

ONWARD & NORTHERN RESEARCH GROUP

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Foreword from the Northern Research Group

In the long history of the modern game, there has never been a more crucial time for football in the UK. The pandemic battered clubs financially, particularly those outside of the Premier League, with matches played in empty stadia for more than a year. Clubs suffered losses of millions of pounds, in some cases putting their existence under threat.

This comes on top of the financial mismanagement and overspending that has been a feature of many professional football clubs, and resulted in 64 clubs entering administration since 1992. And, just last year, the disgraceful attempt by several of Europe's biggest clubs to form a breakaway 'European Super League' and abandon hundreds of years of footballing heritage represented a new threat to the national game.

Nowhere is football more important than the North. We have more professional football clubs per capita than anywhere else in the country and nearly twice the ratio of clubs-to-people than the South. Football is an invaluable source of pride for Northern communities, and they bring significant economic benefits to their local areas and the region as a whole.

Yet despite the strength of the game here, it is Northern clubs which are most at risk. The North is home to one-third of all football league clubs, yet two-fifths of administrations have occurred here. The majority of our clubs are loss-making. Without reform, there is a serious danger that more of our clubs could suffer the same tragic fate as Bury FC did a few years ago and go out of existence. This would have devastating consequences for our towns and cities, to which our football clubs are so important.

We must do more to safeguard football in this country. This is why the Northern Research Group were so pleased to see the Government announce the Fan-Led Review of Football Governance in 2021. The Review painted a clear picture of the dangers the game faces, and set out a comprehensive strategy to secure its future.

But it has now been more than a year since the Review was published, and the Government has not yet acted on its findings. As this research note will set out, the Fan-Led Review is vital to ensuring the long-term sustainability of football in the North through improved regulation and fairer distribution of the game's revenues. There is a clear case for the Government to implement the Review's recommendations in full, but we cannot delay any further. The risks are too great - action is required now.

Northern football clubs are at greater financial risk compared to clubs in the rest of the country

The amount of money in British football has been ever-increasing in recent decades. Almost all Premier League clubs and many Championship clubs have multi-billionaire owners, while multi-millionaires are the standard across the rest of the EFL. As TV revenues have increased, the financial prize for clubs reaching the Premier League (PL) has also grown and now stands at a staggering £170 million. However, the increasing amount of money involved in professional football has resulted in financial turbulence for many clubs, putting them at risk. And, it has also created massive inequalities between PL clubs and the rest of the EFL.

- For example, "vast revenue tiers" now exist between divisions. Just 25 clubs (20 in the PL, plus 5 in receipt of PL parachute payments in the EFL) will receive 92% of the distributable revenues of the English game (£3 billion), while the other 67 professional clubs will receive just 8% (£245 million). Overall, the average revenue of a PL club is more than eight times that of a championship side.
- Many clubs have experienced serious financial difficulties in recent years. Since the formation of the Premier League in 1992, professional football clubs have entered administration on 64 occasions, including some multiple times.

- In all but one of these cases (Portsmouth), these clubs were located outside of the Premier League, in which most clubs have healthy finances due to media and commercial revenues.³
- These administrations are the result of the "dangerous incentives" which exist for clubs to gamble for success, as the FLR made clear. These incentives, combined with poor governance and overexposure to risk has put many clubs' finances in peril.
- Some clubs have gone out of existence such as Bury, Chester City, and Macclesfield Town. Others, such as Portsmouth, have only been saved by fans and supporters trusts stepping in at the last moment.

Northern clubs have been particularly badly affected

Football clubs experiencing financial difficulties is an issue which has affected the entire country. Every region has seen one professional football club enter administration in the last thirty years. However, the North has been particularly badly affected (Figure 1).

- Of the 64 administrations, two-fifths (39%) occurred in clubs located in the North West, the North East and Yorkshire and The Humber.
- Yorkshire and The Humber had the highest number of administrations of any region of the UK (17%).
- Northern voters were also the most likely (outside of London) to say that they used to have a
 professional football club in their town but no longer do. Polling from Public First shows that
 13% of people in the North East and 12% in the North West say they no longer have a
 professional football club in their town. This compares to just 8% of people nationally.⁵

Figure 1: Map of professional football clubs that have entered administration since the formation of the Premier League in 1992

Source: Onward analysis



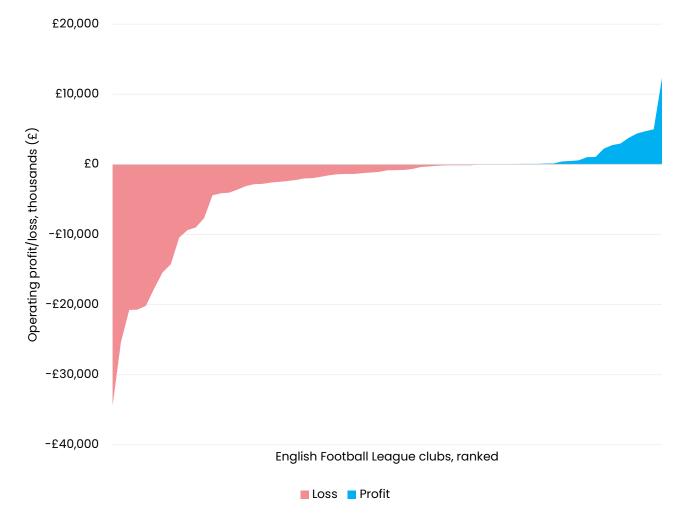
Northern clubs remain at risk and the majority are loss-making

The current system has resulted in many Northern clubs becoming overexposed financially, victims of poor governance and a number even going out of existence. And, excluding clubs in the Premier League (which tend to have very healthy finances) many Northern clubs remain at financial risk.

- In the Championship and League One wages exceed turnover on average across all clubs, meaning they are losing money every year and are reliant on investment from their owners to simply pay the bills.
- As previous research from Onward has shown, the majority of EFL clubs are loss-making (Figure 2). This season alone, EFL clubs are forecast to lose more than £350 million and owners will be required to fund the shortfall. This places these clubs at an inherent risk, particularly if their owners decide to pull out from funding the gap and they underachieve on the pitch.

Figure 2: Operating profit/loss for English Football League clubs in 2019

Source: Kieran Maguire, University of Liverpool & Onward analysis in 'A Sporting Chance'



- This is particularly true for Northern clubs. Of the 25 EFL clubs in the North and Yorkshire and The Humber for which data was available, nearly three-quarters (72%) made an operating loss in the 2018/19 season.
- Sheffield Wednesday made the highest operating loss during the 2018/19 season, and are
 now experiencing severe financial difficulties. They were recently described as "Europe's
 worst financial performers" out of 185 football clubs.⁷ Their financial troubles have
 corresponded with their relegation from the Championship and a decline in matchday
 attendances.
- The Government recognised these risks in their response to the FLR, noting that the "unsustainable operations of many clubs are putting their futures at risk, with severe potential implications on their fans and the local communities they serve." ⁸

As the FLR set out, there are a number of steps the Government should take to reform the regulatory environment and ensure the sustainability of English football moving forward. Key to this process is the establishment of a new independent regulator.

- The regulator must be given responsibility for overseeing the financial regulation of football. As the Government's response to the FLR said, this "should be the core function of the regulator" due to the precarious state of football's finances.
- A new regulator will also help to ensure clubs are better governed, as poor governance has been described as "a root cause for the game's problems". In addition, giving the regulator the remit to introduce new and improved tests for prospective owners and directors would also help to increase the sustainability of clubs. It would reduce the likelihood of clubs being questioned by unsuitable owners and ensure directors have the necessary skills and qualifications to make sound financial decisions and oversee risks.
- In addition to a new regulator, financial redistribution will also be key. The disparities in revenue between different tiers of English football, and the "parachute payments" provided to recently-relegated Championship sides are a significant driver of overspending. If the PL and EFL are unable to agree a suitable distribution plan then the Government must provide the new regulator with a backstop to intervene.

The Government's response to the FLR recognised that Northern clubs remain at risk unless action is taken to secure their future. The response stated that "there is a significant risk of financial failure among clubs" and therefore that the "cultural heritage of English football is at risk of harm". Given these remarks, the commitment in the 2019 manifesto and the Government's endorsement of the FLR's recommendations, the public will be expecting the Government to take steps to safeguard clubs.

This is likely to be particularly true among voters in the North, where the highest number of clubs have entered administration. In these areas, the need for better governance in football has been clearly demonstrated to supporters. If they see a Government that is not making good on its promises, the damage to the Conservative Party at the next election could be significant.

The grassroots game is particularly important in the North - but is also at risk

Grassroots football is extremely important to people in the North, and brings significant social and economic benefits to the region.

- Overall, around 3.72 million people regularly participate in playing grassroots football across the North East, the North West, and Yorkshire and The Humber.⁹
- Nearly a quarter (23.9%) of people living in the North play grassroots football. Only London has a higher proportion, with 24.4%.
- This is despite the fact that many people in the North do not have access to facilities of the same standard as elsewhere in the country. Polling from Public First polling shows that only 23% of people in the North East and 31% in the North West said there was a high quality football pitch available for hire in their towns. This is well below London (40%) and the national average as a whole (38%).¹⁰
- Grassroots football also generates significant socio-economic value. According to the FA's 2021 report, grassroots football generates a total of £2.8 billion in socio-economic value across the North East, North West, and Yorkshire and The Humber.
- Onward analysis suggests that childhood football participation contributes to a reduction of 59,000 cases of childhood obesity in the North, representing a cost reduction for the NHS in these regions of over £2.4m per annum. Similarly, adult participation in the grassroots game in the North contributes to the reduction of 56,000 cases of physical and mental ill-health.¹¹

However, as with professional football, the sustainability of grassroots football is also at risk and this is particularly true in the North.

- A recent survey of grassroots members showed that cost of living pressures meant growing numbers were struggling to pay the subs for their local clubs. 12 Since the pandemic, 10% of people playing grassroots football have not returned to play. A third of these (31%) stated that they couldn't afford the subs, and a quarter (27%) said that they couldn't afford the necessary equipment, such as football boots and kits.
- Nearly half (46%) of families in the North East reported that they would struggle to pay their subs, compared to less than two-fifths (39%) in London.
- In addition, school children in the North are less likely to participate in sports after school than anywhere else in the country, as recent Onward research has shown. Just 42% of schoolchildren in the North West and Yorkshire and The Humber participate in sport after school, compared to 59% in the South West.

• Many grassroots clubs are struggling financially having used up their savings during the pandemic to keep them afloat. Already, 7% of grassroots football clubs across Britain have closed since the pandemic and a further 16% are at risk of closing. Previous Onward research also found that around a quarter (22%) of grassroots sports clubs are loss-making, putting them at increased risk of closure.

The FLR makes a clear case to continue and expand investment in the grassroots game through recommendations such as a solidarity transfer levy for Premier League clubs, and allowing the FA to distribute revenue as it sees fit. With more than 14 million grassroots football players in the UK, the stakes are high. The Government has stated that it is willing to grant the new regulator a 'backstop' to implement redistributive policies across the football pyramid "if a football-led solution is not found". It must be willing to act upon this if required to secure the future of the grassroots game.

Northern football clubs are invaluable community assets which are central to pride in place

Football clubs are an enormous part of the UK's sporting culture and are incredibly important to our social fabric. Having a successful football club is central to pride in place in Northern communities. They are often viewed as a source of immense local pride when doing well or a sign of a deeper malaise when struggling.

- Onward's 'Levelling Up In Practice' research in Oldham revealed the centrality of Oldham Athletic FC and Oldham Rugby League FC to residents' pride in their area and sense of local identity.
- Focus groups by Public First also reported a similar consensus in Derby, where one respondent said: "For a city like Derby not to have a football team, it doesn't even bear thinking about... Without Derby County football club, what else does Derby really have to let people know about?".
- Polling also shows that people in the North are more likely to view their local football team
 as one of the main sources of pride in the local area. 20% of people in the North East picked
 their local football team as one of the three things helping to foster local pride, compared to
 just 11% of people nationally.¹⁴
- The same poll found that people in the North East, North West and Yorkshire and The Humber were more likely than those from anywhere else in the country to say that they had a professional football club in their town.
- In each of these areas, at least two-fifths of respondents said they had a professional football club in their town. This compares to just a third of people nationally, and only a fifth in some parts of the country, such as the West Midlands.

- The sheer number of Northern towns and cities with professional football clubs has cemented their status as defining characteristics of their communities, and it is clear that voters recognise this. For example, in the words of one Bury FC fan: "How do you define an English city? You've got a cathedral, you've got a university and you've got a football club. You need to have a football club to feel like a proper city. The club is a focal point for the community." ¹⁵
- The North has more professional football clubs per capita than anywhere else in the UK. There is one football league club for every 457,000 people in the North compared to one for every 637,000 in the Midlands and one for every 1.03 million in the South East.

Box 1: The case of Bury

On the pitch, Bury were flying high in the 2018-19 season, winning promotion to League One with a second placed finish. Off the pitch however, the club was being saddled with unaffordable debt. A new owner failed to live up to his promises to clear the club's debts, and the club ran out of funding as the new season was about to start. Despite desperate attempts, no new buyer for the club could be found and Bury were formally expelled from the football league on 27th August. The club clings to existence, but has not played a game since, has no paid staff, and the stadium remains empty and unused.

Bury's demise has had a damaging impact on the local community in which it was so dear to. The club has been described as "at the heart of the community for 134 years", and has left the town "grieving", according to one fan. It is easy to see how passionate the local community was about the club; 400 people turned up with mops, sponges and buckets to clean the stadium ahead of their opening fixture for the 2019-20 season - which was never played.

Research has repeatedly demonstrated the essential role football clubs play in instilling civic pride and a sense of belonging in people in the North.

- Football clubs have been described as "central to local communities" and "one of the principal agents through which collective social identities are created and reinforced." The FLR itself states that football clubs are "woven into the fabric of community life" and play an enormous role in unifying people from different backgrounds.
- But some have argued that the increasing commodification of football has led to an increasing view of football clubs primarily being businesses, rather than the invaluable community assets that they clearly are. This annexation of their importance to communities has led to criticism that clubs are viewing their supporters as customers or consumers rather than fans, with a focus on maintaining an economic relationship rather than a social one.¹⁹
- The FLR represents a significant opportunity to reverse this trend and cement the status of football clubs as vital community assets. This must be done by protecting both their existence and their assets. There are already successful examples of this, such as communities in Portsmouth taking ownership of the Jon Jenkins Stadium through the Community Ownership Fund, with £1 million in public support.

Football clubs also deliver enormous social value. They play a major role in the lives of millions of supporters and matter to people in all corners of the country.

- The EFL recently calculated that EFL clubs delivered a total of £865 million in social value to their local areas in 2021/22 alone.²⁰
- EFL clubs also generated £101 million in income and funding for community projects and other initiatives. EFL clubs engaged nearly 1 million (840,000) people in local communities through engagement and development projects such as these.
- Football clubs also support communities through the provision of facilities such as pitches, classrooms, and meeting rooms. In total, EFL clubs made more than 1,600 such facilities available in 2021/22.

Northern football clubs bring significant economic benefits to local communities

Football clubs provide more than just the lifeblood of the communities built around them. They are also vital players in local economies and many local businesses live and die by their success. When the going is good, they can bring significant regional economic benefits.

- A 2016 study found that the net regional economic impact of a medium-sized then-Premier League club (Swansea City) totted up to £46 million of gross value-added and 216 jobs as a direct result of the financial flows generated by the club.
- The study also noted that broadcast revenues were redistributed to the regional economy and that public investment in the stadium infrastructure was therefore generating a significant return on investment. The paper also noted that there were likely to be other benefits that were impossible to quantify, such as the increased revenues made by local businesses on matchdays.
- The Government's Assessment of the Financial Stability of Football report identified evidence that football clubs have both direct and indirect effects on jobs and supply chains, and bring regional benefits to their local areas including jobs and business creation.

However, when things go wrong it can have a devastating impact on local businesses. For example, the collapse of Bury resulted in significant loss of trade at pubs and restaurants near the ground, which are now struggling. ²¹ And it isn't just administrations that threaten local economies. When teams struggle on the pitch and attendances drop, the local businesses that serve supporters attending games struggle too with lower footfall and decreased revenues.

 Northern towns and cities tend to be poorer than the rest of the country. Overall, Northern towns and cities made up twenty-two of the thirty-five places in the top quartile for deprivation.²²

- Of these twenty-two towns and cities, 82% had at least one professional football team competing in the EFL or the Premier League.
- There is therefore a risk that the collapse of any of these clubs could have damaging economic consequences for their local communities, which are already among the most deprived in the entire country.

Northern voters are expecting delivery on the 2019 Conservative manifesto pledge

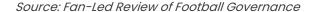
As this research note has set out, football is in dire need of reform to protect both the professional and grassroots game. Nowhere is this needed more than in the North, which has long-suffered with a disproportionate number of professional clubs entering administration and where the grassroots game is particularly at risk. The Government must now take action and implement the Fan-Led Review's recommendations in full, to protect Northern football clubs and ensure the long-term sustainability of the grassroots game in the North. The Government has a mandate to do this:

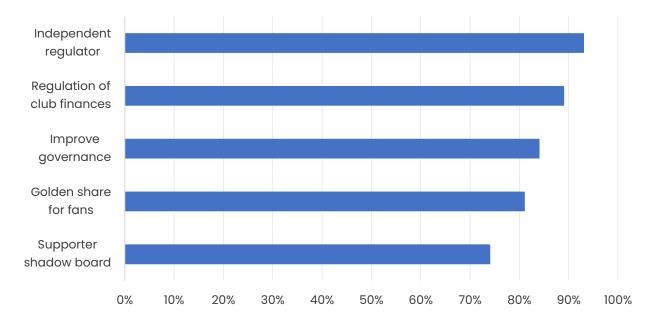
- The new Prime Minister reconfirmed his commitment to the Conservative Party's 2019 Manifesto in his first speech from Downing Street.
- And, during last year's leadership campaign, the Prime Minister said that he would urgently
 implement all ten of the strategic recommendations made by the FLR if elected leader of the
 Conservative Party.²³
- In addition, Boris Johnson's Government previously accepted six of the ten strategic recommendations made by the FLR, thereby making a formal commitment that the Government would implement these recommendations.

A White Paper has been promised "imminently". But voters, along with the wider football community, are now growing impatient:

- A recent open letter signed by 29 professional clubs in November 2022 called for the immediate implementation of the FLR's recommendations and called for the Government to explicitly commit to establishing an IREF.²⁴
- Similarly, a petition calling on the Government to establish an IREF was signed by more than 31,000 people at the same time.
- Support for a new regulator is very strong amongst the public. An online survey conducted for the FLR found that 93% of people support the introduction of a new regulator. This was even more popular than recommendations for fans to have a 'Golden Share' (81% support) and to improve corporate governance (84% support).
- Another poll for the Mail on Sunday also demonstrated high levels of public support for the FLR's recommendations. The poll found that 85% of respondents backed the introduction of an IREF.²⁵

Figure 4: Proportion of survey respondents who support various recommendations made by the Fan-Led Review





Conclusion

This is an important time for football in the North and the country as a whole. Financial insecurities, foreign states purchasing clubs and the threat of a breakaway 'Super League' have meant that the future of the game has never looked so uncertain.

Football clubs remain the lifeblood of communities in many towns and cities across the North. But the long-term future of many of these clubs is still at risk. Dangerous financial gambles and poor governance have led to a string of administrations across Northern clubs in the past few decades. And, without urgent reform, there is a sense that it is only a matter of time before another Northern community loses its club, and with it a huge part of their heritage.

The fan-led review recognised these issues, and set out a number of recommendations including an independent regulator to ensure the stability of English football and the increased distribution of revenues from the Premier League to the rest of the football pyramid. The Government must now get on with the job of delivering on these recommendations, as it has promised to do so. They are vital to protecting the future of the professional and grassroots games in the North, alongside the numerous socio-economic benefits that football brings to the region as a result.

But with more than a year since the publication of the review, voters will be growing impatient, and so the Government must act quickly. Fortunately, the political appetite exists for it to do so. And, at a time when public spending is tight and life for ordinary people is getting harder, protecting and supporting local football clubs can provide an important success story for this Government's record in the North.

Annex: A short history of the Fan-Led Review of Football Governance

The Conservative party included in its 2019 manifesto a commitment "to set up a fan-led review of football governance, which will include consideration of the Owners and Directors Test". This manifesto commitment came following the tragic collapse of Bury FC as a result of unpaid debts and other financial issues. The collapse resulted in the club's expulsion from the English Football League, and the loss of 134 years of footballing heritage.

The pandemic further laid bare the financial fragility of many of our football clubs, and was described as "the biggest shock that the football industry has ever faced" ²⁶. With no football played in front of capacity crowds for more than a year, clubs faced a total loss of matchday revenue on which many were highly dependent to pay operating costs, including staff and player wages. Overall, English clubs lost more than £1 billion in revenue during the pandemic, with Premier League clubs losing £800 million.²⁷

However, this hit clubs lower down the footballing pyramid hardest - Championship clubs generate up to 37% of their income from matchday revenue - and for many League One and League Two clubs this figure is more than half. The pandemic put huge pressures on their finances and required various support packages. For example, the Premier League bailed out £50 million to League One and League Two clubs. However, the Premier League was unwilling to provide a bailout to Championship clubs, and eventually only agreed to pay the interest on a commercial loan that was sourced by the EFL. Government loans were also offered to National League clubs. The football financial crisis that arose from COVID, along with the failure of football to act collectively in response, further demonstrated the need for an all-encompassing review of how the game is run and hastened calls for reform.

The final straw came on Sunday 18th April 2021, when twelve of Europe's biggest football clubs announced their intention to break away from the traditional European football structures to create their own elite 'European Super League'. Among them were six English clubs: Arsenal, Chelsea, Liverpool, Manchester City, Manchester United, and Tottenham Hotspur.

The fallout was immediate. The European Super League was instantaneously condemned by fans, other clubs, leagues, governing bodies, the media and the Government. The backlash was so severe that all six of the English clubs involved backtracked and withdrew from the league within the next three days.

The Government also responded immediately, and the Fan-Led Review into Football Governance was officially announced on the 19th April by sports minister Nigel Huddlestone MP.

The review was chaired by Tracey Crouch MP and conducted by a panel including representatives from across the game. The final report made a total of 47 recommendations across 10 strategic categories.

Key recommendations

- The creation of a new independent regulator for English football (IREF), to ensure the long-term sustainability of the game.
- Responsibility for IREF to oversee financial regulation in football.
- IREF to establish new, strengthened Owners and Directors Tests to replace existing tests, with a recommendation that owners should have to re-pass the test every three years.
- Resolving issues around the distribution of finances from the top of the football pyramid downwards.
- New approaches to corporate governance in football.
- Protection for key items of club heritage, recognising that football clubs are key to communities.
- Additional support and redistributive payments from the Premier League to lower divisions and grassroots football.

In their response to the FLR, the Government accepted or supported every recommendation. 'Accept' means that the Government "agrees with and will implement the strategic recommendation", while 'support' means that the Government only agrees with the recommendation in principle, or another organisation is responsible for its implementation. The Government's response makes the commitment "that the government will take forward significant reform of football through legislation". The Government has therefore formally committed to implementing the recommendations it has accepted, such as the establishment of an IREF.

Endnotes

Cover photo credit: Phillip Bryan/Shutterstock.com

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