



SUPPORTING THE PLAYERS BUILDING THE GAME



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FROM THE CO-CEOS





FOREWORD Kate Gill & Beau Busch

Welcome to the 2023-24 PFA A-League Men Report.

The report illustrates that the A-League Men (ALM) has reached an inflection point.

Before delving into the significant challenges facing the league, we must first start with the achievements of the players, who once again delivered a compelling season.

The Central Coast Mariners, led by captain Danny Vukovic, achieved what seemed impossible when the season kicked off by securing the Premiers Plate and back-toback Championships, and lifting the AFC Cup following an epic campaign across Asia. Head Coach Mark Jackson has kindly contributed to this report, revealing how his player-centric approach underpinned this success.

The outstanding performances of the league's rising stars was illustrated by moves to some of the biggest clubs and leagues in the world, headlined by Nestory Irankunda's transfer to Bayern Munich, Joe Gauci's to Aston Villa and Alex Paulsen to Bournemouth.

We are incredibly proud of this success. However, it is our job to deeply examine the foundations on which we are attempting to build a thriving league.

The report makes clear that there is a significant gap between what the competition is and what it can and should be.

Whilst our annual survey finds growing rates of satisfaction with the high-performance environments provided to players at clubs, it equally reveals a severe lack of trust in the Australian Professional Leagues' (APL) management of the professional game. Following a series of damaging missteps, that is hardly surprising. Beyond that, the players are concerned that the management of the leagues has apparently become adrift of any discernible strategy, guiding principles, or effective accountability measures.

In attempting to establish the professional game in the world's toughest sports market, the players have long understood the need to have absolute clarity of vision and mission. This is what underpinned the PFA's 'For the Fans' blueprint which was the genesis for what became the A-Leagues.

The competition's trajectory will be shaped by the quality of the plan and the collective will of those implementing it.

In pursuit of this, the players are clear that they are unwilling to continue to be subjected to the consequences of decisions taken by management if they are denied the means of influencing them. Business as usual has failed and should not be accepted by any stakeholder.

The PFA and the players will continue to work tirelessly to ensure the ALM achieves its vast potential.

That starts with this report being a platform for change.

Kate Gill & Beau Busch

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Jack Hingert Brisbane Roar Player & PFA Executive Committee Member



Our facility is a competitive advantage in performance and recruitment

David Dome

Wellington Phoenix General Manager

EXECUTIVE SUMMARY

The 2023-24 PFA A-League Men (ALM) Report highlights a range of consequential opportunities and threats facing the competition.

One of the most significant findings is that collective transfer revenue reached at least \$17.5m this season, continuing a trend from the record growth to \$10m in 2022-23. This revenue source now exceeds broadcast income, an extreme reversal from previous years.

The report investigates whether this new revenue stream is sustainable. Modelling by Twenty First Group reveals that the ALM's on-field quality is within reach of leagues where our players might be coveted. Data from FIFA shows that those leagues have rapidly growing transfer economies. The PFA's analysis of match minutes finds that the ALM is giving outsized opportunities to young players who are more likely to attract fees. Taken together, the evidence suggests that this trend can and should continue.

The AFC has relaunched its Champions League with far greater prize money than before, especially in the group stage. Where that tournament was once more of a burden than an opportunity for both clubs and players, it now guarantees a profit and so effectively represents prize money for the ALM Premiership winner.

These growing financial rewards for talent development and football performance are differentiating the ALM economically from other codes that are primarily dependent on traditional commercial, broadcast, and matchday revenues. The optimal revenue mix for an ALM club may differ across markets. The PFA and APL have invited FA to join the Professional Men's Football Committee enacted through the 2021-2026 A-Leagues Collective Bargaining Agreement to consider whether the current regulatory framework is fit for purpose in this emerging context. Average attendances are still below prepandemic levels, but contrary to the public narrative, there are some reasons for optimism. Six of the ten pre-expansion clubs had higher average crowds in 2023-24 than they did in 2018-19. The other four include Melbourne Victory, which is recovering from the fallout from the derby incident in 2022-23, and Perth Glory and Newcastle Jets, which now have new owners.

That said, attendances are well short of the league's peak period of 2012-2017. When asked what needs to be improved in order to grow support, ALM players ranked broadcast and atmosphere as the top two priorities. These core fan experiences are seen to have been neglected in recent years.

APL has a significant trust deficit among ALM players. Half of ALM players are dissatisfied with how APL has performed in its management of the competition, including 27% who are very dissatisfied, according to the PFA's end of season player survey. Regarding developing a vision to improve the league, 46% of players had 'low trust' in APL. Only 11% had 'high' trust in APL to find the answers.

Around one in nine players (11%) felt that their club environment was either physically or psychologically unsafe at some point throughout the 2023-24 season. One in five players across the league said players at their club were unwilling to discuss issues with the coaching staff due to fear of retribution.

Player payments fell by \$1m to \$57.8m, equating to an average of \$4.8m per club. Spending on Scholarship Players was nearly \$300k on average, but Marquee and Designated Players accounted for the majority of cap-exempt spending.

Sydney FC received the highest rating in the PFA's Club Performance Index, derived from player feedback on operations, facilities, and culture in the end of season survey. Wellington Phoenix, Melbourne City, Sydney FC, and Western Sydney Wanderers all received near-perfect scores for their facilities, highlighting a quiet story of progress in the development of elite infrastructure across the league.

Wellington's Sky Stadium was rated by players as the best playing surface last season, while Melbourne Victory's matches at AAMI Park had the best atmosphere, on average.

There were some challenges with pitches and match conditions. Suncorp Stadium and McDonald Jones Stadium presented unacceptable surfaces at times, in part due to other events held on them. Player performance was impacted by extreme weather in 9% of matches, according to post-match surveys throughout the season.

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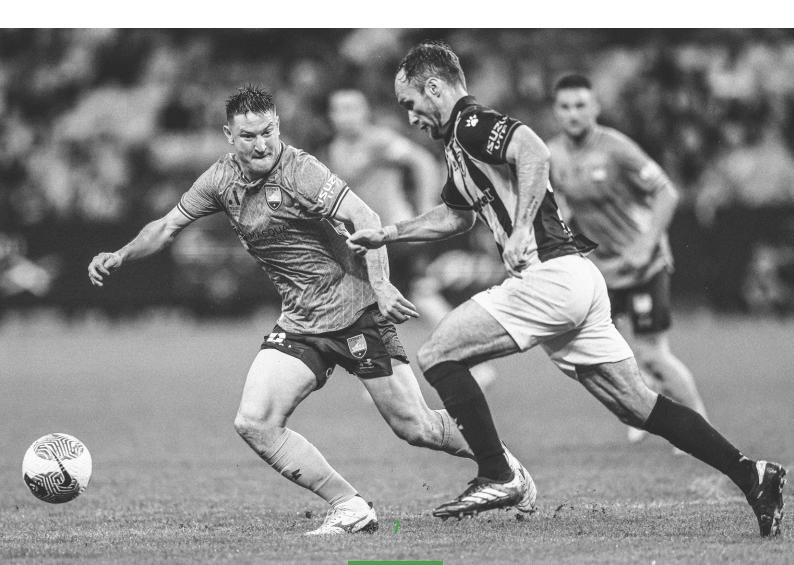


SURVEY METHODOLOGY



Where you see this symbol, the Report shares findings from the PFA's player surveys. This includes the 2023-24 A-League Men end of season player survey as well as post-match surveys conducted throughout the season. One hundred and ninety-one (191) players responded to the end of season survey, a record number. This included at least 13 from each club, so the sample is representative and provides for robust comparison between subgroups. Responses were collected on a voluntary basis between the 7th of May and 31st of May 2024 via an online survey. Not every player responded to every question. The results are sometimes contrasted against the A-League Women survey, which received 197 responses this season, or against previous iterations of the survey.

The fact that the vast majority of the playing groups from both A-Leagues complete the survey speaks to the players' high level of engagement in their industry and provides a powerful source of information for policymakers.







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INTERNATIONAL COMPETITIVENESS

INSIGHT

The ALM sits just behind key reference leagues in Asia, Europe, and North America

Twenty First Group's World Super League model finds that the ALM is a second-tier Asian league with slightly lower average team strength than England's League One, Major League Soccer (MLS), or the Scottish Premiership.

The ALM is rated as similar in quality to the Saudi Pro League, Iran's Persian Gulf Pro League, the Chinese Super League, and Qatar's Stars League.

Asia's strongest leagues, J1 League and K League 1, are similar to the MLS. The Eredivisie and Belgian Pro League are a step up from these again.

The World Super League model uses machine learning to rate team strength based on the performance of teams against each other and the performance of players who move between clubs and leagues. The PFA acquired data from the past six seasons of ten relevant leagues. The average team strength rating placed the ALM eighth among those ten leagues for that time period.

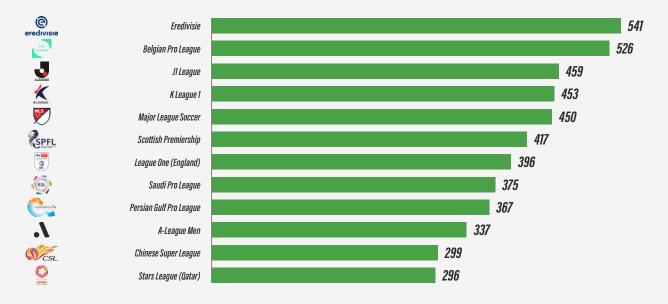
Over the six seasons, the average scores of ALM clubs ranged from 295 (Brisbane Roar and Macarthur FC) to 412 (Melbourne City). Central Coast's score increased from 221 in 2018-19 to 427 in 2023-24, creating an average of 337. The single strongest ALM team rating in the sample was Sydney FC in 2018-19 with 448, showing that our best clubs would not be out of place in Asia's leading leagues, MLS, and Scotland (especially outside the Old Firm clubs).

The fairly tight band within which ALM teams are rated reflects its salary cap system and cyclical success, while some of the reference leagues would likely have a greater range between their perennially stronger and weaker clubs.

The ALM's score declined slightly over the six years, likely due to expansion diluting the talent pool, but its ranking among these leagues did not change.

One use of the data is to provide guidance for outgoing transfers of Australian players. We want to see our best young players land in a development environment which balances quality with opportunity.

In the case of Jordan Bos, one of our league's very best young players was able to immediately establish himself as a starter in a midtable Belgian Pro League side. Players slightly below Bos's level might be better placed in MLS or Scotland, markets which seem increasingly attracted to our talent.



Average Twenty First Group World Super League rating, 2018-2024

TRANSFER REVENUE

INSIGHT

After more record growth, ALM transfer income has surpassed broadcast revenue

ALM clubs received at least \$17.5m in transfer fees in 2024, with the paper value well over \$20m when including add-ons and other clauses, according to PFA sources. The A-Leagues website cited the figure as \$20.6m.¹

Last year's collective haul of around \$10m was already a record which by far exceeded any previous take. This new result sets a new bar, but more excitingly, continues an upward trend.

Prior to 2022-23, collective transfer receipts tended to be around \$2.5m on average per season. All of a sudden, the shape of the domestic men's football economy has transformed, with this rapidly growing transfer revenue now exceeding broadcast revenue – an unthinkable equation a few years ago. The question is: is this growth sustainable? This report enables an evidence-led assessment of that outlook.

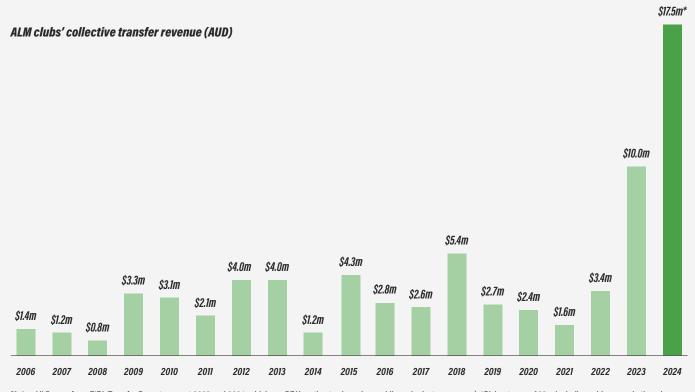
The previous vignette in this report benchmarks the on-field quality of the ALM against some leagues which might be interested in our players. It finds that the ALM's better-than-average players should be consistently attractive for the Scottish Premiership, the MLS, and Asia's top leagues. If you count Saudi's leading clubs and also add Scandinavian leagues to this bracket, those markets account for around half of the players sold (including loans with fees) and half of the revenue received in 2023 and 2024.

Stepping up from there, our clubs have supplied six players to the English Championship, and two to each of the Dutch and Belgian top flights. Around half of the players in this bracket of moves have become regular starters, while the others are future prospects.

Then there are seven transfers to 'big five' leagues: four to the Premier League, two to the Bundesliga, and one to Ligue 1. Other than Ben Old at Saint-Étienne, these players are development signings who have not immediately featured in their clubs' starting XIs.

Taken together, the ALM is providing players to a range of leagues up and down the European pyramid and across the world, from readymade starters to youth talents.

https://aleagues.com.au/news/caceresclause-phase-out-what-it-means-isuzu-utealeague-2025-26/



Note: All figures from FIFA Transfer Reports except 2023 and 2024, which are PFA's estimates based on public and private sources. | *Rising to over \$20m including add-ons and other clauses.

ALM outbound transfers and loans involving a fee in 2024

Player	Age (at 1/7/24)	Club From	Club To				
Nestory Irankunda	18	Adelaide United	Bayern Munich				
Alexander Popović	21	Adelaide United	Gwangju FC				
Musa Toure	18	Adelaide United	Clermont Foot 63				
Giuseppe Bovalina	19	Adelaide United	Vancouver Whitecaps				
Steven Hall	19	Adelaide United	Brighton & Hove Albion				
Joe Gauci	23	Adelaide United	Aston Villa				
Henry Hore	24	Brisbane Roar	Gangwon FC				
Jacob Farrell	21	Central Coast Mariners	Portsmouth				
Marco Túlio	26	Central Coast Mariners	Kyoto Sanga				
Raphael Borges Rodrigues	20	Macarthur FC	Coventry City				
Jonathan Aspropotamitis	28	Macarthur FC	Pohang Steelers				
Aziz Behich	33	Melbourne City	Al-Nassr				
Franco Lino	18	Melbourne Victory	FK Viking				
Paul Izzo	29	Melbourne Victory	Randers				
Apostolos Stamatelopoulos	25	Newcastle Jets	Motherwell				
Daniel Bennie	18	Perth Glory	Queens Park Rangers				
Jake Girdwood-Reich	20	Sydney FC	St Louis City SC				
Ben Old	21	Wellington Phoenix	Saint-Étienne				
Finn Surman	20	Wellington Phoenix	Portland Timbers				
Alex Paulsen	21	Wellington Phoenix	Bournemouth				
Marcus Younis	18	Western Sydney Wanderers	PSV Eindhoven				
Lachlan Brook	23	Western Sydney Wanderers	Real Salt Lake				



INSIGHT

Transfer trends from relevant markets suggests new ALM revenue is sustainable

The global transfer market is growing. Total spending has approximately doubled since 2015.² It has grown by about 50% since 2020. That year was impacted by COVID-19, but it is a useful baseline because FIFA has released a tool which reveals midyear window spending in each association going back five years.³

Since 2020, summer spending in Scotland has doubled, outpacing global growth. In the US, midyear spending has more or less quadrupled since 2020, reaching US\$92m in 2023 and US\$77m this year. Saudi clubs have injected over US\$1.3b into the market in the past two years, dwarfing past expenditure, and fuelling flows across the broader ecosystem. Several of the markets which we have shown to be natural suitors for ALM talent have been investing significantly more in players, suggesting that the growth in receipts here is part of a structural trend rather than a flash in the pan.

At the same time, some of the leagues discussed have also witnessed staggering growth in their own transfer revenues. In Belgium, total fees received have increased every midyear window since 2020, nearly tripling from US\$147m to US\$412m in that time. In the US, midyear receipts increased every year but more than quadrupled between 2020 (US\$23m) and 2024 (US\$104m). In summer 2024, Japanese clubs took in US\$21m and Scottish clubs received US\$71m. Relevant leagues are spending more, receiving more, and (other than Saudi) generally making a net profit each season. ALM revenue has grown quickly, but remains a fraction of that in leagues which sit just above it in the pecking order. On the conditions that we maintain (or increase) our level of on-field quality while continuing to give opportunities to young players, it is reasonable to conclude that this trend is sustainable into the future.

https://football-observatory.com/MonthlyReport97
https://inside.fifa.com/legal/football-regulatory/
international-transfer-snapshot

The Diarra Verdict - overhaul of the Transfer System or more of the same?

Shortly before the release of this report, the European Court of Justice (ECJ) made a ruling which could have significant consequences for the functioning of the international transfer market.

The case relates to what happens when a player's contract is terminated 'without just cause'. In 2014, when France international Lassana Diarra was playing for Lokomotiv Moscow, he was involved in a dispute over performance and wages leading to his contract being cancelled by the Russian club. FIFA's Dispute Resolution Chamber (DRC) found against him, subsequently fining him.

When Diarra struck a new deal with Belgian club Charleroi, he was unable to complete the move because a transfer permit would not be granted until he paid the fine. In addition, Charleroi would have been held liable for that debt had they sought to finalise a deal and potentially punished if they refused to pay it. This was an outcome the Belgian club decided they could not risk and, therefore, walked away from the deal. From this situation the ECJ was asked to consider whether the refusal of a permit restricted Diarra's freedom of movement, and whether the obligations placed on Charleroi, and the potential for punishment, restricted their ability to compete. On both counts the court ruled against FIFA.

FIFPRO, the global footballers union, stated:

"After analysing the decision of the ECJ today, it is clear the ECJ has ruled unequivocally that central parts of the FIFA Regulations on the Status and Transfer of Players are incompatible with European Union law. The ECJ has emphasised that these regulations must comply with EU rules on competition and freedom of movement principles.

"In particular, the ECJ has stated that the calculation of compensation to be paid by a player who terminates a contract 'without just cause' - and the liability for the player's new club to be jointly liable for such compensation cannot be justified. "These clauses of article 17 of the FIFA regulations are the foundation of the current transfer system and have discouraged numerous players from terminating their contract unilaterally and pursuing new employment. The ECJ also made clear that the career of a player is short and this abusive system can lead to the premature end of a player's career. The current regulations, the court says, do not contribute to the protection of their rights as workers."

The impact of this decision must be understood in the context of the ALM's shifting economy. Clubs should be incentivised to and rewarded for developing talent, but this imperative cannot override the players' fundamental rights as workers. Internationally, through FIFPRO, and domestically in partnership with FA and APL, the players are determined to shape an employment framework that ensures balance between the interests of players and clubs.

VIEWPOINT





Sydney FC player and PFA Executive Committee Member

The A-League Men provides such an important stepping stone for young Australian players.

The young talent in the competition is getting better and better each season. There have always been young players; I remember a fresh-faced Alex Wilkinson in year one of the A-League. But I think more teams are turning towards and trusting young players to do a job.

Standards are increasing, and the roots of the clubs are growing deeper. Clubs now have established academies, and they are putting a lot more time and resources into players.

At Sydney FC, I have had a front row seat to witnessing the development of some of the best young talents in the country. In my opinion, they are leading the way in Australia when it comes to youth development. Coming into a facility like Sky Park has certainly enhanced my ambitions to be as professional as I can. If we double down and put more effort into facilities and youth development, it will make the game more sustainable and grow the league.

For lack of a better phrase, we've always had a 'no dickhead' policy at Sydney FC and have a humble changeroom where young boys can come in and work hard, but also learn off each other. Sydney grabs a lot of headlines for the big names who come in, but they really help foster youth too.

When you look around the league, there's boys in almost every team that have come through the Sydney FC Academy. There's Harry Van der Saag at Brisbane, Clayton Taylor at Newcastle, Marco Tilio and Callum Talbot at Melbourne City, and Ryan Teague at Melbourne Victory, just to name a few. It's so exciting to see young boys given a chance, and taking it. The talent continues to get better right across the country and even though the exposure is getting better, the players still have to match the quality. The majority of emerging talent coming through the Socceroos bloomed in the A-League Men. It provides a crucial step for players to learn their trade.

There are players going to clubs overseas and playing really well. Cammy Devlin is a regular at Hearts, for example. Boys are going into clubs overseas straight from the A-League Men, slotting in and playing extremely well.

It's amazing seeing the fees some of the young Aussies are demanding on the international transfer market too. I would love to see clubs double down and take the transfer fees that they're getting and investing them back into their young players.

AFC CLUB COMPETITIONS

INSIGHT

New AFC Champions League format effectively represents ALM prize money

The Asian Football Confederation (AFC) has relaunched its continental club competitions for the 2024-25 season, providing a significant new financial opportunity for our clubs.

Men's clubs will now compete across three tiers: the AFC Champions League Elite (ACLE), AFC Champions League Two (ACL2), and AFC Challenge League. ALM clubs have one berth in each of the top two tiers. There is also a new Women's Champions League competition, which will initially feature one A-League Women club.

AFC club competitions have often been more of a burden than an opportunity for our clubs due to low prize money and high overheads. FIFPRO Asia/Oceania's forensic analysis of the old formats early in 2024 identified that the costs of participating (financial and otherwise) generally outweighed the benefits for clubs and players.⁴

Pleasingly, the new ACLE presents far greater up front rewards for clubs. Qualification to the eight-match group stage comes with a guaranteed US\$800k, plus another US\$100k for each win. The champions will receive at least US\$12m in accumulated prize money, which itself would be a game-changing amount should any club repeat the Wanderers' feat from 2014. But the champions would also gain entry to FIFA's expanded Club World Cup, which would reportedly recoup that amount many times over.

Clubs still need to cover most of their own costs, and those costs are extensive. But with this new group stage windfall, our clubs should be able to come out ahead at a minimum, with significant upside if they win even a few matches. In a sense, qualification to the ACLE now represents quasi-prize money for our Premiership winners each season.

The new ACL2 is more in keeping with the old AFC competition formats, where the upside is reserved for the finalists. Participants in the six-match group stage will receive US\$300k plus US\$50k for a win. Teams which exit in the semi-finals will receive US\$780k plus any win bonuses from the group stage, so only the finalists will surpass an ACLE group stage participant. However, as Central Coast demonstrated in 2023-24, our clubs can realistically compete for honours in this second tier competition, with at least US\$3.28m on offer for the champions. Central Coast received US\$1.5m for winning the final iteration of the old second tier AFC Cup in 2023-24.

Under the 2021-2026 Collective Bargaining Agreement (CBA), ALM players receive an increasing share of prize money from the Round of 16 onwards. Due to the financial burden on clubs in the group stage, the players agreed to essentially play for free in that phase. This concession is no longer appropriate in light of the new ACLE format.

Finally, it should be noted that FIFPRO Asia/Oceania's main recommendation was for the AFC to adopt a more collaborative approach to competition design. Involving clubs, players, and leagues in decisionmaking would maximise potential for all stakeholders. While increased prize money is welcome, challenges remain around workload, conditions, commercialisation, economics, and other aspects, exacerbated by the AFC's top-down approach.

4 <u>https://fifpro.org/media/wizhphjr/fifpro-asia-acl-report-2024.pdf</u>

Minimum prize money for AFC club competitions, 2024-25 (USD)

Stage	ACL Elite	ACL Two
Group Stage	\$800,000*	\$300,000**
Round of 16	\$1,000,000	\$380,000
Quarter-finals	\$1,400,000	\$540,000
Semi-finals	\$2,000,000	\$780,000
Runners-up	\$6,000,000	\$1,780,000
Champions	\$12,000,000	\$3,280,000

*Plus \$100,000 per win **Plus \$50,000 per win

Note: Figures shown represent cumulative totals

VIEWPOINT





Central Coast Mariners Head Coach

The culture that already existed was fantastic and it was up to me to build on that. The first thing that stood out for me was that you had a lot of young, hungry players who were receptive to learning. That didn't stop after a honeymoon period; it got stronger and stronger. We introduced a new way of working with a lot of individual video. That was a big change for them, but they really took to it.

After a game in Perth, we tried something new. Normally after a defeat you want to say 'you haven't done this right and this right,' but we changed tack. We put players in groups and gave them ownership over a topic from the game. The coaches went out and grabbed a coffee then came back in and had them present back to us and the group.

That was a key moment because the players understood that they can be a massive part

of understanding what we want and how we're going to execute it. We continued that throughout the season. We didn't always agree as players and staff. But I'm a big believer in listening to what the players have to say. They are the ones who cross the white line.

That manifested to the point where at half time in extra time of the Grand Final, I said to Max Balard: "I don't need to speak, you speak. You've got this. You know what we need to do." As a manager it got to that stage where you know the players have the answer on the pitch. It was the biggest game of the season but I felt confident to step back. The process to get there requires time and effort, developing that psychological safety where players feel confident enough to speak in team meetings. It's not to say it's right or wrong, but it's our way of working. There were numerous times during the AFC Cup campaign when players could have said 'what's going on here?' No one moaned or said a word. We don't have any egos in the dressing room. That became a big part of how we coped psychologically and physically as well.

We got stranded in Kyrgyzstan because of flooding in Dubai. I told the group we have to flip this negative into a positive for us. They could have stayed in their rooms and been lazy but we proposed we go for a hike in the mountains, and they were well up for it. There was an iconic photo of all the boys in their tracksuits on top of a mountain in Kyrgyzstan. We had it up in the rooms before the Grand Final. That typified how we kept turning these obstacles into positives all the time. It wasn't driven by the players or the staff, it was the collective.

PLAYER PROFILES

INSIGHT

ALM provides opportunities for youth but lacks peak-age players

The PFA analysed every match minute played in the most recently completed seasons of the ALM, J1 League, K League 1, Major League Soccer (MLS), Scottish Premiership, and Belgian Pro League.

The top flights in Australia and Belgium provided relatively far more opportunities for young players than the other four leagues. Just over 10% of match minutes in both leagues were played by players aged under 20 when the season started, while less than 5% of match minutes went to such players in the other four competitions.

As the chart shows, the other Asian leagues gave the fewest opportunities to young players, and the Scottish and American leagues sat in the middle.

Of course, Japan has two more professional tiers beneath the J1 League and the K

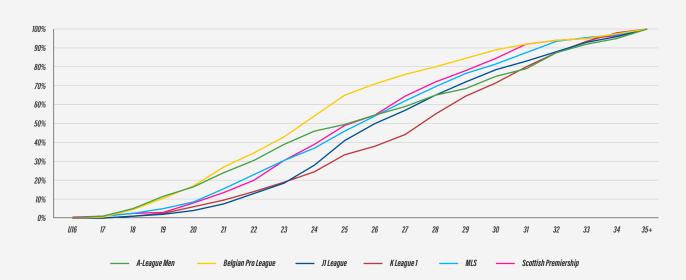
League 1 has one below, so this data does not reflect the total professional capacity in each country. Similarly, the MLS has 29 clubs which play 34 league matches each, so its total quantum of young player minutes is larger than in Australia despite skewing older on average.

Given that Australia has a smaller professional footprint, it is important for the ALM itself to provide youth opportunities, so it is encouraging to see that is the case. The league's average age has dropped significantly since the introduction of scholarship players outside the salary cap.

Of these six leagues, the ALM gives the highest share of minutes to players aged 32 and over (21%). In Belgium and Scotland, only 6% of minutes are played by such players. So the ALM skews both young and old, with a hollow middle: only one third (33%) of match minutes are played by 25-31-year-olds in the ALM, whereas these players make up more than half of the game time in the other leagues except Belgian Pro League (38%).

The relative lack of peak-age players in the ALM perhaps speaks to players' desire to try their hand in Europe or Asia during their best years.





INSIGHT

Adelaide United's Asia-leading youth focus is paying dividends

Adelaide United is one of the world's leading clubs when it comes to providing opportunities for youth players, according to an analysis by the CIES.⁵

The report ranked Adelaide 43rd on a list of over 900 clubs from 58 leagues for the share of match minutes going to players aged under 21 between September 2021 and September 2024.

Eighteen percent of Adelaide's match minutes went to under 21s over the three years, ranking it second amongst AFC clubs behind Uzbekistan's FC Olympic (3rd overall, 39.9%).

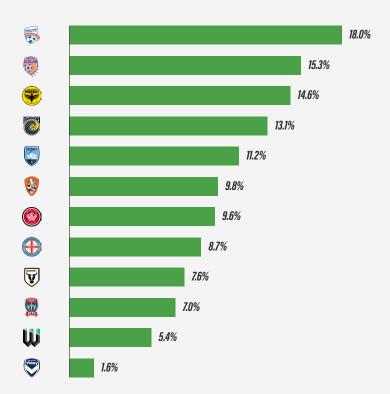
Perth Glory sat 76th with 15.3% of its minutes going to under 21s. Wellington Phoenix (89th, 14.6%) and Central Coast Mariners (118th, 13.1%) were also highly ranked. No clubs from the Japanese and South Korean top flights were inside the top 200.

The presence of renowned development clubs such as RB Salzburg (5th, 37.4%) and AFC Ajax (9th, 24.5%) in the top ten lends credibility to this metric, and shows that our clubs' shares are by no means extreme.

Looking back to the Transfer Revenue section of this report, we see that the majority of ALM players being sold for fees are young players, and that Adelaide led the league in terms of the number of sales last season. The correlation between youth opportunities and potential transfer revenue is a clear and obvious one.

5 <u>https://football-observatory.com/WeeklyPost472</u>

Share of minutes played by U21s, Sep 2021-Sep 2024





ATTENDANCES

INSIGHT ALM crowds are climbing towards pre-COVID levels, controlling for expansion

We now have enough distance from the pandemic to zoom out and draw some conclusions about the league's current ability to attract supporters.

Average attendances for regular season matches rose to 8,076 from 7,553 in 2022-23. It's positive to see an upward trajectory, but crowds have still not recovered to their pre-COVID levels. We must remember, though, that the league added two new clubs during the pandemic. Western United and Macarthur FC had the lowest average attendances, so they pulled down the league mean.

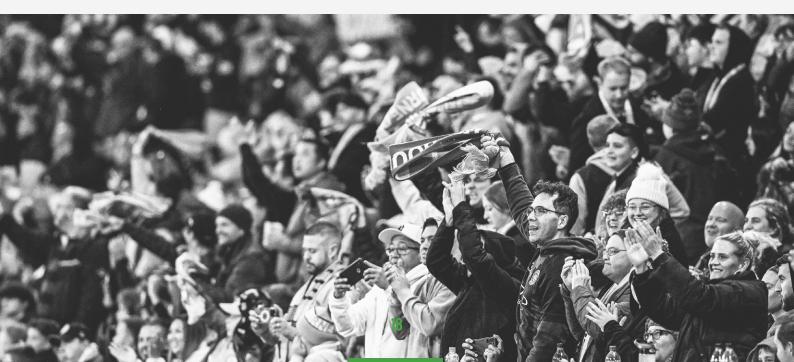
Those two clubs also tended to be among the lowest drawing away teams for other clubs' home games, perhaps due to the lack of brand recognition and historical rivalries associated with them. To compare like-forlike between now and pre-pandemic, we need to control for this. If we exclude all matches which feature the expansion clubs as either the home or the away team, the average attendance last season was 9,232, 14% higher than the 8,076 overall average.

ALM average attendances, by season

	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	All-time
All Clubs	10,956	12,921	14,610	12,180	9,791	8,441	10,497	12,347	13,025	12,511	12,309	12,295	10,654	10,423	7,506	5,452	5,269	7,553	8,076	10,005
'Core' Clubs v 'Core' Clubs*	10,956	12,921	14,610	12,180	10,714	9,442	11,464	12,347	13,025	12,511	12,309	12,295	10,654	10,423	7,882	5,853	5,933	8,817	9,232	10,729

*Excluding matches involving North Queensland Fury, Gold Coast United, Western United, Macarthur FC

Note: Data from Ultimate A-League. All data reflects regular season matches only.



INSIGHT Average crowds at six clubs were higher in 2023-24 than in 2018-19

Controlling for expansion leaves us only about 11% down from the average of 10,423 in the last pre-pandemic season, 2018-19. This remaining gap is best explained at a club level. Four clubs have had significant drop-offs since then, while the other six 'core' clubs all actually had higher home crowds than in 2018-19, even including the visits of the expansion teams.

The reason for Melbourne Victory's decline is obvious: its first three games in 2022-

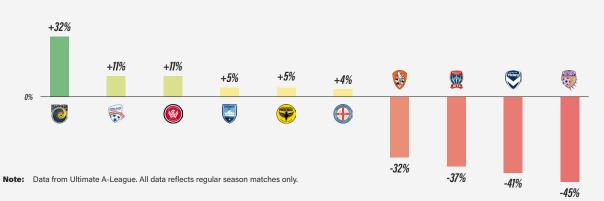
23 averaged a healthy 18k, but after the APL's Grand Final hosting decision, the derby pitch invasion, and the subsequent restrictions on the club's fans, its average by that season's end was 10,124. Hopefully, the uptick this season to 12,227 was a sign of recovery towards its pre-COVID averages of around 20k.

Perth Glory (-45%), Newcastle Jets (-37%), and Brisbane Roar (-32%) are the other three clubs whose 2023-24 averages fell short of their 2018-19 levels. The first two of those now have new ownership, which provides a realistic basis for hope that they might be reinvigorated. Perth and Brisbane also had 'home' games during Unite Round which slightly diluted their averages. Brisbane's new management saw an uptick nonetheless, but the lack of a Goldilockssized venue remains a challenge for the club.

ALM average attendances, by club

	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	All-time
NULL VI	10,948	12,165	12,697	11,713	10,765	11,552	8,829	9,592	11,225	12,637	11,287	9,565	9,830	9,013	6,924	7,383	6,501	10,359	10,035	10,098
	14,785	16,465	16,951	12,995	8,652	9,279	13,387	13,417	14,957	11,660	12,850	13,892	9,093	9,632	7,301	6,058	4,538	5,629	6,510	10,752
Assert De	7,899	9,828	12,738	10,465	7,388	8,076	9,628	9,969	9,398	7,585	8,111	7,412	7,194	5,562	4,496	5,245	4,296	6,646	7,314	7,763
					5,382	3,428	3,438													4,082
V																3,488	3,109	3,514	4,161	3,579
(\mathbf{a})						8,312	9,082	8,560	9,799	10,374	11,047	10,573	9,745	8,133	7,031	5,374	6,530	6,481	8,488	8,565
View	14,167	27,728	26,064	24,516	20,750	15,058	19,208	21,885	21,808	25,388	23,112	22,008	17,631	20,604	13,359	5,375	9,473	10,124	12,227	18,328
۲	3,909	3,011																		3,438
	8,912	11,397	13,209	9,729	6,358	8,429	12,117	13,388	11,949	8,968	9,579	8,645	10,887	9,079	5,880	4,056	4,843	6,152	5,704	8,853
FURY.					6,723	4,245														5,396
	9,734	7,671	7,596	7,942	9,205	8,488	8,329	8,840	9,418	9,542	8,986	10,533	9,186	10,360	5,935	4,409	4,281	4,451	5,655	7,941
SYDNEY	16,669	14,999	16,373	12,375	12,987	8,014	11,861	18,637	18,682	17,378	16,071	16,001	14,682	13,566	9,688	7,813	5,534	17,008	14,293	13,757
Y			11,683	7,193	8,966	7,973	8,691	6,877	8,186	8,583	8,048	6,224	5,694	8,533	7,294	5,329	3,386	6,333	8,940	7,482
								12,466	14,860	12,520	14,297	17,746	11,924	9,312	9,872	8,062	7,388	10,769	10,326	11,655
Ŵ															4,783	2,826	3,351	3,168	3,274	3,481

Change in average attendance, 2018-19 to 2023-24



INSIGHT

2012-2017 peak remains elusive, but negative crowd narrative is overstated

Zooming out further, we have to recognise the 2018-19 baseline was itself a step down from the league's peak years between 2012 and 2017. That decline was caused by a number of factors including governance, active support, broadcast, and stadium renovations. The PFA will release further analysis of this period at a later date.

Taken together, the above analysis provides evidence that the underlying interest in the league is more robust than perhaps the popular narrative attests. We do not seek to handwave away the factors which have contributed to the decline in the overall average, but by isolating them, we can diagnose what needs to improve, celebrate the successes where they exist, and counter an unwarranted sense of widespread malaise.



VIEWPOINT





Brisbane Roar COO

The PFA End of Season Survey was extremely useful in helping swiftly understand the areas that needed attention. By gathering specific feedback from participants, it clearly highlighted the aspects of both the ALM and ALW programs that are working well and those that require improvement. This direct insight allows for more focused efforts on enhancing areas of concern while continuing to strengthen the parts that are already performing better. This targeted approach not only optimises resource allocation but also ensures that future initiatives and expense are more precisely aligned with player needs and expectations.

The results from this season were indeed helpful in highlighting areas where progress

has been made, as well as in identifying key opportunities for future improvement. By comparing current outcomes with previous data, it became clear which strategies and initiatives have been effective and which ones might require revisiting or enhancement. This kind of analysis is crucial for continuous development and ensures that each season builds on the lessons learned from the last, paving the way for more targeted and effective actions in all upcoming decisions.

Addressing the players' concerns when we first arrived at the club was of paramount importance. It was essential to establish trust and open lines of communication right from the beginning. Listening to and addressing player's concerns not only demonstrated respect for their experiences and insights but also helped in fostering a collaborative environment. This approach allowed us to work together effectively to identify and tackle issues, thereby setting a solid foundation for the collective success of the club moving forward.

COMPETITIVE BALANCE

Macarthur and Victory demonstrate upward mobility in another tight season

Competitive balance was strong this season. There were tight races for the Premiership and the top six, with fairly tight clustering from top to bottom once again.

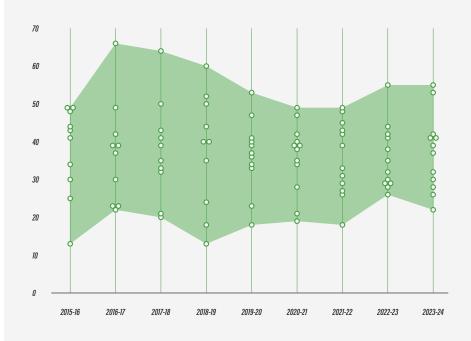
Last-placed Perth conceded at least two goals in all but five of their matches, but they took points off nine of the other 11 clubs throughout the season.

The bottom two teams from 2022-23, Macarthur and Melbourne Victory, both made the finals, demonstrating the strong competitive balance of the ALM across seasons.

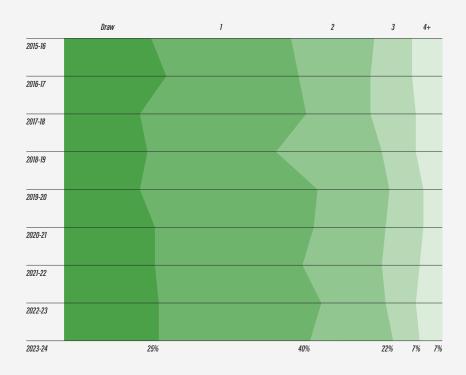
There were a number of very lopsided matches. Melbourne City had home wins of 8-0, 8-1, and 7-0 over Perth, Brisbane, and Western Sydney respectively. But they also lost 6-0 away to Adelaide and conceded five and four goals when visiting Brisbane and Perth. So the results did not speak to a competitive imbalance so much as the league's high-scoring and unpredictable nature.

Overall, the share of 'blowouts' was stable, with 7% of matches featuring a margin of four or more goals and 7% decided by three goals.

Points spread comparison



Goal Margins

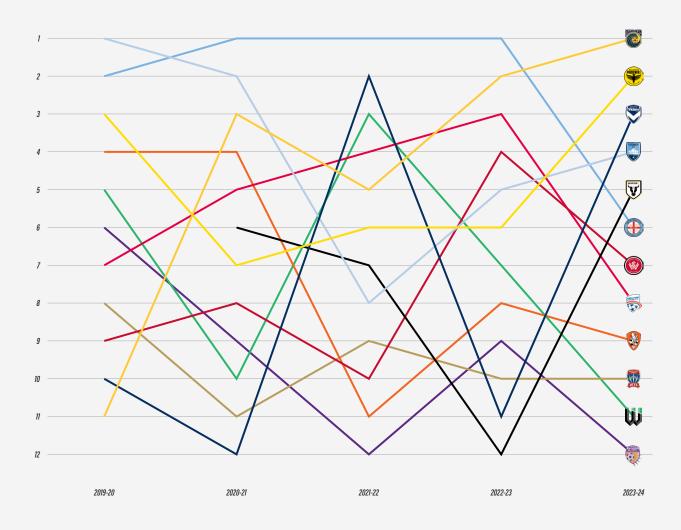


INSIGHT Success has been shared around over the past five seasons

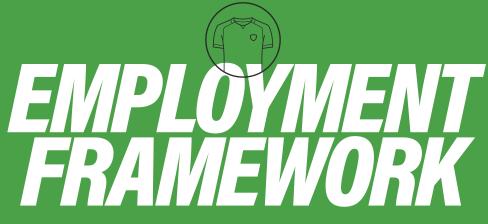
Since the entry of Western United in 2019-20, there has been a moderate to high variation in which teams are successful year to year.

Every club has missed the finals at least once except for Melbourne City, who scraped into sixth last season, and every club other than Newcastle has made the finals at least once during this period. City and Central Coast have shown it is possible to sustain success, and on very different budgets, while Victory's run in the past four seasons (12th, 2nd, 11th, 3rd) shows that it's also possible to climb or fall quickly due to the narrow margins.

Finishing position







25. CBA Progress | 27. Player Perceptions | 30. Workplace Safety | 31. Extreme Weather

CBA PROGRESS

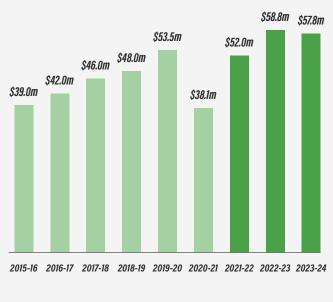
INSIGHT

Player payments fell slightly from 2022-23 but still far exceed the cap, on average

Total player payments were around \$57.8m in 2023-24, down slightly from the all-time high of \$58.8m the previous season.

In the final season before Auckland FC joins the league, average payments per club were around \$4.8m. Once again, this was well above the salary cap of \$2.6m, noting that Western United and Macarthur FC were allowed to spend slightly more due to concessions for expansion clubs, which cannot yet take full advantage of exemptions for Loyalty Players and Homegrown Players. Payments per club exceed the cap because payments to Marquee Players, Designated Players, Scholarship Players, and Homegrown Players sit outside the cap, along with a portion of Loyalty Players' salaries and some relocation expenses. The vast majority of exempt payments were those to Marquee and Designated players, although utilisation at different clubs could vary greatly.

The average spend on Scholarship Players was just under \$300k per club, though this too differed across the league, with one club spending more than \$500k on this category.



Total player payments

New CBA

2021-2026 CBA salary cap projections



INSIGHT

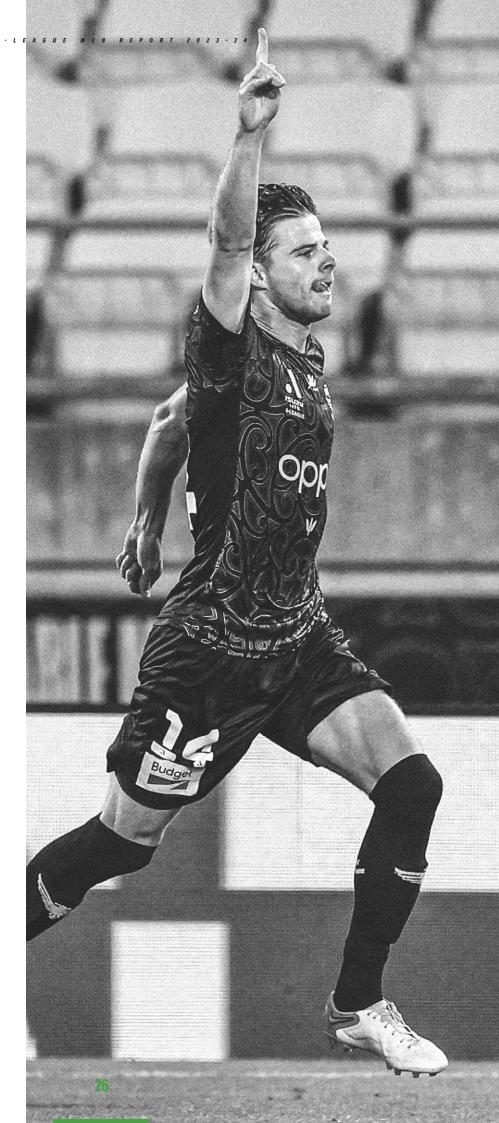
Emerging football revenues create impetus for regulatory rethink

The current salary cap framework has been imbued with a suite of exemptions to allow clubs to pursue a variety of different list strategies, from a youth focus to fanpleasers to top end quality. The added flexibility has also prevented clubs from being cornered into disruptive and harmful rates of player turnover.

This report describes how revenues from transfer fees and a more lucrative AFC Champions League present new financial opportunities for our clubs. Past reports have analysed the rise of World Cup Club Benefits from FIFA as another growing income stream.

ALM clubs have previously been similar to those from the AFL and NRL in that they were primarily dependent on income from broadcast, commercial, and matchday categories. Increasingly, there is 'more than one way to skin a cat', with these traditional sources potentially having a greater or lesser role in each club's optimal path to financial sustainability, depending on factors like its market size and stadium. Two years out from the expiry of the A-Leagues CBA, this shifting landscape prompts a reflection on whether the current framework is still fit for purpose.

The CBA includes a vehicle for these discussions: the Professional Men's Football Committee. It creates a forum for representatives from the PFA (including players), APL, and clubs to discuss ALM issues, but in 2024, it was agreed that representatives from FA would also be invited to enable a broader and more collaborative discussion of the league's economic and regulatory framework. There is also a Professional Women's Football Committee to capture similar discussions regarding A-League Women.



PLAYER PERCEPTIONS

INSIGHT APL has a trust deficit among ALM players

Half of ALM players are dissatisfied with how APL has performed in its management of the competition, including 27% who are very dissatisfied, according to the PFA's end of season player survey.

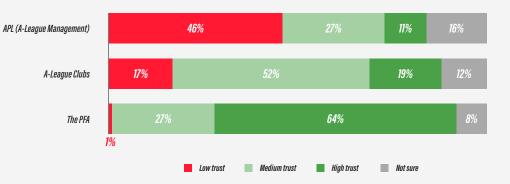
Regarding developing a vision to improve the league, 46% of players had 'low trust' in APL. Only 11% had 'high' trust in APL to find the answers. ALM clubs were rated a bit better than APL by the players, with 28% of players dissatisfied with the clubs' performance and 17% having low trust in them to develop a path forward.

The PFA was rated highest by the players, with 91% satisfied with its performance regarding ALM and 64% having high trust in the PFA to develop a vision. It should be noted that the APL's governance structure sees its board mostly made up by club representatives, so the lines of accountability are not so distinct.

How satisfied are you with the performance of these organisations with regard to the A-League Men competition overall?



How much trust do you have in each of these organisations to develop a vision to improve the A-League Men competition?



INSIGHT

Improving the fan experience is the players' priority focus

The PFA met with delegates from every ALM club throughout the 2023-24 season to discuss strategic issues impacting the league's trajectory, particularly in regard to fan numbers.

From those discussions, a list of nine key themes emerged, which were then put to the broader playing group in the end of season survey. Each player was asked to choose their top three priorities to improve in order to grow support.

More than half of players included Broadcast (58%) and Atmosphere (51%) in their top three, highlighting the core fan experience either in the stadium or at home as the biggest opportunities.

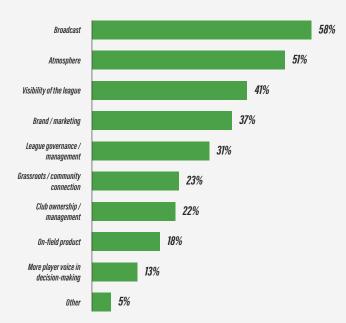
The next two themes, Visibility and Branding/Marketing, speak to the players' frustrations at the lack of buzz compared to earlier periods. Several delegates mentioned having had people ask them "when does the league start" when it was already in season.

On-field product was selected by only 18% of players. The ALM is generally highscoring and unpredictable, and the surging transfer revenues discussed earlier in the report further suggest that the football itself is high-quality. This aspect would take the most amount of time and/or resources to address if it were the core issue, so this is a promising finding.

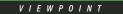
Rather, the players have identified that there is a need to get back to basics with a focus on supporters, as well as taking steps to increase the exposure of the compelling product on show.















Brisbane Roar player & PFA Executive Committee Member

When the APL took over in 2021, I was optimistic about the potential for fresh leadership to elevate the league. Unfortunately, the decisions made since then have been disappointing.

Despite securing a \$140 million investment, the league now faces significant challenges, including reduced distributions. We were promised that KeepUp would take the game to new heights, only to see it shut down after just two years.

The most concerning issue is the lack of consultation with players on major decisions. This affects our livelihoods, as we are the ones on the field. The absence of transparency has led to a breakdown in trust between us and the APL. It shouldn't be this way—we should be collaborating to achieve a shared goal of a stronger, more competitive league. If we are not included in the decision-making process, how can we be expected to fully support and invest in the league's vision?

In conversations with fellow players, there's a shared commitment to the game and a willingness to contribute to its growth. However, there currently seems to be a lack of clear direction.

That said, I still believe there is a significant opportunity for the league to regain its momentum. The excitement surrounding the Matildas and the Women's World Cup has demonstrated the passion for football in this country, and there is a strong fan base eager to support the game. As players, we deserve a seat at the table when it comes to major decisions. We are a critical part of this sport, and the outcomes directly impact us. By aligning with the APL, we can deliver a unified message and move forward together. A more collaborative approach would allow us to collectively work towards a brighter future for the league.

WORKPLACE SAFETY

INSIGHT

11% of ALM players felt unsafe in their club environment at some point this season

The PFA end of season survey uncovered concerning findings regarding the safety of ALM players' workplaces.

Eleven percent of ALM players felt their club environment was either physically or psychologically unsafe at some point during the season.

One in five players (20%) said they or a team-mate were unwilling to discuss issues with coaching staff due to fear of intimidation or retribution. The share of players who were reluctant to raise matters with club management was slightly lower at 16%.

11%

20%

Seven percent of players reported instances of players being forced to train alone at their clubs. One instance of this practice may have been reported by several players.

Reports of unsafe or toxic environments were concentrated to a few clubs. We are reporting the results here at a league level to flag this as an industry issue, but the PFA has met with every club to discuss their results in detail. To their credit, every club engaged with this process and accepted the findings. These survey questions will continue to track progress for upcoming seasons. Earlier this year, the PFA released Safe Football Project: 2024 Snap Report, which examined the issue of workplace safety on the women's side of the game.⁶ At its inaugural Safe Football Conference in October, the PFA hosted football's senior leaders to hear from experts covering all aspects of the safety of our industry, for men and women players.

6 <u>https://pfa.net.au/wp-content/uploads/2024/08/</u> PFA-Safe-Football-Project-Report-Final.pdf

ALM workplace safety, 2023-24

At any time did you feel that your club environment posted a risk to your physical or mental safety?

Has there been any times this season when you or a team-mate felt unwilling to discuss issues with the **coaching staff** due to intimidation or fear of retribution? 16% 7%

Has there been any times this season when you or a team-mate felt unwilling to discuss issues with the **club management** due to intimidation or fear of retribution?

Has there been any times this season when you or a team-mate was forced to train alone away from the main group?



EXTREME WEATHER

INSIGNT Extreme weather conditions hindered player performance in 9% of ALM matches

One in six ALM matches were impacted by extreme weather throughout 2023-24, according to post-match player surveys. Extreme heat was the culprit in the majority of such matches, while a handful were impacted by heavy rain and lightning.

Most of the players (58%) who said their match was impacted by extreme weather also said that the conditions impacted on the players' performances. This equated to 9% of all fixtures where a player completed a survey.

As summer-season leagues, the A-Leagues are at risk of seeing the quality of play and player welfare undermined by unfavourable conditions. Earlier this year, the PFA

released Stoppage Time: A PFA Report on the A-Leagues and Climate Change, which highlighted the growing threat to our industry from increasingly frequent and extreme weather events associated with global warming.7

Thankfully, there was only one occasion this season when a player thought their match should have been postponed due to extreme heat. That player also said the conditions caused health problems for the players. This is much less frequent than in the A-League Women, where players said 6% of all matches in 2023-24 should have been postponed and the conditions caused health problems 8% of the time.

The A-League Women is more vulnerable to heat than the ALM because of two main factors: earlier kick-off times and substandard facilities. Every ALM player who reported extreme heat said that there was sufficient cooling in their changerooms, and all but two said the benches had enough shade.

There were six occasions when the ALM player said that the match was impacted by extreme heat but that drinks breaks were not utilised, pointing to one potential area for improvement for APL and referees.

https://pfa.net.au/wp-content/uploads/2024/03/ Stoppage-Time-PFA-Climate-A-Leagues-Report-FINAL.pdf

"

We shouldn't be playing games with this temperature. It's risky for the players and bad for the game. Anyone who is watching the game is thinking how slow and how bad the game is.



- ALM player, PFA post-match survey







33. Club Indices | 36. Pitch and Atmosphere Ratings

CLUB INDICES

INSIGHT

Sydney FC leads the PFA's player-driven Club Performance Index for ALM

Sydney FC was rated as the league's best performing club in the overall Club Performance Index, after placing in the top three for the sub-indices for Operations, Facilities, and Culture.

The PFA reconfigured its end of season survey in 2022-23 to produce Index scores for the three aforementioned areas in order to compare clubs against each other and track standards over time.

The Club Operations Index aggregates feedback on coaching, sports science, medical, performance analysis, sports psychology, and logistics/travel. The Club Facilities Index covers ten physical features ranging from the training pitch to the showers and social area. The Club Culture Index assesses eight statements describing the club environment, measuring interpersonal aspects such as communication, respect, and unity of purpose.

These three Index scores feed into each club's overall Club Performance Index, providing one number on a 1-4 scale as a simple benchmark.

The PFA has decided to publish the top four clubs for each Index in this report, in order to publicly acknowledge their success and progress. The PFA has met with senior staff at every club and the APL to present the full, identified results.

The Index scores show a strong positive correlation with on-field results, and thus provide clubs with a powerful tool to identify areas of opportunity and drive improvements. To their credit, every club has engaged with the PFA's feedback process and received the results in this spirit.

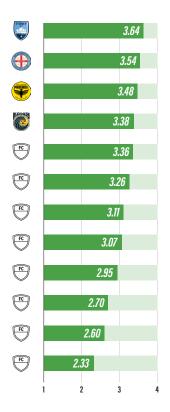
The near-perfect scores for some clubs in the Facilities Index indicates that nearly every player was 'very satisfied' with nearly every aspect of their training venues. Despite the challenges facing the league, there is a quiet story of progress where unprecedented investment has been made into world class assets in Wellington, Casey, and across Sydney. This signals long-term commitment to the league's development and provides a standard of environment which Australian football has rarely witnessed outside of the Australian Institute of Sport.



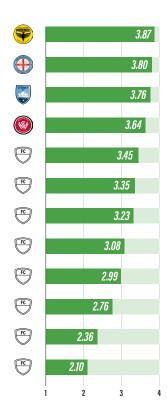
Index methodology

At least half of every ALM squad answered the survey, providing a sufficient sample for robust club-by-club comparison. Each Index has a 1-4 scale where 1 would be total dissatisfaction from every player in every aspect, and 4 would be universal satisfaction. 2.5 is the midpoint. N/A responses are excluded.

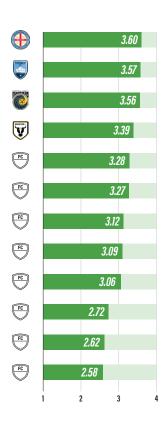
Club Performance Index



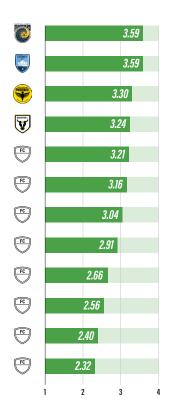
Club Facilities Index



Club Operations Index



Club Culture Index



VIEWPOINT





Wellington Phoenix General Manager

NZCIS is a world-class high-performance facility which allows our teams to assemble, train, and recover in new ways. We believe that there are performance advantages for our teams: to have both indoor and outdoor fields, gym, recovery pools, medical facilities, team rooms and dining areas in such a condensed environment allows teams to win the transitions between different aspects of the week, whether it's team meetings, training or recovery. Precious time is gained and that can be the one percent that makes the difference on game day.

We have used visuals of the unit as part of the club's proposition to new players and of course existing players find it tempting to re-sign with us compared to other training facilities they would otherwise endure. Feedback from international players – some of them have played at the very highest level in leagues overseas – is that our training facility easily surpasses club facilities and most international team training facilities as well.

We also are confident that the facilities we offer enable a significantly reduced return to play timeframe given the access to the technology available.

The impact of a facility such as NZCIS cannot be underestimated. It has elevated levels of professionalism across the club – both on and off the field. No doubt having access to resources that enable world class performance and monitoring, the mental boost from training and working in a true high-performance environment along with athletes of similar persuasion has been immense. Cross code collaboration has enabled the sharing of ideas and best practice which has further enabled team performance.

PITCH AND ATMOSPHERE RATINGS

INSIGHT

Sky Stadium rated as ALM's best playing surface for 2023-24

Wellington's Sky Stadium was given perfect marks for its pitch quality throughout the season and also averaged four stars for match atmosphere.

A-Leagues players rate the quality of the pitch and atmosphere on a scale of 1-5 after every match, alongside other match factors such as extreme weather and the refereeing.

In an article on the PFA's website, Sky Stadium marketing manager Alex Bargh said: "The Sky Stadium turf team put a lot of pride into ensuring the pitch is to the highest standard ahead of every A-League match. It's fantastic to hear that the players have voted our pitch the top in the league."

Adelaide's Coopers Stadium, which took out top honours among A-League Women players, was very highly rated among ALM players with an average of 4.5 for pitch quality and 4.3 for atmosphere.

AAMI Park received pitch ratings between 3.5 and 4.1 across its three host teams, while Victory home matches received an average of 4.4 for atmosphere.

Newcastle's McDonald Jones Stadium and Brisbane's Suncorp Stadium had the worst pitch scores, averaging just 2.1. Both stadiums had challenges surrounding other events such as concerts and dirt bikes impacting their surfaces, while Brisbane also suffered from heavy rains.

But a PFA analysis early in the season found that other venues had managed to recover from concerts in less time than Suncorp had needed, and that its pitch had degraded before the extreme weather set in.

Players should not be subject to substandard and potentially dangerous conditions when clubs and venues have had 20 years to get it right.

Pitch ratings

Stadium	Home Club	Pitch Quality	Atmosphere
AAMI Park	(+)	****	****
AAMI Park	۲	****	****
AAMI Park	W	****	****
Allianz Stadium		****	****
Ballymore Stadium	\$	****	****
Campbelltown Sports Stadium	V	****	****
CommBank Stadium	V	****	****
CommBank Stadium		****	****
Coopers Stadium	interest	****	*****
Eden Park		****	****
Go Media Stadium		****	****
HBF Park	Ŵ	****	****
Industree Group Stadium		****	****
Mars Stadium	W	****	****
McDonald Jones Stadium	.	****	****
North Hobart Oval	Ŵ	****	****
Regional Football Facility Tarneit	Ŵ	****	****
Sky Stadium	Ŧ	****	****
Suncorp Stadium	\$	****	****

8 <u>https://pfa.net.au/news/sky-stadium-and-coopers-stadium-voted-a-league-men-stadiums-of-the-season/</u>

9 https://pfa.net.au/news/the-pfa-post-suncorp-andmcdonald-jones-pitches-highlight-challenges-nearand-far/

COURAGE WORLD CLASS INTELLIGENCE TRUST RESPECT



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