

WORLD FOOTBALL SUMMIT

COVID-19

IMPLICATIONS ON THE FOOTBALL INDUSTRY

AUGUST 2020



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INTRODUCTION

All the sports industry is being directly affected by the Covid-19 sanitary crisis, including football. Calendars worldwide have been disrupted since early 2020 as competitions have had to be either postponed or cancelled in order to slow down the spread of the virus.

Now, as lockdowns are ending and countries are cautiously returning to normal activity, sports properties (including leagues, federations, clubs, athletes, etc.) need to find new ways to restart playing whilst still tackling the pandemic's risks to avoid a second outbreak. In fact, to ensure fans' safety, properties will face increasingly stricter health regulations that will represent a partial turnaround in their business models and that, consequently, threatens to raise even more their already heavy financial pressure.

In that sense, **World Football Summit (WSF)** aimed to calibrate the coronavirus' impact on the football industry by asking the members of the Advisory Board as well as other key stakeholders in the industry about the topic. With that goal, **WFS** created an online survey to gather a better understanding on:

- ▶ How will the near and far future look like?
- ▶ What areas will be the more affected by the crisis?
- ▶ What will be the main opportunities that the challenge will raise?

SPSG Consulting, the boutique consulting firm specializing in sports and entertainment lead by Carlos Cantó, has worked closely with **WFS** in designing and elaborating this research and this report.

WFS would like to thank all the professionals that contributed to this report for their commitment to the improvement of the football industry and to **WFS**. This document shares a summary of the overall thoughts and beliefs of the different football stakeholders that participated in the survey. They were asked to rank on a scale of 1 (minimum) to 7 (maximum) the level of the overall impact of the coronavirus outbreak in the football industry, mainly in the following areas:

- ▶ Revenue streams in the football industry.
- ▶ Main stakeholders in the football industry.
- ▶ Timeline of the estimated impact in the football industry.
- ▶ Geographical areas of the estimated impact in the football industry.

The industry experts also graded on a scale of -3 (very negative impact) to +3 (very positive impact) the level of impact of the Covid-19 sanitary crisis for specific football industry revenue streams for the remainder of 2020 and 2021.

To finish, respondents also considered some of the main football industry opportunities post Covid-19.

MEMBERS OF THE WORLD FOOTBALL SUMMIT

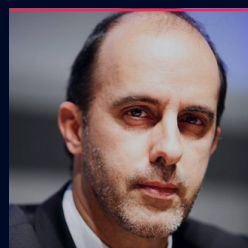
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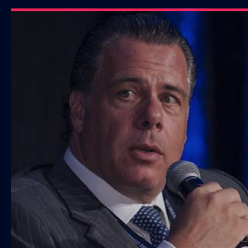
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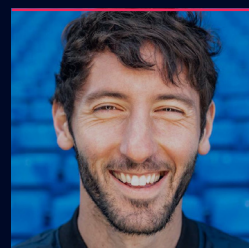
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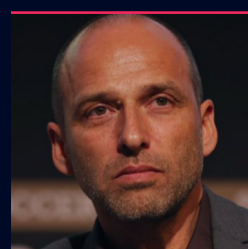
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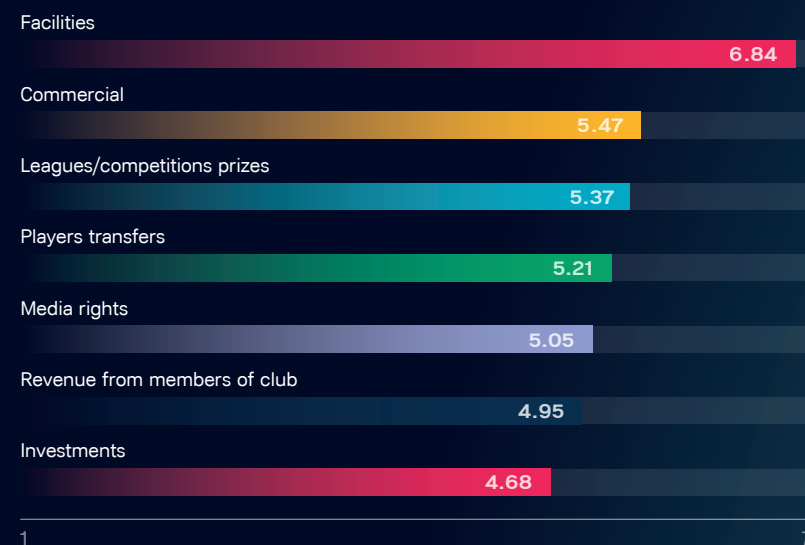
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COVID-19 IMPACT ON THE FOOTBALL INDUSTRY REVENUE STREAMS



Industry experts ranked on a scale of 1 (minimum) to 7 (maximum) the impact of Covid-19 on the football industry's different revenue streams.



The business models of football stakeholders are driven by different revenue streams, including:

- ▶ Commercial revenues (e.g. sponsorship, licensing, merchandising, advertising, etc.).
- ▶ Media rights (e.g. linear TV, PPV, OTT, Social Media Platforms and other).
- ▶ Leagues and competitions prizes.
- ▶ Football players transfers.
- ▶ Facilities (primarily relying on match day income through ticketing, sales of hospitality packages, vendors, etc.).
- ▶ Revenues from members of the club.
- ▶ Investments (e.g. financial, start-ups, diversification, etc.).
- ▶ Other.

However, the measures adopted globally to slow down the pandemic (worldwide lockdowns and social gathering restrictions, among others) have caused an important upheaval to football properties' economic situation. Up until now, the need to suspend football events has affected to a greater or lesser extent all tiers of the mentioned revenue streams and, unfortunately, will still do so in the foreseeable future.

THE MEASURES ADOPTED GLOBALLY TO SLOW DOWN THE PANDEMIC HAVE CAUSED AN IMPORTANT UPHEAVAL TO FOOTBALL PROPERTIES' ECONOMIC SITUATION.

Bearing in mind that selected football leagues are resuming play behind closed doors, respondents believe that match-day revenues will receive a greater impact from the coronavirus outbreak. As a matter of fact, until further notice football organizations will not be able to sell any match tickets, hospitality packages and other activities normally carried out in the stadia. What's more, as Covid-19 infection rates drop and sports stadia plan to reopen, properties will still have to face several obstacles in managing their facilities at their full potential as they will need to comply with strict public health protocols that aim to ensure a safe experience for fans.

Besides, as for the respondents, commercial revenue (from sponsorship, licensing, merchandising sales and advertising, among others) will also take a major hit.

To start with, many properties have performance-driven payment schemes in sponsorship that tie a variable fee to the team performance or the achievement of other metrics on the field (requirements that with sports on hold are complicated to achieve). Also, especially at this phase, sports properties won't be able to deliver some of the rights offered to their current or potential sponsors and advertisers and, thus, it may dilute the value of their sponsorship programs. Therefore, properties will need to explore new ways and assets to add value to partners until the sports industry fully recovers. This has already been partially accomplished by selected football properties that have deployed digital activations and platforms.

With football competitions being suspended or played behind closed doors, **sports organizations will also see a steady fall in the demand of their merchandising** (physical stores, compared to e-commerce, where the impact is less severe) **and licensing products** (especially among casual fans).

Similarly, the early finalization of some leagues and competitions could affect their funds and lead to a need of amending prize lists downward.

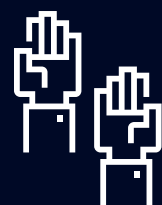
To finish, as football properties face a substantial loss of revenue and are tied to financial limitations, **the transfer market** (which has shown a steady rise in the past few years) **will also be affected, and both the number of player transactions and transfer fees are likely to fall.**

Fortunately, according to the respondents, the prompt resumption of some competitions (despite being behind closed doors) will relieve more potential financial damage that sports properties could suffer if they didn't finish the season. For instance, the restart of matches allows sports properties to create new content for football fans to watch and consequently limits the economic impact from media right holders. In the same way, football clubs are innovating to bring valuable content to their members and avoid losing these revenues as well.

COVID-19 IMPACT ON THE FOOTBALL INDUSTRY'S **MAIN** **STAKEHOLDERS**

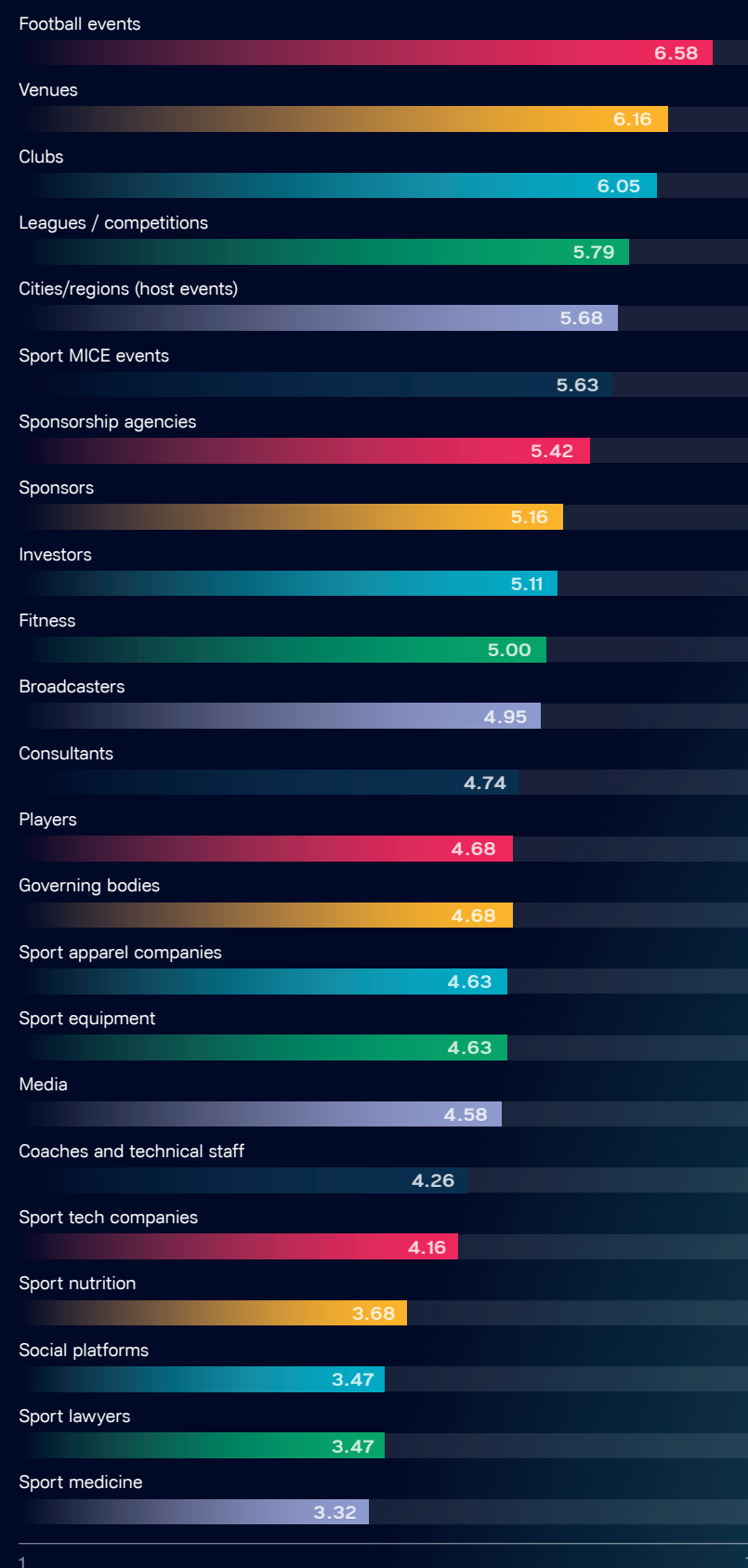
The pandemic has challenged and disrupted the business model of all the players involved in the football ecosystem in a similar way. When asked to rank the level of impact of Covid-19 for the different football industry's stakeholders, experts started by ranking mass-events.





COVID-19 IMPACT ON THE FOOTBALL INDUSTRY'S MAIN STAKEHOLDERS

Industry experts ranked on a scale of 1 (minimum) to 7 (maximum) the impact of Covid-19 on the football industry's different stakeholders.



As stated before, the rapid spread of the virus caused the postponement or even cancellation of 2020 football leagues and competitions as well as MICE events. This situation left organizers and cities that were supposed to host those big events trying to mitigate the derived financial implications while trying to design a comeback plan to avoid greater impacts on their financial situation. For instance, many MICE events have been able to find an alternative to suspension by redefining their offer through an online format (e.g. WFS has created WFS Live -virtual event, July 2020- as the situation obliged to postpone WFS Asia, WFS Africa and WFS20 mega-events).

Currently, with better epidemiologic results but without any effective treatment yet it seems that the Covid-19 effects are likely to remain for a while, and thus, football organizations will still need to adopt severe sanitary measures that will surely challenge their normal operations:

- ▶ Venues will need to update their operational model as they will have to comply with social distancing requirements that minimize risk exposure. To that aim, they will have to limit their seating capacity and standing crowd density and acquire equipment that enables them to control attendant's health parameters. The appliance of these new regulations will increase their operational cost (e.g. through the purchase of needed sanitary equipment, execution of athlete's and staff's recurrent health checks, etc.) while reducing their income generation (e.g. as they will not be able to sell all their available assets or at a reduced capacity).
- ▶ Football clubs have also been hardly affected by the crisis but in varying degrees, depending on their reliance to the different revenue streams. For instance, those clubs more dependent on match-day incomes or player transfers (in relation to their total income) may experience a greater impact than others that are generally generating more revenue from media rights. Luckily, their financial performance has not been as harmed as it could have been if it wasn't for the early adoption of economic control measures that have placed them in a better economic position to tackle a crisis.
- ▶ According to the respondents, football players are no exception because as clubs suffer financially after the pandemic and face future uncertainty, they will eventually need to renegotiate their salaries in order to reduce one of their biggest expenses. Although at another level, coaches and technical staff whose activity is connected to the game will also be eventually affected.

THE PANDEMIC HAS IMPACTED THE FOOTBALL INDUSTRY AS A WHOLE, INCLUDING NOT ONLY SPORTS PROPERTIES BUT ALSO ALL THE RELATED SERVICES AND HAS STIMULATED COOPERATION BETWEEN STAKEHOLDERS TO OVERCOME THE CRISIS

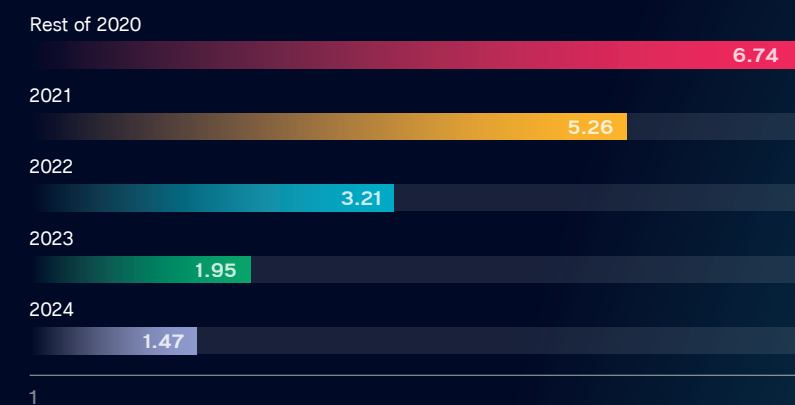
- ▶ In terms of sponsorship, if sports are not able to fill stadiums and lose physical audiences, sponsorship eventually may not be as attractive for companies. Apart from that, selected brands may also be facing some financial difficulties after the pandemic and might need to adjust their marketing budgets accordingly by terminating deals before scheduled or cutting sponsorship investments (as way of example, RSC Anderlecht recently lost its main sponsor BNP Paribas Fortis). In this context, sponsorship fees are likely to decrease and, thus, sponsorship activation agencies could expect a drop in their activity as well. However, the coronavirus situation has also revealed other sponsorship functionalities (e.g. contributing to society, digital activations, etc.) and other sponsorship territories (e.g. eSports) that will surely be explored in the near future.
- ▶ Similarly, with football at a standstill and raising uncertainty, investors' and consultants' activity might be threatened but, more likely, may also bring them new opportunities to support the sports ecosystem recover.
- ▶ Stay at home orders have also put under lockdown the fitness industry, affecting severely smaller gyms and studios. In spite of the financial impact caused by their closure, other fitness stakeholders have seen how the Covid-19 outbreak has revolutionized consumers behavior towards digital channels and many of them have leveraged on the populations' need to workout at home. As a matter of fact, sports equipment and sports apparel companies have been able to mitigate negative effects by renting exercise equipment, selling machines and apparel, and offering training sessions online during confinement.
- ▶ Traditional broadcasters have been challenged during the past few years with the appearance of new media platforms to the market that offer content suited to new consumer behaviors such as on-demand (i.e. OTT, social media, etc.). With unavailability of live sports content but with society's growing entertainment expectations during confinement, media companies have had to find alternative programming attractive for fans (whose preferences have gone more digital) and advertisers. Now, as competitions and leagues resume, media are slowly getting back to normal but without fans in attendance, properties are looking for new ways of improving the behind-closed-doors audiovisual product (e.g. AGF Aarhus launched a virtual stand with 10.000 fans invited to watch a game via Zoom).

To sum up, the pandemic has impacted the football industry as a whole, including not only sports properties (e.g. leagues, events, players, clubs, federations, etc.) but also all the related services (e.g. travel agencies, F&B/catering companies, broadcasting, etc.) and has stimulated cooperation between stakeholders to overcome the crisis.

TIMELINE OF THE ESTIMATED IMPACT ON THE FOOTBALL INDUSTRY



Industry experts ranked on a scale of 1 (minimum) to 7 (maximum) how Covid-19 will impact the football industry in each of the coming years.



Properties are facing important financial and operational difficulties as a result of the football hiatus since early 2020 and, unfortunately, the survey respondents believe that for sure, these difficulties will last for the rest of the year.

As far as experts are concerned, football properties will need to be creative and build fan loyalty in order to ensure incremental sources of income in 2021 because, the coronavirus pandemic is expected to not only impact the industry in the short-term, but at some degree, sports properties will still have to deal with its negative effects at least for the next season as well.

Therefore, the main challenge is the uncertainty that the future holds as properties' financial performance will depend on the state of the pandemic and, thus, the measures adopted to control the situation. In fact, a slowdown in coronavirus infection rates would allow for easing restrictions and open stadia for fans but, in the first place of the process, at a limited capacity. Although football properties would still note a decrease in many of their revenue streams caused by lower attendances (e.g. in ticketing and in-venue purchases), their financial performance would be better than in a worse scenario where a new coronavirus outbreak (and the unavailability of a ready vaccine) could force a whole season played behind closed doors.

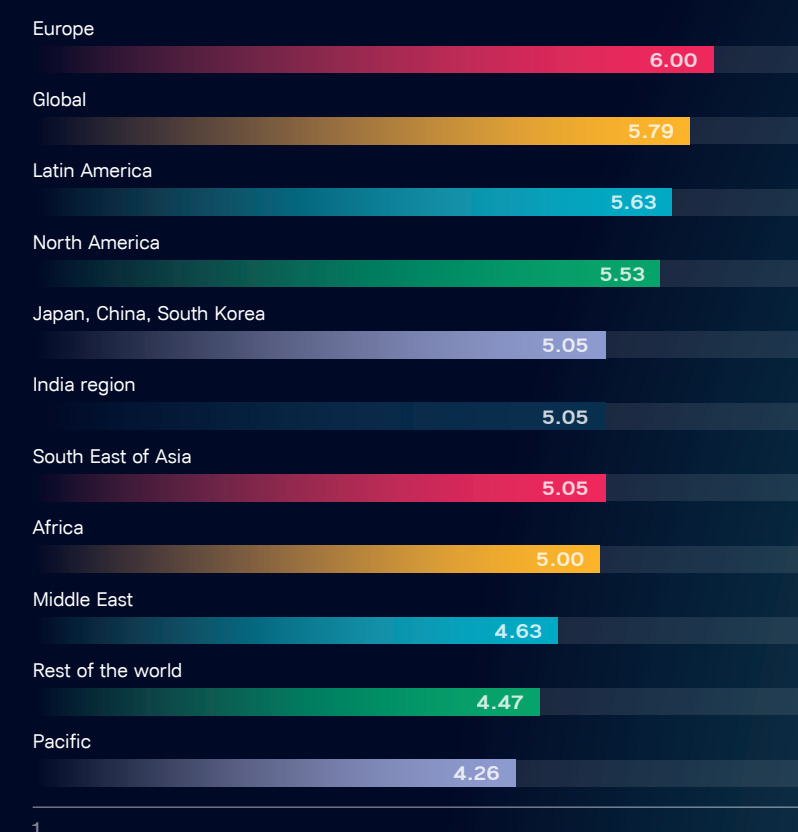
Due to all these uncertainties, the survey respondents consider that in 2022, sports properties are likely to still be in a transition period and drag some of Covid-19 negative effects (especially if the crisis gets extended) but less in consequent years ahead.

IN 2022, SPORTS PROPERTIES
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GEOGRAPHICAL AREAS OF THE ESTIMATED IMPACT ON THE FOOTBALL INDUSTRY



Industry experts ranked on a scale of 1 (minimum) to 7 (maximum) the impact of Covid-19 on the different regions of the world.



The coronavirus pandemic has affected countries worldwide and the majority of them have adopted similar measures to try to control it by mainly adopting social restrictions that have resulted in the postponement or suspension of national/international football leagues and competitions.

This phenomenon has carried out important social and economic effects on a global scale but, according to the **WFS** members, recovery times will vary by region and the overall impact of Covid-19 in the football industry is expected to be greater in Europe, Latin America and North America, while more controlled in the Pacific and Middle East (during the remainder of 2020 – 2021 – 2022).

Actually, we have seen a large and continuous spread of the virus in European, Latin American and North American countries and although many football leagues and competitions have recently restarted playing behind closed doors, they have not done it at a full potential and as mentioned, the financial impacts are already significant (especially on those that have finally been suspended; i.e. Euro 2020 and Copa America).

Lockdowns and other imposed social restrictions have helped to manage the pandemic and flatten the contagion curve in a number of Asian countries. However, we are already seeing instances of a second potential global outbreak that threatens once more the postponement of football leagues that were set to resume (e.g. Chinese Super League). Therefore, the overall impact and length of Covid-19 is still uncertain.

COVID-19'S IMPACT ON EACH REVENUE STREAM



TRANSFER MARKET



MEDIA RIGHTS



COMMERCIAL REVENUES

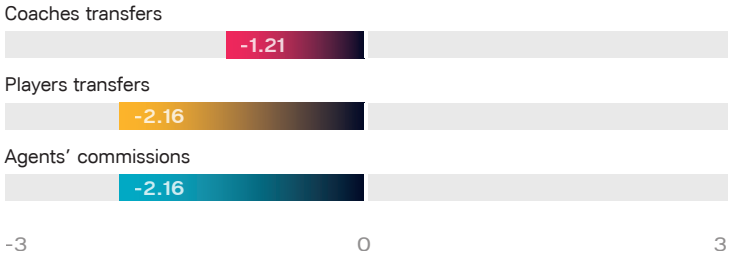


VENUES – FACILITIES



COVID-19'S IMPACT ON EACH REVENUE STREAM
TRANSFER MARKET

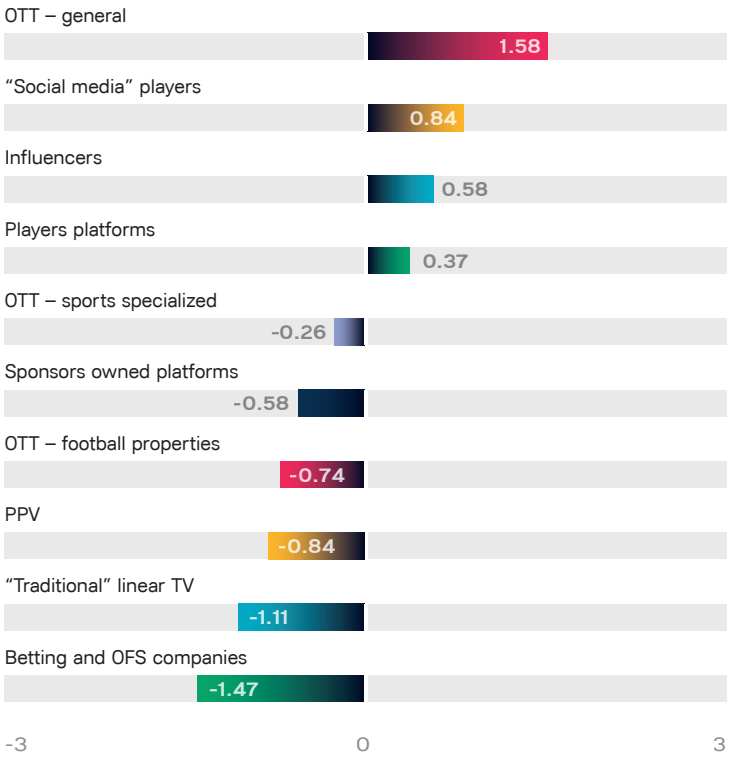
Industry experts graded on a scale of -3 (very negative impact) to +3 (very positive impact) the impact of Covid-19 on specific football industry revenue streams for the remainder of 2020 and 2021.



According to experts, with clubs financially struggling the pandemic could potentially lead to a decrease in the number of player transactions and a devaluation in transfer fees. Therefore, with less football players “purchased” and at lower fees, “seller’s” (meaning those clubs that are generally more reliant on player transfers revenue streams) will face a decrease in their financial performance (and, thus, agents’ commissions as well). As an alternative, we may see an increase in other types of transfers in the market such as the number of swap and loan deals.

COVID-19'S IMPACT ON EACH REVENUE STREAM
MEDIA RIGHTS

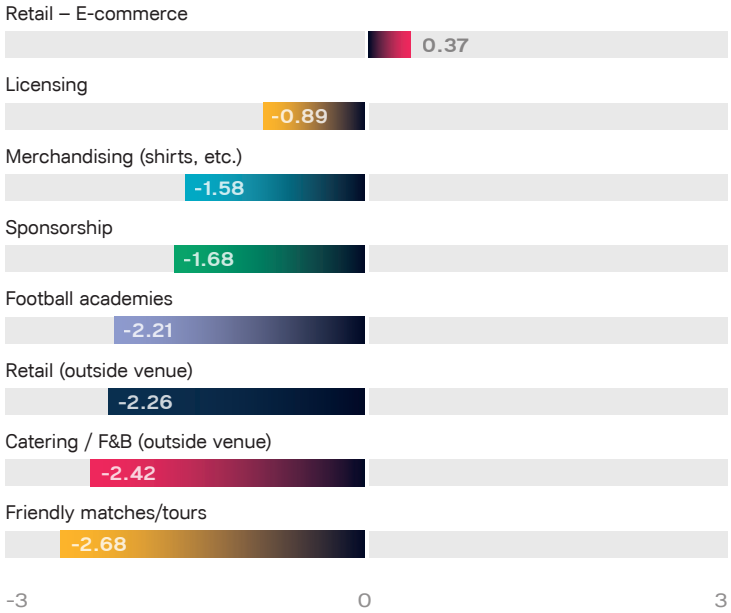
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In the past few years, we have experienced a media fragmentation that has seen the rise of OTT platforms and social media in the market. Lockdowns have accelerated the consumer trends of consuming sports audiovisual content through digital platforms and channels (that offer on demand and personalized content accessible at any time, at any place). Therefore, respondents believe that the Covid-19 pandemic has had a positive impact on OTT, social media, influencers and players platforms (that were already increasing its importance) whilst traditional linear TV, betting companies and PPV are rapidly losing ground. Also, sports specialized OTT platforms and other OTTs’ owned by sponsors and football properties that were relatively new in the media market, will slightly be even more challenged in comparison to other digital players that are more established.

COVID-19'S IMPACT ON EACH REVENUE STREAM
COMMERCIAL REVENUES

Industry experts graded on a scale of -3 (very negative impact) to +3 (very positive impact) the impact of Covid-19 on specific football industry revenue streams for the remainder of 2020 and 2021.



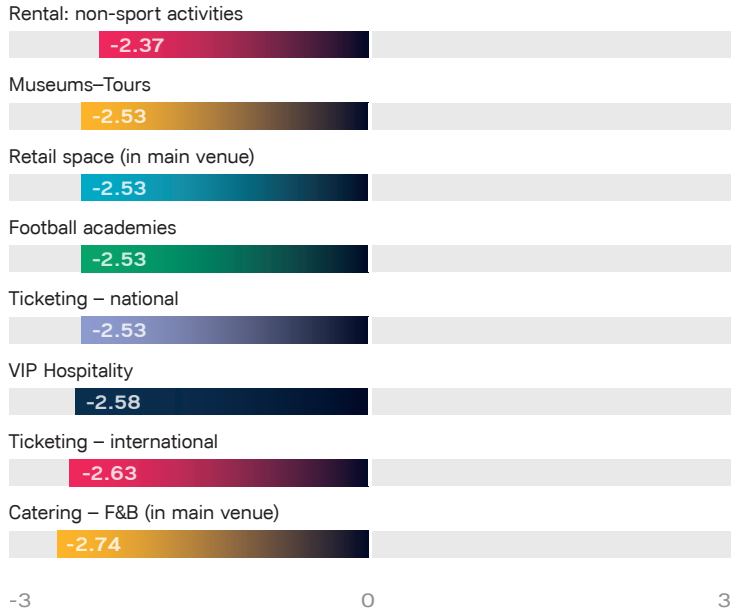
In general, commercial revenues have been heavily affected by the situation and will recover at a slow pace during the rest of 2020 and 2021. Due to travel restrictions and social distancing measures, friendly matches and tours, and football academies will be under question. Also, with leagues and competitions resuming without fans attendance on stadia, sectors that are related to the game experience and reliant on football audiences will likely see an important decrease in their activity as well (e.g. catering/F&B and retail outside the main venue and even sponsorship).

Although the slow return to normal activity will diminish fandom purchases (merchandise and licensing products that are usually worn when attending a match to cheer on football clubs), the survey respondents’ expect that the pandemic has led to an increase of online purchase habits on the population, and thus, football properties will be able to leverage on e-commerce revenue streams (which do not imply any type of social contact).

COMMERCIAL REVENUES HAVE BEEN HEAVILY AFFECTED BY THE SITUATION AND WILL RECOVER AT A SLOW PACE DURING THE REST OF 2020 AND 2021

COVID-19'S IMPACT
ON EACH REVENUE
STREAM
VENUES – FACILITIES

Industry experts graded on a scale of -3 (very negative impact) to +3 (very positive impact) the impact of Covid-19 on specific football industry revenue streams for the remainder of 2020 and 2021.

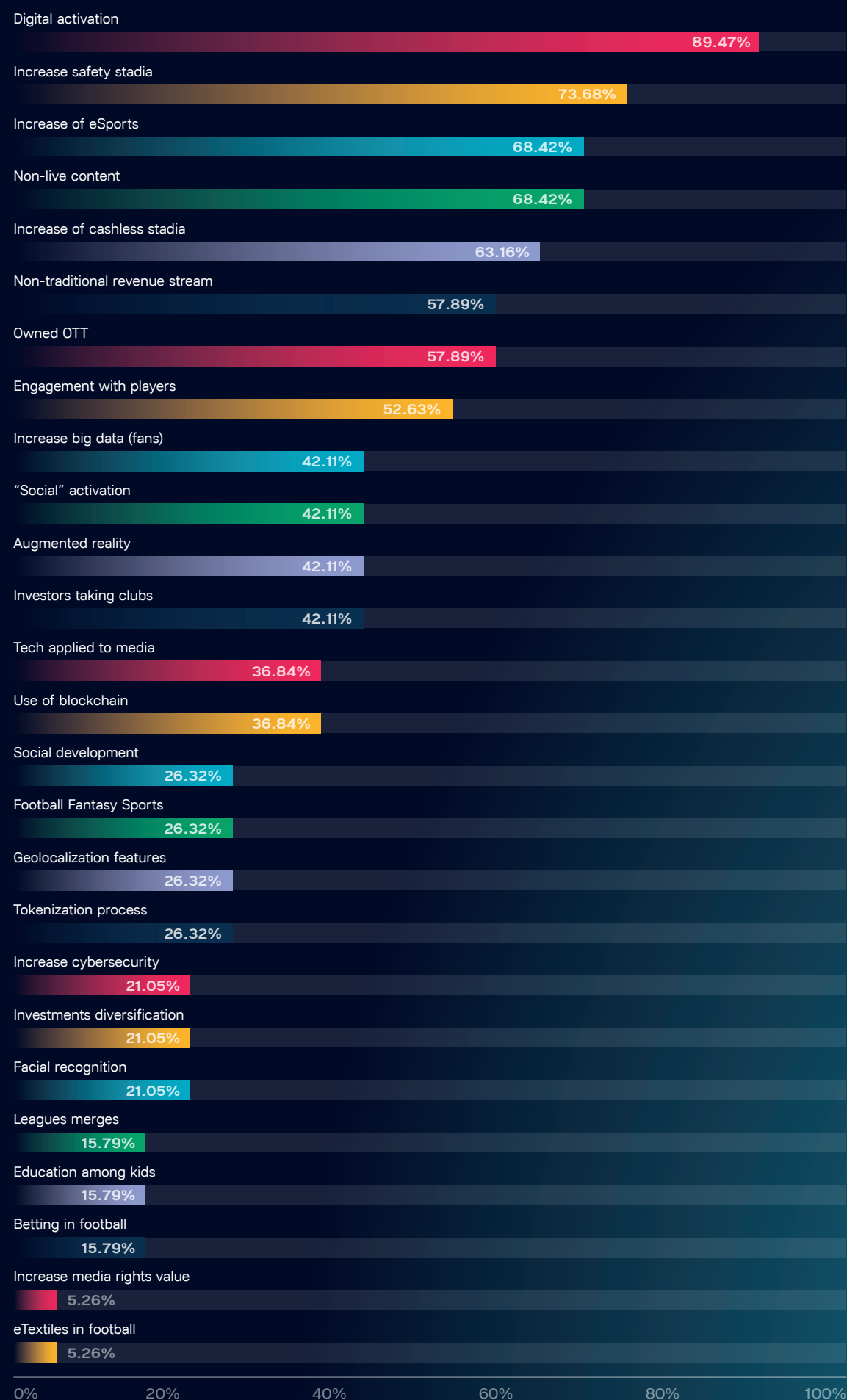


According to the WFS Advisory Board members’ and surveyed experts, as long as the pandemic persists, social distancing restrictions will be applied and, thus, all the facilities’ revenue streams will be hardly hit in the following years. Either playing matches behind closed doors or at a fan limited capacity, the commercialization of venues’ main activities at their full potential will be at a standstill (e.g. catering, ticketing, VIP hospitality packages, academies, retail spaces and tours of the museums). Therefore, **stadia must innovate and redefine other business strategies that enable them to generate revenue from other sources until the football industry fully recovers.**

FOOTBALL INDUSTRY'S MAIN OPPORTUNITIES POST COVID-19

In the post-Covid-19 phase, sports properties will need to convert some of the main challenges arisen from the crisis into opportunities to remain relevant in the market.





FOOTBALL INDUSTRY'S MAIN OPPORTUNITIES POST COVID-19

Main business opportunities for the football industry post-Covid-19.

To start with, during the last few months, sport properties have had to rely on technology to keep providing content and interacting with their fans; especially during the lockdown where people were in need of entertainment. As a matter of fact, with live sports on hold, eSports consumption has risen to the next level and many properties took advantage of that by turning to online competitions to keep their fans engaged.

In that sense, respondents believe that the Covid-19 crisis has accelerated digital existing trends and sports properties will increasingly foster the creation of "phygital experiences" (by combining the physical and digital world). For instance, **sports properties are likely to leverage on big data to create digital activations through augmented reality and work up on fantasy game's offering.**

Likewise, as the coronavirus outbreak is threatening some of the biggest revenue streams for sports stakeholders (e.g. match-day purchases inside the venues), they will likely need to optimize other non-traditional ones. In recent years, several properties have developed their own OTT platforms to be able to completely adapt the frequency and type of content provided to the fans according to their demands. As the crisis has prompted the consumption of short, non-live and differential content (i.e. with direct engagement with players), experts consider that football properties' owned OTT are likely to increase in the near future.

Besides, the main challenge for sports venues will be to ensure fans' safety. To that aim, it is clear that they will have to adopt health measures that ensure a risk-free experience (e.g. by providing sanitary equipment to the staff and public) but they will also invest in new technologies that minimize the main contagious moments while building on a competitive advantage. As way of examples, many stadia are probably going to convert their operations to cashless, provide geolocalization services, increase the use of blockchain technologies to ensure cybersecurity or develop tokenization processes to maximize the fan experience, among others.

Finally, we have seen how both brands and sports properties have proactively and positively contributed to help tackle the coronavirus outbreak by providing necessary services and products (e.g. the Maracana Stadium in Brazil turned into a hospital to treat coronavirus patients). In that sense, the survey respondents expect that brands and properties will still be willing to collaborate post-Covid-19 to contribute to social development through valuable activations (what it is known as "sponsorship/partnership with a purpose").

To sum up, many questions and challenges will arise from this situation that will push sports organizations to manage and transform them into opportunities to mitigate negative effects. At some extent, football properties should, partially, be re-invented, adding new opportunities to generate revenues and providing added value to their stakeholders (fans, sponsors, suppliers, shareholders, cities/regions, society, etc.).

SPORTS PROPERTIES ARE LIKELY TO LEVERAGE ON BIG DATA TO CREATE DIGITAL ACTIVATIONS THROUGH AUGMENTED REALITY AND WORK UP ON FANTASY GAME'S OFFERING

CONCLUSION

The different stakeholders conforming the football industry (e.g. players, clubs, governing bodies, sponsors, investors, host cities, leagues and competitions, media, etc.) have been financially hit by the coronavirus pandemic globally. Sports organizations in different countries around the world have seen their business models threatened at varying levels, especially in Europe, Latin America and North America.

The rapid spread of the virus and high risk of contagion has left live sports on hold and consequently, some of their revenue streams as well. As a matter of fact, facilities' revenues are at a standstill as they rely on fan assistance (e.g. ticketing, F&B in the main venue, etc.). Sports properties haven also seen a decrease in all the different revenue streams that are related to the matches themselves; commercial revenues (e.g. merchandising, licensing, sponsorship, etc.), revenues from members of the club, and taking into account all the Covid-19 consequences all together, we will also find a devaluation of league/competition prizes and player transfers.

Besides, the main threats are the uncertainty regarding the duration of the crisis, the future measures that will be necessary to tackle it and the consequences that will keep arising. Unfortunately, the virus effects will last for some time and experts believe that it will still impact the sports industry during the rest of 2020 and slightly in the following years.

However, although the pandemic has left sports properties having to face numerous challenges, the members of the **WFS** Advisory Board believe that it will also unlock new business opportunities. In that sense, technological capabilities will allow organizations to innovate to tackle the crisis by increasing security at stadia, improving the fan experience on-site (and through media) and finding new non-traditional revenue streams to subsist, among others. In addition, further innovation not-related to technology will be unlocked, providing football industry new areas where to develop, generate added value and monetize.

THE MAIN THREATS ARE THE
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ARISING

WORLD FOOTBALL SUMMIT

COVID-19 IMPLICATIONS ON THE FOOTBALL INDUSTRY

ABOUT WORLD FOOTBALL SUMMIT (WFS)

World Football Summit is where the football industry's leading stakeholders meet to shape the future of the beautiful game. Our platform has evolved from an annual gathering held in Madrid, focused on the European market, to a growing series of on-site and online events that cover the challenges and opportunities of the different regions and sectors in this thriving industry. **WFS** is powered by a global community of influential professionals sharing a unique passion for the business of sports and a mission to spark discussion, share knowledge and promote innovation to drive progress for the game and the industry.

worldfootballsummit.com/en/

ABOUT SPSP CONSULTING

SPSP is a boutique consulting firm specializing in providing business solutions in the fields of Sponsorship, Partnership and Sport.

Created by Carlos Canto (formerly, Vice-President Consulting division at IMG and Lagardère Sports), who has the experience to lead projects in 23 countries in the industry of Sports, Entertainment and Sponsorship, advises sport companies/clubs, federations, governing bodies, sponsors, media companies, public sector entities, entertainment companies and investors.

www.spsgconsulting.com

