

A sporting chance

How to save sporting institutions from collapse during the pandemic



ONWARD >

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Summary of the argument



British sporting life has been in abeyance since the coronavirus crisis took hold in mid-March. The Prime Minister advised against mass gatherings on 16th March. Within a few days, every major UK sporting body had suspended training and competition, placing hundreds of professional football, rugby union, rugby league, and cricket clubs on the bench or in the pavilion. Many may never play again.

The furore about the pay and charity of Premier League footballers has obscured the perilous balance sheets of local professional sports clubs. The most recent data reveals that six English Football League clubs - around 8 per cent¹ were in acute financial difficulties, seven County Cricket clubs were loss-making, and the Rugby League itself was facing an existential threat - even before the pandemic hit.² However, the recent £16 million loan programme announced by the Government for Rugby League will certainly lessen this imminent danger.

The loss of match-day and television income from clubs' revenue streams will exacerbate these issues, pushing these and other clubs close to the edge. English Football League clubs, on average, rely on gate receipts and TV income for more than two-thirds (69%) of their revenue³ and rugby union clubs rely on gate receipts and commercial income for over half of their revenue (54%).⁴ Among County Cricket clubs, this figure is a third when including hospitality income (34%).⁵ With stadia locked and games going unplayed, this revenue will be virtually impossible to replace. According to the select committee hearing of 5th May 2020, the estimated figures lost from closure are £200 million for the EFL and £380 million for England and Wales Cricket. If the autumn internationals are cancelled, this figure is as much as £122 million for the RFU.⁶

We know from the collapse of Bury F.C. last year, and the experiences of Wimbledon F.C. and Scarborough F.C. before it, the costs that the loss of a sports club inflicts on a town. The loss of local jobs and business trade, redevelopment of the stadium, and erosion of belonging can do lasting damage to a local economy and community. Avoiding this outcome from the COVID-19 crisis should be a priority.

As part of Onward's two-year *Repairing our Social Fabric* programme, this note explores the financial resilience of professional sports clubs across the UK and the risks to local identity and economies from sporting collapse as a result of the ongoing coronavirus outbreak. Our findings should provide a wake-up call to ministers, who stood on a manifesto last year that pledged to "encourage local takeovers of" football clubs and

heralded the 2021 Rugby League World Cup, and whose election victory was won in Red Wall rugby league and football towns in the North and Midlands of England.

To preserve local sporting institutions and ensure that they can reunite society and boost the economy when the immediate public health crisis is over, we recommend the Government takes immediate steps to protect their balance sheets. This should include immediate short-term relief, in the form of repayable loans, and longer-term steps to ensure fans have options and stadiums are not lost if clubs go into administration and to sustain and grow physical exercise in communities after lockdown ends.

Recommendations



Recommendations

Problem	Solution
<p>Clubs face an immediate cash flow problem, created by the cessation of revenue from gate receipts, TV rights and commercial sponsorship and advertising. This is a disproportionate problem for Rugby League as the sport relies more heavily on such income, which explains the Government's commitment to an emergency loan for the sport, but this challenge affects all sports.</p>	<ol style="list-style-type: none">1. The Government should review the terms of the existing Coronavirus Business Interruption Loan Scheme to ensure it is appropriate for loss-making sports clubs. One option would be to offer sports clubs a similar arrangement to start-ups: The Government would offer loans that would be converted into equity at a discount and sold to fans if the club owners did not repay. If seasons are restarted behind closed doors, ministers could also make clear that additional broadcast revenue should be used to support lower-league clubs facing financial difficulty
<p>Sports clubs face uncertainty about when the season will restart and the impact of social distancing measures on future revenue. The Government's Coronavirus Job Retention scheme is welcome but will not cover the wage bill of many clubs.</p> <p>Demand for grassroots sports and exercise is increasing to support people's physical and mental wellbeing during lockdown, but access to services is limited and declining.</p>	<ol style="list-style-type: none">2. Sports England should support local clubs to find alternative revenue streams during the lockdown to mitigate the loss of income.3. The Government should explore the possibility for all schools, colleges and local authorities to make publicly owned sports facilities open for socially distanced exercise as lockdown eases.
<p>Some clubs will face the prospect of insolvency relatively soon without some form of cash injection or support package.</p> <p>Because of weak financial reporting requirements, it is not possible to identify those clubs in need of assistance or those who are able to draw on existing reserves.</p>	<ol style="list-style-type: none">4. The Government should support more clubs to become community-owned, including by launching the £150 million community ownership fund promised in the manifesto.5. Subject sports clubs to stricter financial reporting requirements to improve transparency

The protections available to fans and communities to save their sports clubs are weak. Recent history demonstrates the attractiveness of sports clubs to hostile bids intended to realise the development potential of the local stadium, rather than to invest in the clubs themselves.

6. Temporarily designate stadia as “assets of community value” to prevent their sale without first consulting the local community.

The challenge



Professional sports clubs have been the anchor of their communities for centuries, helping to forge solidarity and supporting the local economies of many small- and medium-sized towns.

For local people, match-day attendance is a shared ritual and the local stadium hallowed ground. The achievements of the local sporting team are a source of pride, shared by the entire community. This is true of all sports, but particularly true of the most popular British sports - football, cricket, rugby union and rugby league - where local clubs are synonymous with local identity.

Success even in the lower leagues brings well-paid jobs, match-day trading and tourism to local places at a time when local economies are struggling with high street decline and the costs of globalisation. An estimated 74 million people attended live sporting events in the UK in 2019, the highest level of attendance worldwide and a 3.4% average year-on-year increase since 2011.⁷

Since the start of the COVID-19 outbreak, many clubs have proved their commitment to place in spite of their own financial difficulties. Essex Cricket Club players have helped prepare and deliver hot meals for the NHS. Wigan Athletic F.C. have delivered emergency food packages for the elderly. Leeds Rhinos have called their supporters to ensure they are safe. These are just some examples; a longer list is at Annex A.

The Government has set out a number of important steps to safeguard the economy, including the Coronavirus Job Retention Scheme and Coronavirus Business Interruption Loan Scheme, but these general-purpose interventions will not support many clubs whose wage costs continue but revenue has halted.

English Football League

Football is the highest grossing sport in the world, generating almost £27 billion in revenue a year and about 40% of all global sport revenue.⁸ The recent furore over Premier League footballers' wages and contribution to the NHS has reinforced the commonplace view that all footballers and clubs are wealthy.

But this ignores the fact that income is concentrated in a tiny portion of clubs at the top of the game, who benefit from television and sponsorship rights, while the majority of clubs in the English Football League - comprising the Championship, League 1 and League 2 - are running at a loss, with few reserves, and rely on match-day income for survival.

The most recent Begbies Traynor Football Distress Index shows that six clubs in the EFL show signs of serious financial trouble, including established clubs such as Oldham Athletic and Notts County, the world's oldest professional club (who have since lost league status for the first time following their relegation from League 2).⁹

Over a quarter of clubs present a cause for concern. Half of Premier League clubs have very healthy finances, compared to 20% of Championship clubs, 24% of League One clubs, and just 11% of League Two.¹⁰ As Figure 1 shows, most of the EFL clubs operate on a loss, any dip in gate receipt and TV revenue will only add to their already unsteady financial positions.

For many clubs, gate receipt revenue makes up much of their annual revenue, especially in the lower leagues. Assuming that the season is abandoned and clubs forfeit the gate receipt revenue from the nine lost fixtures from 13 March onwards, the average Championship club is set to lose £4.4 million.¹¹ For League One and Two the average losses are £750,000¹² and £272,000¹³ respectively.

Figure 1: Operating profit/loss for English Football League clubs 2019

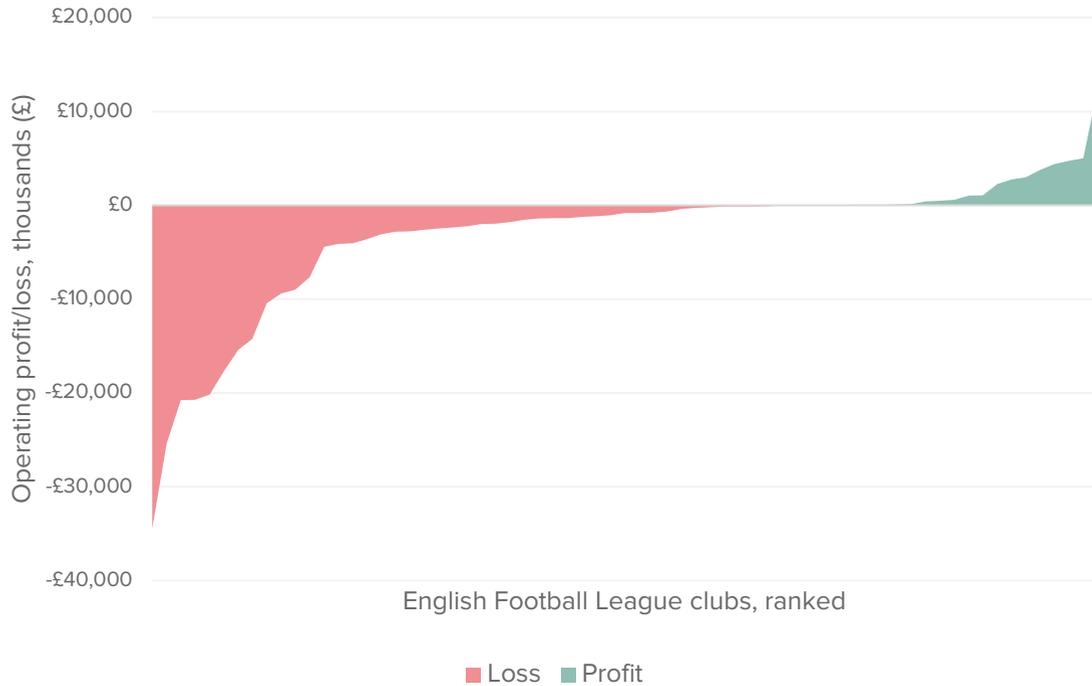
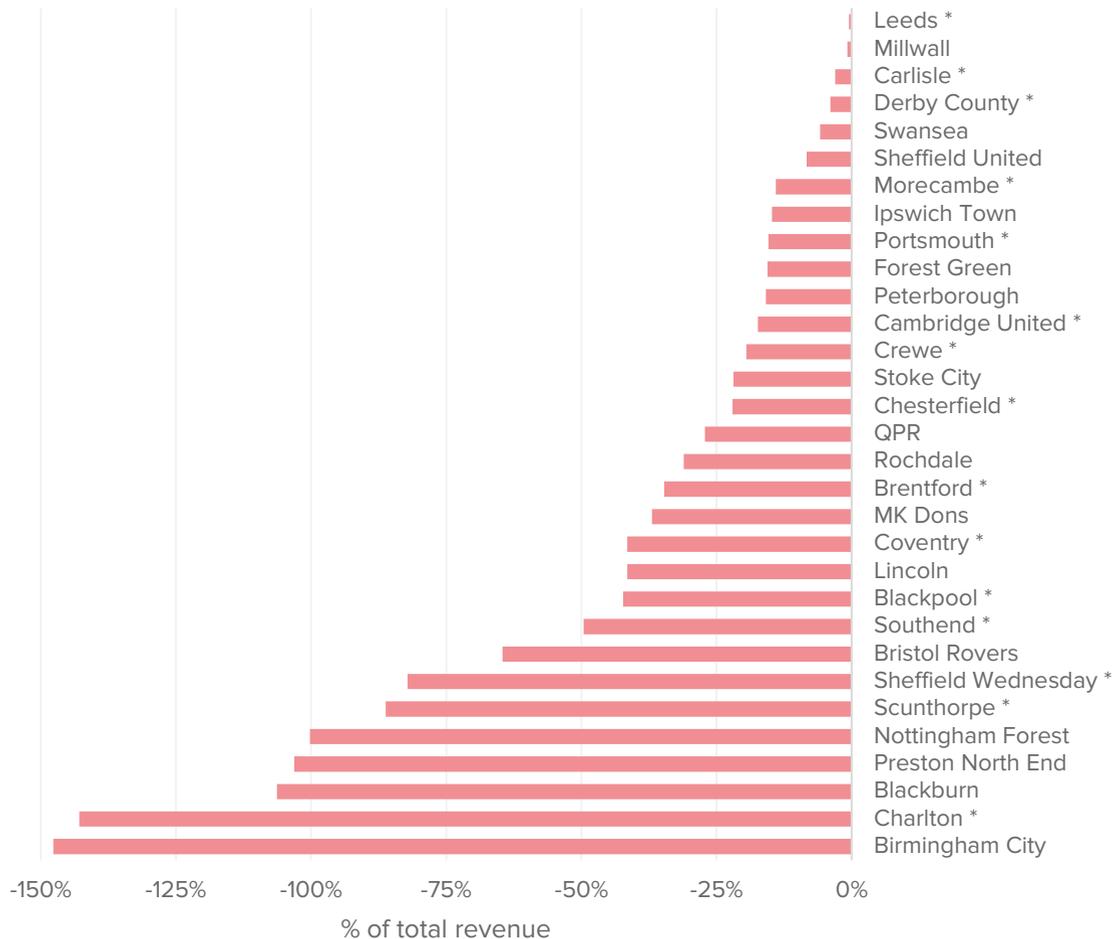


Figure 3: Operating losses as a % of total revenue

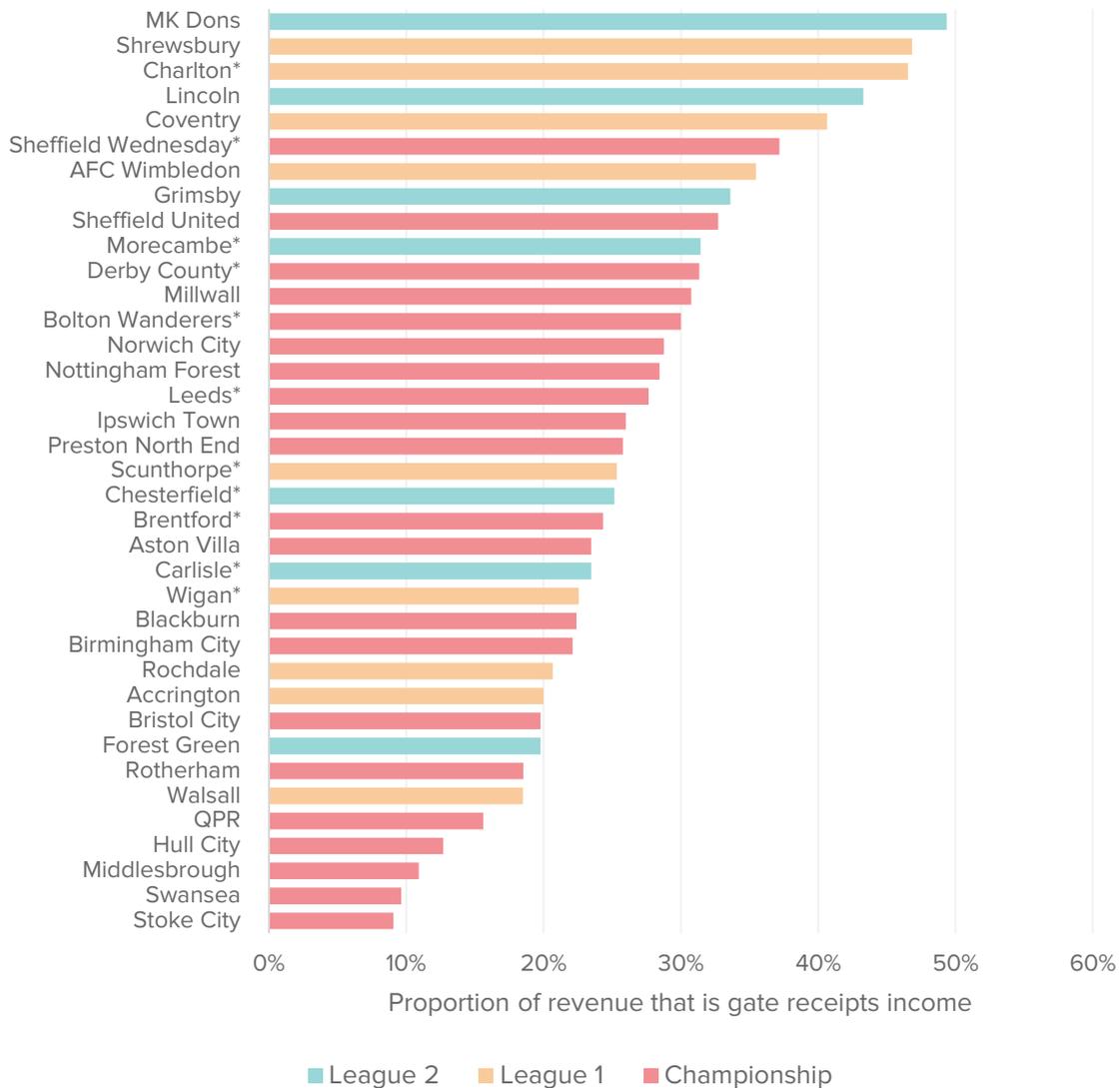


Source: Onward analysis of data provided by Kieran Maguire, University of Liverpool

*Notes: All data refers to the 2019 financial year, where available; clubs marked with * indicate that 2019 data is unavailable, in which case the most recent data has been used.*

The average English Football League club relies upon gate receipt income for 30% of their total revenue, but this varies considerably between clubs. For example, Shrewsbury, Charlton and Coventry rely upon gate receipt income for just under half their annual income, making them particularly vulnerable to a prolonged period of league suspension.¹⁴ Meanwhile, Stoke City and Swansea receive over 90% of income from other sources. While the EFL has provided a £50m relief package, it is unclear how far that will go if the crisis continues beyond a few months, especially for the most financially squeezed clubs.

Figure 4: Proportion of revenue of EFL clubs from gate receipts income



Source: Onward analysis of data provided by Kieran Maguire, University of Liverpool

Notes: All data refers to the 2019 financial year, where available; clubs marked with * indicate that 2019 data is unavailable, in which case the most recent data has been used.

The potential resumption of the football season behind closed doors may also exacerbate the financial divide within the game. The Premier League, which has the most working capital and largest asset base from which to borrow of any UK sporting league, will be the primary beneficiary of immediate broadcast revenue. In normal times, this revenue would

cascade down the football pyramid during the transfer window in the summer, but by June 10th struggling lower league clubs may be pressured into forced sales of players at reduced value to survive.

If Premier League matches resume before other leagues, because of clubs' more advanced medical and public safety arrangements, this will also have a knock-on effect on other leagues. The average Championship club relies on television income for 48% of their annual revenue. In League One, the average is 29%.¹⁵ The risk is that the Premier League not only receives a lion's share of any additional broadcast revenue but the resumption of the Premier League first prevents EFL games from attracting as much revenue as they might otherwise have done.

The concerns about the state of EFL club finances were raised by Chairman Parry in the DCMS Select Committee hearing of 5th May, where he spoke of "the financial hole of about £200 million [that the league will suffer] by the end of September". Worry was also raised around the possibility of playing behind doors next season as the EFL is "much more dependent...on [matchday] revenue...than the Premier League". He said that if plans to play behind closed doors went ahead, "for many clubs it would cost them to play" and that there would be almost no financial benefit.¹⁶

Many clubs have taken steps to mitigate these effects. In the Championship, Birmingham City have deferred wages and asked those earning more than £6,000 per week to accept a 50% cut for the next four months.¹⁷ Leeds United have also asked players to give up some of their wages "for the foreseeable future", and the club expects to lose "several million pounds" a month during the crisis.¹⁸

League One, Tranmere Rovers, have suggested that playing without crowds could cost the club up to £500,000 in lost income.¹⁹ Accrington Stanley have announced that they have furloughed all of their staff and the Gillingham manager has called on players at every level to take a pay cut in the wake of the crisis. Also, The Peterborough chairman Darragh MacAnthony told Talksport that his League One Club will lose between £300k to £400k from just the initial three week lay-off.²⁰

In League Two, Cambridge United have announced the furloughing of the vast majority of staff, including coaches. Forest Green Rovers have furloughed all staff. The Chairman of the FA, Greg Clarke, has said that "many communities could lose the clubs at their heart with little chance of resurrection".²¹

Figure 5: Breakdown of revenue for Championship clubs 2018/19 by source

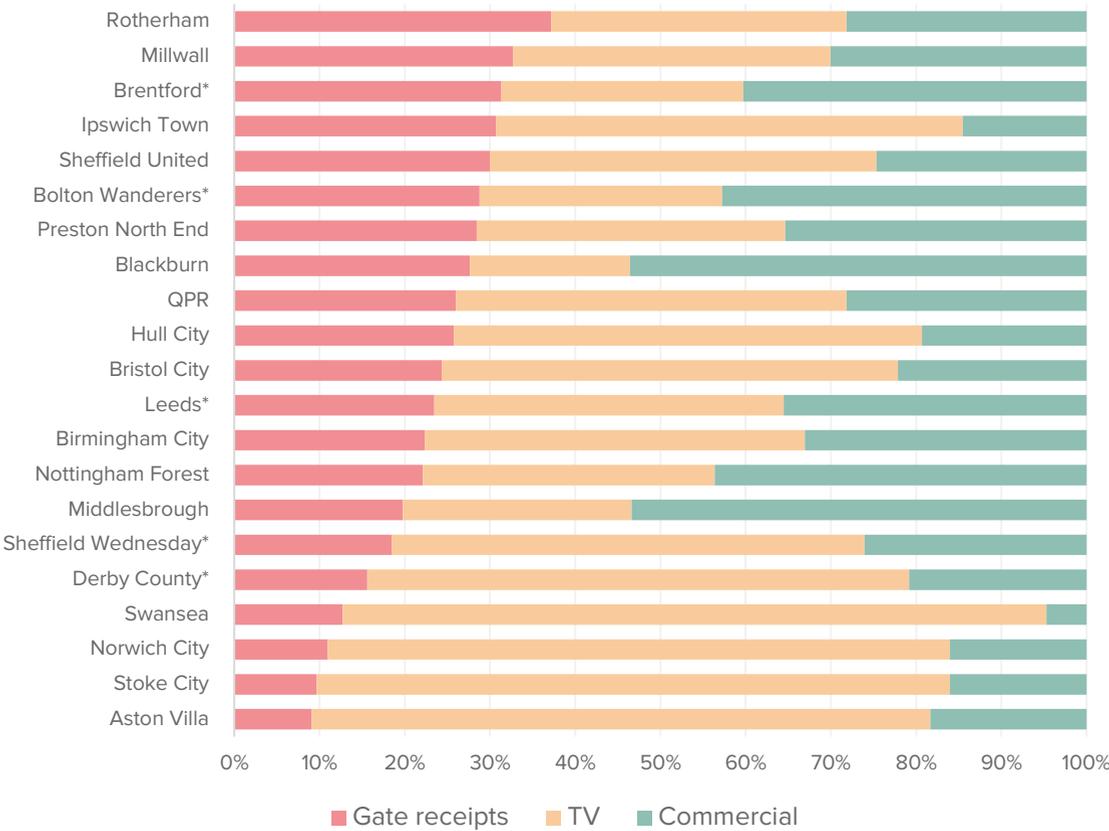
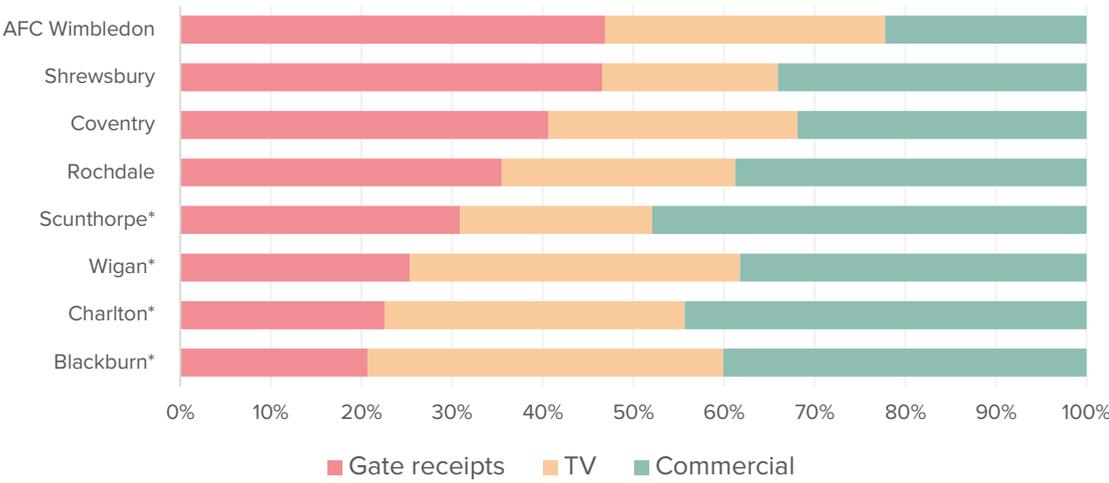


Figure 6: Breakdown of revenue for League One clubs 2018/19 by source



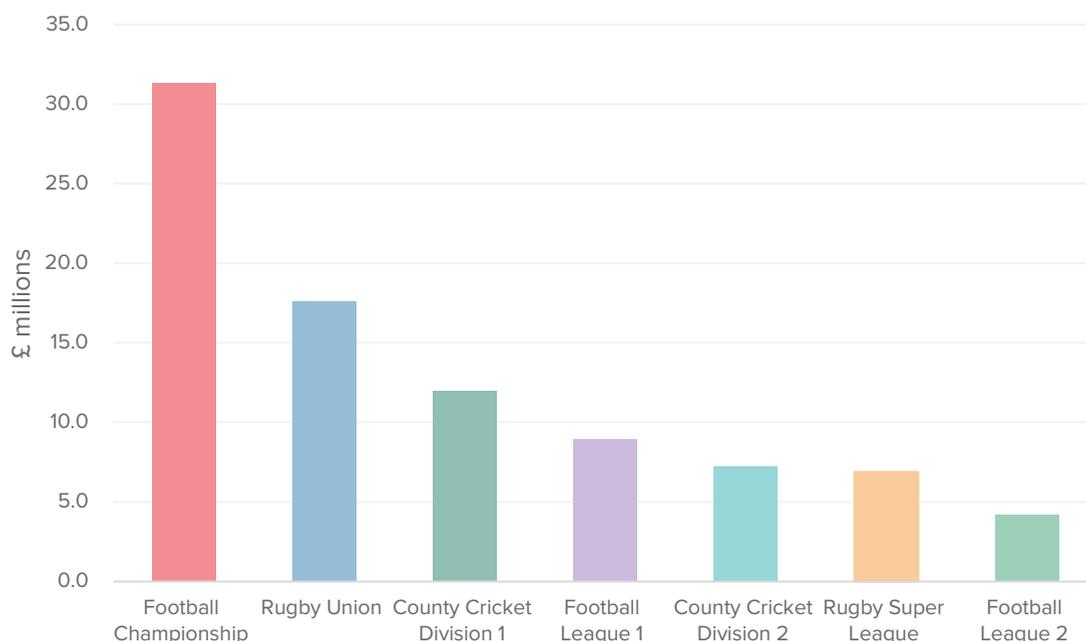
Sources: Kieran Maguire, University of Liverpool.

Rugby League

Before the Government had committed to an emergency loan for rugby league, football clubs were in an enviable position in comparison. Rugby league is more reliant on gate receipts and TV income than any other sport.²² In addition, the rugby league season only started in January, meaning that the ongoing suspension may eclipse the majority of the 2020 season, rather than just the final fifth of matches. Data on the finances of rugby league clubs is slim and where present, opaque. However, it is clear from both secondary literature and anecdotal evidence that many rugby league clubs are in severe financial difficulty.

Rugby league clubs have been facing financial problems for several decades. A 2002 Comparative Review of Sports Finances conducted by Deloitte and Touche found that 77% of Super League clubs' income was spent on player wages, compared to 68% for rugby union and 48% for county cricket.²³ In 2011, a BBC investigation found that 11 of the 14 Super League clubs had a combined debt of £68.5 million. Since 2011, four clubs have gone into administration.²⁴

Figure 7: Average revenue by league



Sources: Full Accounts Data, Companies House; Kieran Maguire, University of Liverpool.

Revenue among rugby league clubs pales in comparison to their EFL neighbours. According to Gavin Willacy, Rotherham United's income in the Championship in 2018 was c.£15 million, almost triple than that of rugby league neighbours Castleford.²⁵ Only five clubs in the Super League regularly attract matchday crowds of five-figures, a fraction of the fans who attend local football games.

Postponing rugby league fixtures has a greater relative cost on clubs' balance sheets than other sports, even without their existing vulnerability. The later season start date of the Super League means clubs have generated a lower percentage of their annual income to fall back on than other sports. The public estimates of club leadership suggest that most clubs stand to lose approximately £1 million, a far greater proportion of revenue for rugby league than for other sports.²⁶

Super League clubs rely upon a TV rights contract with Sky for just under £150,000 per month for each club.²⁷ They must also meet the costs of maintaining the Challenge Cup and accept lost revenue from events hosted at their stadia. For example, Hull KR were due to host a series of shows on the weekend of 10-12 July at Craven Park, including Westlife and Little Mix. The loss of external income, alongside lost TV and gate receipts income, would cause a serious hole in club finances.

The impact of season suspension on rugby league clubs will be considerable. Michael Carter, Chief Executive at Wakefield Rugby Club, claimed that just one game played without an audience could result in a £60,000 loss for the host club.²⁸ Hull Kingston Rovers have estimated that "most clubs will have at least a million pound hole by the end of the season... Regardless of what costs we can trim, they are only going to scratch the surface of what that hole we will be left with will be."²⁹ Wigan Warriors have said: "we rely on crowds and supporters and retail, and at this moment we're getting none of it."³⁰ Workington Town has said the club faces the "hardest fight" in its history.

This warning has been echoed by others in the sport, often in existential terms. Eamon McManus, Chairman of St Helen's Rugby Club told BBC Radio 4 that "the very existence of our sport is on the line."³¹ When he suspended the season until 3 April on 16 March, the Rugby Football League's Chief Executive, Ralph Rimmer, conceded that many clubs could be at risk.

The Government have recently responded to the growing concern over the future of Rugby League, by pledging £16 million in loans. The Secretary of State for Sport Oliver Dowden called it "a massive shot in the arm to secure the survival of rugby league". This support package was hugely welcome for a sport that was facing an existential moment in their history. The loan's exclusivity to rugby league also speaks to the particular vulnerability of the sport. While county cricket, rugby union and lower tier football clubs have individual cases of concern, for rugby league, the worry was for the very future of the sport.

Rugby Union

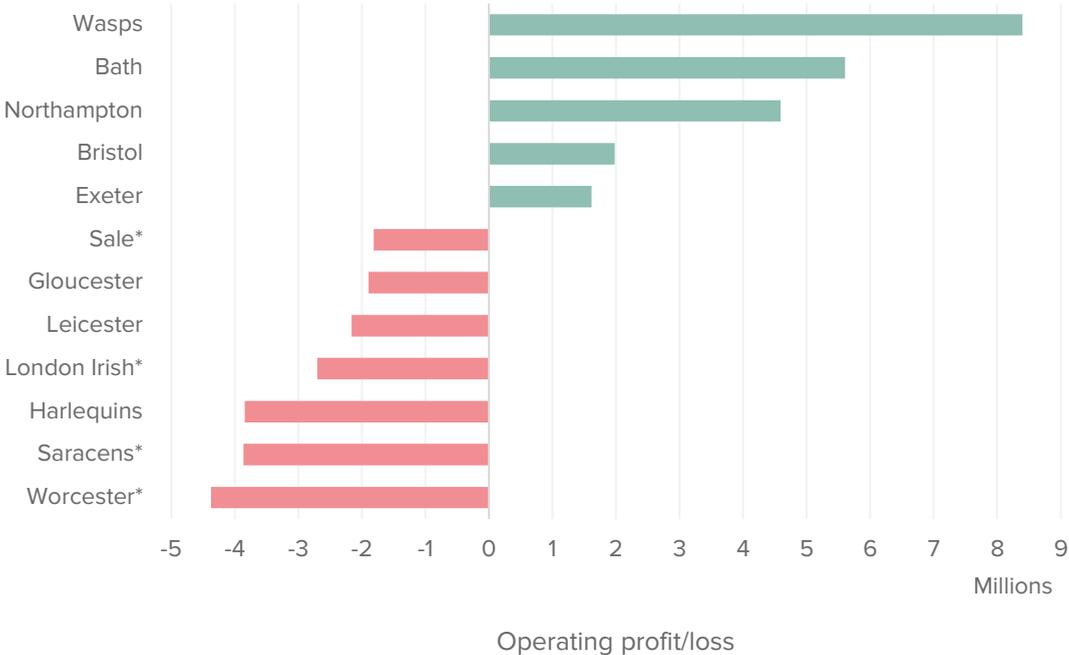
Like their rugby league counterparts, rugby union clubs rely heavily on gate receipts income and have historically suffered similar financial difficulties.³² However unlike rugby league, the clubs in the Gallagher RFU Premiership had a September start date, meaning 13 out of 22 matches had been completed by the suspension of the season in March. The data on club finances are similarly opaque, but from available records it is clear many of clubs are in acute financial difficulty as a result of the pandemic.

Rugby union has faced an increasingly difficult financial challenge over the past twenty years, with profit-making clubs becoming increasingly rare. In the latest accounts, Worcester, Saracens, Harlequins, London Irish, Gloucester and Sale reported losses, with just Exeter, Bristol, Northampton, Bath and Wasps reporting profits. Whilst the salary cap across English rugby union has prevented player wages rising unsustainably, some clubs have reported unaffordable salary inflation over the last 10 years.³³ This will be felt more acutely currently due to the crisis.

In the past, clubs have relied on a mixture of commercial and gate receipts income to survive. In recent years, financial difficulties have been softened by Private Equity firm CVC Capital Partners who bought a minority shareholding in Premiership Rugby of about 27%.³⁴ The deal was worth about £200 million, and each club received approximately £13.5 million, of which it is understood most has been spent. A new deal between CVC and the Six Nations to buy 14% share in the annual international competition has been halted as a result of the pandemic.³⁵

The particular vulnerability of rugby union clubs lies in clubs' reliance on gate receipts and commercial revenue. The average rugby union club receives £3.7 million³⁶ in gate receipts per annum, making up 29% of total revenue, and £3.6 million³⁷ in commercial revenue per annum making up 25% of total revenue.³⁸ With these income streams ceasing, the average club could lose over half their day-to-day income during the pandemic. Assuming the remaining nine games of the season are lost, the average club would see a 22% fall in current season revenue.³⁹

Figure 8: Operating profit/loss for Gallagher Premiership clubs 2019



Source: Full Accounts, Companies House.

* 2018 accounts.

International rugby union continues to dwarf the sport at club level, rendering the RFU the richest league in world rugby. In 2017, the RFU reported that 90% of its revenue comes from 8 England fixtures hosted at Twickenham stadium.⁴⁰ This funding is distributed to clubs in return for training players to the English-qualified players standard and releasing them for international duty. The latest eight-year deal, signed in 2016, totalled £225 million for Premiership clubs, of which the second installment is due this year.⁴¹ Bill Sweeney, RFU CEO, has confirmed that as a result of this deal, Gallagher Premiership

teams should not expect further financial help from the RFU in the wake of COVID-19.⁴² The RFU this year took the decision to almost halve funding to Championship clubs as a result of them failing to meet certain objectives, including producing England international players.

Clubs and the RFU have been vocal about the reliance on gate receipt income and the impact of this during the COVID-19 crisis. In the DCMS Select Committee hearing of 5th May, Chief Executive of the RFU Bill Sweeney highlighted that the loss to the sport could be as much as £122 million if the autumn internationals are cancelled, which would be “catastrophic”, given that 85% of their income comes from hosting international games.⁴³ The Chief Executive of Bath Rugby said that “the financial impact on all clubs is significant and immediate.”⁴⁴ Bristol Bears released a statement which said “without matchday revenue and central funding from Premiership Rugby, the club have had to make some very difficult decisions to ensure the future security of the Bears.”⁴⁵ The direct financial impact cannot be accurately quantified on current public records, but Leicester Tigers’ Chairman Peter Tom said that losses were between “£300,000 and £400,000 per home game; taking lost revenues beyond £1million” solely for the period over March and April.

County Cricket

Another sport heavily affected by the ongoing lockdown is cricket. The finances of many county cricket teams have been in a state of disrepair for many years, although new formats and international matches have provided much needed funding for clubs. The England and Wales Cricket Board (ECB) acts as an important financial backstop for the sport, through grants, emergency funds and bailouts. If the pandemic continues for longer, the ECB will find its ability to play this role inhibited by its own shortfall.

The average county club takes 12% of revenue from gate receipts, 12% from commercial streams, 12% from catering and hospitality and 43% from ECB Grants.⁴⁶ To put this into perspective, in 2018 Kent County Cricket Club generated £27,000 from one fireworks night and £39,000 from gate receipts for the final of the County Championship at Lords - a match that should be the highest grossing match of the season.⁴⁷ Kent also runs its own physiotherapy clinic, which is reportedly the most profitable part of the clubs business.⁴⁸

County cricket clubs have come to rely upon the ECB for both grants and bailouts where needed. Around £35 million is given to county cricket clubs annually. In October 2016, Durham received a £3.5 million bailout from the ECB. These regular injections of cash into domestic cricket have significantly diminished ECB reserves over the years, at the end of January 2019, ECB cash reserves were down to £11.2 million from £73.1 million in 2016.⁴⁹

County clubs rely heavily on alternative formats to generate revenue. Important revenue streams for these clubs include the T20 Blast, international fixtures and the upcoming The Hundred series, hosted at their club grounds. Some reportedly receive up to 90% of their income from the T20 Blast matches.⁵⁰

Many also subsidise domestic operations with hosting of international matches. In some years, Gloucestershire obtained 18% of their total turnover from a single One Day International and Glamorgan obtained 50% from staging a 5-day international Test match.⁵¹ There are 44 international matches scheduled for June, July and August 2020.

Since the start of the crisis, the ECB has issued a £61 million grant to county clubs, of which £40 million arrived immediately. There has also been an agreement reached between the Professional Cricketers Association, the ECB and all 18 county clubs, for

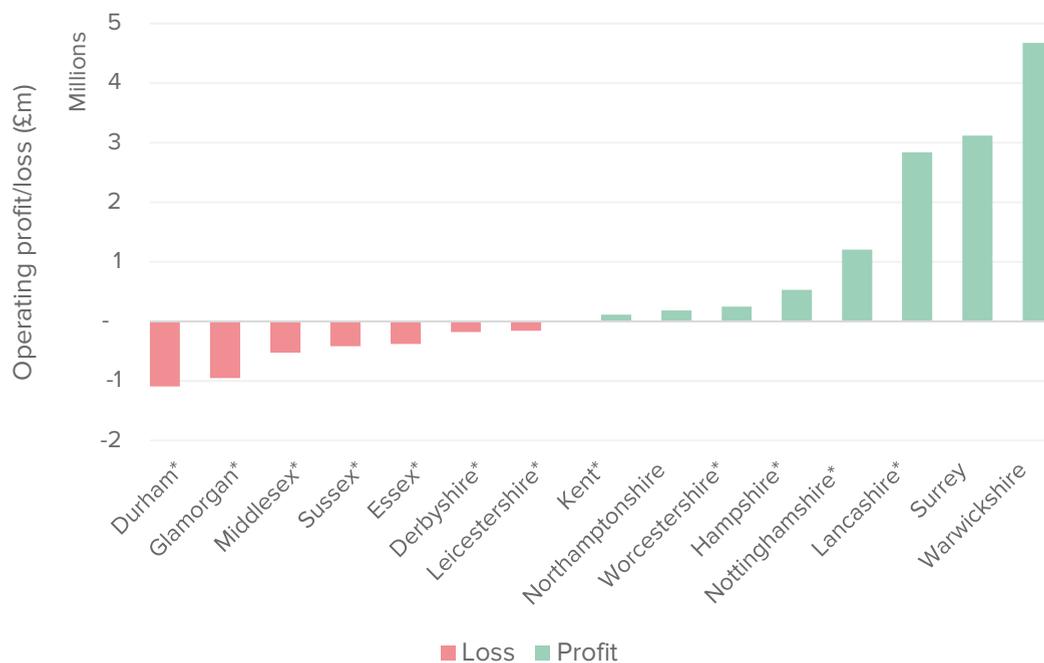
players to be furloughed if requested, to reduce player salaries and relinquish prize money. The money saved will go to supporting domestic cricket in the coming months.

Nearly half of the county cricket clubs for which comprehensive accounts are available (7 of 15)⁵² were loss-making enterprises in the most recent year of accounts, including Durham and Glamorgan who operate with a loss of around £1 million a year. There are also three further clubs - Worcestershire, Northamptonshire and Kent, which, while profitable, operate on very small margins and will therefore be susceptible to a downturn such as the current crisis.

Gate receipts make a small proportion of total revenue for cricket clubs so the effect of league suspension will not be as severe for some other sporting clubs. However, the loss of catering and hospitality income and the potential loss of commercial revenue from sponsorship and advertising will have a considerable effect, especially for certain clubs. Two fifths of Worcestershire's revenue, for example, is from gate receipts and commercial activity. For many clubs, the crisis will mean greater reliance on the ECB Grant.

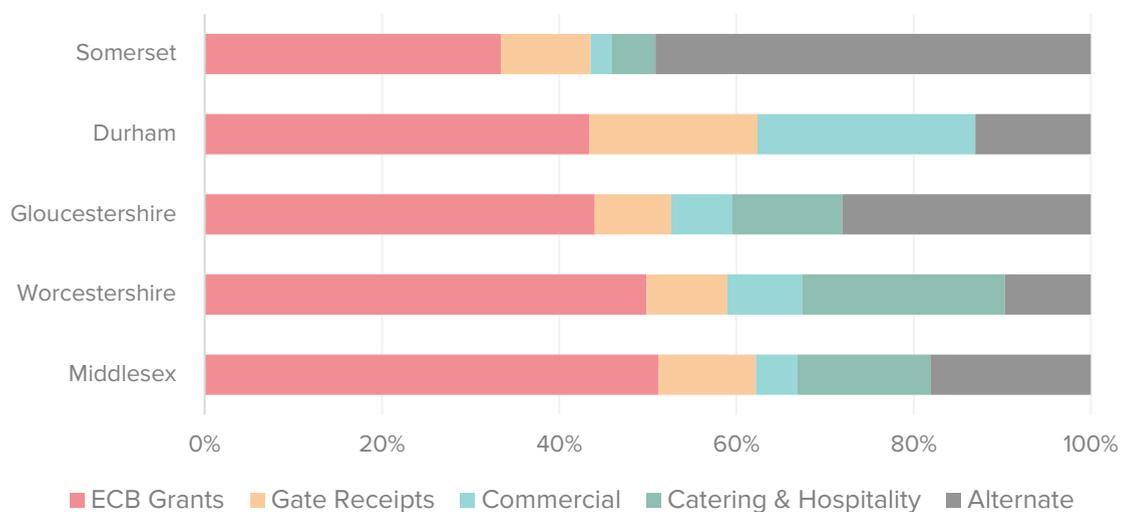
The Chief Executive of the ECB, Tom Harrison, told a DCMS Select Committee of 5th May that their worst case scenario is a loss of as much as £380 million.⁵³ Durham Chief Executive, Tim Bostock, has said the biggest counties (Lancashire, Warwickshire and Yorkshire) may be the hardest hit, because they have become reliant on additional revenue streams. He said "They've done the right thing, they've diversified so that they can survive without ECB income, but what that has meant is... that has fallen off the edge of a cliff through no fault of their own. That is a major challenge."⁵⁴ Additionally, with The Hundred now postponed until 2021, the ECB may be able to redirect a portion of the £90 million that was due to be spend annually on the competition to help relieve the financial strain of the coming months.⁵⁵

Figure 9: Operating profit/loss for county cricket clubs 2017-2019



Source: Full Accounts Data, Companies House; FCA’s Mutual Public Register.
 Note: Somerset, Gloucester and Yorkshire did not provide the relevant financial data.

Figure 10: Revenue breakdown for selected county cricket clubs 2017-2019



Source: Full Accounts Data, Companies House; FCA’s Mutual Public Register
 Note. This is excluding additional loans from the ECB. Durham County Cricket Club did not provide Catering and Hospitality data.

Grassroots sports

The rollout of social distancing and restrictions on movement during the coronavirus crisis has brought the value of physical exercise to the fore. Ministers have repeatedly referenced the relationship between physical activity to public health, including resistance to COVID-19, as well as to reduced levels of anxiety and depression, the prevalence of which has risen in the last two months.⁵⁶

Sport England's Active Lives Survey in November 2018/2019 found that the most active individuals (more than 150 minutes of physical activity per week) were also those that reported being most satisfied with their lives, most happy and least anxious.⁵⁷ In recent weeks, Sport England research regarding physical activity during coronavirus has found that 62% of adults in England say it's more important to be active now, compared to before coronavirus and 65% also believe exercise is helping them with their mental health during the outbreak.⁵⁸

Sport England has already taken steps to help community sport clubs. The body's £195 million fund has earmarked £20 million for the 151,000 community sports clubs in the UK.⁵⁹ The average income of a sports club in the UK is £35,648, and 57% of clubs having an income of below £10,000.⁶⁰ However, only 22% of clubs recorded a deficit over the past year, marginally down from the 24% recorded in 2013.

The high costs incurred for renting facilities and maintaining grounds will put many community clubs in a precarious position with suspensions to their seasons and a halt in new income. 72% of clubs are in rental or leased accommodation and even before the crisis, venue and ground closures for community sports clubs were already becoming more common. Recent data shows that there were 710 fewer local authority owned football pitches in 2019 than in 2010.⁶¹

Further, Sport England's Active Places database shows that over a quarter (28%) of outdoor grass pitch facilities and over three quarters (78%) of outdoor tennis courts are not open for public use, either for free or for a form of payment.⁶² Their analysis also shows that 39% of all sports facilities are located on school, college or university sites.⁶³

On this basis, it appears that community and grassroots sporting institutions are likely to face considerably more demand as the lockdown is eased, at a time when they are falling in both number and levels of access. The challenge for policymakers will be to explore ways to give more people the ability to take part in physical exercise and sports during months of social distancing and extended disruption.

Solutions



Sports clubs face four immediate challenges, in the short-term and longer-term, as a result of COVID-19.

They face an immediate cash flow problem, created by the cessation of revenue from match days, TV rights and commercial sponsorship and advertising. This is a disproportionate problem for rugby league as the sport relies more heavily on such income, which is reflected by the Government's commitment to a £16 million emergency loan for the sport, but this challenge affects all sports.

They face uncertainty about when the season, and thus revenue, will restart and the impact of social distancing measures on future revenue. If fans are required to be 2 metres apart for the foreseeable future, gate receipts are likely to be extremely subdued or non-existent (if the costs of security outweigh the receipts or games are played behind closed doors. While the Government's Coronavirus Job Retention scheme has been used by many clubs, the £25,000 salary limit reduces its ability to cover the wage costs of clubs.

As a result, some clubs will face the prospect of insolvency relatively soon without some form of cash injection or support package. This is true across all sports but lower league football clubs are particularly vulnerable. Because of weak financial reporting requirements, it is not possible to identify those clubs in need of assistance or those who are able to draw on existing reserves.

Finally, the protections available to fans and communities to save their sports clubs from administration or unscrupulous owners are weak. There is a risk that owners act for the short term, selling key assets like the local stadium, many of which are located in prime locations in local towns and cities, rather than supporting the long-term interests of the club.

Government should not and cannot underwrite the balance sheets of every sporting club in the country, many of which are wealthy and able to weather this difficult period. However, funding should put in place support to prevent clubs from falling over unnecessarily, and to ensure that - if clubs do face insolvency in the coming months - their fans are able to come together and save the club and its heritage rather than losing local sources of pride and belonging forever.

Recommendation 1: The Government should review the terms of the existing Coronavirus Business Interruption Loan Scheme to ensure it is appropriate for loss-making sports clubs.

The fact that many sporting clubs are loss-making means that they may struggle to gain loan approval through the Government's existing scheme to support businesses through this period. Applicants to the Coronavirus Business Interruption Loan Scheme (CBILS) have to prove that they have a borrowing proposal which the lender "would consider viable, were it not for the current pandemic".⁶⁴ Loss-making sports clubs, with highly uncertain revenue from TV revenue linked to competition performance, are unlikely to meet this test. This may be exacerbated by high levels of existing debt.

The Treasury should therefore review the terms of the CLIBS to ensure it is appropriate for sports clubs operating a loss. It has already acted quickly to solve a similar problem with early stage start-ups, which often focus on growth over profit in their early seed funding stages, but have considerable economic potential. Sports clubs have more limited economic potential in statistical terms, but for the local places that they represent they play an integral role in local community and society and therefore warrant special attention. One option for this would be to offer sports clubs a similar arrangement to start-ups: The Government would offer preferential loans, that would be converted into equity at a discount and sold to fans if the club owners did not repay.

Another option to support EFL clubs in particular would be for the Government to make it a condition of restarting the Premier League that a portion of the broadcast revenue is ring fenced for supporting clubs in lower leagues. The Premier League may argue that this deprives them of revenue but it would be a financial blessing for clubs if the season resumed at all. In both the Netherlands and France, the season has been cancelled. Moreover, the costs to the game as a whole of a large number of clubs going into administration would be considerable, depriving top flight clubs of talent and disrupting the lower tiers of the pyramid.

Recommendation 2: Sports England should support local clubs to find alternative revenue streams during the lockdown to mitigate the loss of income

The loss of gate receipts and TV income will mean some clubs losing considerable revenue over the course of the following months. For some clubs, this will push them into insolvency. There are, however, ways for clubs to find alternative sources of revenue

during this period. For example, a lower league German football side BFC Dynamo raised €70,000 playing a virtual match streamed live on YouTube, to which fans paid for virtual tickets and merchandise.⁶⁵ The Virtual Grand National, which replaced the annual horse-racing event in April, raised £2.6 million for the NHS using a simulated game.⁶⁶ Workington Town R.L.F.C. has invited fans to buy “virtual pints” to support the club’s finances.

These initiatives are creative ways to generate new forms of revenue, often building on the loyalty and commitment of fans. Sports England should share initiatives across different sporting bodies and support clubs to develop new ideas.

Recommendation 3: Ensure all schools, colleges and local authorities make publicly owned sports facilities available for socially distanced exercise as lockdown eases.

The pandemic has placed an increased focus on grassroots sporting activity, with large numbers of people placing greater value on exercise as a way to combat the physical and mental health impact of lockdown.

The Government should explore ways to open up the large amounts of currently latent sporting assets in communities up and down the country. This should include sports playgrounds and sports pitches, community tennis courts and football pitches currently lying unused in the community.

Given known links between the coronavirus and obesity and the beneficial impact of exercise in increasing natural resistance to the virus, providing access to green space and sports facilities will be essential as the country moves beyond lockdown and into months of social distancing.

Recommendation 4: The Government should support more clubs to become community-owned, including by launching the £150 million community ownership fund promised in the manifesto

A more radical option would be for clubs to offer fans a stake in their local club to keep them afloat.

Evidence from England, via the small number of existing fan-owned clubs, and from other countries where full or partial fan ownership is the norm, such as Germany, do not suffer

the speculative capitalist model that afflicts the British game. Fans, via the mechanism of supporters' trust, have proven themselves to be the most prudent owners of clubs and fan ownership is a popular solution.

Teams owned by community benefit societies cannot go into administration and board officials are more likely to act as custodians than gamblers. 27% of fans want full or majority ownership of their clubs.⁶⁷ A further 41% support partial ownership including board representation.

Creating routes for greater fan ownership would generate greater buy-in and engagement from fans and the community: AFC Wimbledon, for example, receives around 250-300 volunteer contributions each year. 52% of fans of supporter-owned clubs felt “very involved” in their club, compared to 26% among fans of other clubs.⁶⁸ Half of fans say that they would be more likely to volunteer for their club if it was supporter owned.

The 2019 Conservative Manifesto included a pledge to “establish a £150 million Community Ownership Fund to encourage local takeovers of civic organisations or community assets that are under threat – local football clubs, but also pubs or post offices”. With many sporting clubs on the brink of collapse, it is imperative this fund is established without delay.

Recommendation 5: Subject sports clubs to stricter financial reporting requirements to improve transparency

While there is good financial information about the finances of Premier League football clubs, there is extremely poor data available for the finances of less established teams or other sports. In many cases, it is impossible to even gauge a clear baseline for turnover and operating costs for some sports clubs. Given the history of poor financial management, leading to the high-profile collapse of several teams in recent years, there is a clear case for greater financial transparency and assurance of how clubs are being run and the solvency of their balance sheets.

We recommend that the English Cricket Board, Football Association, Rugby Football League and other sporting bodies agree to a set of financial reporting requirements for every professional sports club in the country, to be enforced as a condition of

participation. This higher level of reporting is made more relevant by the ongoing COVID-19 crisis but was necessary before, highlighted by the ability of several high-profile football clubs to circumvent Financial Fair Play rules and at least one rugby union club to disregard the salary cap imposed in recent years.

Recommendation 6: Temporarily designate stadia as “assets of community value” to prevent their sale without first consulting the local community

If clubs do go into administration as a result of the crisis, history suggests that their assets are likely to be sold for immediate returns rather than the long-term sustainability of the club. The experiences of Scarborough, whose McCain Stadium was sold and transformed into a Lidl after they were dissolved in 2007, and Kettering Town, whose stadium was sold and abandoned after they were demoted two divisions in 2011 after years of poor management, should act as cautionary tales.

The existing legislation surrounding Assets of Community Value (ACV) offers an opportunity for stadia to be partially protected from owners seeking to profit from the short-term development value of a site, rather than invest in the long-term success of a club. There are a number of sports grounds that are already designated as ACVs, including Ewood Park in Blackburn, Old Trafford in Manchester, St. Andrews and Bloomfield Road in Blackpool.

However, the vast majority have not been designated and do not benefit from the protections. Immediately applying the protections to all stadia would not interfere with the rights of existing owners, but it would ensure that owners have to inform the local authority of a potential sale and give community groups (in this case fans) the opportunity to place a moratorium on the sale and to buy the asset themselves. The owner would not be obliged to sell at a discount. ACV restrictions are usually in place for five years but the Government could apply a shorter timescale to the compulsory designation to apply only to the period of COVID-19 disruption.

Conclusion



Sports clubs are some of the enduring institutions of Britain's social fabric, providing a sense of belonging as well as economic and social value to many places. Many were in dire financial straits going into the pandemic, and find themselves on a precipice as a result of the ongoing restrictions. They have little ability to innovate, secure debt-financing or to find a cash injection. If sports clubs are allowed to fail, the soul of many towns will be lost.

There is a strong political case, as well as a sound social and economic rationale, for the Government to act to support Britain's sports clubs during this crisis. Many of the places that voted for the Conservatives at the last election were small and medium-sized towns, where football and rugby league in particular are local religions.

In these places, the local club acts not just as a source of entertainment but a source of civic pride and hub for economic activity. Grimsby, Wakefield, Warrington, Stoke, Keighley, Sedgefield Bishop Auckland: these constituencies are characterised by strong sporting identities as well as recent political interest. The loss of a local club may have far-reaching consequences at the ballot box as well as the pitch.

The UK is the spiritual home of competitive sport. We are set to host the Rugby League World Cup in 2021, the UEFA European Women's Championships in 2021 and the Commonwealth Games in 2022. Policymakers should do all they can to ensure clubs come out of this crisis stronger, not on their knees.

Annex A

Sports clubs in the community



Sports clubs and their support networks have come out in force during this crisis, demonstrating their enduring role as anchors to their communities. For example:

- Castleford Tigers are using their twitter page to champion key workers and offering free tickets to their next home game.
- St Helens' Saints Community Foundation delivered 1000 tins of Heinz soup to charities and the local community.
- St Helens rugby stars have been calling their elderly season ticket holders to lift spirits.
- Hull Kingston Rovers (KR) player Ryan Brierly wrote for the local paper, with a plea for people to come forward for ideas of how Hull KR can help their fans.
- Salford Red Devils Foundation are delivering essentials to individuals in the community, using the club's kit van to cater to demand.
- Wakefield Trinity's Owner and Chief Executive have been calling up and delivering food parcels to elderly fans.
- Warwickshire County Cricket Club's Edgbaston stadium car park has become the largest COVID-19 testing centre in the UK.
- Essex County Cricket players have teamed up with the charity Supporting Humanity, helping to cook 1000 hot meals for NHS workers.
- Nottinghamshire and England cricketers Stuart Broad and Harry Gurney have re-opened one of the pubs they co-own as a takeaway and village shop. They are operating a free delivery service for NHS workers and over 75.
- Yorkshire's Director of Sport has been calling elderly members who may be lonely.
- Queens Park Rangers and Luton Town players have been calling their supporters for a chat and to see if there is any way they can help.
- Burton Albion donated Easter Eggs to be included in care packages for those who have sought support.

- Sheffield Wednesday have launched an appeal to raise money for the local charities working hard, it has already raised over £25,000.
- Nottingham Forest have donated 200 Easter Eggs to the local food bank, and 1000 carrier bags and 500 food containers to the homeless charity framework.
- Peterborough United have asked their fans to nominate elderly individuals who they could send care packages to, in partnership with Morrisons.
- Shrewsbury Town have offered their stadium car park to be used as a coronavirus assessment centre, to take pressure off GP surgeries.
- Tranmere Rovers have teamed up with Helplink Community Support Charity, using their social media presence to find new volunteers and helping to deliver food and medicine.
- London Irish players and backroom staff have been delivering 800 meals a day to NHS hospitals.
- Wasps players have been calling supporters to check on their wellbeing.
- Worcester Warriors players have been volunteering to help collect food and prescriptions and chat to those isolating alone.
- Harlequins are providing mindfulness sessions to their players online and plan to expand this out to help the wider community
- Sale Sharks Community Trust have continued to create their fun, rugby-themed learning resources to help in home schooling efforts.
- Exeter Chiefs home ground Sandy Park has been provided as a COVID-19 testing centre.
- Bristol Bears Foundation have been working with Robins Food Foundation, helping to deliver approximately 1000 meals and food parcels to vulnerable individuals.
- Bath rugby are hosting weekly virtual pub quizzes to entertain their fans.

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