



FUTURE DIRECTIONS OF TASMANIAN FOOTBALL PROJECT

Summary Report

Extracts from Report presented by Simon Garlick completed in January 2016

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1. INTRODUCTION AND BACKGROUND

The Australian Football Community in Tasmania is of critical importance to both the Australian Football League and the State itself. Australian Football has a long and decorated history as Tasmania's primary sport for 150 years, adding significantly to the social fabric and history of the State in addition to producing an inordinate amount of icons and greats of the national game.

At the end of the 2015 season, Tasmanian Football was comprised of around 39,500 total participants, which equates to about 3.2% of the total national participants in Australia.

From a community (club) football perspective, Tasmania has 12,125 players registered across 517 Teams, in 106 Clubs in 16 Leagues. 12,125 players represent 3.6% of the national player total with Tasmania's participation to population rates at a level similar to other foundation football States.

Tasmania has provided 3.6% (194 of a total of 5,321) of the draftees into the AFL Competition since 1986, including 4 from the most recent 2015 draft.

Importantly, Tasmania also boasts around 35,000 non-playing participants who are actively involved (in a paid capacity or as volunteers) in the game itself. Based on that figure, Tasmanian football is clearly the largest community group within the State by a significant margin with a history and capability of having a positive influence on the community as a whole.

Whilst relatively small as a percentage of the national totals, the above statistics point to a reasonable performance in relative terms, outstripping Tasmania's 2.2% of the national population. However, growth has been largely negligible in recent years and not unlike numerous other States and Territories, community football in Tasmania is facing significant challenges.

Whilst this broader challenge is being addressed through a national Future Directions of Australian Football Project, led by former AFL Commissioner, Bill Kelty, the AFL and the Tasmanian State Government announced in August 2015 a commitment to undertake a strategic review and develop an ongoing program designed to support and strengthen Australian Football in Tasmania.

The AFL committed to accelerate the work of the overall project in Tasmania with a view to setting a framework and investment plan to ensure community football in Tasmania is supported appropriately to thrive well into the future.

There are undoubtedly a number of issues and challenges within Tasmanian football that the game needs to confront. There are parts of Tasmania where football is in decline, some through issues that can be influenced and improved and in a number of instances through reasons beyond the control of local administrators and volunteers. Demographic and social changes for instance have had an impact on some regions and their football Leagues.

However, there are some Leagues that continue to provide strong and sustainable football competitions and opportunities. There is also an incredibly strong foundation that 150 years of existence provides. As mentioned, a combined number of playing and non-playing participants of around 70,000 also means the Australian Football community is by far and away the largest social institution in Tasmania maintaining a significant amount of reach and influence within the community.

This report looks at ways in which the areas that are continuing to grow have the capacity to ensure that existing opportunities can be leveraged so that football remains the dominant sport in those regions. It is also critical that the right decisions are made and support provided to those regions dealing with stagnant or declining populations and other social and economic challenges so that any related impact on the game can be alleviated as much as possible.

The State of Tasmania as a whole is facing some significant social and economic challenges. The game of football has a long history of playing an important and influential role in mitigating these challenges and positively influencing the communities facing them. Whilst it is clear football can continue to do the same in Tasmania, it should not be expected to provide a “cure all” to any or all such significant issues. Having said that, it is important that the AFL and AFL Tasmania work effectively with all levels of Government to ensure the game’s influence in this area is leveraged to be as positive and influential as possible.

Extensive consultation was undertaken throughout this project with large numbers of key stakeholders at local Club and League level, with Local and State Government, the Tasmanian corporate community, AFL Tasmania and throughout the AFL and its broader network with Tasmanian connections and interests. Representatives across all levels and roles within the game were personally met with to ensure any and all opinions and recommendations were led by insights from those involved at the games core.

This project was completed with an appreciation and understanding of the significance of the past and the contribution made by a vast amount of people over a long period of time. However, in line with the project scope, it was unapologetically focused on assessing the current status of football in the State along with the challenges and opportunities it faces for the purpose of making recommendations on the most appropriate model, structure and approach to ensure a sustainable and strong future of the game that has been Tasmania’s primary sport for 150 years.

2. EXECUTIVE SUMMARY

2.1 Background

After a significant increase in the amount of direct AFL Premiership Season content into Tasmania, the profile and health of AFL football in the State has grown strongly over the last 15 years, as evidenced by an increasing number of games, crowds, members and TV audiences. To that end this project does investigate a pathway to a 'one-Club' model for AFL football in Tasmania.

However, it is important to note that while high profile items such as the ongoing AFL match model and the talent pathway plan attract significant media and political interest, this project has placed a significant emphasis and focus on a number of other critical areas fundamental to the future health of the game.

These areas include, but are not limited to the investments and structures required to support and strengthen community and State League football, particularly its Clubs, resources required to support the growth of female football and the most effective future governance and funding model of AFL Tasmania. These areas, along with a number of others, have been covered extensively during a detailed and thorough stakeholder consultation process and accordingly within the broader report.

As the project progressed it became apparent that there is a need for change in the way AFL Tasmania currently administers the game at both the State League and Community football levels. Recommendations to this end are not only a response to the current structures and management practices and what needs to change now, but also suggestions as to what is required over the next 10 – 20 years considering the issues facing the Tasmanian football community.

Such recommended changes will be designed to allow for more resources to be available for Clubs, Leagues, umpires, volunteers and other key contributors to ensure the game remains a relevant and sustainable community organisation and institution for players, spectators, families, government, community and corporate partners.

There is an apparently strong and realistic grasp across the game's key stakeholders of its current status and position, the reality of the differences the market now faces, the challenges that lay ahead and a genuine willingness across a broad range of key and influential stakeholders to work with the AFL, and each other, for outcomes that will have a positive impact on the game.

2.2 Findings

While some of the high level numbers reported around participation and engagement show a relatively stable performance, particularly from a relative perspective and when viewed as a percentage of population, there are some indicators of distress that need to be recognised.

It became clear that increased resourcing and improved capability are required in certain areas to assist not only the growth of the game, but in some areas ensuring that it can maintain its position as the most popular sport in the State.

As the stakeholder consultation process and broader project progressed it became clear that, in line with the project scope, the **four key areas** requiring more extensive investigation and attention were;

- ✓ **Community Football (including Female Football)**
- ✓ **The Tasmanian State League (TSL)**
- ✓ **Talent Pathways**
- ✓ **One AFL Club Premiership Season Match Model**

In addition to these four key areas, there are significant opportunities for AFL Tasmania to manage key stakeholder relations more effectively. While a renewed approach to collaboration is applicable across all stakeholders, there is particular opportunity to approach Government far more effectively in relation to partnership and funding opportunities than currently occurs. It became apparent that clear strategy and recommendations to ensure the appropriate levels of support, development and organisational structure need to be facilitated in these areas.

These critical focus areas, and a snapshot of the key findings and recommendations pertinent to them, are included below;

2.2.1 Community Football (including female football)

Snapshot;

Focusing on supporting grass roots football by providing increased resources in the appropriate regional locations with high levels of professionalism and capability particularly around contemporary stakeholder management, communications and leadership. The foundation that community football provides to the State needs to be strong, and the AFL needs to assist in resourcing AFL Tasmania appropriately to ensure the football 'hubs' are effective in lessening the burden and reliance on volunteers, increasing the strength and sustainability of Clubs and improving the structure and quality of community football competitions.

Major Findings – Community Football;

- Football below the national game has changed from what are sporadically referred to as the 'glory days' of Tasmanian Football of the 60's, 70's and 80's. Significant demographic, social and economic changes and challenges across the State have coincided with changes in participation, engagement and viewing habits in relation to the local game.
- Tasmania's unemployment is amongst the highest in the nation, its education level amongst the lowest and a high number of its suburbs the poorest (Skills Tasmania analysis of Census data reports). Add to that an ageing population and an excessive dependence on Government assistance and there are clearly some factors impacting social growth and cultural change within the State.
- Community and State League football in Tasmania has also gone through an extended period of change and instability over the last 30 years. Most recently the establishment of a revamped State League competition known as the Tasmanian State League (TSL) occurred and the AFL formally became the pre-eminent governing body for the game when AFL Tasmania became a wholly owned subsidiary of the AFL in 2014. At this time, the Tasmanian Football Council (TFC) was also established as the governing body for community football below the TSL competition.
- While data indicates that overall participation is slightly increasing in Tasmania over recent years, participation in the key segment of Club participants is actually declining. Total Club football (junior, youth, senior, veterans) participation has decreased from 13,100 in 2014 to be 12,125 in 2015, in contrast to the growth of the other States.

- League Structure is an issue in community football (all competitions below the TSL) in Tasmania which can manifest in unintentional outcomes including uncompetitive teams, difficulty in fielding teams, inefficient competitions, duplication of volunteer workforce and effort, lack of collaboration. In a broad sense having 16 Leagues service only 106 Clubs at an average of just over 6.5 Clubs per League is a model that clearly suggests some consolidation of Leagues would be beneficial. Whilst Tasmania has a relatively small population of just over 500,000, it is worth considering the broad structure of football in Victoria where 83 Leagues support 1124 Clubs at an average of 13.5 Clubs per League.
- While Tasmania is a small football market from a participant and population point of view, it is unrealistic to expect the amount of current AFL Tasmania resources to effectively carry out the tasks assigned to them.
- It is also apparent that the structure and focus of AFL Tasmania reflects the deliberate prioritisation of the TSL as the State's premier football competition and the talent pathway programs as the key performance areas. Whilst Management recognise and understand the importance of participation and community football, it is clear that the priority has been to focus on the elite level of the game and the development of talent and that a more balanced approach, where community football and participation needs are focused on more heavily and resourced accordingly, should be taken.
- Further to the above, AFL Tasmania is under resourced in the game development and community football areas both comparatively to other States and regions, and also specific to its market. Not having the appropriate amount of employed resources in these critical areas also means that there is a significant and counterproductive reliance and dependence on Club and League volunteers.
- Alterations and additions to the AFL Tasmania organisational structure and resourcing priorities need to be made to assist and support community football Clubs and competition management as well as regional game development activities. Provision of professional services to community football will assist in alleviating pressure and burden on Clubs and Leagues, providing consistency across the football models and regulations across the State and a level of independence to the management of community football.
- There has been a reduction in active and vibrant school football competitions in recent years based on a lessening ability of the Department of Education providing support for schools to facilitate school sport competitions. So it is critical to ensure that there is a link from school to community football transition. To that end the AFL School Ambassador (AFLSA) program was implemented in 2005 and there are currently approximately 200 AFLSA's in Tasmania that would provide for a presence in around 80% of schools. Feedback has suggested there is some doubt about the capacity, resourcing and even a lack of clarity about the roles and deliverables of the AFLSA's so there is clearly an opportunity to improve the support given to the program. Again, an increased focus by AFL Tasmania on grassroots participation and the resourcing and infrastructure to support it is critical here.
- As is the case throughout Australia a number of significant challenges facing junior football in Tasmania include the amount, quality and organisation of competitor sports, the AFL's capability of providing a structured and high quality environment and product and the ability the system has to provide and maintain a high level of coaching.
- Appropriate and necessary consideration is now being given on a national level as to how junior football engagement can be improved. NAB AFL Auskick has been the absolute benchmark bottom up participation program for a significant period and has now been imitated by numerous sports. However, it needs to be refreshed and more flexible to maintain its attractiveness in a market full of fresh and exciting choices.

- It became clear that, as with some other States, there has been little focus and resources committed to female football in Tasmania to date. Accordingly, the rate of growth has not perhaps been at the level of some of the other States; however there is significant interest and enthusiasm around what is clearly an exciting and growing segment.
- Increased promotion and awareness of female football over the last 12 months or so has resulted in an increase in Clubs communicating an interest to join the Tasmanian Women's League. Predominantly, these approaches have been based on little to no strategic planning or critical mass of interested players, but rather a simplistic desire to become involved in female footy.

Main Recommendations – Community Football;

Increase Resources to the Regions

- Add an additional *Football Development Manager (FDM)* to bring the total to three covering all three key football regions in the North, North West and South. The FDM's within each region should also each be responsible for the management of a *Competition Manager (CM)* to assist with the management and development of community football competitions and the *Game Development Officer (GDO) resource/programs* to drive participation outcomes (proposed new resources).

It is also suggested that a part time trainee should also be part of these administrative "hubs" that will be a centre for all community football and game development activities in the region.

Consolidation of Leagues as and when appropriate

- Complete a detailed review of the Community Football League structures across the State to assess where some consolidation could occur. Given the work done to date, continue to drive a consultative, gradual and transparent process to bring about the reduction in the total number of Leagues on the North West Coast. Increased professional resources and ongoing governance roles should provide for a compelling case for Clubs and Leagues to support such a position assuming that it is communicated and implemented in a professional, collaborative, understanding and patient way. Whilst this may be driven by the regional FDM or GM, the AFL Tasmania CEO should be assisting this process and helping bring the key stakeholders on the journey.

Stakeholder Management

- AFL Tasmania prioritising and being held accountable for the creation and facilitation of an environment that encourages and facilitates effective levels of communication, collaboration, transparency and co-operation. Making use of the experience, strategy and resources at the AFL would be logical and beneficial in terms of this recommendation. The resourcing of AFL Tasmania being appropriately structured and capable of delivering the above outcomes.

Build Critical Mass in Female Football

- Provide new and enhanced opportunities for females to engage in Australian Football that are more flexible and convenient. Carnivals/event days that are shorter and more relaxed to build interest and engagement.

Utilise AFL seed funding to support local competitions and conduct Youth Girls competitions to build critical mass for senior women's football. Competitions featuring U12/14/16/18 age groups need to be built to provide a foundation for a strong and sustainable female football competition and community.

Pathways for Female Football

- As it develops in its formative years, continue focusing on creating an even TWL (Tasmanian Women's League) competition. Examine the viability of conducting three hub Academies for talented players between the ages of 14 to 21 to prepare for State teams, senior competitions and a possible future AFL Women's Draft.

2.2.2 The Tasmanian State League (TSL)

Snapshot;

There is a critical need to solidify the TSL as the premier competition in Tasmania. Quality footballers from the community football level in Tasmania should aspire to play with their local TSL Club based on the support and networks provided, the quality of facilities and amenities, the pathway it provides as well as the standard of football being clearly the best in the State.

Major Findings – TSL;

- The Tasmania State League was established in its current form in 2009 with AFL Tasmania stating its purpose as providing an elite competition, environment and pathway for the best players in the State. Such a purpose is a valid and appropriate one, however discussions across the Clubs made it clear that they feel a balance between the 'development' focus and also ensuring that the operating structure and requirements allows for the building of a football 'Club' in the sense of a local community hub and environment is imperative. Feedback suggests that not all Clubs believe this balance is currently appropriately achieved.
- The competition was logically set up with 2 teams in the North West of the State, 3 teams in the North and 5 teams in the South. There was appropriate consideration given to inclusion of foundation teams with long and decorated histories within Tasmanian football as well as important drivers like population centres and a suitable spread within geographical zones. It is apparent that based on a high level assessment that 10 teams is the maximum number sustainable however there would be value in an independent assessment being undertaken that would assess the most appropriate number of teams for this competition. The 10 participating Clubs operate under individual licences granted by AFL Tasmania which includes specific requirements relating to strategic planning, structure, people and programs.
- The responsibility for the competition sits with the General Manager, State League and Talent. There is two part-time staff covering an Operations/Special Projects role as well as a State League Umpires Coach/Manager.
- There have been difficulties, contention and acrimony throughout the competitions formative years, with issues getting to the point of Clubs leaving the League, not being provided with a license or being required to merge to secure a licence. This report does not propose to go over the historical, political and controversial circumstances that led to some of these highly emotional issues and outcomes other than to highlight that there are significant opportunities for improvement in relation to stakeholder management, communication and leadership provided by the management of the competition.
- It became clear quite quickly that communication, collaboration and general relations are strained across enough of the State League Clubs to raise concern. Admittedly some of the relationships do function reasonably effectively, however it is clear that there are enough issues and levels of dissatisfaction between stakeholders from both sides to warrant a closer review at the ways in which this critical piece of stakeholder management could be managed and implemented more effectively.

- It is the responsibility of AFL Tasmania to manage the competition effectively and successfully and it is clear that consideration should be given to alter the resources as they are currently applied to the Management of the competition. Such change needs to ensure that AFL Tasmania provides the appropriate level of concentrated resources to administer and manage the competition more effectively.
- The resourcing structure and approach in relation to the TSL within AFL Tasmania needs to be one that focuses on and is capable of building strong, positive, effective and transparent relationships with their Clubs. AFL Tasmania need to be resourced appropriately and held accountable for solidifying the TSL as the Tasmania's premier sporting competition and one that is strong, consistent, sustainable, aspirational and respected. This is said with full understanding that the Clubs and participants also need to play their role in seeking positive and sustainable progression for the competition as a whole.
- Part of the current agreement between AFL Tasmania and the TSL Clubs results in the Clubs being partially funded for the employment of a Junior Development Officer. This is part of a larger funding distribution to the Clubs from AFL Tasmania through the AFL.
- The JDO program has for the most part had a limited impact from a community football development perspective and it is recommended that consideration should be given to centralising the game development function under the direct remit of AFL Tasmania. This may allow it to become more effective and measurable and also remove a distraction from TSL Clubs that are already pushed to the limit. The removal of the participation requirement on TSL Clubs is logical given they are community clubs run by volunteers for the most part and generally under considerable financial and resource pressure.
- Most TSL Clubs have found it challenging to build a sustainable commercial model with most revenue generally driven on the traditional streams of community sponsorship/donations, gate receipts, bar and kiosk sales and general fundraising.
- Other challenges the TSL faces that are similar to those faced by corresponding competitions in other States include the poaching of TSL players by Clubs in lower Leagues not bound by salary caps, players leaving regional areas for more populated cities and states, travel requirements, alternative leisure and entertainment (including the AFL) options dragging talent and spectators away from the game.

Main Recommendations – TSL;

Stand Alone Resource Managing the TSL

- It is recommended that the current role of GM State League and Talent be separated. A concentrated GM of the TSL along with a full time resource assisting operationally and with special projects is a more appropriate resource allocation to such a critical component of Tasmanian football.

This is said with a clear understanding that the competition management role of a fledgling and developing League where Clubs struggle under financial pressures is a difficult one. It is one that does require unpopular decisions to be made and unpopular action to be taken from time to time, however it is also far from impossible and can be done more effectively than it is currently. This being completed successfully can be assessed by ensuring critical and appropriate KPI's exist within the revised work plan.

Funding Model, TSL/JDO Program

- Centralise the delivery of game development activities into AFL Tasmania. This, in time, should be through revised community football hubs under the direction of a dedicated Football Development Manager in each region being responsible for a pool of game development resources to implement the appropriate related activities. The TSL Clubs, their facilities and players should still be utilized to assist in program implementation, but the overarching responsibility would be removed from the Clubs.

Shared Learning Forums

- AFL Tasmania to develop, establish, promote and manage various forums across the State to ensure that learnings are shared across the State for people involved at Clubs, Leagues, umpires and so on. These could cover areas including but not limited to non-traditional (and effective traditional) Club revenue streams and models, best practice Club structure, cultural/leadership learnings, community programs etc.

Poaching of players between Leagues

- AFL Tasmania to set up a committee of League representatives from across the State to discuss and develop a State-wide points system similar to that being implemented in other States, to assist in addressing the issues of player payments in Leagues below the TSL increasing at an unsustainable level. References can be made to other States and regions where such similar trials are being undertaken. Part of this review would obviously include assessing the current salary cap and its suitability.

A committee of this sort could also examine other issues including improving the competitions ability to attract the State's best players to the TSL and attracting recently retired or delisted AFL Players to the TSL whether it be as potential players or coaches.

2.2.3 Talent Pathways

Snapshot;

The simple task of an effective AFL Academy based in Tasmania is to ensure that no aspiring and promising junior player be disadvantaged based on their State of origin. A young talented footballer from Tasmania should undoubtedly have access to the same opportunities, standard of facilities, programs and learning environment to those available to his or her contemporaries in other States.

Main Findings – Talent Pathways;

- As is well known, Tasmania has been a breeding ground for some of the best footballers ever to play the game. From Baldock, Hart, Cazaly, Crosswell, Howell, Hudson, Eade, Gale, Clayton, Richardson, Lynch and Pritchard, to name a few. The list is testament to the States rich history and commitment to the game.
- The environment is changing on a number of fronts and the talent pathway is no exception. While alternative leisure activities and technology may be impacting participation and spectator engagement, there has also been a significant increase in competitor sports aggressively targeting Tasmania's most talented young athletes.
- In terms of current resourcing, the current AFL underage Academy and talent pathway in Tasmania is serviced by the State Academy program based around the Northern, North Western and Southern regions. Three full time staff in the positions of High Performance Manager (Hobart based), State

Academy Coach (Launceston) and Strength and Conditioning Manager and Welfare Officer (Hobart) currently implement the program.

- The State Academy program currently starts at the U16 age groups with an U18 side that competes as the Tassie Mariners in the NAB AFL Championships (nationals). Competitor sports and AFL Academies in the Northern States are starting at younger ages, the latter usually around the U12/13 range.
- In this context, the High Performance Manager resource has spent a significant portion of time in the last 12 months running programs and engaging in the younger age groups in the Southern region. While this has provided a greater understanding and knowledge of the talent that is coming through into the programs, it is activity that is additional to the responsibilities of the current role and outside the capability of the current resource structure.
- The current structure has not allowed the replication of this type of vital work with the younger group in all regions of the State, however it is felt that having the appropriate resource capability to find the talent is a critical piece in terms of ensuring the academies can then play the key role of assisting further talent development and retention.
- To that end it is apparent that the addition of an Academy resource in both the North and North West regions tasked with responsibility of U12 programs and upwards would be beneficial in assisting the earlier talent identification, development and retention outcomes throughout the State. This would bring the Tasmanian Academy resourcing more in line with that of the AFL Club Academies in the northern markets.
- There is opportunity for AFL Tasmania to engage in meaningful dialogue with the State Government Department of Sport and Recreation in relation to planning around an expanded academy program. The Tasmanian Institute of Sport has significant and valuable resources and such discussions may not only help avoid levels of duplication, but also potentially open up broad opportunities for collaboration in areas including but not limited to infrastructure and resource utilisation.
- It is intended that implementation of the recommendations provided will assist the Tasmanian State Academy program more closely resemble those being implemented in the Northern States, and in turn help develop a deeper talent pool for TSL and community football generally.
- More detailed discussion in relation to how a one team AFL Match model may be able to have significant benefits from an Academy perspective will follow later in the report. However, it is clear the identification an Academy can have with an AFL Team, through the branding, resource support and other alignment benefits are something that would provide significant outcomes for both parties.
- While Aurora Stadium is the most central and logical regular venue for the State squads to gather to train, it is clear that an important part of the progression and growth of an AFL Academy in Tasmania is to ensure it is a whole of State program. Logistical challenges mean that it will be difficult to bring the 3 different programs together on a regular basis and while the northern venues make sense as the main venue, it would be advisable to explore ways in which facilities across the whole of State can be utilised for these key sessions.
- To assist the ongoing growth of female football it would be ideal to have an Academy program for the young female players in all three regions. The current resource limitations clearly mean this is unrealistic at present however it does not mean it should not be planned for and implemented at the appropriate time.

- With all of the above in mind it is important that AFL Tasmania devise and implement a strategy to approach the State Government based on supporting an improved AFL Academy program. This is undoubtedly an initiative that all levels of Government are likely to be interested in supporting.

Main Recommendations – Talent Pathways;

Resourcing

- An additional full time staff member is appointed in both the North and North West regions with responsibility for programs for Under 12 upwards to assist the earlier talent identification, development and retention outcomes in all regions of the State.
- Further to the recommendation in the TSL section, it is recommended that the current role of General Manager State League and Talent be separated to have a General Manager dedicated to both key departments. This more concentrated role, along with a full time resource assisting operationally and with special projects is a more appropriate allocation to such a critical component of Tasmanian football.
- AFL Tasmania to undertake a detailed assessment of their current underage Academies and Talent Pathway program/s and benchmark it against the AFL Club Academies in the Northern States.
- While the above resourcing would provide for a structure similar to that of the AFL Club Academies in the Northern States, the AFL should assess the opportunity for the program to be integrated with one of the AFL Clubs currently playing games in Tasmania. It would be best suited to do this with one Club only and therefore it will be difficult to attach any draft priority access at this point in time. However, there are still significant opportunities in relation to such an alignment

2.2.4 One AFL Club Premiership Season Match Model

Snapshot;

Determining what a one AFL Club AFL Premiership Season Match model could look like and some of the initial steps required to achieve that aim.

Main Findings – One AFL Club Premiership Season Match Model;

- The current model sees Hawthorn and North Melbourne play four games in Launceston and three games in Hobart respectively. In addition, Hawthorn plays one pre-season game in Launceston per year. These ventures have seen local spectator support and engagement soar as has tourism benefits with the experiments considered successful to differing degrees.
- Both current arrangements are scheduled until the end of the 2016 season. Hawthorn have reached agreement around a 5 year renewal with the Tasmanian State Government, Australian Football League and Launceston City Council seeing the partnership further extended from 2017 – 2021. North Melbourne is currently in discussions with key Government and commercial partners in regards to their intentions for 2017 and beyond.
- Both arrangements see the teams receive financial consideration in the form of a combination of match funding and sponsorship in return for them playing their home games in Tasmania. Additional benefits to both teams of local membership, fan development, brand affinity and exposure are also not insignificant.
- It is also clear that there has been significant return to the State and other investors from the arrangements. Reports commissioned by the Hobart City Council (HCC) to quantify the socio-

economic value of their sponsorship of North Melbourne reported a socio-economic value of AFL games and related activities in Greater Hobart being conservatively estimated at \$25.7 million and \$43.7 million in 2014 and 2015 respectively.

- Other findings from the same reports included that in 2015 for every dollar invested by the community, \$2.65 in benefits were returned to Tasmania, while for every dollar invested by HCC, over \$27 in benefits were returned to their residents and ratepayers.
- So on a number of measures at least; the current arrangement is one that is working on a number of levels. However, it is deemed an appropriate time to review in more detail the effectiveness and appropriateness of the two-team AFL Match model.
- Whilst there may be some levels of disappointment if a change from the current system to a one-team model were to occur at some time in the future, any downside would likely be outweighed by the potential benefits such a model would provide in the future. Whilst it could well take up to a decade of genuine commitment and work by the Club involved, along with the AFL and AFL Tasmania, the likelihood is that Tasmanians would eventually come together in support of the one AFL Club, assuming that Club made a real, genuine and lasting commitment to the State.
- The option of a Tasmanian team being based in and playing games out of Tasmania is clearly a significant factor when discussing AFL Premiership Season games being played in the State. A thorough, detailed and professional business case was commissioned by the State Government in 2008 which presented a case for the next AFL Team being based in Tasmania. Whilst the 2008 report, along with other key documents surrounding this option were reviewed along with the consultation of key stakeholders associated with its formation, this project focuses mainly on the widely reported current AFL preferred position of looking at relocated games into Tasmania as the model for the immediate future.
- There are clearly some compelling components behind a Tasmanian based team as a potential option in the future. However, given the introduction of two new sides in the northern markets in the last 5 years, the fixture and broadcasting dynamic currently in place, and the AFL's minimum match obligations in its agreements with Victorian venues, this is clearly something that would be only for consideration in the longer term. Therefore, this report focuses on the current model and how that is potentially best transitioned in coming years whilst still considering all of the critical short, medium and long term factors.
- In terms of what a one Club model may look like in the medium and longer term there are a number of points to highlight:

Games to be played in both Launceston and Hobart - It would be important that the Club looks to represent all regions of the State and doing so equally from a premiership games perspective is entirely logical. The total number of games to be played is a decision for the AFL. It also makes sense that a Club looking to represent the whole of the State has an administrative and football base and presence in both Launceston and Hobart.

The Club makes a genuine long-term commitment to Tasmania - Discussions throughout this project have also indicated that the making of a genuine and substantial commitment by the Club would be important in making the Club attractive to Tasmanian football followers. Such a commitment would ideally be for a length of time in the vicinity of a decade as a minimum and in fairness could be dependent upon certain key indicators such as government, commercial and membership support metrics being met.

Access to Tasmanian talent - For a Club to be fully embraced by the Tasmanian public as the

Club representing them, the opportunity for Tasmanian talent to join the team as a priority is important. To that end, the capability of the Club being granted the opportunity to run a Club based Tasmanian Talent Academy would be beneficial and worthwhile. Run in the same manner as the Clubs in the Northern States, a Club that was willing to commit to the State in line with the above points, should be given the opportunity to have priority access to the State's young talent under the applicable points bidding conditions of the AFL Draft.

Clearly the priority access to talent that a legitimate AFL Club Academy would bring in Tasmania would be significant. Some of the other benefits potentially available to a Club that is able to win the hearts and minds of Tasmania include a significant amount of new members, government (State and Local) support, corporate sponsorship opportunities and a genuine home ground advantage.

Main Recommendations – One AFL Club Premiership Season Match Model;

- Whilst understanding there are limitations caused by current contracts in place, discussions should be held between the AFL and the two current Clubs playing in Tasmania about their long term intentions regarding home games in Tasmania. Potential interest in exploring an opportunity along the lines of the one Club model outlined above should be canvassed.
- With the same caveat as above, discussions should be initiated with the State and relevant Local Governments in relation to a potential one Club model to gain a deeper understanding of the issues, challenges and opportunities to that end.
- Clearly both the Tasmanian State and various Local Governments will be the key stakeholders and partners in the formation of the ongoing AFL premiership season match model. These relationships will need the appropriate levels of attention, work, strategy and management to ensure they are as effective as possible. AFL Tasmania should be responsible for taking the lead in this sense and ensure that strong and sustainable relationships at all levels of Government are formed and maintained on an ongoing basis. AFL Tasmania should also be required to work closely with the appropriate AFL officials to build and execute a strategy that involves leveraging these relationships for the best outcomes possible from both a Tasmania community and football perspective.

2.3 Key Stakeholder Relations and Collaboration

As mentioned, in addition to the four key focus areas highlighted, there is a significant opportunity for AFL Tasmania to significantly improve key stakeholder relations and management. While not limited to one particular group, a significant opportunity to build relations and partnerships across all levels of Government should be a focus area.

Specific to Government relations, a planned approach should be formulated and co-ordinated with the appropriate Government relations colleagues at the AFL that effectively positions partnership opportunities with varying levels of Government to leverage the reach and influence that football has in Tasmania. This approach should focus on the positive impact football has had and can continue to have in the community and look to have Government contribute resources, funding and influence to partner with AFL Tasmania to help achieve positive social outcomes.

Such partnership opportunities exist in areas including but not limited to schools/TSL/game development programs, female football, community infrastructure and facilities, academy/talent model and the AFL Premiership Season match model. Recommendations regarding opportunities in these areas have been made in the relevant sections of the report.

From a broader stakeholder perspective, it is important to highlight that a large and seemingly genuine level of interest and enthusiasm to embrace a collaborative and co-operative approach across the industry came forward clearly during the consultation meetings with the wider Tasmanian football community.

To this end, as an absolute priority it is the governing bodies' responsibility to take a leadership position and ensure this occurs as effectively as possible. AFL Tasmania does not have to look far to see this being done effectively and appropriately by its head office in the AFL. The maturity of the game at the highest level has grown significantly in the last decade in particular, to the point where Clubs understand that the health of the overall game has to form a critical piece of their thinking, planning and operations. This grasping of the importance of the big picture has developed within the AFL system regardless of self-interest obviously remaining a driver of significance.

There is certainly a sense that Tasmanian football as an industry and community is ready to move forward in a collaborative, mature and co-operative way and it is undoubtedly AFL Tasmania's responsibility to create an environment that can facilitate such progression. This will require sophisticated, professional, planned and contemporary key stakeholder management and communication, just as it has at AFL level in recent years.

3. IMPLEMENTATION

This initial report forms part of a broader project designed to provide recommendations that will shape the future of football in Tasmania both in the short term (next 12-24 months) and over the longer term (next 30 years).

This initial report provides a significant and varied number of recommendations and strategies for the AFL to consider in relation to the future direction of Tasmanian football. Clearly some of these strategies will be more straightforward and easier to implement than others. Some will also need more time and work to develop before implementation, while others may be judged to not be appropriate at that time for some reason or another.

The AFL Game Development Department, led by Simon Lethlean, will be charged with the confirmation of the validity and affordability of recommendations emanating out of this report as well as the implementation of those deemed appropriate.

4. INDUSTRY CONSULTATION AND ACKNOWLEDGEMENTS

A broad and diverse number of stakeholders and interested parties contributed to this project including but not limited to League administrators, coaches, players and volunteers, State and Local Government officials, AFL, AFL Club and AFL Tasmania staff, stadium operators and local business leaders. In all, over seventy individual key stakeholders were met with during the course of the project. They were all incredibly generous in providing their time, insights and experiences during discussions that were constructive, open, transparent and critical in the development of the projects views and recommendations.

The vast majority of administrators and volunteers in Tasmanian football already provide a significant amount of their own time and resources in terms of the roles they currently play. The fact that all contacted were willing and enthusiastic enough to take part and add to this project underlines the fact that the AFL, AFL Tasmania and those who play, support and enjoy football in Tasmania owe these volunteers and administrators a debt of gratitude for what they do for the game. In the vast majority of cases, their involvement and contribution is done for no personal financial return but rather for the love of their Club, League or the broader game.

At the inception of this project it was regularly raised that there will be a high level of willingness, or even enthusiasm of many people associated with Tasmanian football to readily raise the significant challenges that history, regional parochialism, self-interest, economic conditions and social issues pose to the development of a State, not to mention a strong and sustainable football community. It was also suggested that many of those engaged in the process would automatically hark back to the “glory days of the 1960’s, 70’s and 80’s” with regret that local football was a shadow of its former self.

Whilst such advice and opinion was raised from time to time, it is worth highlighting that the project encountered significant levels of interest and enthusiasm of the broader football community to embrace a collaborative and co-operative approach to moving their game forward.

There is also an apparently strong and realistic grasp across the game’s key stakeholder group of its current status and position, the reality of the differences the market now faces, the challenges that lay ahead and a genuine willingness across a broad range of key and influential stakeholders to work with the AFL, and each other, for outcomes that will have a positive impact on the game.

It was also evident that a large portion of those consulted understood that a critical component of the approach to be taken is done so from a position of focusing on the best outcome for the industry and game as a whole rather than for just individual Clubs and or Leagues.

I would also like to thank the Management and staff of AFL Tasmania. A large portion of AFL Tasmania staff including Chief Executive Officer Scott Wade and Board Members Brian Roe and Grant Williams were canvassed during the project. Scott ensured both he and his team were available and co-operatively willing to engage in the process and assist on an ongoing basis as and when requested.

I would also like to acknowledge the support and contribution of Simon Lethlean of the AFL Game & Market Development department and Andrew Gennai-Garino and David Grossman of the AFL Strategy department.

5. CLOSING REMARKS

It became clear from the outset of this project that it was not simply going to be a report about what the AFL Match model in Tasmania will look like in future or how and when Tasmania may be afforded a Club based Talent Academy. This project needed to be, and is about all aspects of football in Tasmania.

In addition to the important aspects of the AFL Match model and Talent Academy, the project was unashamedly focused on what action would be required to support and strengthen community and State League football and the Clubs in particular, what resources are required to support the growth of female football and what the most effective future governance and funding model of AFL Tasmania looks like.

If Tasmanian Football is to both maintain a reputation and status built over 150 years and indeed grow and flourish, the foundation that community football provides needs to be supported and assisted. Community football and its Leagues, but particularly its Clubs, must be dynamic, vibrant and financially sustainable. They need to be safe and welcoming and capable of providing an environment that brings people together. They need to play the role of community hubs and social facilitators.

All of the areas mentioned above, along with a number of others, were covered extensively during a detailed and thorough stakeholder consultation process and accordingly within the broader report. The majority of those who willingly and enthusiastically gave up their time to assist in providing insights, opinions and suggestions are already Tasmanian football volunteers. These volunteers and administrators are owed a debt of gratitude for what they do for the game. In the vast majority of cases their involvement and contribution is done for no personal financial return but rather for the love of their Club, League or the broader game.

This volunteer network is an incredible asset and essentially the key reason behind the historical success and sustainability of Tasmanian football. It does however also provide for a level of vulnerability. Left unchecked, the challenges around volunteers, amongst a host of other factors could easily impact the game to a degree where it declines in years to come.

Change in the structure, resourcing and approach of AFL Tasmania will assist the games ability to meet and successfully manage the difficulties the game faces. The recommendations made throughout this report are done so with the challenges and requirements the next 10-30 years will provide Tasmanian football.

In conclusion, I would like to thank the AFL for the opportunity to undertake this project. It has been a most interesting, fulfilling and worthwhile assignment, one that I trust will be ultimately considered worthwhile by all stakeholders of Tasmanian football.