shares insights on how events like these embody create a sense of belonging for everyone across the Arsenal family.







WIDER IMPACTS

ARSENAL GENERATES WIDER VALUE THROUGH ITS ACTIVITIES IN THE COMMUNITY, WITH AN AIM TO CREATE A SENSE OF BELONGING TO THE CLUB. ARSENAL CHAMPIONS SUSTAINABILITY AND IS LEADING IN EMPOWERING GIRL'S FOOTBALL, AS WELL AS SUPPORTING THE NEXT GENERATION OF PLAYERS THROUGH ITS ACADEMIES.

5.1 WIDER IMPACTS OF ARSENAL IN SOCIETY

Football has the ability to unite people and strengthen communal bonds by providing a shared interest for individuals from all backgrounds, beliefs, and ages in supporting their favourite team. Arsenal acknowledges the importance of football in society and uses its role as a Premier League club to support meaningful change in society.

This section explores the broader initiatives and support that Arsenal provides for the community, its people and supporters. This includes investment in future player development via the Arsenal Academy, measures

to promote equality, diversity, and inclusion as well as environmental sustainability. Arsenal also seeks to engage with supporters, both locally and globally to create a sense of belonging at the Club.

5.2 DRIVING SOCIETAL CHANGE AND CREATING A SENSE OF BELONGING²³

In 2008, Arsenal launched the 'Arsenal for Everyone' initiative as celebration of diversity of the Arsenal family. The main goal is to ensure that everyone connected to Arsenal, feels an equal sense of pride and belonging to Arsenal through a variety of initiatives.



²³ <https://www.arsenal.com/community/arsenal-for-everyone>

Over the 2022-23 season, Arsenal made significant strides in promoting inclusivity and ensuring that every member of the community felt equally welcomed at the Club. The key milestones and achievements in promoting Equality, Diversity and Inclusion (EDI) by the Club are shown below.

ARSENAL FOR EVERYONE – KEY ACHIEVEMENTS

Full British Sign Language (BSL) integrated into all Emirates Stadium home game pitch side shows and all Club content within the stadium has a BSL interpreter. Accessibility support also includes a Sensory Room, Audio Descriptive Commentary, and a specialist Disability Liaison Team.

Continued to run a range of staff training, and introduced a learning and development programme for all staff and line managers.

Celebrated a range of key awareness days including International Women's Day, Mental Health Awareness Week, World Menopause Day and Pride.

Continued work on #stoponlineabuse through the Club's targeted action plan and publicised bans both online and in the stadium.

IN 2022-23, ARSENAL...

Celebrated 10 years of Gay Gooners and the official launch of the Jewish Gooners supporter group.

Celebrated Black History Month with Dr Clive Nwonka, Associate Professor of Film, Culture and Society at University College London and author of Black Arsenal, a book exploring the Club's place in Black British culture.

Continued to partner with the Premier League on the Coach Inclusion and Diversity Scheme.

Welcomed Kick It Out's Raise Your Game Conference at Emirates Stadium for the sixth time to help break barriers for under represented groups.

Delivered the 'Respect for All' curriculum across all academy age groups. A curriculum focused on a range of EDI topics.

Launched the Club's first 'Emerging Strong, Young, South Asian Gunners' event at the Hale End academy.

Retained the advanced level of the Premier League Equality, Diversity and Inclusion standard.



No More Red: Arsenal and adidas' Award-Winning Initiative to Tackle Youth Violence

Arsenal and adidas launched 'No More Red' in 2021 to highlight the growing issue of youth violence in London. This campaign, which was informed by Arsenal's insights from three and a half decades of inner city community projects, focuses on creating a sense of belonging, safe spaces, long term engagement, positive role models and opportunities for young people in the capital. No More Red broke the mould for how brands and clubs can engage with social issues, becoming one of the most talked about moments in global football culture.

To help raise awareness of the issue of knife crime, adidas partnered with Arsenal to create an all-white versions of Arsenal's iconic red home kit, to be exclusively awarded to select London youth striving to achieve their dreams in the city's knife crime hotspots. Arsenal's men's team has worn the kit in each of its FA Cup third round matches in January since the campaign launched.

In 2024, Arsenal's women's team also wore the kit for the very first time, whilst Arsenal men's team also wore the kit for the first time at home, against Liverpool, at the Emirates.

Never for sale, the white shirt stands as a symbol of the campaign, which has also created social opportunities for young people, enhanced mentorship with adidas, to enable talent and investment in safe spaces to play football throughout London.

In 2023, the campaign also launched a volunteering programme in collaboration with 10 knife crime-related charity partners. The campaign was honoured with the Purpose Driven Sponsorship Award at the Sports Industry Awards 2023. This prestigious recognition serves as a testament to the unwavering commitment and dedication of all those involved in the project, showcasing their relentless efforts and hard work.



Source: <https://www.arsenal.com/community/news/NMR-sports-industry-award>

5.3 MOVING TOWARDS A SUSTAINABLE FUTURE²⁴

Arsenal has a long history of taking responsibility for the social and environmental impact of the Club and more recently are leading the way in promoting sustainability. In 2020, Arsenal made history by becoming the first Premier League club to pledge its support for the United Nations (UN) Sport for Climate Action Framework.²⁵



UN Climate Action Framework

“Football inspires so many of us around the world and there is a remarkable potential for the game to become greener, more climate resilient and lead by example for millions of global fans. We are delighted to welcome Arsenal as the first Premier League club to the UN Sports for Climate Action community, as we raise awareness of climate change and use this opportunity to make a difference together.”

Lindita Xhaferi-Salih, Sports for Climate Action Lead at UN Climate Change

Source: <https://www.arsenal.com/news/arsenal-joins-un-tackle-climate-change>

The Club has already achieved notable strides to date, towards its sustainability goals, including being the first Premier League club to successfully implement a reusable cup programme in 2019-20 — partnering with the Camden Town Brewery, the scheme prevents an estimated 20,000 single-use plastic cups from ending up in landfills per game at Emirates Stadium. Additionally, all of the Club's adidas match kits are made from 100% recycled material.

Arsenal is taking steps to inspire the next generation around the important of sustainability. Arsenal in the Community works

with local schools to raise awareness and inspire climate action by engaging participants in planning their own projects that will positively impact their communities. Arsenal also runs an education programme at their Academies, for young people to learn about climate change and its connection with football.

Despite these accomplishments, Arsenal recognises that there is still more work to be done and remains steadfast in its commitment to furthering its sustainability efforts.

²⁴ Information provided by Arsenal on environmental initiatives and strategy.

²⁵ <https://www.arsenal.com/news/arsenal-joins-un-tackle-climate-change>

ARSENAL KEY ENVIRONMENTAL INITIATIVES AND ACHIEVEMENTS



Arsenal's reusable cup scheme reducing **20,000** single-use plastic cups per game.



Since 1999, more than **29,000** trees have been planted at Arsenal's Sobha Realty Training Centre.



Arsenal's water refill stations save c. **150,000** single-use plastic water bottles per year.



Installation of automated **LED lighting** at all Club sites and Electric Vehicle chargers at the stadium and training grounds.



Hand sorting matchday waste after every game which significantly improves the Club's recycling rates.



A water tank at the Arsenal's training ground collects **2 million** litres of water from the pitch irrigation as well as rainwater from the buildings to be re-used on the pitches.



All Arsenal adidas match kits are made from **100%** recycled materials.



Tree-planting of over **33 acres**, equalling 20 football pitches, in Arsenal Forest (Bore, Kenya) creating jobs for 60 women and supporting the area's first women's football team.



Arsenal is developing a holistic Environmental, Social, and Corporate Governance (ESG) strategy for the future. As part of this strategy, the Club is committed to reducing its carbon emissions to net-zero in line with the climate science. To do this, the Club has calculated a complete carbon footprint, giving Arsenal a thorough

understanding of the key sources of emissions to inform their reduction strategies. Arsenal will look to work with its people, partners and supporters to reduce the Club's impact and create a better, more sustainable future.

CASE STUDY: ARSENAL IN THE COMMUNITY EMPOWERS LOCAL STUDENTS TO COMBAT CLIMATE CHANGE

Arsenal in the Community works with local schools to raise awareness and inspire climate action by engaging participants in planning their own projects that will positively impact their communities. To coincide with key climate action events such as Green Football Weekend, Global Recycling Day, and Earth Day, projects during the Spring term focus on environmental sustainability and protecting the planet. Programmes run weekly for a minimum of 6-weeks and currently there are approximately 50 primary and secondary school students engaged in these projects.

Outcomes include running a school assembly, creating digital content about sustainability to be shared on AITC social media, and designing an educational game to engage and inspire Arsenal supporters.

Arsenal has run an education programme at the boys and girl's academy for the young people to learn about climate change and its connection with football. Sessions have already been run, and Arsenal plan to extend this to more age groups in the coming seasons and offer this to all U12, U15 and U16 players.



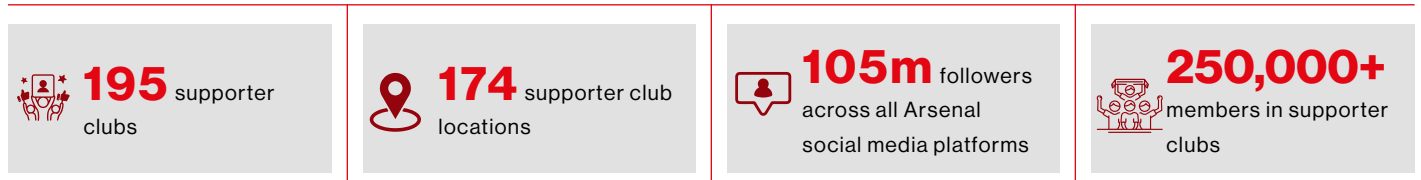
5.4 THE ARSENAL FAMILY

Arsenal's strong connection with its supporters has been shaped by its historic relationship with the local community and its people, which has contributed to the development of the Club's identity and values.

ARSENAL SUPPORTER CLUBS

Over time, Arsenal's supporter base has grown increasingly diverse and global, amassing a social media following of around 105 million. Currently, the Club has 195 supporter clubs with over 250,000 members spanning across 174 locations..

SUPPORTER ENGAGEMENT



Source: Data shared by Arsenal. Member estimates include paying and non-paying members. Social media platforms include Facebook, Instagram, Twitter, Tik Tok and YouTube.

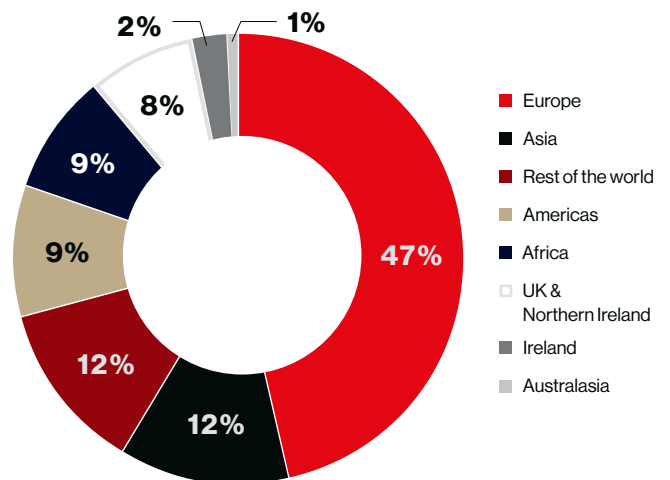


Arsenal has established supporter clubs worldwide to cater for its supporters outside of the UK. These supporter clubs serve as a focal point for supporters to connect, watch games together, and engage with Arsenal as a community.

The supporter clubs are home to two main categories of members — paid members and unpaid members (who prefer to participate as social members). Paid members of supporter clubs typically contribute a membership fee, which helps support the Club's activities and operations. They may enjoy additional benefits, such as exclusive access to events, merchandise discounts, or priority seating. The Arsenal Europe Supporters' Club accounts for the largest proportion of paying members globally at 47%.

Social members, while not obligated to pay a membership fee, actively engage in the Club's social activities, and contribute to its vibrant atmosphere. They may participate in discussions, attend social gatherings, volunteer their time, or provide valuable support in various ways to create a sense of community.

Figure 11: Proportion of paid supporter club members by origin country²⁶



²⁶ Data provided by Arsenal.



Arsenal has taken a leading role in amplifying supporter voices and promoting inclusivity through its supporter clubs. In 2013 Arsenal became the first Premier League club to establish an official LGBTQ+ supporter group called the 'Gay Gooners' and it is now the largest LGBTQ+ supporter group in England with over a thousand members globally. The Club collaborates closely with Gay Gooners

members to combat anti-LGBTQ+ discrimination in football, inviting members to take part in inclusion training for staff as well as inviting members to participate in the annual Arsenal for Everyone tournament at the community hub. In 2022, Arsenal also funded and delivered the London Pride Bus for the Gay Gooners.

Arsenal supporter clubs

GAY GOONERS	Established in 2013, they are the first and largest LGBTQ+ supporter group in England, providing a safe and welcome space and campaigns to kick homophobia, biphobia, and transphobia out of football
ARMED FORCES	Open to all supporters that have served, or are currently serving in, in any of the British Armed Forces
DISABLED SUPPORTERS ASSOCIATION	Arsenal Disabled Supporters Association, created at the end of the 2006/07 season with the aim to give disabled supporters a voice in issues that directly affect them in following and watching Arsenal FC
ARSENAL WOMEN SUPPORTERS CLUB	Established in 2015, this supporter club is continually growing and is home to a vibrant range of initiatives and events to help Arsenal Women FC supporters feel closer to the Club
BLUENIGHT	Arsenal Supporters Group for past/present members of the Emergency Services
JEWISH GOONERS	Recently established in 2023 with the aim of the group to help prevent antisemitism and to help foster a more inclusive environment for Jewish supporters
GOONER GALS	Collective of female global Arsenal supporters



Pride in London — quotes from Gay Gooners



"It's a bit emotional, actually. Obviously organising the float, we knew what it would look like, but just turning around the corner and seeing it and it's all lit up and the music, just really did hit home that we're doing wonderful stuff, we're being visible, we're being loud and we're being proud and it looks amazing."

"What Arsenal are doing really well, as much as this is wonderful and PRIDE is wonderful, it's not just about one day or one month it's about every day of the year, and Arsenal really embrace that through Arsenal for Everyone and it is about PRIDE every day, not just on a wonderful PRIDE Day in London."

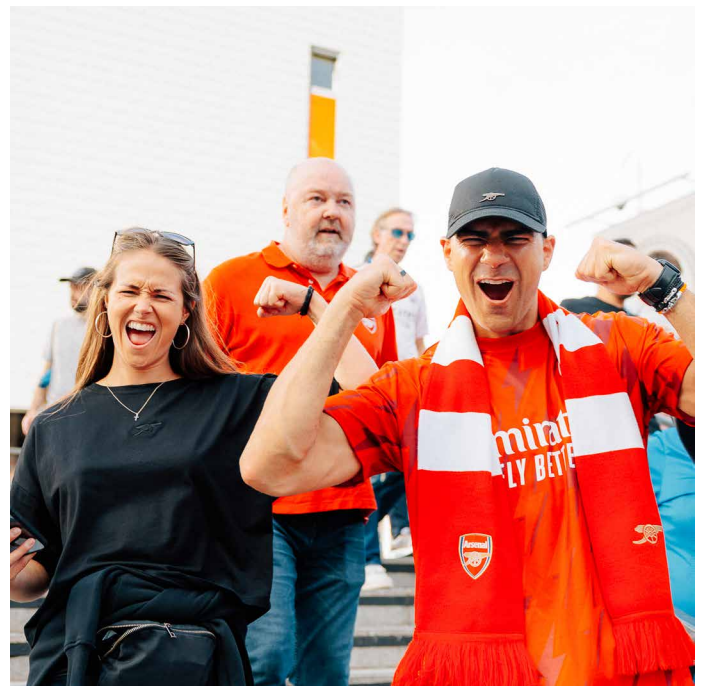
"Beyond excited to be honest to get so close to the players, especially after the last few years, when we had to keep the distance, and what an amazing moment when Mikel turned up as well, that meant a lot to this group and to the wider group when they find out they're just going to be absolutely buzzing."

WIDER SUPPORTER ENGAGEMENT

Arsenal engages its supporters and community across many touchpoints across the course of a season. The stadium artwork, launched in 2023 represents one example of engaging with supporters outside of formal channels, integrating their feedback into the Club's decision-making.

The Club has also implemented several initiatives to maintain and strengthen its relationship with supporters, particularly on matchdays. The Club organises VIP days for supporters to meet players and coaches. The Club also features its supporters on the global 'Arsenal Breakdown' live stream broadcast, where supporters are interviewed about their thoughts on Arsenal's performance and progress.

Arsenal also introduced 'My Arsenal Rewards', the Club's new rewards scheme, exclusive to paid Arsenal Members. Through My Arsenal Rewards, supporters are rewarded through points for their interaction and engagement with the Club, including when attending matches, or answering polls. Points can be redeemed against a range of exclusive rewards, including money-can't-buy experiences, and rewards from Arsenal's official partners.²⁷



²⁷ <https://www.arsenal.com/membership/faq/myarsenalrewards#:~:text=Through%20My%20Arsenal%20Rewards%20you,can%27t%2Dbuy%20experiences.>



5.5 SUPPORTING PLAYERS THROUGH THE ACADEMY²⁸

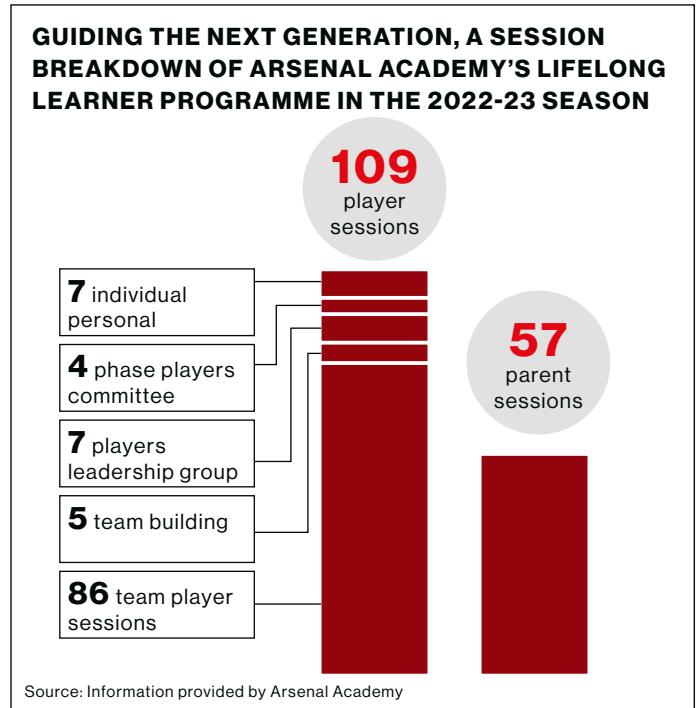
The Arsenal Academy is a renowned institution dedicated to nurturing young talent and developing well-rounded individuals both on and off the football pitch. Led by Academy Manager Per Mertesacker, the Arsenal Academy focuses not only on developing footballers but also on preparing them for the future challenges they may face in life. The Club offers part time (U9-U11), hybrid (U12-U16) and full-time football training programmes (U16+) for elite youth players.

The Academy's vision revolves around creating 'strong young gunners' who possess the resilience and skills to overcome life's obstacles. Arsenal therefore takes a holistic approach to each player's development with focus placed on supporting players to show 'Respect, Discipline and Humility', on and off the pitch, encouraging players to become better individuals and, as a result, better players.

The Arsenal Academy's mission is supported by four pillars that guide its programmes and initiatives. One of these pillars is a 'commitment to lifelong learning', recognising that football careers may come to an end early, and preparing players for life beyond the sport. Education and career development are therefore key aspects of the Arsenal Academy's focus. In the 2022-23 season, 109 player sessions and 57 parent sessions were held as part of the Lifelong Learner Programme.

The Academy offers different models to balance academic and football commitments, ensuring players receive a well-rounded education. Close monitoring of academic progress and collaboration with schools ensure that players stay on track academically. The Academy provides support and guidance for players as they navigate educational choices, including A-levels, BTEC courses, and even part-time university courses.

Football and non-football-specific learning programmes are implemented for each age group, equipping players with essential life skills. These include initiatives such as video assistant referee (VAR) training for the Under-18s, media training with Sky Sports for the Under-14s, and education on topics like gambling awareness, anti-doping, and building health relationships contribute to their growth as individuals. The Academy also addresses important social issues, such as mental health, social media, racism, and discrimination, as well as environmental issues through workshops and awareness campaigns.



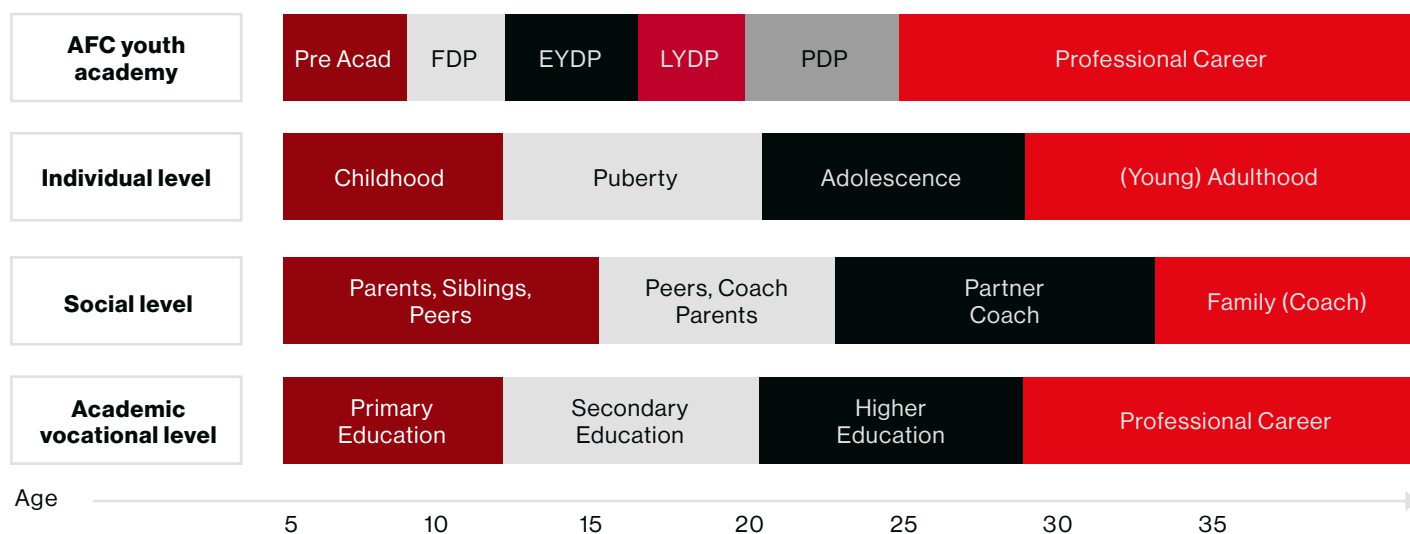
²⁸ <https://arsenalacademy.co.uk/academy/>

Recognising the unique nature of transitions experienced by players, the Arsenal Academy places a primary focus on implementing transactional activities that provide support during common transition stages. These activities encompass various measures such as facilitating the transition from pre-Academy to Academy, assisting players as they progress from trialist to signed player, ensuring smooth age group handovers, providing necessary support for long-term injuries, and implementing a retain and release process that prioritises the welfare of all youth academy players.

Moreover, the Academy acknowledges that some transitions are more individualised and personal, rather than shared by the entire group. In such cases, informal support is offered through the day-to-day efforts of the multidisciplinary team (MDT). This support helps them navigate new challenges and changes, ultimately contributing to their development and success.

Figure 12: Player transition through the Academy

KEY TRANSITIONS



5.6 EMPOWERING YOUNG GIRLS

Arsenal Women's Football and the Girls' Academy have established themselves as prominent drivers of growth in women's football, with a commitment to nurturing talent, promoting the sport and empowering young girls to pursue their dreams in football. The Arsenal Girls' Academy is now one of the largest in women's football, supported by the significant investments made by the Club since 2020. The Girls' Academy provides training and development opportunities for girls aged from under 8 to under 21, with a focus on grassroots participation.

Over time, the Girls' Academy has experienced growth, expanding from an initial group of 65 players to now having 195 individuals in the pathway. The selection process occurs through development centres, and Girls' Academy follows a person-centred approach, aiming to develop well-rounded individuals. The primary purpose is to provide the right opportunities for each player at the right time, empowering young females to become the best versions of themselves. Arsenal strives to equip its girls with the necessary skills and understanding to succeed in any industry, utilising football as part of their overall development.

Georgia Legg and Macey Heard exemplify the success of the Arsenal Girl's Academy.

Having joined the Girls' Academy during their early teens, they have both advanced their careers through the development programme. Georgia Legg has transitioned into a coaching role within the Academy, while Macey Heard has pursued a career as a physiotherapist.



ARSENAL FOOTBALL CLUB





The initiatives of the Girls' Academy extend beyond football training, encompassing various aspects such as education on topics like the menstrual cycle and sports bras. Arsenal also encourages players to review their own football footage to improve their skills and understanding of the game. While facing resource limitations compared to the men's and boys' teams, Arsenal places a strong emphasis on the development of both individuals and players. The Club's focus is not solely on pursuing commercial gain through academies, but rather on nurturing the growth of players as

well-rounded individuals. The Club sees itself as the guardian of the game, nurturing homegrown talent.

Arsenal is committed to providing equal opportunities and breaking down barriers in women's football. Arsenal strives to increase accessibility of the Girls' Academy by supporting players who may live further away, by supporting these players to get registered with their local grassroots clubs, and building programmes to engage with the Girls' Academy, as tailored to their needs.

Figure 13: Person centred model approach

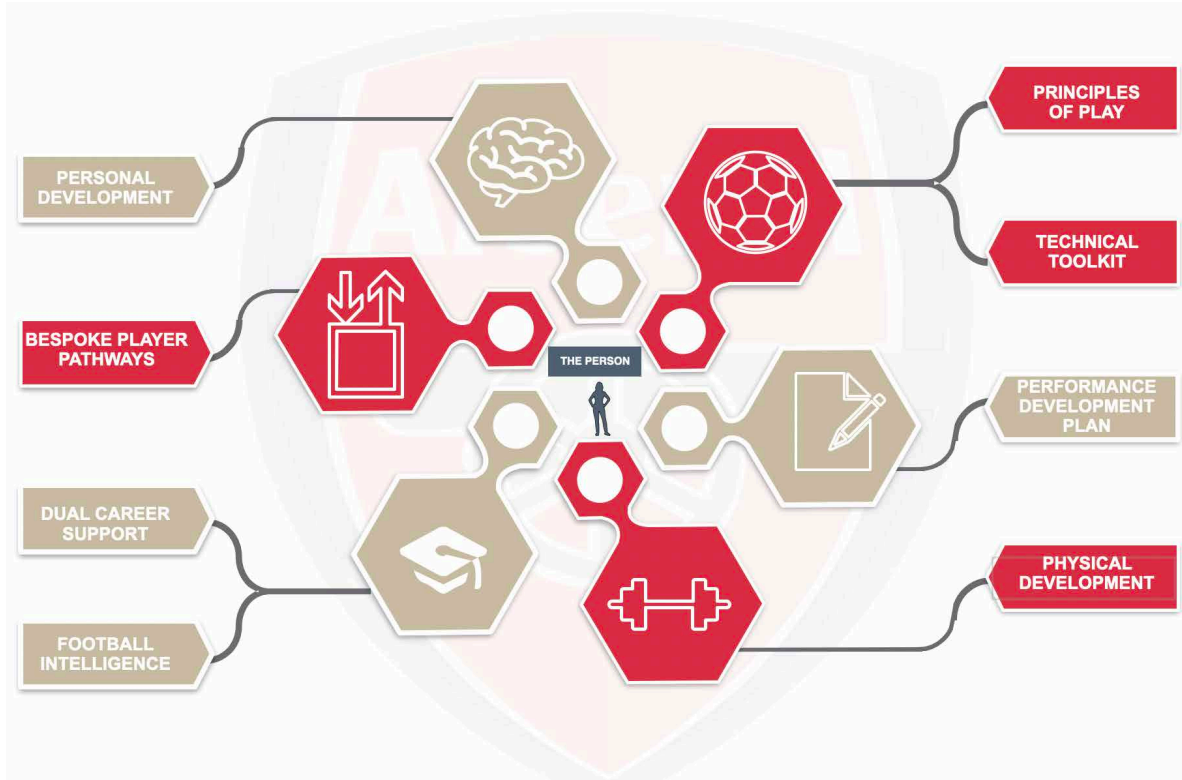
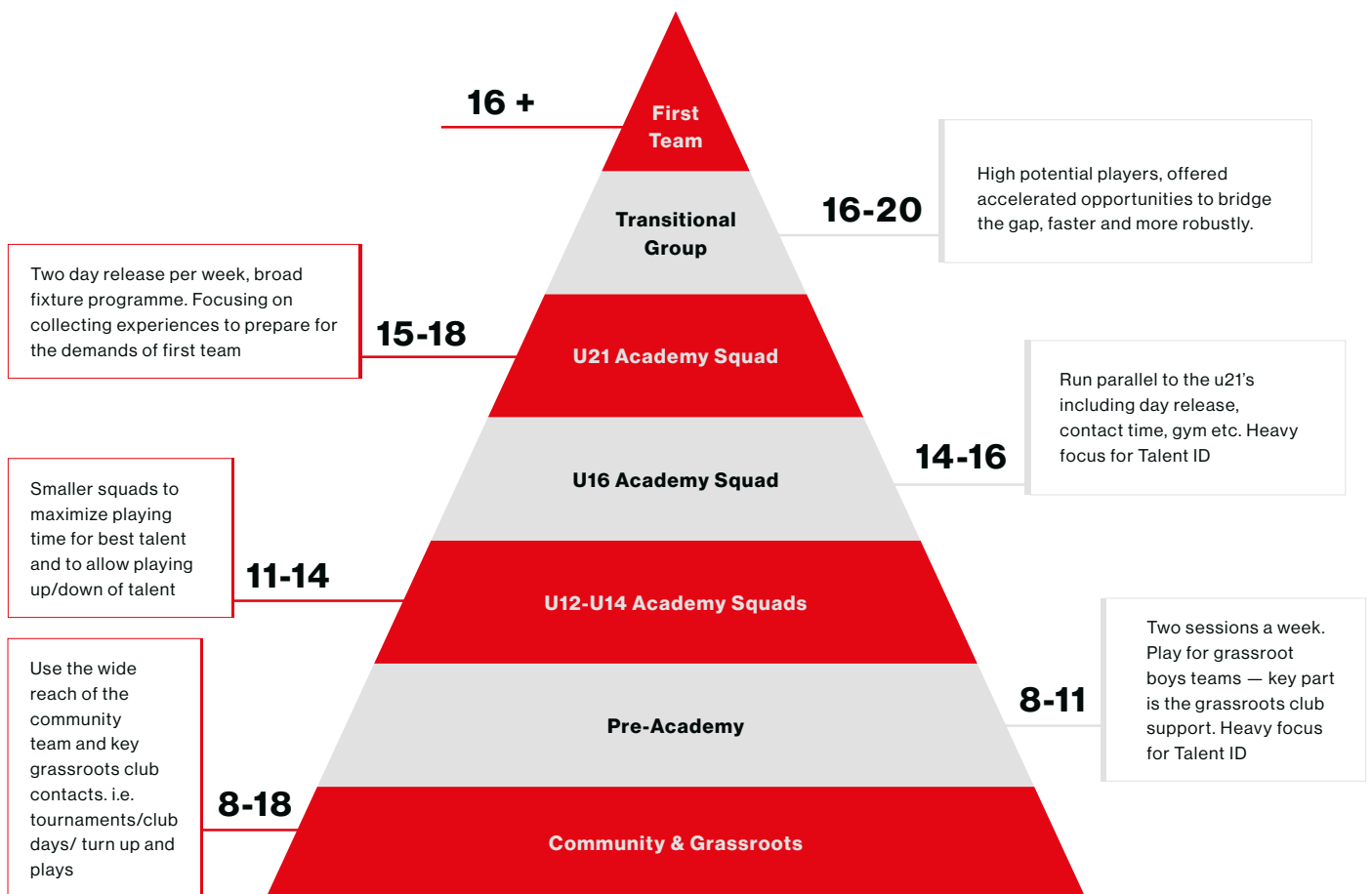




Figure 14: Female pathway through the academy



EMIRATES STADIUM

OPPORTUNITY

GREATNESS



CLOCK END

HAVE EVER ALLOWED MYSELF TO BE AN
SUPPORTER OF AN ENEMY? THAT THE ONLY
REASON I PLAY FOR ONE OF THE MOST HATED
WARRIORS IS THAT I WOULD LOVE THEM
AND...

PATRICK VIERA
DEFENSE



MIXED BRANDS WITH SPANISH
GENEALOGIC BOLA WITH STEEL.

RES LEUNG
DEFENSE

THESE GUYS ARE THE MOST
TALENTED GUYS I'VE EVER
PLAYED WITH.

THE TIME

FORWARD THE CLOCK
CHANGED AND THINGS OF
THESE GUYS ARE THE BEST

THE TIME

THESE GUYS ARE THE MOST
TALENTED GUYS I'VE EVER
PLAYED WITH.

APPROACH TO ECONOMIC IMPACT ASSESSMENT AND SOCIAL RETURN ON INVESTMENT.

6.1 ECONOMIC IMPACT

This report assesses the economic footprint of Arsenal based on the range of activities undertaken by its constituent entities. These activities include day-to-day commercial operations, matchday activities and community programmes. The impact of visitors attracted to Islington and their incremental spending is also captured in this analysis. The entities in scope which drive economic impacts includes Arsenal Football Club PLC, Arsenal Stadium Management Company Limited, Arsenal (Emirates Stadium) Limited, Arsenal Women Football Club Limited, Ashburton Trading Limited (property), Highbury Holdings Limited (property), Arsenal Securities PLC, Arsenal Overseas Holdings Limited, Arsenal Overseas Limited (Jersey), Arsenal Broadband Limited and The Arsenal Foundation.

Across these activities, direct, indirect and induced impacts have been estimated. These impacts are described below.

DIRECT ECONOMIC IMPACTS

The direct impacts are based on information provided by Arsenal regarding operational costs, tax liabilities, income, employment and event attendance. This information supports an assessment of the economic activity generated directly by Arsenal. That is, the activity that results most immediately from Arsenal's activities, including the direct impact of visitor spending on matchdays.

These direct impacts are broken down by geography based on the primary location of their underpinning activity to provide impact estimates across Islington and the UK as a whole.

- ▶ Employment within Arsenal, as measured by full time equivalents (FTEs)
- ▶ GVA of Arsenal, measured using the income approach (the sum of gross operating surplus, compensation of employees and net taxes on production)
- ▶ Taxes paid, accrued, or collected by Arsenal, including corporation tax, income tax, national insurance contributions, business rates and net VAT

INDIRECT AND INDUCED IMPACTS

The impact assessment includes not only the direct economic impact resulting from Arsenal's activities, but also the economic activity stimulated through its supply chains (i.e., the indirect impacts) and additional activity supported by employment incomes and consumer spending (i.e., the induced impacts). This assessment is informed by a breakdown of Arsenal's supply chain expenditure, which is categorised by major economic sector.

Indirect and induced impacts are estimated using EY's economic impact model, which estimates the GVA and employment 'effects' driven by direct sector spending. These effects show the further rounds of impact on the local or national economy for each £1 of supply chain expenditure. The effects are driven by the structure of the local economy, including the extent to which the local economy relies upon imports from abroad and from elsewhere in the UK. This follows the input-output framework pioneered by Wassily Leontief, and is based on national and local economic accounts.

ADDITIONALITY

The economic footprint analysis presents a snapshot of Arsenal's impact at a point in time. The analysis does not therefore seek to make adjustments or allowances for the additionality of impact, other than to attribute impacts to the geography within which they are expected to take place.



EY CONTACTS



Peter Arnold

Chief Economist and Partner
Economic Advisory

Direct Tel: +44 20 7951 5587

Email: parnold@uk.ey.com



Zaina Hussein

Manager
Economic Advisory

Direct Tel: +44 20 7197 7548

Email: zhussein@uk.ey.com





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Arsenal Football Club
Highbury House
75 Drayton Park
London, N5 1BU

<https://www.arsenal.com/>