

FUTURE DIRECTIONS OF AFL SYDNEY PROJECT

UNDERTAKEN IN 2017



BACKGROUND

Throughout 2017, AFL NSW/ACT undertook a comprehensive review of community football in the greater Sydney region titled the 'Future Directions of AFL Sydney project'. The aim of the review was to develop a unified long-term vision for and strategic objectives of AFL Sydney in line with the key recommendations from the AFL's national Future Directions of Football report (2016).

Consultation across the AFL community in Sydney was a critical element of the project. In doing so, AFL NSW/ACT met with and surveyed thousands of representatives from all levels of football in Sydney, at community, semi-professional and elite level, as well as key national and state stakeholders. The involvement and input from key stakeholders

across AFL Sydney was invaluable and enabled us to better understand the opportunities and challenge, and to help shape the future direction.

The research phase included an extensive analysis of data including the engagement of external consultants to test the key insights and help to develop the various recommendations, before refining these emerging recommendations with key stakeholders.

The project has identified over 60 final recommendations – including 10 key recommendations – to guide the future direction of AFL competitions in Sydney.

We thank all of you who contributed to the project and we look forward to working with you all as we embark on this exciting phase to lay the foundations for the next phase of growth of AFL Sydney into the future.



Sam Graham
Chief Executive Officer
AFL NSW/ACT



Sam Chadwick
State Manager – Football,
Policy & Major Projects
AFL NSW/ACT





PROJECT OVERVIEW

A thorough consultation process commencing in January 2017 and continuing throughout 2017

NOV 2016 – FEB 2017

FRAMING

Frame the key areas of focus

FEB 2017 – JUNE 2017

ANALYSIS

Consult key stakeholders & analyse information

JULY 2017 – DEC 2017

KEY FINDINGS

Identify & test key findings

- » Review National Future Directions of Australian Football report
- » Hold initial meetings with key stakeholders and obtain initial information
- » Establish Project Working Party and key consultants
- » Identify the Terms of Reference including the Project Scope
- » Announce Project and distribute the Terms of Reference

- » Conduct online survey with key stakeholders (over 500 respondents)
- » Meet with key stakeholders (all 76 AFL Sydney senior and junior Clubs, Juniors Exec & Regional Committees, AFL Sydney Strategy Group, Players, Umpires, Umpire Coaches, AFL/NEAFL Clubs, AFL staff etc)
- » Over 20 workshops and forums involving key stakeholders
- » Review data to identify gaps
- » Identify key issues and common themes
- » Analyse relevant information and test initial findings

- » Identify the key findings based on information/ data
- » Test key findings with AFL staff and key stakeholders
- » Determine strategic priorities and implementation timetable
- » Draft and distribute proposed key recommendations for feedback
- » Finalise key recommendations
- » Develop operational implementation plan



FUTURE DIRECTIONS OF AFL SYDNEY

The following SWOT analysis summarises the views of stakeholders with respect to the AFL Sydney landscape across seniors and juniors

SWOT

STRENGTHS

- » AFL brand and reputation in Sydney
- » The only community AFL league in Sydney
- » Largest community league in Australia
- » Female participation growth
- » Competitive balance of men's competitions
- » Sufficient number of clubs
- » Geographical spread of senior clubs
- » Auskick participation
- » LAM club development structure in Western Sydney
- » Increasing club depth in teams

WEAKNESSES

- » Senior and junior alignment and pathway
- » Relatively low player transition
- » Lack of Premier Division clubs in west
- » Gap between Premier Division and other clubs
- » Varied capability of club coaches and administration
- » Travel due to lack of scale
- » Insufficient staff resourcing to drive growth
- » Irregular match-day experience
- » Declining youth boys growth
- » U19s competitive balance and depth
- » Women's competitive balance and depth
- » No clear pathway for club promotion
- » Limited media coverage for competitions
- » Two-year age gap in junior competitions

OPPORTUNITIES

- » Western Sydney population growth
- » Growing NEAFL profile
- » Interest in female football due to AFLW
- » Sydney Swans and GWS Giants Academies
- » Growing profile of AFL due to Sydney Swans and GWS Giants
- » Growing population diversity
- » Brand and resources of the AFL organisation
- » New product offerings to attract and retain participants – AFL9s, Masters, AFLX etc
- » Independent Schools AFL programs
- » Development of 'tier two and three' clubs
- » Improved player retention/transition

THREATS

- » Scalability of other codes due to smaller player numbers
- » Insufficient access to grounds and facilities at community level
- » Wet weather rescheduling
- » Traditional profile of NRL and soccer
- » Management of concussion
- » Limited volunteer engagement of non-traditional AFL market
- » Rising player payments in senior competitions
- » Sustainability of 'tier two and three' clubs
- » Increasing costs to operate a club – venues, medical, equipment, coaches

KEY RECOMMENDATION 1

INTEGRATE THE GOVERNANCE AND ADMINISTRATION OF COMPETITIONS UNDER THE AFL

WHAT

- » The governance and administration of AFL Sydney juniors and seniors to be merged and integrated with junior competitions to become directly managed by AFL NSW/ACT
- » Wind up AFL Sydney Juniors Inc and streamline AFL Sydney Juniors governance (currently five separate governance bodies) with greater AFL staff resourcing to manage competitions
- » Maintain and clarify the role of the AFL Sydney Juniors Regional Committees

WHY

- » Ensure the strategic alignment across senior and junior competitions, including improved senior and junior club alignment and player transition (Sydney experiences a relatively low 48 per cent player transition rates versus other major NSW/ACT regions such as Canberra which is 65 per cent and Riverina which is 64 per cent)
- » Improved operational efficiency and financial management through minimising duplication and utilisation of AFL shared services
- » Continue to engage and utilise the experienced volunteer network
- » Ability to integrate and commercialise assets across seniors and juniors



KEY RECOMMENDATION 2

PROVIDE A STEP CHANGE IN INVESTMENT AND OPTIMISE THE COMMERCIAL MODEL

WHAT

- » Provide a step change in increased AFL investment to better support and develop the largest community football league in Australia with about 600 teams, plus Independent Schools and Masters competitions, including increased resourcing across competition management, club support and coaching
- » Appropriately and incrementally increase affiliation fees in line with state and industry benchmarks for AFL and other sports
- » Integrate commercial assets and develop a commercial toolkit of league assets
- » Reinvest AFL Sydney Juniors cash reserves into key junior football needs such as coaching and facilities
- » Ramp up focus on ensuring greater access to Sydney community facilities
- » Convert existing natural turf ovals to synthetic/ hybrid surface where possible and invest in improved venue lighting

WHY

- » AFL Sydney is well below resourcing benchmarks of other NSW/ACT leagues and other major community leagues nationally
- » To ensure professional league administration, drive junior and senior alignment, develop clubs, and support new and growing segments including Sydney Independent Schools and Masters competitions
- » Dedicated coaching development resources are required in Sydney to improve coaching standards and enhance the player experience, support and develop clubs to ensure future sustainability through new dedicated resources
- » Enhance financial sustainability of the league by maximising commercial revenue
- » Synthetic surfaces and lighting will address the current challenges regarding venue usage and wash-outs and facilitate the growing demand from participants

↳ ABOUT 25 PER CENT OF COACHES IN NSW/ACT ARE BASED IN SYDNEY ↴



KEY RECOMMENDATION 3

ENHANCE SENIOR COMPETITION STRUCTURES AND STANDARDS

WHAT

- » Develop and outline the process and criteria for the promotion of clubs to AFL Sydney Premier Division (Men's and Women's) to provide a transparent criteria and guidelines for aspirational clubs
- » Develop and enforce minimum standards for club participation in AFL Sydney Premier divisions across governance, facilities, teams, coaching, youth development, medical, brand and inclusion
- » Introduce a club-based top-tier senior men's competition structure (i.e. seniors, reserves and youth teams), with divisionalised lower tiers to facilitate growth
- » Develop the second tier clubs to ensure future sustainability, including key clubs in growth regions where there is no Premier Division presence (eight or the twelve lower division men's clubs are based in Western Sydney)
- » Reduce quarter length and breaks of senior matches

WHY

- » Build the profile of AFL Sydney by elevating and developing the AFL Sydney Premier Division competitions
- » Enhance club culture and match-day experience by maximising opportunities for multiple club teams playing at the same venue on same day
- » Minimise the impost on club volunteers and cost on clubs by increasing the ability to schedule more matches per venue on match day and reducing the need to spread associated support roles across various venues
- » Build towards long-term goal of standard match-day, comprising two men's, one-to-two women's and top-age youth teams all playing back-to-back at one venue
- » Assist lower-division clubs to attract and retain talent and compete against other clubs at senior level

ENHANCE CLUB CULTURE AND MATCH-DAY EXPERIENCE BY MAXIMISING OPPORTUNITIES...7



KEY RECOMMENDATION 4

IMPLEMENT A COMPETITIVE BALANCE FRAMEWORK

WHAT

- » Introduce a player points system for AFL Sydney Premier Division Men's and Women's
- » Define junior to senior club pathways
- » Reintroduce a NEAFL Mini Draft for external NEAFL recruits

WHY

- » Incentivise the investment in local youth development and player pathways, including the establishment of club academies, as clubs benefit from fielding 'home players'
- » Provide for an appropriate spread of talent, in particular with respect to AFLW and NEAFL recruits
- » Encourage local NEAFL players to remain connected to their AFL Sydney club of origin
- » Align to industry standards regarding competitive balance mechanisms to provide closer games improve the experience for participants and fans longer term



KEY RECOMMENDATION 5

ENSURE A GREATER GEOGRAPHICAL SPREAD OF CLUBS IN PREMIER DIVISION COMPETITIONS

WHAT

- » Expand the AFL Sydney Premier Division Men's competition to 10 clubs
- » Focus on promoting a club based in Western Sydney (subject to the minimum standards and in accordance with the criteria for participation)
- » Provide enhanced club development support to developing clubs in key regions

WHY

- » 10 teams will provide 18 regular season rounds with no byes (currently nine teams)
- » Only one AFL Sydney Premier Division club (East Coast Eagles) is based in Western Sydney and there is no AFL Sydney Premier Division presence in South-West Sydney, Mid-West Sydney or Far West Sydney – forcing players to travel to other regions to play at a higher level
- » The Western Sydney region includes more than two million people and key regions are forecast to almost double in population by 2036, including in Macarthur, Blacktown and Parramatta



KEY RECOMMENDATION 6

ESTABLISH AND GROW ALTERNATIVE COMPETITION OFFERINGS

WHAT

- » Better support and develop Independent Schools boys' and girls' competitions, including increased resourcing across competition management, club support and coaching
- » Establish a strategic partnership with 'Masters' football bodies including through increased collaboration and AFL support
- » Explore the establishment of alternate and abridged competition offerings such as AFLX
- » Develop a plan to establish all abilities competitions in Sydney

WHY

- » Independent Schools boy's competitions have grown significantly over recent years and provide an effective game development vehicle
- » Masters are a small but growing segment of community participants, and establishing a formal relationship with the 'Masters' football bodies will help promote growth and increase engagement within the loyal Masters demographic
- » AFLX is well suited to Sydney given limited access to ovals, there are many rectangular fields, fewer players are required and there is an appetite for shorter matches
- » There is a growing demand for programs and competitions in Sydney which cater for players with a disability



KEY RECOMMENDATION 7

REDUCE ON-FIELD PLAYER NUMBERS ACROSS ALL JUNIOR AND YOUTH COMPETITIONS

WHAT

- » Mandate a maximum of 16 players a team on-field across all junior and youth boys' competitions (i.e. up to U17), including Independent Schools competitions
- » Reduce quarter lengths and breaks of matches to accommodate 16-a-side

WHY

- » Generate scale to establish additional teams and tiers of competition, which will increase the ability to effectively grade sides, reduce the need for club alliances and reduce the risk of forfeits
 - AFL Sydney provides a maximum of 15-a-side up to U12 boys
 - This increases to 18-a-side from U13 – requiring three to six extra players to be recruited to field a team – which often leads to teams folding or merging around these age levels
 - Teams will remain together for longer after the shift to 16-a-side

- » Address team depth differentials and therefore enhance competitive balance
- » Increase opportunity for all players to be involved in the play – a key factor as to whether a player has 'fun' – leading to improved player retention and participation
- » Create a less-congested and freer-flowing match (reduce likelihood of injury and concussion)
- » An extension of the AFL Sydney framework which provides for:
 - A maximum of 15 players a team in all boys' competitions up to U12 and in U15 girls' competitions
 - A maximum of 16 players a team in the Sydney Harbour Division 3 youth boys' and in U18 girls' competitions



KEY RECOMMENDATION 8

DEVELOP THE FUTURE STRUCTURE FOR JUNIOR AND YOUTH COMPETITIONS

WHAT

- » Introduce an U16 youth boy's competition to provide single-age groups across all boys' competitions as soon as possible, subject to scale
- » Implement steps to establish two-year age groups across all girls' competitions as soon as possible, subject to scale (compared to three-year age groups)
- » Establish a youth boy's competition modelling working group to develop new competition structures from 2019 onwards which may include:
 - Sydney-wide Division 1 youth competitions
 - Locally based lower-division competitions teams feeding into Division 1 teams
 - Junior competitions up to U12 to remain localised

WHY

- » U15 to U17 is the only two-year age group across boy's competitions
- » Single-age groups are proven to enhance player retention
- » Junior competitions to remain localised to minimise impost of travel where competitive balance less of a consideration
- » Localised competitions improve the ability to attract new participants to our game

KEY RECOMMENDATION 9

PROMOTE TRULY INCLUSIVE CLUB ENVIRONMENTS

WHAT

- » Ensure single-club governance and branding/naming across male and female teams through the implementation of minimum standards
- » Hold AFL Sydney Premier Division men's and women's Grand Finals at same venue on the same day
- » Establish strategic partnerships for themed rounds, with a focus on LGBTIQ and multiculturalism, including supporting the Sydney Swans 'Pride Match'

WHY

- » In line with the AFL's inclusion policy to make Australian football welcoming to all in the community given the physical, psychological and social benefits of participation
- » Facilitate inclusive club culture to enhance club environments
- » Support the growth of female football and ensure female interests are represented



KEY RECOMMENDATION 10

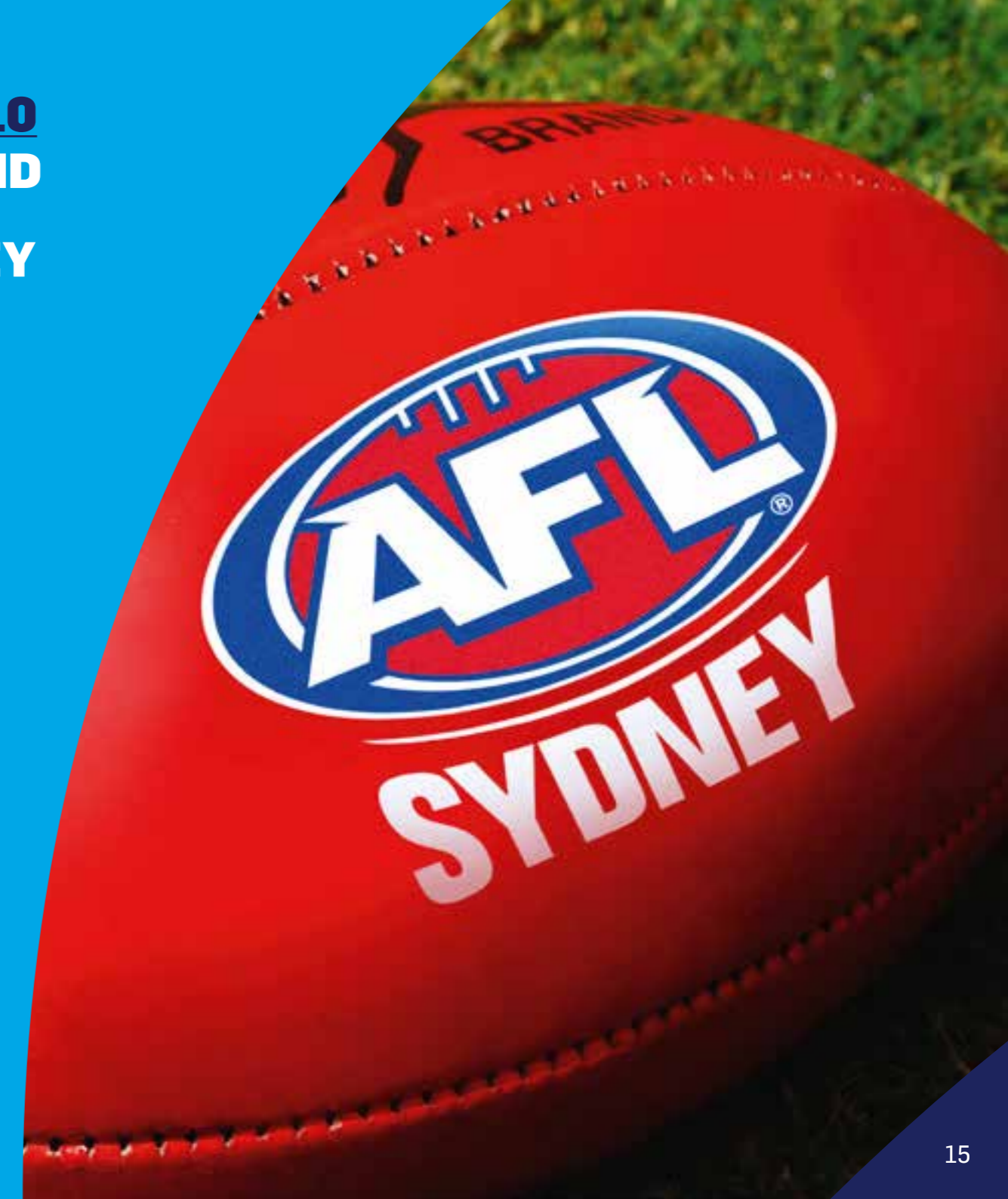
DEVELOP A SINGLE BRAND & IDENTITY ACROSS AFL COMPETITIONS IN SYDNEY

WHAT

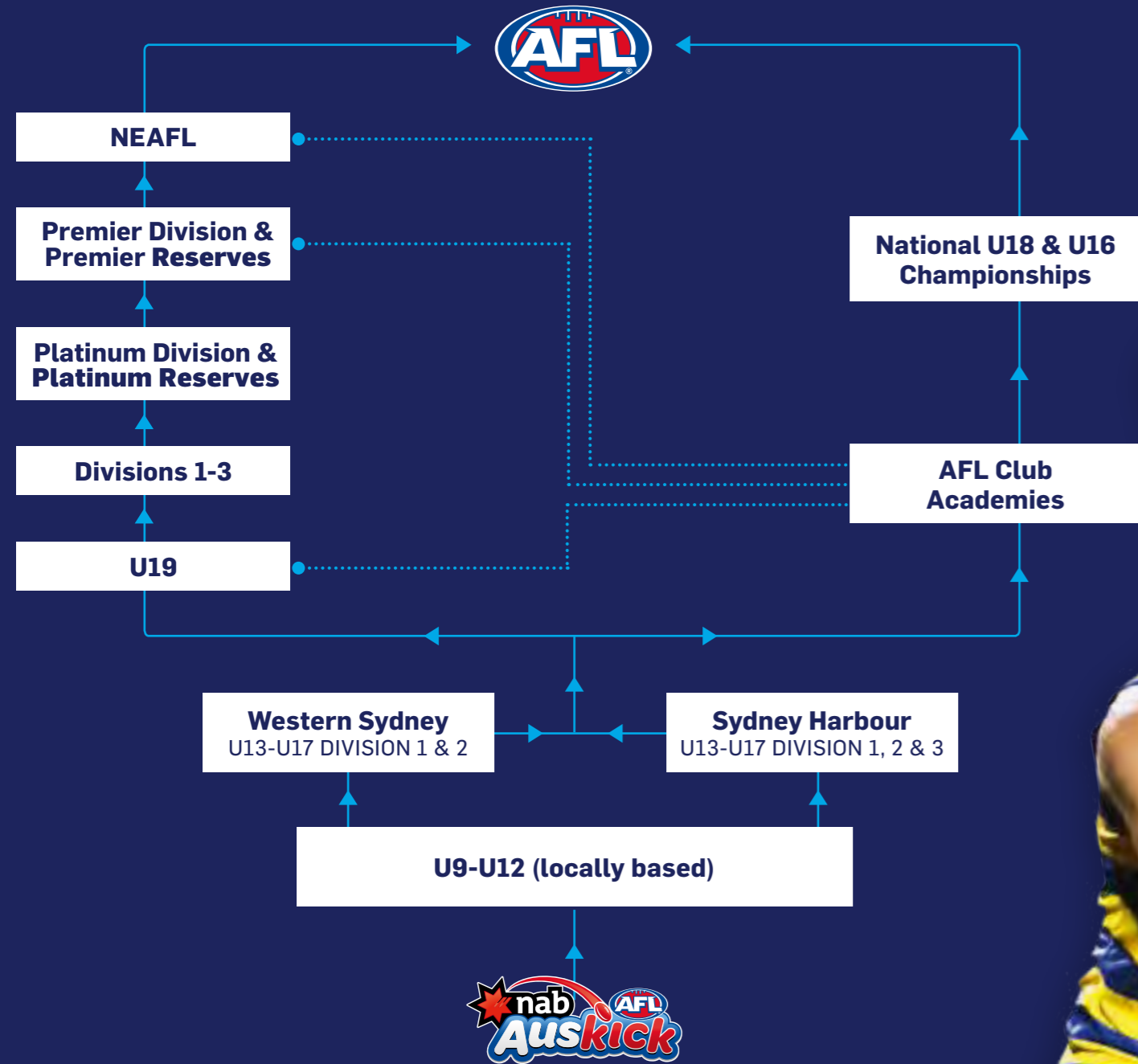
- » The 'AFL Sydney' logo and brand to apply consistently across all club competitions in Sydney
- » Develop AFL Sydney brand guidelines
- » Integrate league commercial and media assets (i.e. websites) and develop a suite of marketing collateral

WHY

- » Increase the awareness of AFL competitions in Sydney
- » Ensure consistent and professional marketing collateral
- » The 'AFL' logo resonates with stakeholders in Sydney
- » Remove optical segregation between junior and senior competitions to improve player transition and junior/senior club relations



MALE PLAYER PATHWAY 2018



FEMALE PLAYER PATHWAY 2018





AFL SYDNEY FUTURE DIRECTIONS 2018–2022

OVERVIEW

VISION

What we will achieve

TO BE THE BIGGEST AND BEST COMMUNITY FOOTBALL LEAGUE IN AUSTRALIA

STRATEGIC THEMES

What success looks like

OPTIMAL PATHWAYS

- » Integrated pathway
- » Connect juniors/seniors pathway & operations
- » Developing AFL, AFLW & NEAFL players, coaches & umpires
- » Geographical spread of Premier Div clubs

HEALTHY COMPETITIONS

- » Unpredictable results
- » Standard is continually improving
- » Sustainable clubs
- » Improved player & umpire retention
- » Vibrant juniors, seniors & masters competitions

BEST PRACTICE MANAGEMENT

- » Effective governance & administration
- » Professional league management
- » Consistent decision making
- » Strategic leadership
- » Healthy club relations

UNIFIED & VALUED BRAND

- » Clubs relevant to their local communities
- » Inclusive & diverse clubs
- » A sense of belonging for all participants
- » League & club brand awareness
- » Increased sponsorship

CLUB GROWTH & SUSTAINABILITY

- » Club team growth
- » Increased player participation
- » Improved facilities
- » Effective club management
- » Vibrant club match days

TOP PRIORITIES

How we will get there

- » Truly representative NEAFL team(s)
- » Sydney wide Div 1 juniors competition
- » Incentivise junior/senior pathways & links
- » Improved coach & umpire development & support
- » Improve standard of women's competition & align rules to AFLW

- » Geographical spread of clubs & participants
- » Criteria for Premier Div participation
- » Competitive balance framework
- » Optimal competition structures
- » Integrate with schools & masters competitions
- » League appointed umpires to all matches

- » Single integrated governance & administration model
- » Invest in dedicated AFL Sydney resources
- » Realise administrative & financial efficiencies
- » Maximise value of commercial inventory
- » Re-invest current cash reserves

- » A clear unified brand for AFL Sydney
- » Fully integrated male & female clubs
- » Targeted community engagement programs
- » Standardised AFL marketing collateral
- » Sell commercial inventory
- » Leverage council/government & commercial partners

- » A dual club-based & divisionalised competition model
- » Greater club development support
- » Community Club Improvement Program
- » Criteria for promotion to Premier Div
- » Implement & support state facilities strategy

VALUES

How we work





SYDNEY

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