

# READY FOR TAKEOFF

THE PLAYERS' VISION  
FOR THE A-LEAGUE WOMEN

2025





# SUPPORTING THE PLAYERS BUILDING THE GAME



## Professional Footballers Australia

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In the spirit of reconciliation, Professional Footballers Australia acknowledges the Traditional Custodians of Country throughout Australia.

We also acknowledge and pay our respects to the Traditional Owners and Elders past, present, and emerging throughout Australia, and recognise their continuing connection to land, waters, laws, and culture. They hold the memories, traditions, cultures, and hopes of Aboriginal and Torres Strait Islander peoples of Australia.



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## FROM THE PFA

# EXECUTIVE COMMITTEE

For thirty years, generations of Australian footballers have pursued the realisation of the game's enormous potential through our union – the PFA.

Those that came before us recognised that the wellbeing of the game was a precondition to the wellbeing of the players. In doing so, they resolved to shape the future of the game.

The pages that follow aim to build on what has come before, not start over. It attempts to honour the longstanding contributions made by fans, A-Leagues clubs, coaches, sponsors, Member Federations, the Australian Professional Leagues (APL) and Football Australia (FA) by seizing the opportunity presented to us and accelerating women's football towards a new future.

At the heart of the arguments put forward in *Ready for Takeoff* is the belief that we cannot market the A-League Women (ALW) as something worthy of fan interest, whilst investing at a level which signals to fans that it is not worth engaging with. We need look no further than the Matildas for proof of this.

This document represents the most comprehensive analysis of the women's game undertaken in Australia, as this is what was required to ensure the players could develop a Vision for the future.

This Vision does not span every aspect of the league's operations. Instead, it focuses on the fundamental elements that will have the greatest bearing on the league's trajectory:

- ▶ fit for purpose governance;
- ▶ effective fan engagement;
- ▶ a reformed football economy; and
- ▶ suitable matchday infrastructure.

If its recommendations are implemented, the game, and our country, will be transformed and the generational moment for progress before us will be seized.

As players we know this Vision cannot be brought to life alone. It requires the support of A-Leagues clubs, the APL, FA, and, most importantly, the fans. *Ready for Takeoff* is our invitation to collectively build a new reality for the ALW: one defined by courage, vision, sustainability, and excellence.

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CHIEF EXECUTIVE



## THE PLAYERS' VISION

# READY FOR TAKEOFF

In 2015, the Matildas took historic strike action to demand that they be paid a basic minimum wage. Players told stories of cleaning toilets and lining up for unemployment benefits in between representing their country. Football Federation Australia (FFA) saw this request as a cost, not an investment, and argued it could not be afforded. The players stood firm and within a decade, the Matildas would be generating tens of millions of dollars for the federation each year. In hindsight, professionalising the Matildas was an opportunity the game could not afford to miss.

The ALW now stands at a similar crossroads. The difference is that in 2015, even the most optimistic supporters of women's football might not have predicted just how large the return on investment would be. In 2025, we can point to clear evidence in the Matildas, women's football overseas, and other women's sports in Australia to demonstrate the immense potential of the ALW. Where women athletes have been treated as elite professionals and given a platform to shine, exponential growth in support has followed. The exclusive market research supporting this Vision suggests the ALW would be no different.

Our clubs and league have been slow to recognise this opportunity. It is true that the ALW has made progress since 2017 when the first W-League Collective Bargaining Agreement (CBA) was signed; minimum conditions and the length and size of the competition have improved. Clubs have increased their investment. But it is also true that this progress has been drastically outpaced by the rest of women's football and by other domestic women's sports. The result is that the ALW has fallen backwards in relative terms. Where it once housed world class players – both

Australian and foreign – it is now losing talent at an alarming rate. Where it once offered one of the best minimum salaries among major Australian women's leagues, it now has the lowest by far.

Players are voting with their feet, and so are fans. While we have hesitated, expectations for women's sports have moved on. It is no longer good enough to simply have a women's team; it must be valued as much as women and girls would expect to be valued in any other realm. Leagues and teams which do this are winning the future. Through its semi-professional standards and subpar presentation, the ALW signals to prospective fans that it and they are an afterthought. This word came up constantly during the fan focus groups that formed part of this project. Progress is itself the product; the league will not win over a new women's football audience with slogans or marketing, but by embodying the advancement of women athletes.

At the heart of this Vision is a business case that explains how making the league fully professional is an investment that will pay for itself in short time. It is vexing to see other Australian women's sports racing ahead when football has the advantage of

unique revenue streams. Although it has presented challenges for talent retention, the global growth of women's football means that transfer fees, prize money, and FIFA World Cup Club Benefits present lucrative opportunities for our clubs – but only if we invest in our talent. When these streams are added to the booms in fan interest and commercial support that tend to follow professionalisation, the step up to full-time becomes an economic no-brainer. Leading investors abroad have seen where the industry is headed and staked a claim for that future pie. It is not too late for the ALW to secure a significant share of the booming women's football economy, especially by becoming the dominant league in Asia.

This Vision's title, *Ready for Takeoff*, reflects that the ALW is demonstrably the biggest opportunity in Australian sport.

The league needs a focused and fit for purpose governance model to grab this opportunity. The current model has failed to even recognise it. The APL Board is primarily made up of male A-Leagues club directors. The league lacks staff dedicated to and expert in the growth of the women's game. Decision-makers have been



preoccupied with the men's teams that dominate the game's finances, especially while those finances have been in a crisis of their own making. In the process, they have repeated the mistake of FFA in 2015 by missing the potential phenomenon sitting under their nose.

Australian football's longstanding infrastructure problem must be solved for the league to provide true homes for clubs and fans. The medium is the message, and the ALW's story is being told through venues that are either too small, too big, too old, or not well located. If the industry's approach to securing appropriate-sized, modern rectangular stadia has not worked, we must rethink the approach. The silver lining of our belated progress is that we have the opportunity to ensure new homes for our clubs cater for the unique needs of the growing and distinct women's football audience.

In 2002, the PFA released *For the Fans*, an evidence-based blueprint for a new professional men's league that helped lay the foundations for the A-League Men (ALM). Once again, the players have deemed it necessary to make an extraordinary intervention in the game's trajectory. Through 18 months of intensive research, the PFA asked of both the ALW and the ALM: how big can these leagues be, and what do they need to get there? The research identified four key areas for reform common across both leagues (although the specifics differ for each).

These four pillars are outlined in the paragraphs above: fan engagement, football economy, league governance, and matchday infrastructure.

The recommended reforms are bold, with an immediate step up to full-time professionalism the cornerstone of the ALW Vision. When the Women's Super League (WSL) made that leap for the 2018-19 season, some clubs failed to meet the new criteria and were replaced by others with more resources and ambition. The ALW too may need to work backwards from the elevated standards required to kickstart growth, rather than forwards from what the status quo says it can afford.

Just like FA looking back at the Matildas' journey since 2015, leagues like the WSL must be grateful to the true believers who took a risk to launch their virtuous cycles of growth. In 2035, the inheritors of a thriving, world class ALW will thank the current generation for ensuring the league does not let this moment slip.







# RECOMMENDATIONS

# READY FOR TAKEOFF

## PILLAR 1 FIT FOR PURPOSE GOVERNANCE



- 1.1** The A-Leagues are governed by an independent commission with proper gender representation and the requisite skills and experience to steer thriving competitions
- 1.2** The independent commission and APL management are qualified and resourced to pursue the distinct opportunities of the ALW
- 1.3** ALW composition is determined by clubs meeting minimum criteria to ensure each contributes to the league's objectives, including:
  - a demonstrable market that can support a thriving professional team
  - quality ownership with financial resources and sporting and business acumen
  - ability to meet the minimum standards of a high-performance workplace

## PILLAR 3 A REFORMED FOOTBALL ECONOMY



- 3.1** The ALW becomes full-time professional from the 2026-27 season
- 3.2** The player payments model targets the unique and growing women's football revenue streams of matchday, membership, commercial, transfer fees, prize money, and FIFA World Cup Club Benefits
- 3.3** The return of the 'Golden Generation' Matildas to the ALW is a strategic priority
- 3.4** The ALW economy is fully integrated and embeds revenue sharing to establish a cooperative culture between clubs

## PILLAR 2 EFFECTIVE FAN ENGAGEMENT



- 2.1** A fully professional ALW to be relaunched following the 2026 AFC Women's Asian Cup, demonstrating to fans that it is an elite product which values women
- 2.2** A player-centric fan engagement model, enabled through a focus on off-field storytelling
- 2.3** A unique brand and identity for the ALW, with a strong focus on social impact, inclusion, progress, collectivism, and the celebration of women
- 2.4** The APL to establish and maintain strong central quality control over clubs' fan engagement strategies
- 2.5** Formalised collaboration between the APL and FA on fan engagement to leverage the popularity of the Matildas, including reciprocal promotion obligations
- 2.6** An amplified broadcast product enabled by more cameras, better shoulder content and analysis, multiple on-site commentators, and which captures in-stadium support and atmosphere
- 2.7** The ALW matchday presentation and experience includes family-friendly entertainment and activities, highlights player stories, and encourages positive social interactions between fans
- 2.8** The APL, in cooperation with FA, Member Federations and the PFA, to create an industry-wide game development program to establish deep bonds between grassroots players and ALW clubs and players

## PILLAR 4 SUITABLE MATCHDAY INFRASTRUCTURE



- 4.1** All ALW clubs secure modern, purpose-built and well located boutique home venues that have the capacity to cater to the distinct women's football audience and accommodate the growth trajectory of fans
- 4.2** Matchday facilities meet minimum standards that are appropriate for women players and summer scheduling
- 4.3** Stadium amenities, including food and beverage, reflect that of an elite national competition
- 4.4** The establishment of a national football infrastructure body that includes all stakeholders, to streamline football's approach to government-supported infrastructure development



# A-LEAGUE WOMEN STATE OF PLAY

## CURRENT CHALLENGES



### CONVERSION SHORTCOMINGS

- ▶ Only 15% of ALW fanatics\* attended a match in 2023-24.
- ▶ Crowds declined in 2024-25 despite a growing base of football fanatics.
- ▶ 47% of football fans watched the Matildas on TV in the past 12 months compared to 19% having watched an ALW match.
- ▶ The ALW failed to fully capitalise on the 'Matildas effect' and leverage the 2023 FIFA Women's World Cup.



### TALENT DRAIN

- ▶ The semi-professional environment strains players, leading the best to pursue better opportunities elsewhere and others to end their careers early.
- ▶ The ALW is now the least preferred league globally amongst its own players.
- ▶ The ALW minimum wage is the lowest of all major Australian sports.



### LACK OF VISIBILITY

- ▶ ALW fans report being unaware of where and when matches are played and broadcast.
- ▶ Due to the lack of promotion of the ALW, it has failed to build awareness of the players who are integral to fan engagement.



### DEFECTIVE LEAGUE GOVERNANCE MODEL

- ▶ The decision-making of the APL Board since separation has been poor, acting as a restraint on the growth of the ALW.
- ▶ Decision-makers do not appear to have a sufficient focus on the women's football opportunity and the ALW's unique needs.
- ▶ The APL Board falls well short of established best practice governance principles, including independence and the 40:40:20 gender commitment.

## FUTURE OPPORTUNITIES



### A BOOMING GLOBAL INDUSTRY

- ▶ Women's football leagues in Europe and North America, and women's international football, are growing at a remarkable rate in terms of fan support and commercial and broadcast revenues.
- ▶ The ALW can benefit from unique football revenue streams which are booming as a result, such as transfer revenue and FIFA World Cup Club Benefits.



### CLEAR BUSINESS CASE

- ▶ To deliver year-round, fully professional club environments, ALW clubs would each need to invest on average an additional \$600k on player salaries and \$1m overall each season.
- ▶ These costs could be offset by increased revenues almost immediately, with increased transfer revenue alone potentially exceeding \$10m by 2027. Other revenue streams such as AFC and FIFA prize money, FIFA World Cup Club Benefits, and commercial and fan revenues would also increase.
- ▶ Gemba's modelling found that if the league replicated the progress of the WSL and the Matildas, it could attract 4.03m attendees by 2029, up from 2.69m in 2024. This would be worth an additional \$300k annually in ticket revenue per club by 2029.



### APAC OPPORTUNITY

- ▶ The APAC market is lacking a clear Tier 1 women's league.
- ▶ Whichever league moves first to dominate Asia will entrench football revenue streams.



### INTEGRATION WITH THE MATILDAS

- ▶ 66% of ALW fans followed the Matildas before they followed the league.
- ▶ Matildas matches were amongst the top three most watched sporting events in 2023-24 with support having rapidly grown since 2022.
- ▶ Opportunity to repatriate leading Matildas who are approaching the latter stages of their careers.

\*See Methodology for definitions

## THE STORY OF

# PLAYER DRIVEN PROGRESS

2015



### Matildas Strike

Following a quarter-final appearance at the 2015 FIFA Women's World Cup, the Matildas refused to participate in a tour of the United States after a breakdown in negotiations with FFA over a new CBA. An agreement was eventually reached after securing significant improvements to pay and conditions.

2017



### Grassroots to Greatness

The PFA released its Grassroots to Greatness Roadmap, which detailed a vision for Australia to be champions of the 2020 Olympics or the 2023 FIFA Women's World Cup through an urgent boost to professionalisation.

### First W-League CBA

The PFA and FFA agreed the first W-League CBA, which established a minimum wage, salary floor and minimum workplace standards for the first time in the competition's history.

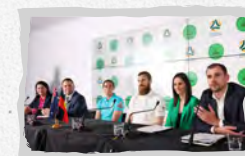
2020



### The Next Step

The PFA released The Next Step whitepaper, outlining three key models for the W-League to consider. It provided a vision for the Australian game's optimal structure, positioned within the global context.

2023



### New National Teams CBA

The 2023-2027 National Teams CBA entrenched gender equal pay and conditions and delivered enhanced player welfare and development.

2016

### W-League Working Conditions Report

In 2016, the PFA conducted the first systemic review into the careers being offered to our elite players in what was then called the W-League. The report revealed the amateurish environment where the vast majority earned less than \$5,000 per season.



2019

### National Team Gender Equality CBA

The landmark 2019-2023 National Teams CBA achieved gender equality between the Matildas and the Socceroos. Under the deal, both teams were afforded identical pay and performance standards.



### Our Goal is Now: FIFA Women's World Cup Equal Prize Money Campaign

In the lead up to the 2019 FIFA Women's World Cup, the PFA launched Our Goal is Now, a campaign driven by the Matildas players designed to highlight the gap between prize money for the men's and women's FIFA World Cups.

2021

### Joint A-League Women and Men CBA

The first joint CBA increased ALW salaries and embedded gender equality across high-performance areas, ensuring ALW players had access to the same resources and support as ALM players.





# FIT FOR PURPOSE GOVERNANCE

10





# RECOMMENDATIONS

**1.1**

THE A-LEAGUES ARE GOVERNED BY AN INDEPENDENT COMMISSION WITH PROPER GENDER REPRESENTATION AND THE REQUISITE SKILLS AND EXPERIENCE TO STEER THRIVING COMPETITIONS

**1.2**

THE INDEPENDENT COMMISSION AND APL MANAGEMENT ARE QUALIFIED AND RESOURCED TO PURSUE THE DISTINCT OPPORTUNITIES OF THE ALW

**1.3**

ALW COMPOSITION IS DETERMINED BY CLUBS MEETING MINIMUM CRITERIA TO ENSURE EACH CONTRIBUTES TO THE LEAGUE'S OBJECTIVES, INCLUDING:

- A DEMONSTRABLE MARKET THAT CAN SUPPORT A THRIVING PROFESSIONAL TEAM
- QUALITY OWNERSHIP WITH FINANCIAL RESOURCES AND SPORTING AND BUSINESS ACUMEN
- ABILITY TO MEET THE MINIMUM STANDARDS OF A HIGH-PERFORMANCE WORKPLACE

**1.4**

FA'S REGULATORY AND OVERSIGHT ROLE IS CLEARLY DEFINED, TRANSPARENT, AND FIT FOR PURPOSE

**1.5**

A COMPREHENSIVELY AND COLLECTIVELY AGREED CLUB LICENSING PROGRAM IS DEVELOPED BETWEEN FA, THE APL, AND THE PFA TO ENSURE TRANSPARENCY, CONSISTENT IMPROVEMENT, GOOD GOVERNANCE, AND STAFF DEVELOPMENT



# CURRENT CONTEXT

The ALW and the ALM have suffered from the suboptimal governance model the APL adopted when it separated from FA. In addition to the aspects of the model that have failed both leagues, the ALW has been specifically impacted by a lack of gender representation on the APL Board, and an apparent lack of strategic focus on the issues covered throughout this document.

Countless reviews and reports, going back decades, have recommended Australia's professional men's league should be overseen by an independent board of directors, akin to the leading sports leagues in Australia. This concept was again central to the conversation during the process of the A-Leagues' separation from FA in 2020. While the discussion has historically centred on the men's league, the same principle applies to the ALW.

## *For the Fans* PFA (2002)

“The APL will be governed by a highly able and respected group of independent commissioners who will constitute the APL Board of Directors and be known as the APL Commission. Like the most successful professional team sports in the United States and the Australian Football League, the APL Commission will be vested with the power to act in the best interests of the game without regard to club politics.”



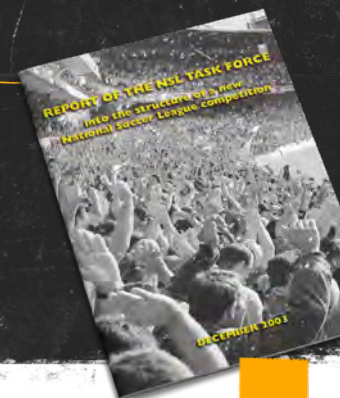
## *Crawford Report* Commissioned by government (2003)

“Soccer Australia establish the NSL as a separate entity operating under a licence from Soccer Australia with a board comprised of independent directors elected by participating NSL clubs and with separate (to Soccer Australia) funding.”



## *NSL Taskforce Report* Commissioned by ASA (2003)

“Its structure ensures that the League will be free of the political and subjective influences of the past.”



## THE A-LEAGUES' SEPARATION FROM FOOTBALL AUSTRALIA

The transfer of control of the A-Leagues from football's governing body to the clubs' private vehicle, the APL, provided an opportunity to redesign the competitions' governance structure. The separation process was instigated by FIFA's intervention in Australian football in 2018. FIFA established a Congress Review Working Group (CRWG) to consider reforms of FFA's Congress, which was not sufficiently representative.

Among CRWG's outputs was to recommend the establishment of a New Leagues Working Group (NLWG) to determine the futures of what were at the time called the A-League, the W-League, and the National Youth League. The NLWG featured members from A-League clubs, FFA, FFA's Member Federations, the PFA, and the Women's Football Council.

In parallel to these events, the professional clubs had formed a lobbying group called Australian Professional Football Clubs Association (APFCA) to agitate for more control over the leagues. APFCA submitted a *Blueprint for an Independent Future* to the NLWG, released in February 2019, outlining its vision for an independent league.<sup>1</sup>

APFCA's *Blueprint* supported a new league being overseen by an independent board, citing a desire for consistency with the Crawford Report and *For the Fans* in this regard. It further made the case for separation from FFA so as to reduce conflicts of interest and mirror best practice adopted by other Australian sports: principles that would have been achieved by an independent board but not by the model of governance agreed by the APL and FA.

“

The proposed transition to an independent League is consistent with the recommendations of the 2003 Report of the Independent Soccer Review Committee (AKA 'the Crawford Report'), which called for the establishment of an independent premier domestic league, operating under a licence from the sport's national governing body, overseen by an independent board elected by participating clubs, and sustained by its own sources of funding. It is also broadly consistent with the model for an Australian Premier League that was proposed by Professional Footballers Australia (PFA) in December 2002.”

APFCA'S BLUEPRINT FOR AN INDEPENDENT FUTURE (2019)



<sup>1</sup> <https://www.scribd.com/document/405995837/APFCA-Blueprint-For-An-Independent-League-1-pdf>



The NLWG was given six short weeks to deliberate. In March 2019, it released its *Recommendations Report*.<sup>2</sup> The report noted that the clubs articulated a different view to the PFA regarding the structure of a new league's board.



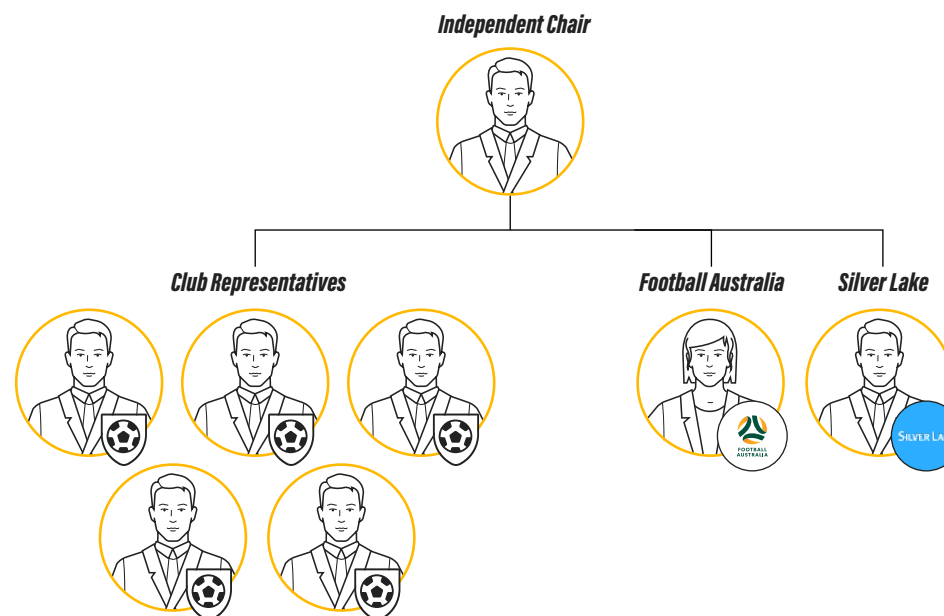
It is important to note that the PFA strongly advocated to the NLWG that the Board of the Professional Leagues entity be an independent commission with an independent Board of directors, rather than have representatives appointed by the Clubs. The Clubs view is that they are all personally invested in currently loss-making club licences and that their cumulative losses in some cases extends to many tens of millions of dollars per club. The Clubs feel strongly that the right to appoint directors should absolutely rest with the owners of those clubs.”

NLWG RECOMMENDATIONS REPORT (2019)

One of the NLWG's 15 recommendations was that “the State Body Members, each Women's Football Council Member and the Players' Member (the PFA) continue to be recognised as essential and interested stakeholders and continue to be consulted in relation to the conduct, organisation and commercialisation of any New Professional Leagues Model”.

Instead, FA and APFCA sidelined the other members and worked through separation bilaterally, finally announcing the deal on December 30, 2020.<sup>3</sup> The announcement explained that the board of the new leagues entity would be made up of five club-appointed directors, three independent directors, and one FA representative. An independent Chair would be elected by the clubs and ratified by FA. FA also outlined that it would retain regulatory involvement including club licensing, and other ‘good of the Australian game’ rights. But neither a separation agreement detailing these elements, nor a constitution explaining the entity's mission and rules, have been made public.

### Current (September 2025) APL board composition



The clubs may claim that ‘independent’ only ever meant ‘independent of FA’, as opposed to the Crawford/PFA meaning of a truly independent board or commission. This interpretation would make the APL's model inconsistent with the recommendations of Crawford and *For the Fans*, making APFCA's *Blueprint* errant at best and disingenuous at worst.

Several other APFCA *Blueprint* recommendations were discarded in the deal with FA, such as the development with the PFA of an expansion roadmap and a share of broadcast revenue going to Member Federations. A cynical reading might conclude that the clubs never believed in these commitments, but simply said what they thought other NLWG members wanted to hear when control was in the balance.

But perhaps the biggest broken promise of APFCA's *Blueprint* has been the one it made to itself: “Greater Sustainability” including “giving participating clubs a greater chance of breaking even or making a profit”. This has been undermined by the performance of a suboptimal governance model.

The PFA has always supported the principle of the leagues being owned and run independently of the governing body, but only on the condition that guardrails are in place to protect the game's interests.

<sup>2</sup> [https://www.footballaustralia.com.au/sites/ffa/files/2019-04/NLWG%20Recommendations%20Report\\_0.pdf](https://www.footballaustralia.com.au/sites/ffa/files/2019-04/NLWG%20Recommendations%20Report_0.pdf)

<sup>3</sup> <https://www.footballaustralia.com.au/news/australian-professional-leagues-be-unbundled-football-australia>

## THE APL'S PERFORMANCE SINCE SEPARATION

The APL's tenure so far could be described in two phases: an initial, failed "digital first" experiment, and a pivot to austerity in 2024. Neither phase has centred on the fan experience or the quality of the core product.

The APL's performance is best summarised by a series of key decisions:

### **Silver Lake investment**

In 2021, private equity firm Silver Lake took a one third stake in the APL by investing approximately \$140 million. Silver Lake received a place on the APL Board. The terms of the deal have been kept private, so it is not clear what kind of payback, if any, the game owes. By 2024, the APL had exhausted these funds.

### **KEEPUP**

One of the APL's key focuses under its initial "digital first" strategy was a direct-to-consumer digital platform. It launched KEEPUP in 2021 and invested significant funds into the project. The concept may have had merit, but KEEPUP was shuttered in 2024 amid massive cutbacks at the APL.

### **Broadcast deal**

In 2021, the APL established a new broadcast partnership with 10/Paramount. The deal included targets for A-Leagues-driven sign-ups to the newly launched Paramount+ streaming service, with strong penalties to the APL if these were not achieved. Sign-ups fell well short of the targets, leaving the APL with diminished broadcast revenue.

### **Club distributions**

Despite the fall in broadcast revenue by 2022, the APL maintained club distributions at similar levels for another two seasons. In effect, the APL – overseen by club directors – exhausted part of the one-off Silver Lake capital injection to continue funding clubs to a degree not supported by the leagues' operating revenues.

### **ALM Grand Final hosting rights**

In late 2022, the APL sold the ALM Grand Final hosting rights to the NSW government, breaking with the tradition of the highest qualifying team hosting the match. It took the decision with minimal consultation. The decision was unpopular, and fans were further turned off by the APL's attempt to spin it as a positive rather than own the financial justification.

### **Unite Round**

As a compromise with the NSW government, the APL replaced the unpopular Grand Final decision with Unite Round, a full weekend of A-Leagues football in Sydney. Unlike the AFL and NRL's equivalent schemes, which see their larger sports 'take over' smaller cities, Unite Round failed to achieve much cut through in Sydney and was discontinued after 2025.

“

There's a series of business decisions the APL have taken, rightly or wrongly, that have not put them in good stead with the footballing community.”

ALM FOCUS GROUP PARTICIPANT





These decisions reflect the inherent problems and conflicts of the governance model that the APL adopted with FA's consent. Club distributions should have been reduced earlier and more gradually, but that would have entailed club directors – doubling as APL Board members – effectively defunding their own businesses. The Grand Final decision benefitted some clubs and disadvantaged others, with no voice of reason questioning the broader repercussions. The overall strategy, and the subsequent financial performance, would have come under stricter scrutiny from an independent commission with a mandated mix of skills and expertise.

The financial challenges created by these decisions have contributed to the ALW's stagnation. This Vision defines the women's football opportunity as arguably the greatest investment opportunity in Australian sport. The APL raised enough capital to entrench the ALW as a world leader had it recognised this potential. But the clubs' capacity to take advantage has now been inhibited by poor decisions focused largely on the men's side.

The APL's club-governed model does not lend itself to league-think. Under FA's management, underperforming clubs were either shut down or put on notice to improve outcomes in order to have their licences renewed. "You can't expect to just squat on a licence in our competition," David Gallop said of Wellington Phoenix in 2015, when the club's average crowds were over 8,000.<sup>4</sup> The PFA maintains that the balance of power was tipped too far in FA's favour, but it was reasonable to expect that each club must justify its inclusion to the benefit of the whole. It is not clear how this dynamic is managed under the APL's model, where management is accountable to a Board that can feature the underperforming clubs themselves.

## FOOTBALL AUSTRALIA'S ROLE AS REGULATOR

According to the unbundling announcement in 2020, FA would have several functions pertaining to the regulation of the A-Leagues, including:

- ▶ On-and-off-field disciplinary and integrity matters
- ▶ The registration of Clubs, Players and Officials
- ▶ The transfer system
- ▶ The domestic match calendar
- ▶ A new club licensing framework for the Professional Leagues
- ▶ Access to the Professional Leagues (whether by expansion, contraction, or promotion/relegation), the AFC Champions League, FFA Cup and all other domestic and international competitions

In addition, "Football Australia will also retain 'good of the Australian game' rights in respect of the Professional Leagues, which apply to a variety of matters that are aimed at ensuring the ongoing growth of the Professional Leagues".

Since separation, FA has had one representative on the APL Board. The specifics of FA's oversight would be contained in documents such as the unbundling agreement and the APL's Constitution. These are not publicly available and have not been viewed by the PFA despite numerous requests.

FA has entrusted itself as the only guardrail between the self-interest of A-Leagues clubs and the good of the Australian game. We must conclude that either FA does not have sufficient authority to have prevented the decisions taken, or lacks the will to do so.



<sup>4</sup><https://www.nine.com.au/sport/football/gallop-slams-phoenixs-offfield-failure-20151028-p5fran.html>

## INSUFFICIENT FOCUS ON THE ALW

The problems described so far in this pillar are universal across both the men's and women's leagues. For the ALW, they are compounded by an apparent lack of strategic focus on the unique opportunities and challenges in women's football.

This is not to deny that there are people at the APL and the clubs who are working hard and have the best intentions for the women's league. Clubs have invested in expanding the size and length of the ALW. The point is that the clubs do their investment a disservice by not calibrating the league's governance and management to fully benefit from its immense potential.

There are many ways to measure this lack of focus. At the source, most of the industry's leadership positions are filled by men, and the APL and clubs lack staff dedicated to the ALW. In terms of outcomes, there is little evidence that the industry recognises the economic opportunity outlined in this document, and fans tell us the ALW feels like an "afterthought".

The ALM makes up the majority of the A-Leagues economy as it is today, but not necessarily of its potential size tomorrow. But because the leagues are experiencing financial challenges, most decision-makers appear to be preoccupied by the dominant men's side. This is perhaps understandable, but speaks to the need for the ALW to have its own strategy and sufficient resourcing to pursue it.

The WSL provides an example of what a dedicated focus on women's football can achieve. Until recently, the WSL was owned and operated by the English FA. In 2017, the FA launched its ambitious women's football strategy, *The Gameplan for Growth*, spearheaded by its head of women's football, Baroness Sue Campbell.<sup>5</sup> The following year's relaunch of the WSL as a fully professional league was led by Campbell and supported by the FA's director of women's professional game, Kelly Simmons. As of 2024-25, the top two divisions in England are overseen by an all-female leadership team at a new entity called WSL Football.



<sup>5</sup><https://www.thefa.com/news/2017/mar/13/fa-womens-football-strategy-gameplan-for-growth-double-participation-130317>



# DELIVERING FIT FOR PURPOSE GOVERNANCE

## APL BOARD OF DIRECTORS

The APL's governance model has stifled the ALW's development. The previous section outlines how it was flawed in theory and then in practice. The APL's club-majority Board does not reflect best practice in sports league governance, such as the independent commissions which oversee the AFL and NRL (and their women's leagues).

The APL Board should be replaced with an independent commission. The commission should reflect the 40:40:20 gender principle and be mandated to reflect the skills and experience required to steer thriving A-Leagues. The commission should be free of conflicts inherent in representatives of any one club, and govern in the best interests of the league overall and Australian football more broadly. The rules governing the commission should be transparent.

In recommending an independent commission for a new men's league, *For the Fans* was prescriptive to the point of specifying the number of commissioners and how they should be appointed. For the purposes of these new player Visions, the principles are more important than the details. The clubs and other stakeholders are entitled to help shape a new model, so long as it finally satisfies the needs for true independence, representation, acumen, and transparency.

## FOCUS ON THE ALW

An independent commission is essential for both the ALM and the ALW to thrive. For the ALW specifically, further changes must be considered to ensure that the unique opportunities and challenges of women's football are properly recognised.

This could take many forms. The commission should have proper gender representation and also mandate experience in women's football or sports leagues as one of its required skills. The APL's management structure could also be adjusted to ensure the ALW is adequately resourced to grow out of the ALM's shadow and fulfil its own great potential.

As the ALW further matures, consideration must ultimately be given as to whether it is in the game's long-term interests for the ALW and the ALM to be owned and run by the same entity.



## LEAGUE COMPOSITION

The WSL's leap to professionalisation in 2018-19 is instructive for the ALW's ambition to do the same. The English FA determined new elevated criteria, including minimum investment, and invited clubs to apply for a place in the relaunched league. Some clubs fell away and others stepped up to meet the higher bar. Crucially, decision-makers worked backward from the standards required to kick off a virtuous growth cycle, rather than forward from what the status quo said it could afford. In hindsight, this approach has been proved correct.

The capacity and appetite to invest in women's football has differed across existing men's clubs in Europe. Women-owned new entrants such as the London City Lionesses are reshaping the landscape. In the US, NWSL clubs have a mix of ownership profiles, with some sharing owners with MLS clubs and others owned by separate women-led groups.

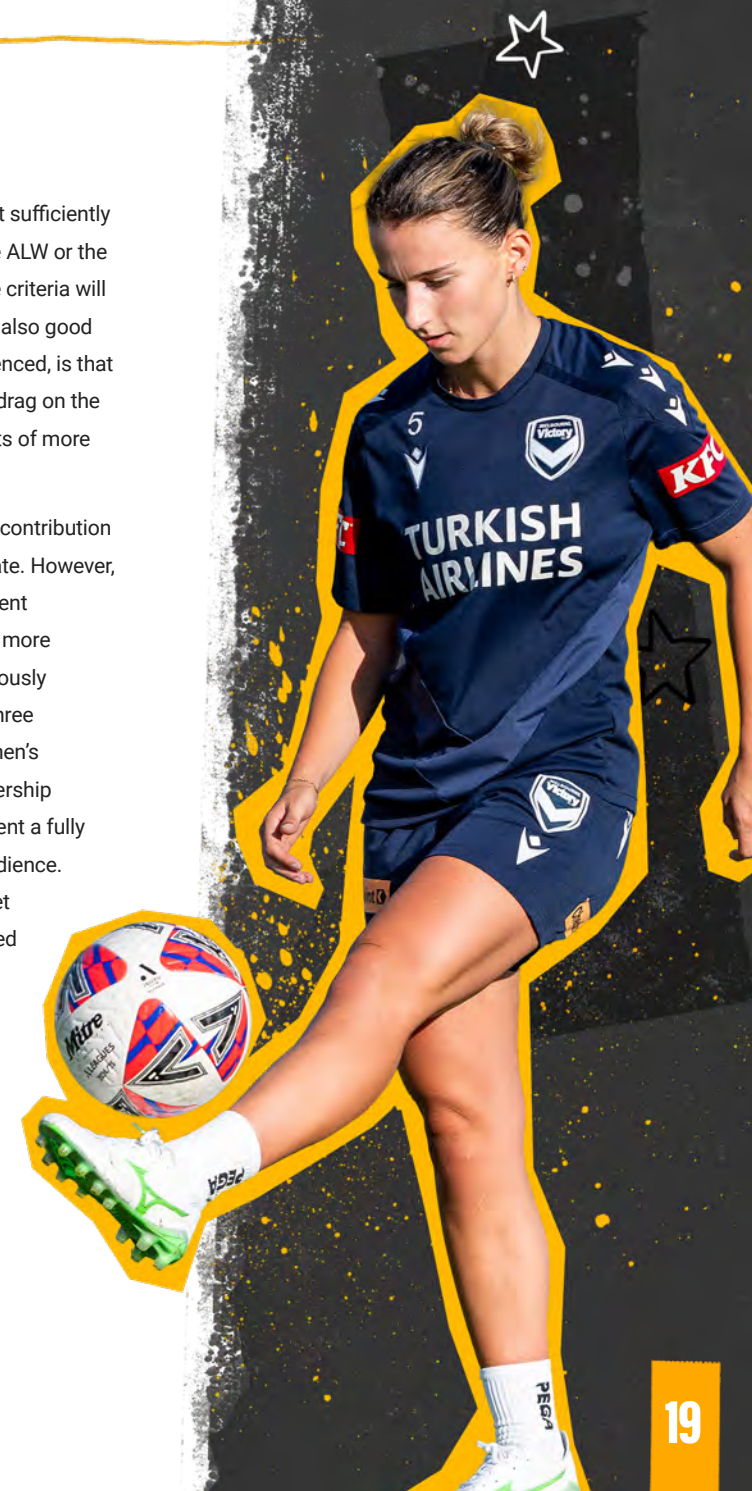
By contrast, the APL's approach is to mandate a dual-club model for the A-Leagues. This brings some benefits, particularly in helping the ALW mature to its current state through shared resourcing. But it begs the question as to whether it fit for purpose going forward. The model anchors the ALW to the clubs with the least capacity or appetite to seize the women's football opportunity, and it locks out a growing class of investors who might be solely interested in the women's game.

There is no magic number of clubs for either of our professional leagues. The PFA has three long-held criteria in determining who should participate:

- 1. Market:** There must be a demonstrable market that can support a thriving professional football team.
- 2. Ownership:** Quality ownership with the financial resources and sporting and business acumen must be the prerequisite to be entrusted with an ALW licence.
- 3. High performance workplace:** Clubs must be able to meet minimum workplace standards including appropriate training and matchday infrastructure.

The current governance model has not sufficiently focused on 'league-think' for either the ALW or the ALM. Ensuring every club meets these criteria will be good for the clubs themselves and also good for the whole. The alternative, as evidenced, is that underperforming clubs become a net drag on the system, compromising the investments of more capable clubs.

The players have deep respect for the contribution made by club owners to the ALW to date. However, the research underpinning this document demonstrates an opportunity perhaps more distinct from men's football than previously accepted. ALW clubs must meet the three prerequisites through this unique women's football lens, including having an ownership with the will and know-how to implement a fully professional ALW pitched at a new audience. If current dual-clubs are unable to meet the moment, the door should be opened for new entrants who can.





## CLUB LICENSING

A comprehensive and collectively agreed club licensing program should be developed between FA, the APL, and the PFA. It should be enforced and managed by FA. Its objective should be ensuring the constant improvement of the A-Leagues club environments. The program should ensure increased transparency regarding the financial health and ownership status of clubs and provide clarity regarding their strategic direction. To ensure the consistent elevation of standards across the A-Leagues and effective enforcement, the objectives of the club licensing program should be:

- 1. Transparency:** the financial health of each club should be publicly reported annually to improve transparency around club ownership and build trust with fans.
- 2. Consistent improvement:** an annual benchmarking process should be established to rank all clubs against others based on agreed performance metrics.
- 3. Good governance:** effective enforcement measures should be established to ensure compliance, support, and oversight of club governance.
- 4. Staff development:** the quality of our people will determine our success, so club licensing should support the ongoing development of club staff.



## FA REGULATORY AND OVERSIGHT FUNCTION

The A-Leagues are sanctioned monopolies as the top-tier leagues in the region. A balance must be struck between the clubs' right to control their own private investments, and the need for the leagues to complement Australia's broader football ecosystem.

FA has entrusted itself as the only guardrail between the self-interest of A-Leagues clubs and the good of the Australian game. FA has failed in this role.

English football has reckoned with many similar challenges that also eroded the confidence of fans, players, and stakeholders in the English FA's ability to regulate the Premier League and Football Leagues. In response, following a comprehensive fan-led review of football governance, the United Kingdom government established an independent regulator for English football (IREF).<sup>6</sup> Independent of the English FA, the Premier League, and the Football Leagues, the introduction of the IREF represents a seismic shift in British football.

Short of such a shift here, FA's role as regulator requires significant enhancement. The first step is transparency, starting with making public the secret unbundling agreement between the APL and FA. From there, stakeholders can actually review FA's performance compared to what is written down and work towards a fit for purpose model in the game's interests.

<sup>6</sup> [https://assets.publishing.service.gov.uk/media/63e4d010d3bf7f05b871200d/Football\\_Fan\\_led\\_Governance\\_Review\\_v8Web\\_Accessible.pdf](https://assets.publishing.service.gov.uk/media/63e4d010d3bf7f05b871200d/Football_Fan_led_Governance_Review_v8Web_Accessible.pdf)

# EFFECTIVE FAN ENGAGEMENT





# RECOMMENDATIONS

**2.1**

A FULLY PROFESSIONAL ALW TO BE RELAUNCHED FOLLOWING THE 2026 AFC WOMEN'S ASIAN CUP, DEMONSTRATING TO FANS THAT IT IS AN ELITE PRODUCT WHICH VALUES WOMEN

**2.2**

A PLAYER-CENTRIC FAN ENGAGEMENT MODEL, ENABLED THROUGH A FOCUS ON OFF-FIELD STORYTELLING

**2.3**

A UNIQUE BRAND AND IDENTITY FOR THE ALW, WITH A STRONG FOCUS ON SOCIAL IMPACT, INCLUSION, PROGRESS, COLLECTIVISM, AND THE CELEBRATION OF WOMEN

**2.4**

THE APL TO ESTABLISH AND MAINTAIN STRONG CENTRAL QUALITY CONTROL OVER CLUBS' FAN ENGAGEMENT STRATEGIES

**2.5**

FORMALISED COLLABORATION BETWEEN THE APL AND FA ON FAN ENGAGEMENT TO LEVERAGE THE POPULARITY OF THE MATILDAS, INCLUDING RECIPROCAL PROMOTION OBLIGATIONS

**2.5**

AN AMPLIFIED BROADCAST PRODUCT ENABLED BY MORE CAMERAS, BETTER SHOULDER CONTENT AND ANALYSIS, MULTIPLE ON-SITE COMMENTATORS, AND WHICH CAPTURES IN-STADIUM SUPPORT AND ATMOSPHERE

**2.7**

THE ALW MATCHDAY PRESENTATION AND EXPERIENCE INCLUDES FAMILY-FRIENDLY ENTERTAINMENT AND ACTIVITIES, HIGHLIGHTS PLAYER STORIES, AND ENCOURAGES POSITIVE SOCIAL INTERACTIONS BETWEEN FANS

**2.8**

THE APL, IN COOPERATION WITH FA, MEMBER FEDERATIONS AND THE PFA, TO CREATE AN INDUSTRY-WIDE GAME DEVELOPMENT PROGRAM TO ESTABLISH DEEP BONDS BETWEEN GRASSROOTS PLAYERS AND ALW CLUBS AND PLAYERS

# CURRENT CONTEXT

The ALW has attracted a loyal and dedicated fanbase. Since 2008, these fans have had to go the extra mile to support this league, forming their own community, travelling to far-flung venues, and seeking out rare coverage or filling the void with their own. They have evangelised about a league that has not always seemed to value itself as they do. They have celebrated as women's football has experienced the takeoff they believed it would. And they have waited patiently for the ALW to follow suit.

The PFA has conducted an unprecedented level of market research to understand what the league needs to do to have its own breakthrough. This includes fan focus groups conducted by the PFA, and market sizing and a mass fan survey conducted on our behalf by Gemba. The headline finding is that for a growing new audience, the progress of women's football is itself the major selling point. In other words, expectations have shifted. It is not enough to simply have a women's league. It can no longer rely on the die-hards looking past its rough edges. A new Matildas-activated audience will not be attracted by a league that compromises on the conditions and standards for women athletes.

Far beyond that core insight, the research provides a detailed blueprint for the league to develop a distinct brand and redefine its presentation. Case studies and fan feedback highlight the importance of placing the players at the centre of the engagement effort. There is strong evidence that if the ALW embodies a narrative of women's progress, there is a large latent supporter base ready to be engaged.

The importance of this pillar should be self-evident. Growing support is part of a virtuous cycle that includes greater commercial interest, more mainstream coverage, and a better product. This pillar is also critically interconnected with the other three; fully professional players will be enabled to invest time in fan engagement, appropriate home grounds will keep new fans coming back, and a focused governance structure will move the league from afterthought to the spotlight.





MARKET SIZING

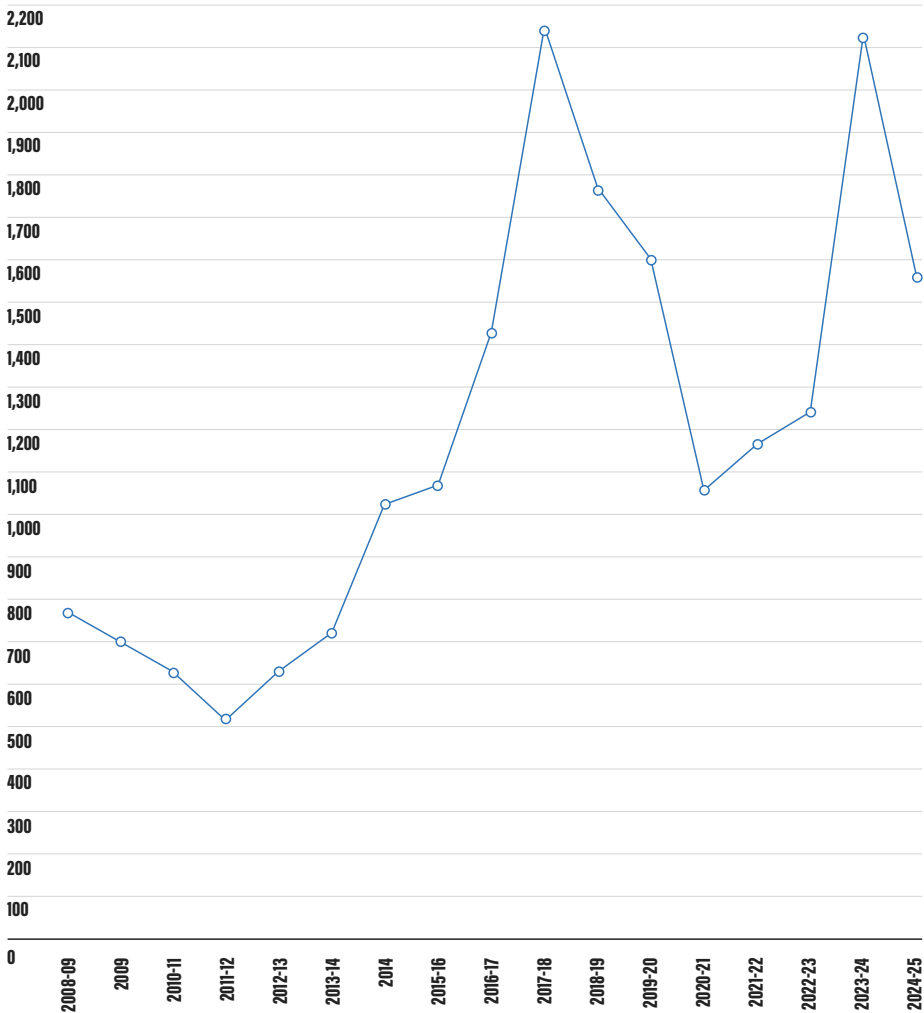
According to market research by Gemba, commissioned by the PFA in 2024, 12% of the Australian adult population are ALW ‘fanatics’ (for definitions, see Methodology). This equates to 2.7m people. In 2018, 15% of Australians were ALW fanatics, showing that some combination of factors has diminished underlying interest in the ALW even as the competition has expanded into new markets and extended the length of the season.

Gemba’s data is reflected in actual matchday attendances; average ALW crowds were at their highest to date in 2017-18. That season featured a combination of key factors: greater exposure through a record share of double-headers and expanded broadcast coverage, progress for players through the league’s first CBA, and the presence of 19 of the 23 Matildas who would go on to compete at the 2023 World Cup.

Average attendances nearly reached those levels again off the back of the home World Cup. The 2023-24 season was different to 2017-18 in several ways. There were more than twice as many regular season matches (132 cf. 54), meaning that the aggregate attendance in 2023-24 was more than double that in 2017-18 (279k cf. 115k). The 2023-24 season only featured 23% of matches as double-headers, half the share as in 2017-18 (46%). And most of the leading Matildas were playing their club football abroad by 2023-24. So, each season represented high points in different ways and for different reasons.

But the average attendance in 2024-25 was 1,559, down 26% year-on-year. Evidently, the spike in interest generated by the World Cup has not translated into sustained growth in underlying support, as Gemba’s data illustrated.

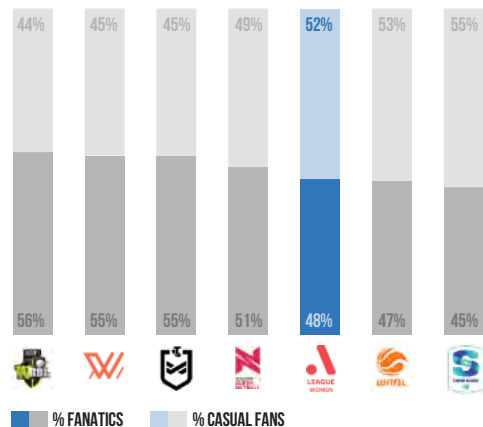
Average ALW attendances by season



## EFFECTIVE FAN ENGAGEMENT

Gemba's 'fanatics' make up 48% of all general fans of the ALW, which is less than the share of diehards among all fans of WBBL (56%), AFLW (55%), and NRLW (55%). This more casual profile is possibly a reflection that those fanatics who have dropped off since 2018 still retain a general interest, and could be won back.

### Ratio of fanatics to casual fans, women's sports leagues

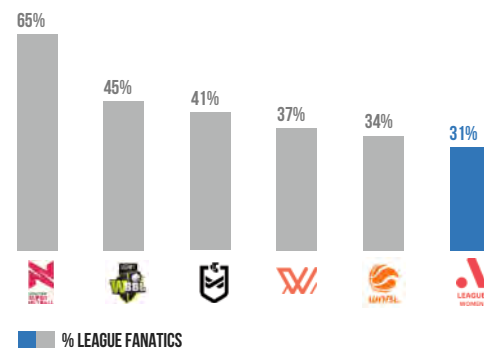


Only 15% of ALW fanatics attended a match in 2023-24, suggesting that even among those identifying as strong supporters, actual engagement is low.

In the meantime, interest in the Matildas has gone the other way, with 23% of Australians identifying as fanatics of that team, up from 15% in 2022. Among football fans, 47% had watched the Matildas on TV in the past 12 months, compared to 19% seeing the ALW. Among football fanatics in Australia, 31% are ALW fanatics. This is a lower 'conversion' rate than other sports and their

respective leagues, which makes sense because football's relative abundance of global content dilutes interest in any one property.

### Share of each sport's fanatics who are fanatics of their women's league



In 2023-24, the ALW became the most-attended domestic women's season in aggregate terms. This was eclipsed by Super Netball 2024, which had 331,841 regular season attendees at an average of just under 6,000 per game. Super Netball is more effective at getting its fanatics into stadiums. It has only slightly more support overall with 14% of Australians being fanatics, compared to 12% for ALW (this does not include New Zealand-based ALW fanatics). Super Netball welcomed an average of around 24,000 fans to each of its 14 rounds, compared to around 13,000 per week turning out to watch the ALW in 2023-24.

Taken together, the evidence suggests several clear, immediate opportunities for growing ALW support: getting more existing ALW fanatics to attend and watch matches, and channelling fans of the Matildas and football generally into the ALW.



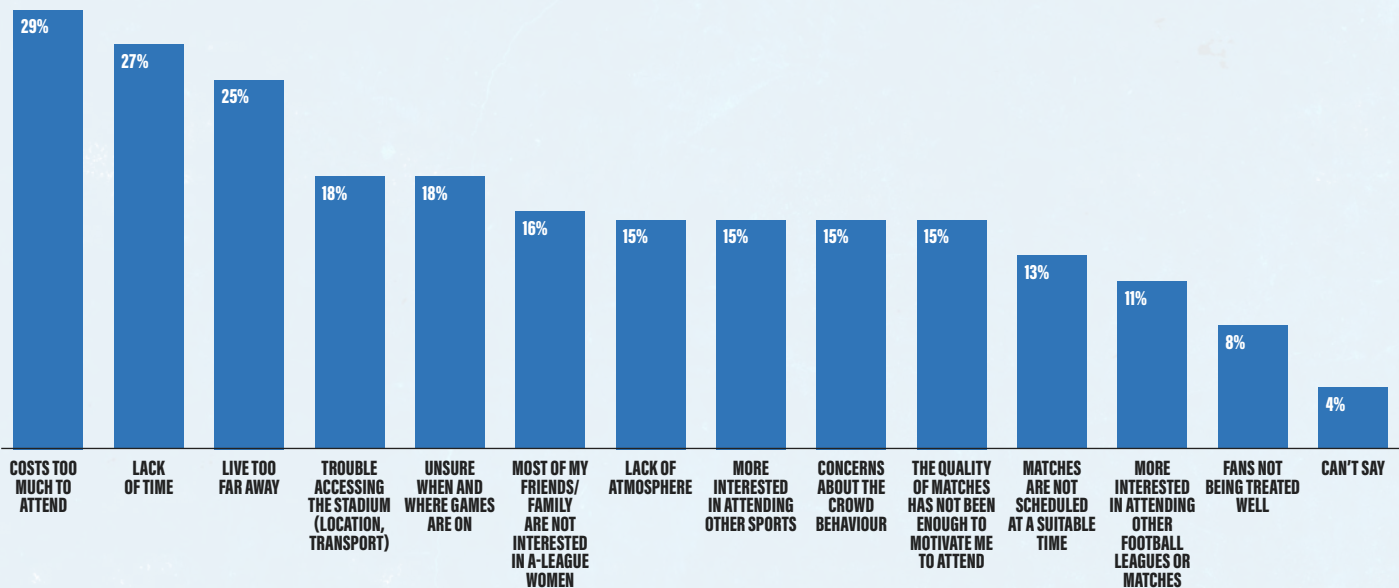


BARRIERS TO SUPPORT

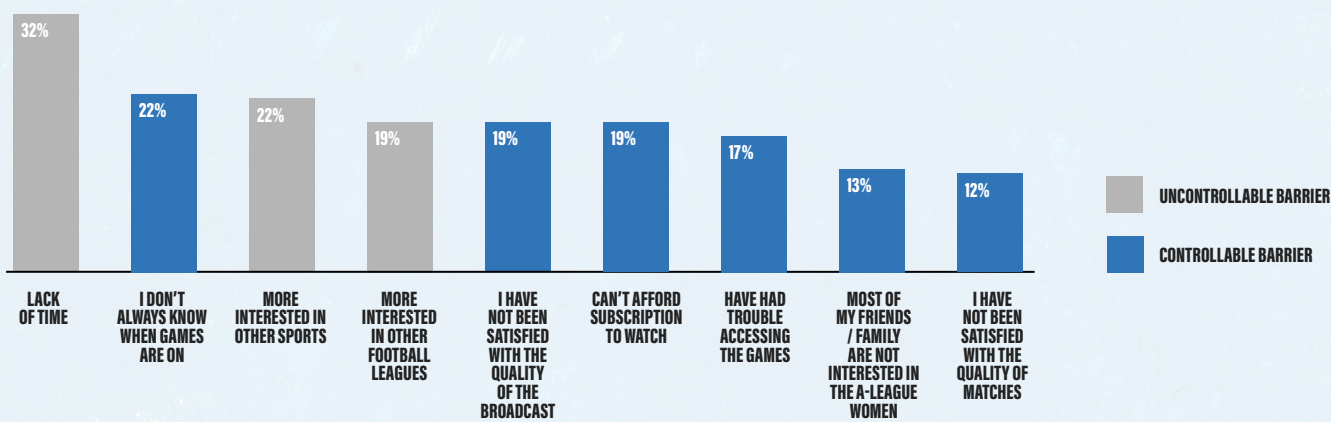
Gemba revealed that a lack of visibility was a primary barrier to both matchday attendance and broadcast. Among ALW fanatics, 18% cited not knowing when and where games are on as a barrier to attendance, and 22% cited this reason as a barrier to broadcast viewership, making this the highest ranked factor in the league's control. These findings were reinforced by the PFA's fan focus groups, with a lack of information and inconsistency of venues and timeslots making it difficult to engage habitually.



Barriers to attending the ALW among ALW fanatics



Barriers to viewing the ALW among ALW fanatics



Gemba's research and the focus groups both identified the league's part-time nature as a restraint on growth. Access to players was seen by fanatics as the most important reason in driving support to the ALW, but only 18% of current fans felt they had a strong connection with the players. Sports fandom is trending towards a player-centric rather than club- or league-centric model, but part-time ALW players do not yet embody the 'stories' of elite athletes that fans will connect with, and are not yet enabled to invest time in connecting with fans as part of a full-time role.

“

It's the personality of the players. You don't get to see that like you do with the Matildas. You can't relate to them on a deeper level. Obviously, if you go and follow their social media, but some of these people still work part-time jobs because they don't get much money.”

ALW FOCUS GROUP PARTICIPANT



**ALW fanatics' reasons to attract new support**

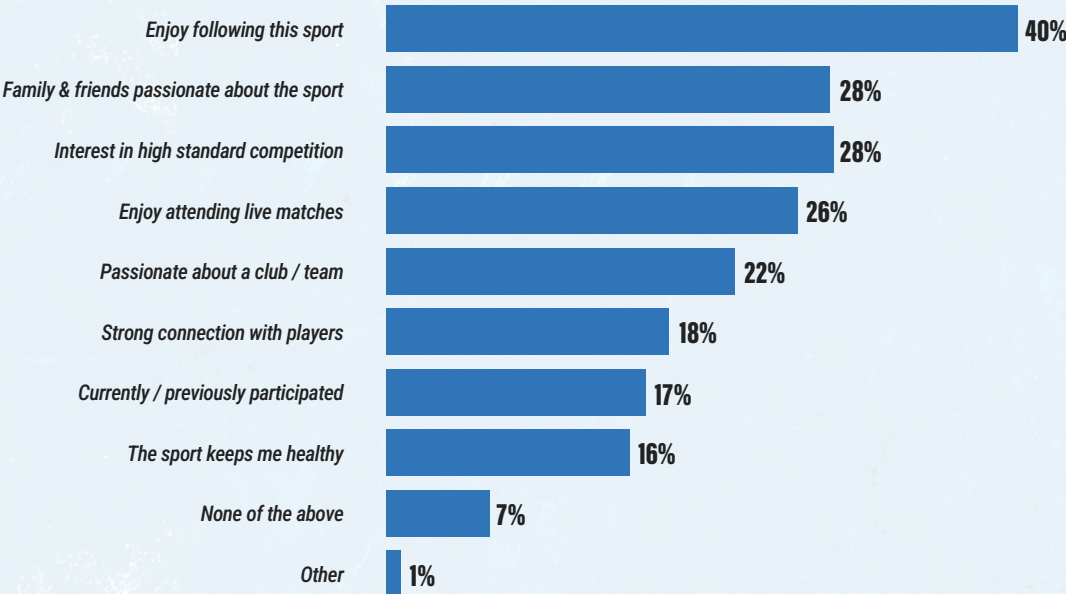
*Please rank the following factors in terms of their importance in attracting support*



Note: % reflects share of fanatics who put factor in their top two



**ALW fanatics' drivers to support**





## BROADCAST

Another barrier is that the current broadcast production does not present the league in the best light. Few cameras are used, and with these usually on the same side as the main grandstand, venues appear empty. One focus group participant noted that this plays into a narrative of a lack of interest in women's football, to which potential fans are sensitive. There is usually little to no pre-match, half-time, or post-match shoulder content, and usually just a solo commentator.

According to the APL, viewership on 10/Paramount has been climbing. Total minutes viewed increased by 63% from 2021-22 to 2022-23 and then by another 133% from 2022-23 to 2023-24<sup>7</sup>. Even controlling for the increased number of matches, this represents solid growth.

“

The TV coverage I found was variable. I watched the away games for Sydney FC, and it was really hard to watch the game. I just couldn't see the ball a lot of the time.”

ALW FOCUS GROUP PARTICIPANT

“

It would be really nice if the cameras were on the other side of the field showing the spectators rather than showing empty seats, because everyone goes, 'who wants to go see soccer'?"

ALW FOCUS GROUP PARTICIPANT



<sup>7</sup> <https://aleagues.com.au/news/australian-professional-leagues-annual-report-2022-2023/>

<sup>8</sup> <https://aleagues.com.au/news/a-league-women-2024-25-season-guide-fixtures-memberships-signings-kits-how-to-watch/>

<sup>9</sup> <https://aleagues.com.au/news/memories-and-moments-a-back-catalogue-beautiful-game/>

<sup>10</sup> <https://aleagues.com.au/news/audience-records-tumble-westfield-w-league-decider/>

<sup>11</sup> <https://www.roymorgan.com/findings/w-league-grows-tv-viewership-as-australia-nz-awarded-hosting-rights-for-2023-womens-world-cup>

Historically, broadcasters have tried different timeslots to feature the league without clashing with the ALM or other sports in weekend primetime.

Fox Sports introduced Thursday ('Hersday') night football in 2018-19, showcasing a marquee fixture with all the production "bells and whistles" afforded to the ALM at the time.<sup>9</sup> The innovation was popular with viewers, but posed challenges for attendees and also for players who (to this day) have to work other jobs throughout the week to support themselves.

ABC has featured the league in the clear air of Saturday and Sunday afternoon 3pm/4pm kick-offs, but as summers get hotter, this timeslot has proved unworkable.

When the league broadcast gets the right combination of investment and exposure, the appetite is healthy. The 2016-17 Grand Final, featuring Sam Kerr, Steph Catley, Lydia Williams, and Jess Fishlock, attracted an audience of 440,000 across Fox and ABC.<sup>10</sup> In 2019-20, Roy Morgan found 879,000 people watched the ALW.<sup>11</sup>

To relaunch the league as an elite product, broadcast production is one of several areas which needs a step-change increase in investment. Specifically, the production should include more cameras, better shoulder content and analysis, and multiple on-site commentators.

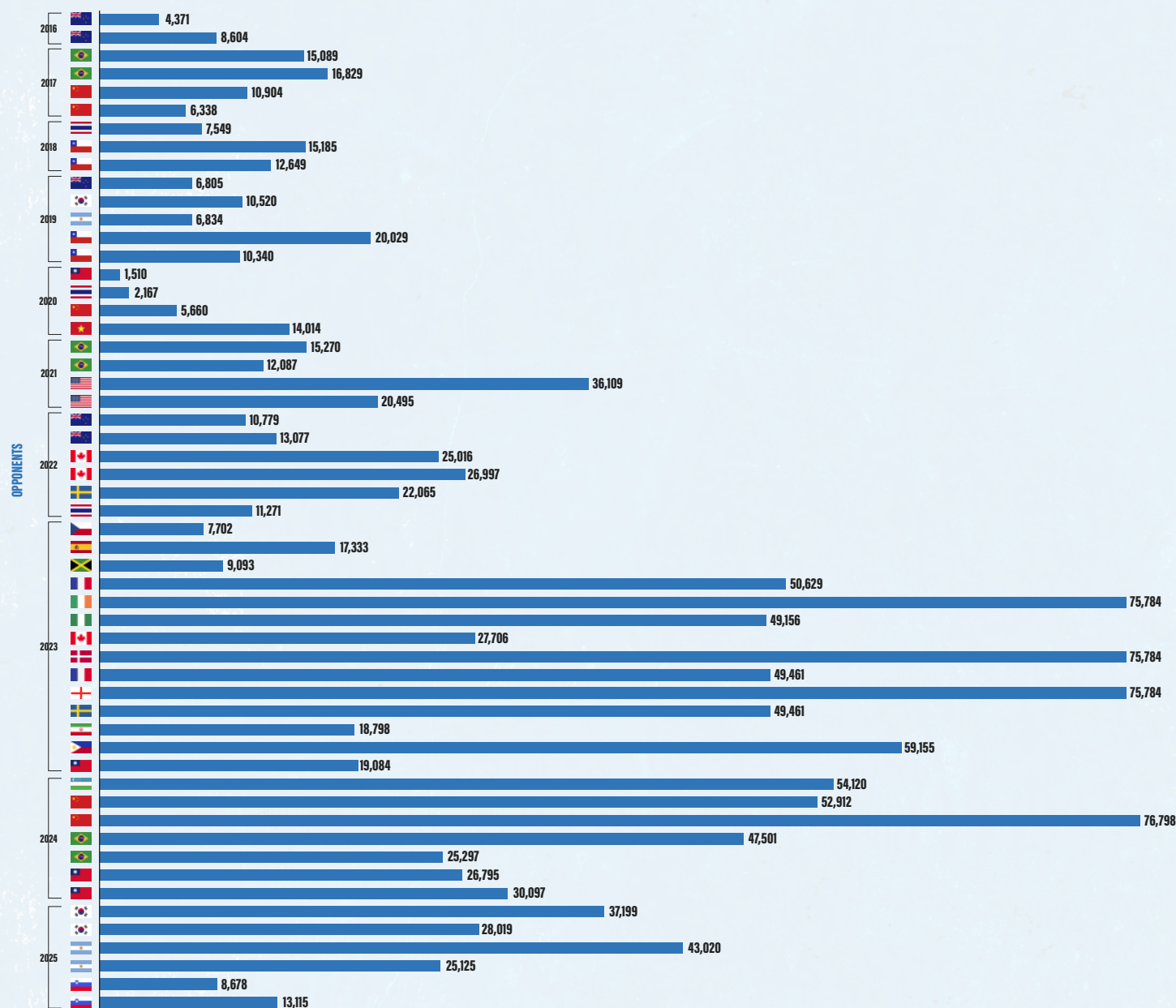


## MATILDAS PHENOMENON

The Matildas have achieved phenomenal growth during this golden period for women's football. Even before the 2023 Women's World Cup, support was building. Then, starting from the World Cup warm-up match against France at Docklands, the team sold out 16 consecutive home matches, averaging 50,464 fans for that run.

During the World Cup, the Matildas became the most-watched event in Australian television history. Interest in women's football extended beyond our own teams; an average of 36,272 attended the 35 matches held in Australia. New Zealand's 29 matches averaged 24,439.

Matildas attendances, 2016-2025



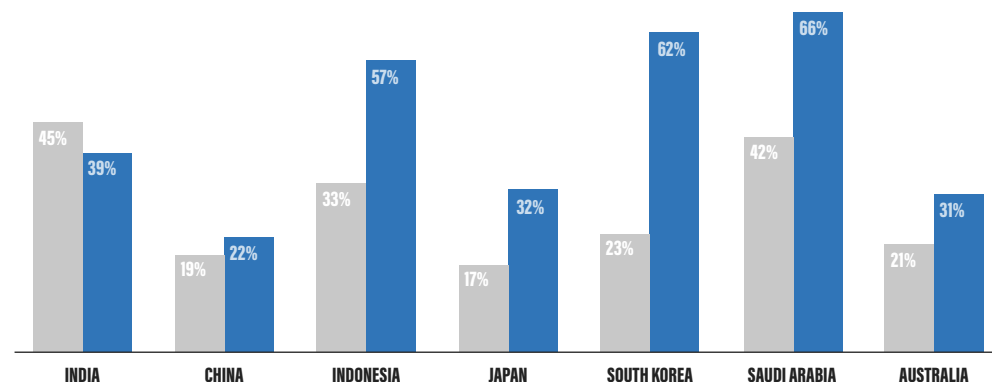


Another piece of research conducted by Gemba, commissioned by FIFPRO Asia/Oceania, has identified the substantial commercial potential of the 2026 AFC Women's Asian Cup in Australia. The tournament is expected to be by far the most valuable iteration yet, off the back of significant growth in interest in women's football across the region. On average, the number of football 'fanatics' in key Asian markets grew by 15% between 2018 and 2024.

It has further endorsed the belief that the Asian Cup represents a monumental moment for the ALW to leverage.



### Football passion in APAC



On average, Gemba's measure of football 'fanaticism' grew by +15% in major nations in the APAC region, market size of ~1.1bn

2018 2024

#### ESTIMATED MARKET SIZE OF FOOTBALL FANATICS (2024)

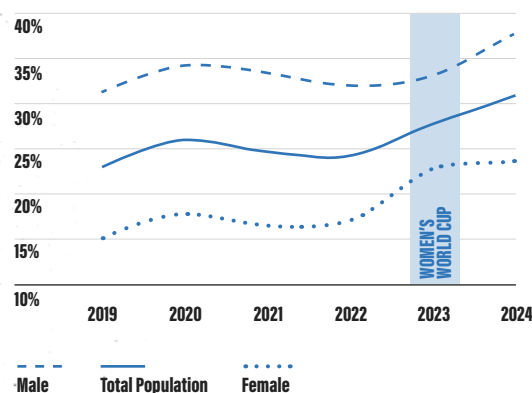
537m	316m	159m	39m	32m	21m	8m
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### Passion for football

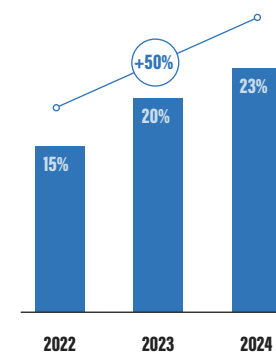
#### FOOTBALL PASSION IN AUSTRALIA

Passion for football in Australia has grown by +8% since 2019, with the 2023 Women's World Cup in Australia driving further fandom, particularly amongst females fans (+5% increase between 2023 & 2024)



#### PASSION FOR THE MATILDAS

Passion for the Matildas has grown by +50% since 2022



The stars have aligned for the ALW. It makes no sense to let this moment pass only to try to progress the league later in less favourable circumstances. If there is genuine belief in the potential of the ALW, now is the time.



# DELIVERING EFFECTIVE FAN ENGAGEMENT



## FROM PART-TIME TO AN ELITE PRODUCT

The semi-professional environment strains players, leading the best to pursue better opportunities elsewhere and others to leave their careers early. This further erodes a product which already compromises its presentation and delivery to cut costs. Fans pick up on this signal, and do not come to value a league which does not appear to fully value itself. To break out of this cycle and into a virtuous growth dynamic, the PFA proposes a step-change in investment on and off the pitch.

The PFA's focus groups and Gemba's broader fan survey revealed how much of a selling point full-time professionalism would be. Focus group participants consistently contrasted their perception of the Matildas with the ALW:



“

*The rise of the Tillies is on the back of a larger cultural movement in women's equality. We're seeing that in multiple different sectors: employment, women's rights, focus on safety and women in relationships and so forth. The Tillies are like the poster girls of that. They're there to show young women you can achieve amazing things in your life.*

.....

*In an ideal world, I love the idea of them being independent clubs and having a women's league like what happens in the NWSL. I get the impression that we're very much an afterthought. We're on the same level as the boys' academy team that are a bunch of teenagers not even playing professional football.*

.....

*I don't think just championing inclusion and championing feminism would be enough to sell [the ALW]. I think we would actually have to see the product and the professionalism take a step up rather than people being on like part-time, no jobs and that sort of thing.*

”

ALW FOCUS GROUP PARTICIPANTS



Gemba's fan survey found that 62% of Australian football fans believe the ALW should be full-time professional, with only 8% disagreeing. The survey found that access to players is seen by fans as a critical factor in growing support, but that the part-time commitments are inhibiting players' abilities to build those connections. Fans of women's football are more likely to follow players over clubs or leagues than fans of men's football, and 68% of ALW fans agreed that "it is important to have star names in the league".

Professionalisation would present a compelling opportunity to engage fans at any moment, but the next few years provide a golden window. The afterglow of the home Women's World Cup is still warm. In 2026, the Women's Asian Cup will recapture some of that magic.

Many of the 2023 Matildas, who are among Australia's most valuable individual sporting brands, will be coming to the end of their careers over the next few years. They could be repatriated, driving the same interest that the golden generation of Socceroos did during the ALM's strongest period. If the ALW remains semi-professional, there is less chance that the Matildas' biggest stars will take a swan song in the competition.

In addition to professional players, other aspects of the league's presentation need to signal elite-ness and respect for women. These are discussed in the next section.

## CASE STUDY

# ANGEL CITY FC



NWSL club Angel City FC was founded in 2020, began play in 2022, and was valued at US\$250m in mid-2024. Its average attendances have been over 19,000 in each of its three seasons.

Its co-founder Julie Uhrman shared some of the core principles driving the club's success in a podcast in 2024.<sup>12</sup>

One of her key points aligned with the findings of the PFA's market research: leverage player personalities through storytelling. "We have 26 players ... which is 26 incredible stories someone can connect to. We recognise that [fans] follow a player first, team second, league third," she said.

Uhrman described the club's ethos as "living and breathing commitments to equity and diversity". This takes shape through external social impact initiatives, such as a partnership with Common Goal, but it is emphasised that the team itself embodies the values. For example, players directly receive 1% of net ticket revenue, so the product is literally progress for women athletes.

In terms of matchday, Uhrman said the club caters different experiences to different fan segments, from premium to accessible. She made the point that you should not charge \$5 to see world class players, because it does not signal to fans that it is a world class product.

She also said there is a focus on providing a "spectacle" above and beyond a game of football, reflecting the preference of our focus group participants (one of whom had been to an Angel City match and appreciated this element).

The lesson for the ALW is not to pick up and drop Angel City's exact model into our context, but to ask whether the core pillars of its success are applied here. What signal does the ALW send prospective fans with its pricing, venues, broadcast, and semi-pro status? Do semi-pro players have the capacity to be the protagonists in league storytelling? Does the ALW's perceived status as an ALM afterthought embody the essential narrative of women's progress?

<sup>12</sup> <https://podcasts.apple.com/au/podcast/the-world-football-summit-podcast/id1642741013?i=1000665399812>

## A NEW ALW BRAND: FROM AFTERTHOUGHT TO PRIORITY

The PFA's fan focus groups provide a blueprint for effective fan engagement by capturing the elements underpinning the Matildas' runaway success and identifying specific areas for improvement in the ALW. Consistent themes emerged, providing lessons for how to present a compelling women's league in Australia with a new, unique identity.

### Key themes from the PFA's ALW fan focus groups (2024)

Topic	Theme	Insight
Part One: Matildas	Catching the bug	<b>Discovery:</b> The 2023 Women's World Cup was the gateway for new Matildas die-hards
		<b>Epiphany:</b> The spectacle and groundswell of the tournament – and especially its meaning for women – got them hooked
		<b>Commitment:</b> Support has sustained or escalated since the World Cup
	Drivers to fandom: What is it about this team?	<b>Player stories (Matildas):</b> Fans connect with the Matildas' personalities
		<b>Family:</b> The players are role models, and the team is a vehicle for families to connect
		<b>Unity and legacy:</b> Working together towards a "higher purpose"
		<b>Representation:</b> The Matildas as an attractive metaphor for social progress
	Media consumption	<b>Learning from scratch:</b> Explanatory and non-judgmental information sources are appreciated
		<b>Behind the scenes:</b> Docuseries and social accounts provide off-field access
		<b>Broadcast and streaming:</b> Women's football can drive subscriptions
		<b>Mainstream fail:</b> When mainstream media was mentioned, it was criticised
	Attending matches	<b>Safety:</b> The absence of the perceived toxicity and aggression of men's sport is a huge attraction
		<b>Atmosphere and fan culture:</b> A new way, borrowing from men's football and Taylor Swift
		<b>Matchdays as events:</b> It's about more than 90 minutes on the pitch

Topic	Theme	Insight
Part Two: A-League Women	Awareness	<b>Conversion:</b> Around half of the participants had become regular ALW fans since the World Cup
		<b>Knowledge:</b> It is hard to get basic information on the competition
	Connection to Matildas	<b>Tillies factor:</b> The Matildas are a key gateway to supporting the ALW
		<b>Incubator:</b> Watching the next generation of Matildas in the flesh is a huge appeal
	Promotion and media	<b>Player stories (ALW):</b> As with the Matildas, storytelling is critical to building connection to the ALW
		<b>Broadcast:</b> The quality and consistency of ALW match broadcasts is a weakness
		<b>Social media:</b> Standalone accounts for women's teams are preferred
	Attending matches	<b>Venues:</b> Many current stadia are inaccessible or wrong-sized, but Leichhardt works
		<b>Family-friendly:</b> Affordable pricing and earlyish kick-off times work for the kids
	What should the ALW be?	<b>Afterthought:</b> Female fans are sensitive to the current lack of 'care-factor'
		<b>Professionalism:</b> The semi-pro nature of the players' careers made them harder to connect to
		<b>Values:</b> The league should actively promote social justice causes





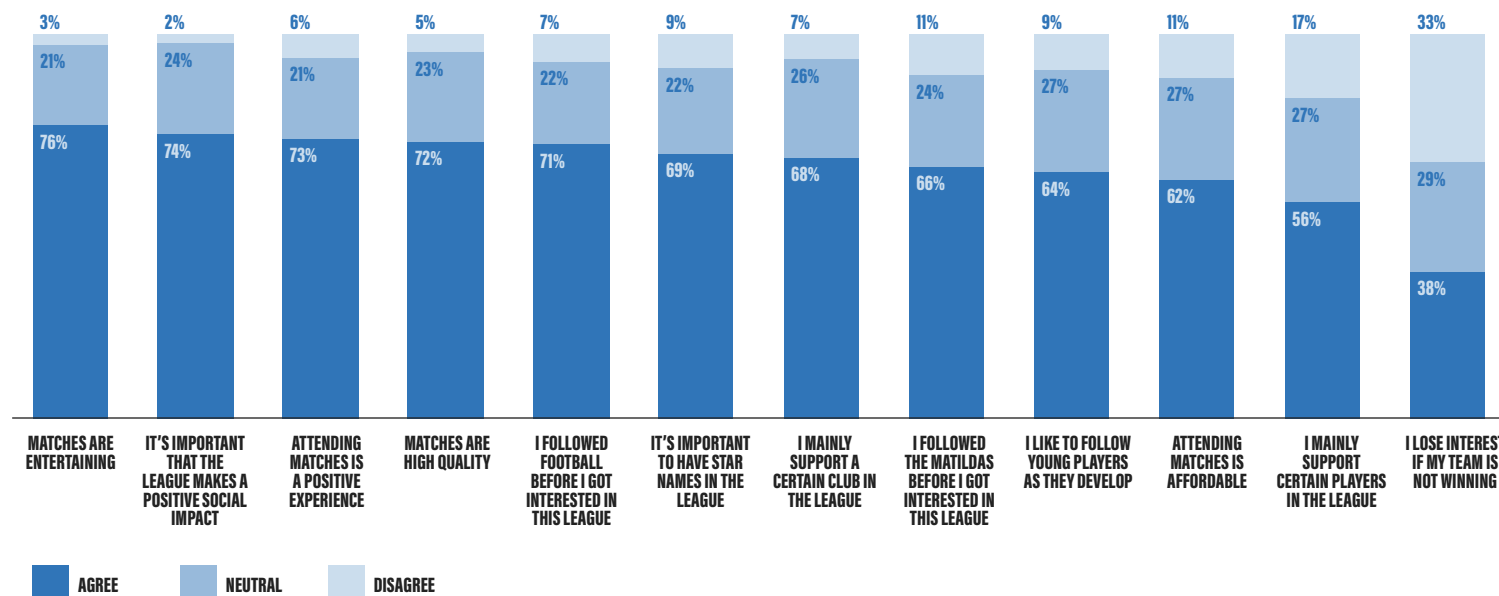
Focus group topics ranged from broadcast and social media to matchday presentation and the league's values. A common thread was that the ALW consistently felt like an afterthought in how it was conducted or presented, especially when compared to the experience of being a Matildas fan.

With women's football having been undervalued historically, fans are sensitive to the 'care factor' they detect from league HQ and clubs. An ALW which is merely an inferior clone of the ALM, overseen by the same people, will not fulfil its potential. The women's league must have a unique identity, packaged for a unique audience, championed by people waking up every day solely with its interests in mind. Adopting a new brand is not about a slogan or an ad; the league must embrace authentic representation at all levels, genuinely invest in quality, deeply engage with the community, and fearlessly live its values.

The focus group insights were reinforced by Gemba's fan survey, which identified similar elements that should be central to the ALW's unique brand. Among existing fans, 74% agreed "it's important the league makes a positive social impact" (cf. 70% ALM fans). Only 38% agreed that they lose interest if their team is not winning, compared to 45% of ALM fans, showing that the experience outside of the match result is relatively more important to ALW fans.



### Passion drivers for ALW fans



Seventy-three percent of existing fans agreed that attending matches is a positive experience. This needs to be grown. Focus group participants appreciated the 'festival vibe' around Matildas matches (and for one participant, NWSL matches). Examples included family-friendly entertainment and activities in the precinct, player storytelling incorporated into the matchday, and positive social interactions with fellow fans.



[A Matildas match is] a family place. It's full of energy. It's warm and welcoming. People chat to each other in the seats. People offer each other chocolate. People are now swapping bracelets and stuff. It's a female and family-driven culture. And also safe LGBTQI+ people."

ALW FOCUS GROUP PARTICIPANT



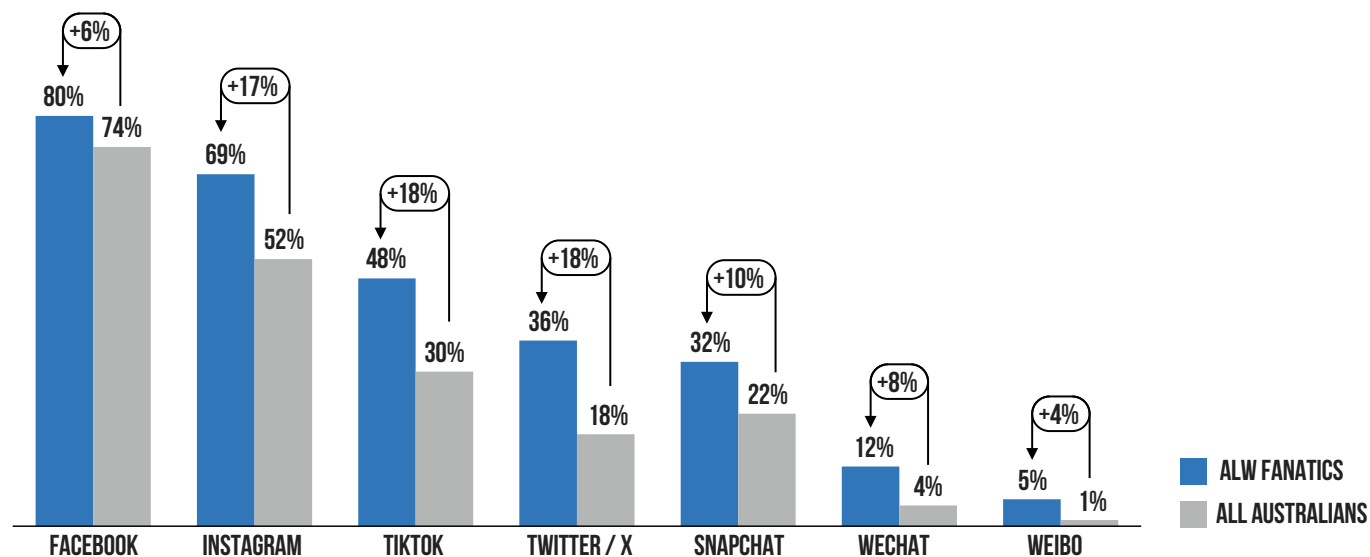
Gemba found that only 56% of fans who had attended a match rated the food and beverage options as 'good', compared to 10% who thought they were poor and 33% who were neutral.

According to the focus groups, the lack of quality amenities at some suburban ALW venues feeds into the 'afterthought' perception, as did instances where larger venues did not open food and ticketing outlets for women's matches.

A key barrier to both attendance and viewership was fans not always knowing when games are on. Gemba found that ALW fanatics are more likely to use social media than the average Australian, highlighting that as a key channel to invest in to raise the league's visibility.



### Social media use by ALW fanatics



The PFA has seen little evidence of strong central support for clubs in developing fan engagement strategies. To ensure universal rollout of this elevated brand, the APL must assume greater responsibility for quality control.



## CASE STUDY

# WSL FAN SEGMENTATION

In August 2024, Nicki Doucet, the chief executive of the WSL, told the Guardian that her team had identified three key fan segments:<sup>13</sup>



**CORE FANS**



**FAMILY FRIENDLY**



**'SWIFTIES'**

The third group – the 'Swifties' – were identified as being little understood but vast and having transformative potential.

Doucet described them as:

“A fan that's come in through the Lionesses, untethered to the men's game. They're not tribal and they're learning about us. They're trying to find highlights, they love the players and that's the biggest group that the football ecosystem doesn't know enough about. That's your 'Taylor Swift fanbase' for that particular analogy. And I don't think anyone talks to them in the way that we need to. We have a responsibility to.”

The PFA's fan focus groups seem to have pinpointed (and gained a deep understanding of) this important segment. In general, our participants:

- ▶ accessed the ALW through the Matildas;
- ▶ are antipathetic towards men's football;
- ▶ connect more to players than teams;
- ▶ are attracted to positivity, community, and social impact more than tactics, results, or rivalries;
- ▶ self-identify as being low-information fans; and
- ▶ even engage in crafting and sharing at matches, like Taylor Swift fans at her concerts.

Doucet's revelation lends credibility to the PFA's focus group insights (while also making the important distinction that this segment is not the only one out there).

<sup>13</sup> <https://www.theguardian.com/football/article/2024/aug/20/nikki-doucet-womens-football-exclusive-interview>



FORMALISE COLLABORATION WITH FOOTBALL AUSTRALIA ON FAN ENGAGEMENT

Gemba’s research revealed the importance of the Matildas as a gateway to ALW fandom, with 66% of ALW fans having followed the Matildas before they got into the league. Unsurprisingly, Gemba also found that passion for the Matildas has climbed rapidly. This means the opportunity of leveraging the Matildas is only likely to increase in importance.

Despite this, the focus groups perceived a lack of coordination between FA and the APL when it comes to promoting the ALW.



“

I have checked my emails. I haven’t got anything from Football Australia or Adelaide United or anything. I’m assuming that my details are now in a database, having bought Matildas tickets, having subscribed to get the notification of Matildas tickets. And I’ve received nothing about Adelaide United games, men or women that are on, or how I’d go about getting a membership.”

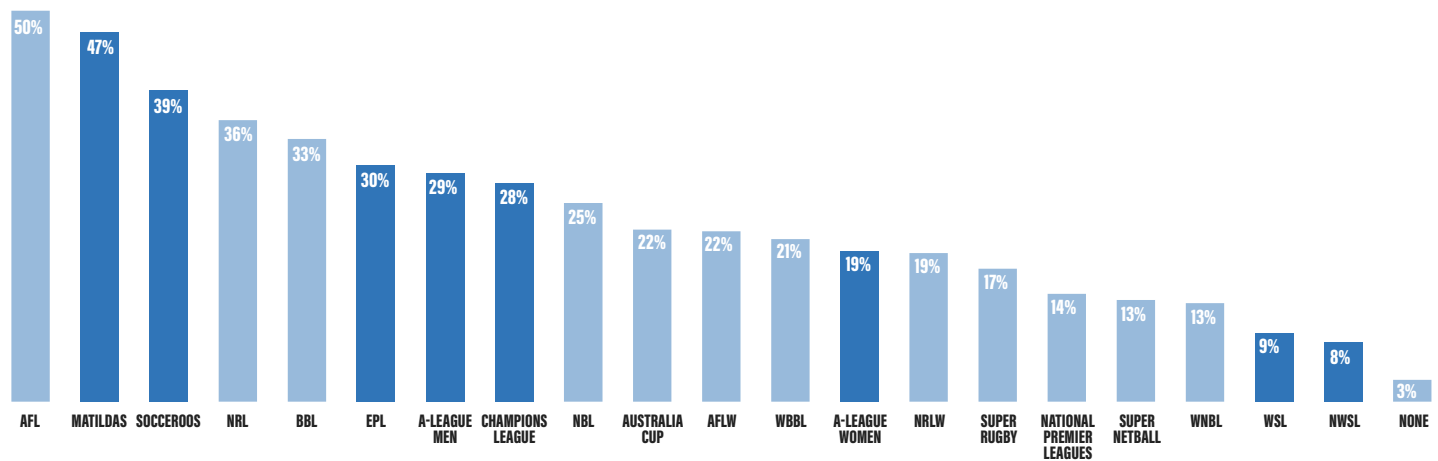
ALW FOCUS GROUP PARTICIPANT

Ahead of the Women’s Asian Cup, urgent lessons must be learned from the opportunities missed during the Women’s World Cup. FIFA’s tournament obviously provided a general boost to women’s football, but the disconnect between FA and the APL meant that this momentum did not translate to the ALW as it could have. It is incumbent on the two organisations to formally collaborate and cross-promote their assets.



Teams and leagues viewed in the past 12 months

Matildas and Socceroos matches were among the three sporting events watched by the highest number of Australians in a 12-month period



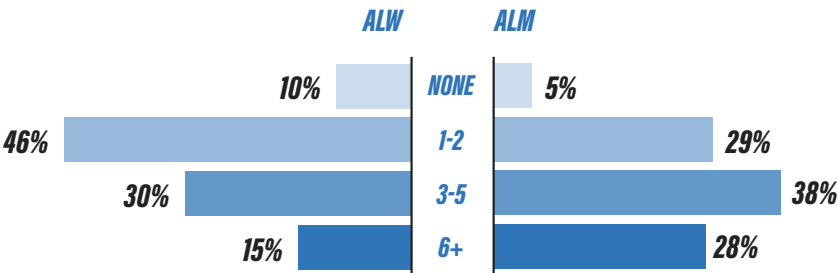


ESTABLISH A LEAGUE-WIDE GRASSROOTS PROGRAM

In *For the Fans*, it was noted that fans increasingly see elite sport as having distanced itself from the very communities that built them: “Clubs [should be] required to embrace their local communities through grassroots campaigns, including through schools featuring star ... coaches and players; and ensure they are committed to local social issues, especially those facing young people and children.” This assertion has stood the test of time and is as true today as was over two decades ago.

In the PFA’s end of season survey for 2024-25, the majority of ALW players reported doing less than three community appearances during the season. This is insufficient to play a meaningful role in growing the ALW fanbase. As stated earlier, Gemba’s research found connection with players as a strong potential driver to ALW fandom.

“How many community appearances (with local clubs, schools, signing sessions, or similar) did you take part in this season?”  
PFA end of season surveys, 2024-25



For a start, making the players full-time will increase their capacity to attend more community appearances (two thirds of ALM players did three or more). But the club-led grassroots engagement framework is fragmented and in need of a broader rethink.

Football has less resources than other codes and many more participants to cater to. A coordinated approach is critical to maximising the impact of our resources in junior clubs and schools.

In cooperation with FA, Member Federations, and the PFA, the APL should establish an industry-wide grassroots game development program that its clubs are obligated to participate in through club licensing.





# A REFORMED FOOTBALL ECONOMY



# RECOMMENDATIONS

**3.1**

THE ALW BECOMES FULL-TIME PROFESSIONAL FROM THE 2026-27 SEASON

**3.2**

THE PLAYER PAYMENTS MODEL TARGETS THE UNIQUE AND GROWING WOMEN'S FOOTBALL REVENUE STREAMS OF MATCHDAY, MEMBERSHIP, COMMERCIAL, TRANSFER FEES, PRIZE MONEY, AND FIFA WORLD CUP CLUB BENEFITS

**3.3**

THE RETURN OF THE 'GOLDEN GENERATION' MATILDAS TO THE ALW IS A STRATEGIC PRIORITY

**3.4**

THE ALW ECONOMY IS FULLY INTEGRATED AND EMBEDS REVENUE SHARING TO ESTABLISH A COOPERATIVE CULTURE BETWEEN CLUBS



# CURRENT CONTEXT

## There are two main ways in which the ALW economy is dysfunctional.

The first is that it is a 'closed' league (in that it does not have promotion or relegation) but it does not have the economic features required to make closed leagues successful. Leading men's closed leagues in Australia and the United States have revenue sharing mechanisms designed to compensate for natural differences in market size or spending power. Revenue sharing promotes competitive balance – driving overall interest in the league – in the most economically efficient way. A hard salary cap by itself also promotes competitive balance, but it does so inefficiently; it simply drags all clubs' spending towards the smallest team's capacity. Larger teams are hampered, smaller teams are not supported to grow, and the whole ecosystem falls short of its potential. This is especially the case in the sport with arguably the most elastic global market for talent.

The ALM economy suffers from this same lack of league-think. The PFA's equivalent ALM Vision discusses this issue in detail. In the interests of space, this document will not repeat that analysis. It will become more important for the ALW's economic model to be reformed as the league's

broadcast and commercial value becomes distinct from the ALM's, and as clubs' football revenues blossom.

The second issue with the ALW economy is that the current investment is not well matched to the potential returns. The booming women's football economy presents numerous new opportunities that our league is perfectly placed to capitalise on. Australia has a strong history of developing elite women's talent and the ALW is close to Asia's summit. There is an economically viable place for an ALW that is Asia's dominant league and second tier globally. Through accident or design, our clubs have invested enough to put themselves within touching distance of this opportunity. The binary between semi- and full-time professionalism is so great that the next step up in investment will bring more rewards than any before or after. But from the point of view of club businesses, staying where we are is like driving halfway to a destination: all cost and no payoff.

This second issue – the business case for full-time professionalism from 2026-27 – is the main subject of this pillar.





## PART-TIME REMUNERATION

As recently as 2020, the ALW had a minimum salary among the highest in Australian women's sports. After the WNBL players agreed a new CBA in May 2025, the ALW now features the lowest minimum salary.

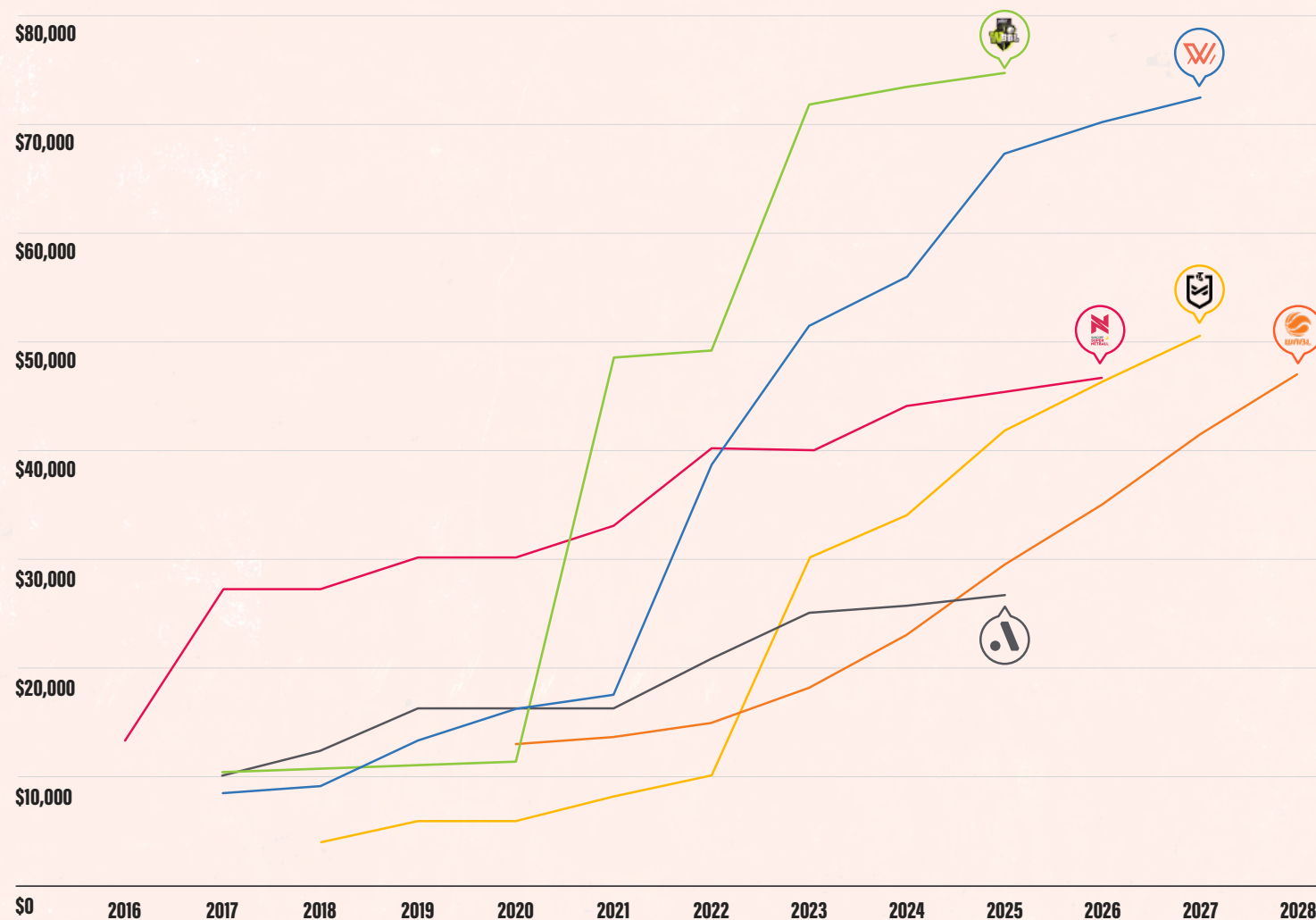
Despite the ALW having a head start on other leagues and making solid progress as a result of collective bargaining, the terms offered by the likes of AFLW and NRLW have blown past our league.

“

Sick of having to balance [work and football] during soccer seasons. Makes me want to be back in AFLW when you can just be an elite athlete.”

ALW PLAYER, 2024-25  
END OF SEASON SURVEY

### Minimum salaries, Australian women's sports leagues



WBBL 2017-2020 excludes state contract (no minimum). WBBL 2021-2025 includes minimum state contract.



## A REFORMED FOOTBALL ECONOMY

The PFA's annual ALW reports have consistently described the challenge for players at this stage in the league's evolution: remuneration is part-time but football demands are near full-time.<sup>14, 15</sup>

As of 2024-25, 62% of ALW players worked a job outside football to help sustain themselves. Among those working, 60% worked more than ten hours per week on average, including 29% who worked more than 20 hours per week. This dynamic restricts our players' ability to fulfil their potential or even stay in the game, undercutting the league's ability to build its fanbase or drive football revenues.

### Player survey comments regarding the part-time tug-of-war



There is not much balance. My job was flexible but it is hard to hold down a job when you take up the majority of the working day with training/gym."

The average wage is still far too low that in order to live above the poverty line ... there's no time to work because trainings take up majority of the day but the pay is not enough to be stable."

If I could just focus on football I believe I would be much better because I would have more time to get fit, recover and focus on my mental health/getting a break."

It's been hard trying to find the balance of working and not being too tired for training/matches ... I've not been used to working alongside football (while) playing in the WSL."

I have been getting in trouble for calling out of work and asking to leave training / gym early and it's been really bad disappointing both my bosses and coach and don't know what to do."

I work until late at night due to starting shifts later, therefore I really struggle with adequate sleep during season."

It's a personal choice but we basically sacrifice so much just for the love of chasing our football career."



<sup>14</sup> <https://pfa.net.au/wp-content/uploads/2023/10/PFA-ALW-Report-2223.pdf>

<sup>15</sup> <https://pfa.net.au/wp-content/uploads/2024/10/PFA-ALW-Report-232448.pdf>






































































































































































































## TALENT DRAIN

Wage data is not available to display for all overseas women's football leagues, but the ALW has also declined in the global football pecking order. In the mid-to-late-2010s, the ALW employed practically all of Australia's best players and a handful of world class international stars. For a time, the short ALW and NWSL season windows allowed leading players to play across both competitions each year to compile a full calendar of elite football. As both leagues expanded, the season windows overlapped and this dynamic ended. Forced to choose, the ALW's best players have left for leagues with conditions that had become vastly superior.

In the 2019-20 season, all but three of the Matildas from Australia's 2023 FIFA Women's World Cup squad played in the ALW. Come 2022-23, only four of those 23 players featured in the ALW.

## ALW clubs represented by the Matildas 2023 Women's World Cup squad

	2008-09	2009	2010-11	2011-12	2012-13	2013-14	2014	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	ALW matches
Clare Polkinghorne																152
Katrina Gorry																142
Tameka Yallop																139
Steph Catley																127
Lydia Williams																120
Kyah Simon																108
Caitlin Foord																106
Alanna Kennedy																106
Emily van Egmond																101
Sam Kerr																95
Mackenzie Arnold																93
Aivi Luik																88
Cortnee Vine																87
Hayley Raso																86
Clare Wheeler																79
Alex Chidiac																75
Ellie Carpenter																58
Kyra Cooney-Cross																57
Courtney Nevin																43
Clare Hunt																37
Charlotte Grant																34
Teagan Micah																13
Mary Fowler																7

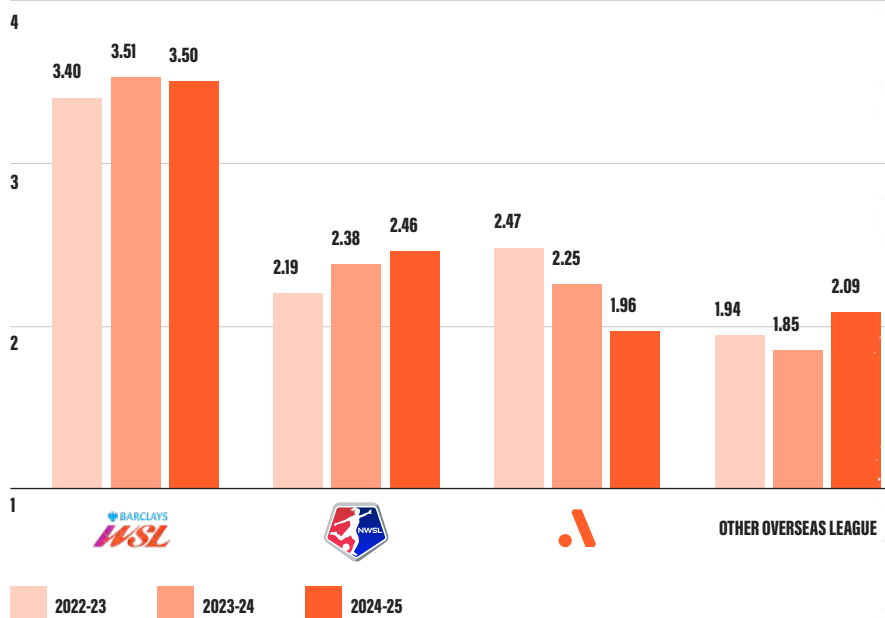
## A REFORMED FOOTBALL ECONOMY

The talent drain extends beyond the elite tier. The NWSL is rapidly adding new clubs and a competitor American league, the USL Super League, also offers professional standards. Around half of the ALW's foreign players in 2023-24 were American, so the proliferation of opportunities in the United States has proven to be a direct threat to the ALW's quality.

In addition, the PFA's 2024-25 end of season survey found that, for the first time, the ALW is on average the least preferred league amongst our own players when given a choice of the ALW, WSL, NWSL, or 'other overseas league'.

### Most preferred leagues among ALW players, by season

Note: The average rank is represented by a 1-4 scale where 4 would be that league being the most preferred by all players.





## GLOBAL FRONTRUNNERS

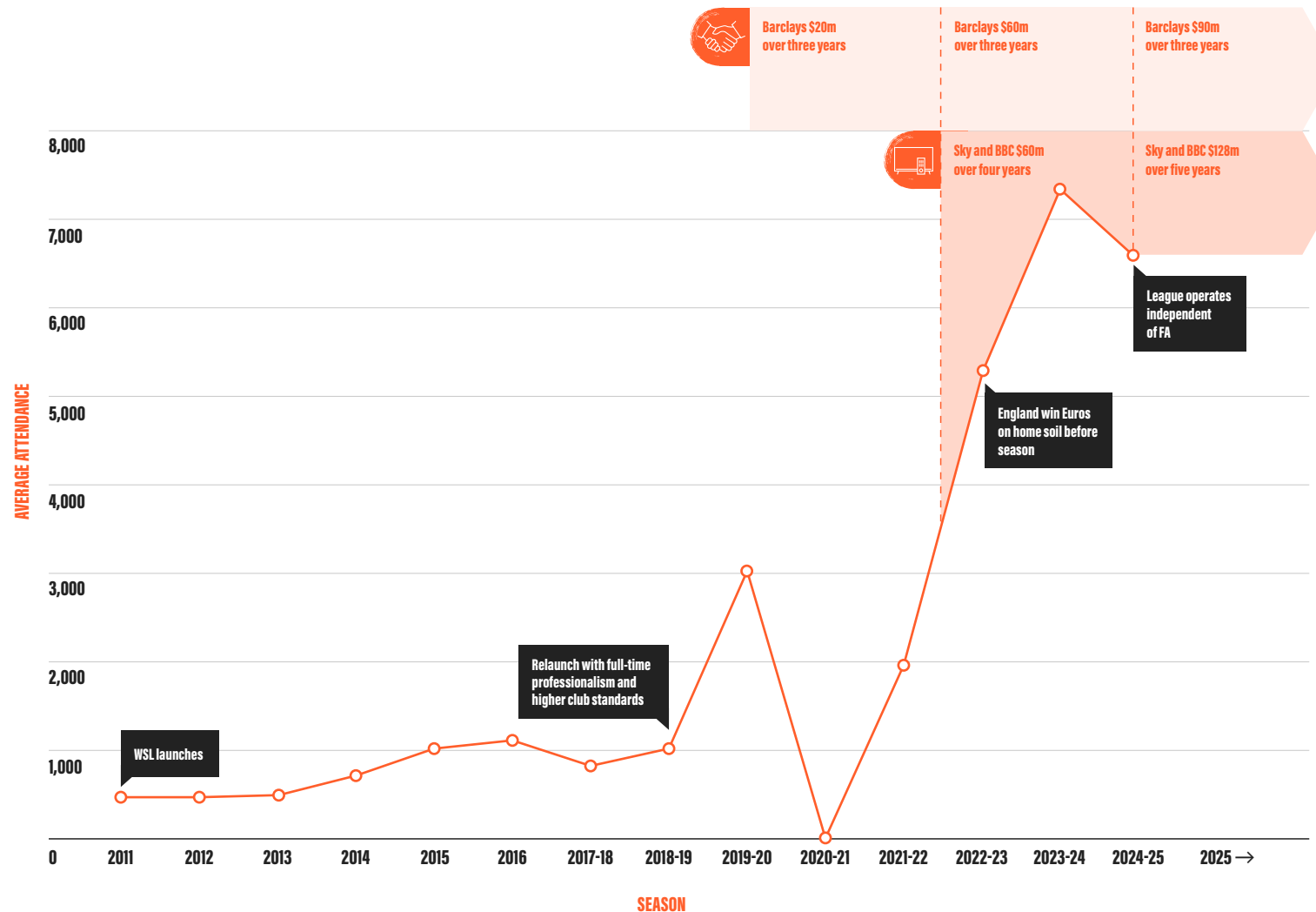
## WOMEN'S SUPER LEAGUE

The WSL was launched in 2010, two years after the ALW. For its first seven seasons, it ticked along with attendances lower than the ALW and marginal commercial support. In 2018-19, it took the bold step of relaunching with full-time professionalism and other strong criteria for clubs to participate. Some clubs fell away, while others stepped up to meet the higher bar.

This gambit kicked off a virtuous cycle of growth in terms of crowds, on-field talent, and commercial support. From the 2025-26 season, Barclays' title sponsorship and the domestic broadcast deal will together reap over A\$55m each season.

As of 2022-23, club wage bills (including staff) ranged from £1.5m (approx. A\$3m) at West Ham to £6.2m (approx. A\$12.3m) at Arsenal.<sup>16</sup>

The WSL is the frontrunner in a broader European landscape which is developing rapidly. UEFA's *Business Case for Women's Football* (2022) projected that the fanbase across the continent will more than double over the next decade and that commercial revenues will increase by six times in that period.<sup>17</sup>



<sup>16</sup> <https://swissramble.substack.com/p/womens-super-league-finance-202223>

<sup>17</sup> [https://editorial.uefa.com/resources/0278-15e121074702-c9be7dcd0a29-1000/business\\_case\\_for\\_women\\_s\\_football\\_external\\_report\\_1.pdf](https://editorial.uefa.com/resources/0278-15e121074702-c9be7dcd0a29-1000/business_case_for_women_s_football_external_report_1.pdf)

Note: Figures in AUD rounded from GBP conversion at time of writing. Some deals also cover the second-tier Women's Championship. 2020-21 season played behind closed doors due to COVID-19.

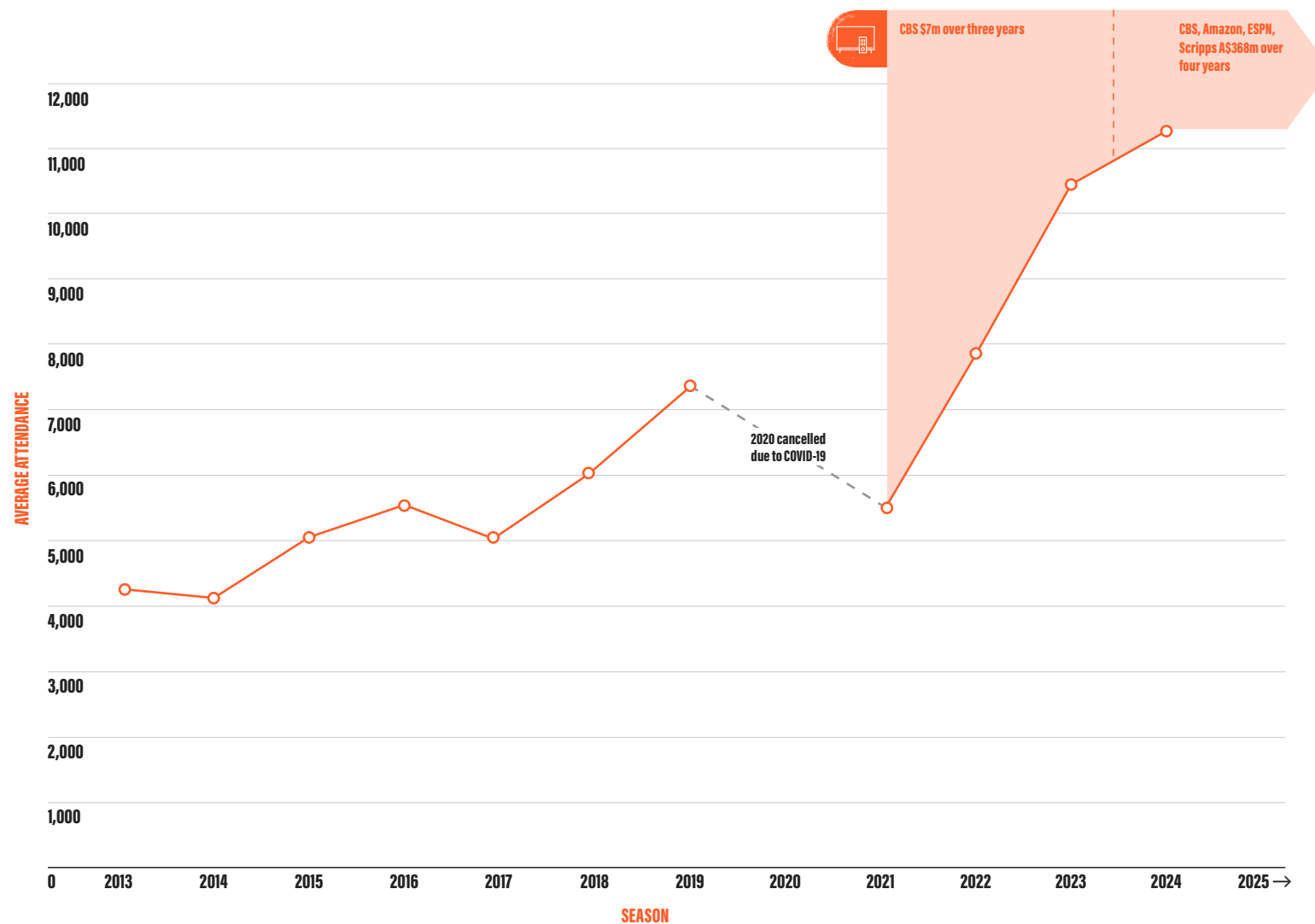
## NATIONAL WOMEN'S SOCCER LEAGUE

The NWSL had an even later launch than the ALW and the WSL. Its average crowds started from a higher base in 2013, but it too somewhat ticked along during the last decade before experiencing massive growth in the past five years.

Its new 2024-2027 broadcast deal is worth 40 times more per season than the previous one. There's no title sponsor, but central sponsorship deals are estimated to be worth A\$38m in 2024, up 4x since 2021.<sup>18</sup>

Prior to 2022, club licences were available for between A\$3m and A\$8m. As of June 2025, Forbes valued the league's clubs at between A\$100m and A\$400m.<sup>19</sup>

The players unionised in 2017 and agreed their first CBA in 2022. For season 2025, the NWSL salary cap rose to US\$3.5m (approx. A\$5.5m).<sup>20</sup> This is a base of US\$3.3m plus another US\$200k determined by a revenue share model built into the new CBA. The base salary cap will rise to US\$5.1m (approx. A\$8m) in 2030. The minimum salary will rise from US\$48,500 (approx. A\$76k) in 2025 to US\$82,500 (approx. A\$130k) in 2030.



<sup>18</sup> <https://www.sportspro.com/analysis/insights/nwsl-2024-sponsorship-fees-value-data-nike-ally-google-lucid/>

<sup>19</sup> <https://www.forbes.com/sites/brettknight/2025/06/02/the-nwsls-most-valuable-teams-2025/>

<sup>20</sup> <https://www.nwslsoccer.com/news/nwsl-announces-competition-updates-ahead-of-2025-season>

Note: Figures in AUD rounded from USD conversion at time of writing



# DELIVERING A REFORMED FOOTBALL ECONOMY

## FULL-TIME PROFESSIONALISM

The ALW has fallen behind other Australian sports in the race to professionalise their women's national leagues. But football has a clear advantage over other sports; it is plugged into unique revenue streams which would be boosted by increasing the quality of talent in the league and protecting player values with multiyear contracts. Making the players full-time athletes has long been the smart play, but women's football has progressed so quickly that the economic benefits of professionalisation now outweigh the costs almost immediately.

For the 2025-26 season, the ALW minimum salary is \$26,500, with players contracted for a 35-week term with part-time contact hours. In 2024-25, the average ALW club spent around \$720k on player payments, equating to \$8.7m across the league. If we make a simple assumption that a leap to full-time professionalism would see 22 players earning \$60,000 at each club, clubs would need to spend approximately \$1.3m on annual player payments. So, based on that scenario, clubs

would need to close an average gap of about \$600k and the leaguewide uplift for 11 clubs would be just under \$7m.

Clubs would also have to extend their ALW staff to work year-round. Some clubs are close to this already while others would have to invest more. Based on the PFA's knowledge of costings, we can assume that the average uptick in investment required to meet minimum staffing requirements might be around \$200k-\$300k per club. Allowing contingency for other costs associated with stepping up to a full-time program, the total average increase in investment per club could be estimated to be around \$1m per season.

This exercise makes some basic assumptions to provide a ballpark figure, for the purpose of illustrating the opportunity. Specific costings and more detailed projections of player payments need to be worked through by the APL, the clubs, and the PFA.



## REVENUE POTENTIAL

### FAN REVENUE

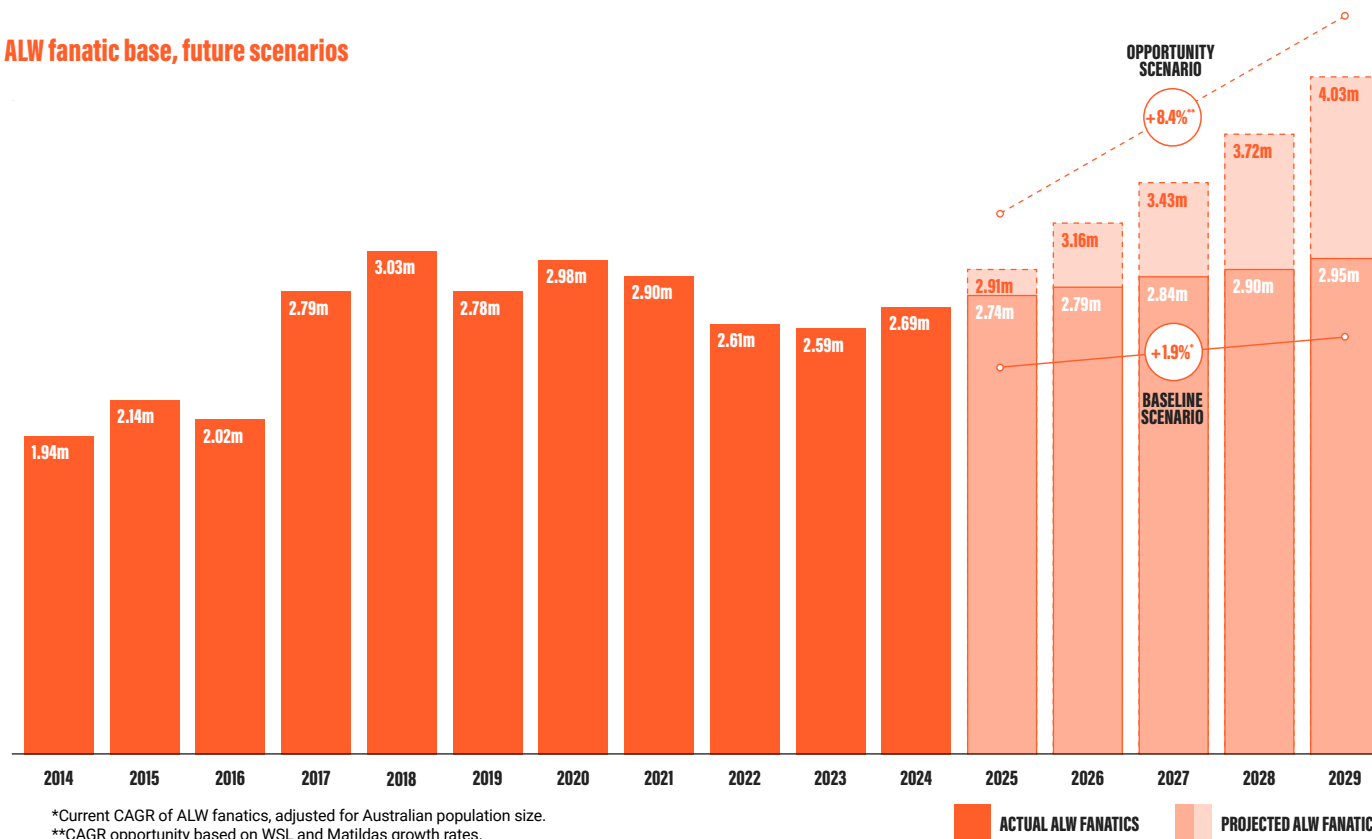
To assess the ALW's potential market size going forward, Gemba projected two futures: one based on the current incremental growth rate, and one based on a growth rate demonstrated by leading women's football properties.

Based on the current trajectory, the number of ALW fanatics in Australia would grow steadily from 2.69m in 2024 to 2.95m in 2029. This would almost return the league to the level of support it achieved in the years before the pandemic and separation, which peaked at 3.03m in 2018.

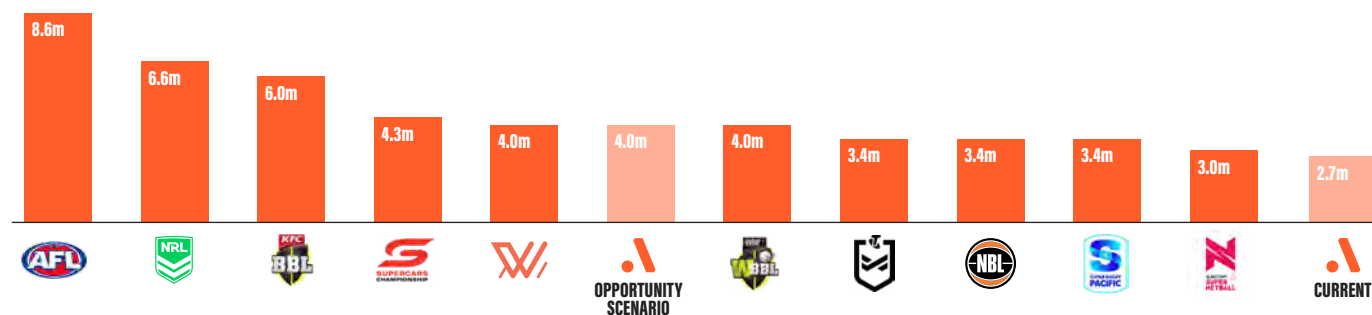
If, instead, the league was to replicate the more rapid recent progress of the WSL and the Matildas, it could attract 4.03m fanatics by 2029. The WSL and the Matildas are not arbitrary references; both have created massive growth by professionalising their standards and then telling a new story to fans, broadcasters, and commercial partners about women and football. This very same opportunity sits in front of the ALW. In addition, the cohort of Golden Generation Matildas nearing the ends of their careers in Europe are unlikely to want to return to semi-professional standards; stepping up to full-time professionalism is likely a precondition to tapping into their transformative potential.



### ALW fanatic base, future scenarios



### Australian sports leagues by number of fanatics





Gemba found that if the league could also increase the conversion of the league’s fanatics to matchday attendees from 10% to 12%, bringing it in line with Super Netball, the rapid growth scenario would see 498k fans attending matches in 2028-29, instead of 307k in the base case.

At Gemba’s assumed average ticket price of around \$19, these additional supporters would drive league-wide ticket revenues to \$9.6m in 2028-29 compared to \$5.9m in the base case (assumed to be \$5.4m as of 2024). According to Gemba, replicating the accelerated progress of the WSL and the Matildas would be worth more than \$300k annually per club by 2028-29 in ticket sales alone.

+\$3.7m

ALW ticket revenue by 2028-29 in growth scenario

	Total attendance 2028-29	Ticket revenue
Baseline scenario	307k	\$5.9m
Opportunity scenario	498k	\$9.6m



Gemba’s analysis was conducted in mid-2024. Since then, in 2024-25, crowds declined 26% as the Women’s World Cup buzz wore off. So Gemba’s baseline scenario – incremental growth – possibly overestimates the revenue in that case. The ‘hibernation’ of Western United would also change the equation for both scenarios.

Gemba only focused on matchday ticket sales because this was the only element of fan revenues with solid numbers to model from. The analysis does not include broadcast revenue, commercial revenue, merchandise, or club licence valuations, which have grown by up to 100x in the frontrunner leagues discussed earlier. So the figure of \$3.7m *drastically understates* the potential uplift in traditional sports league revenues associated with making the ALW full-time.

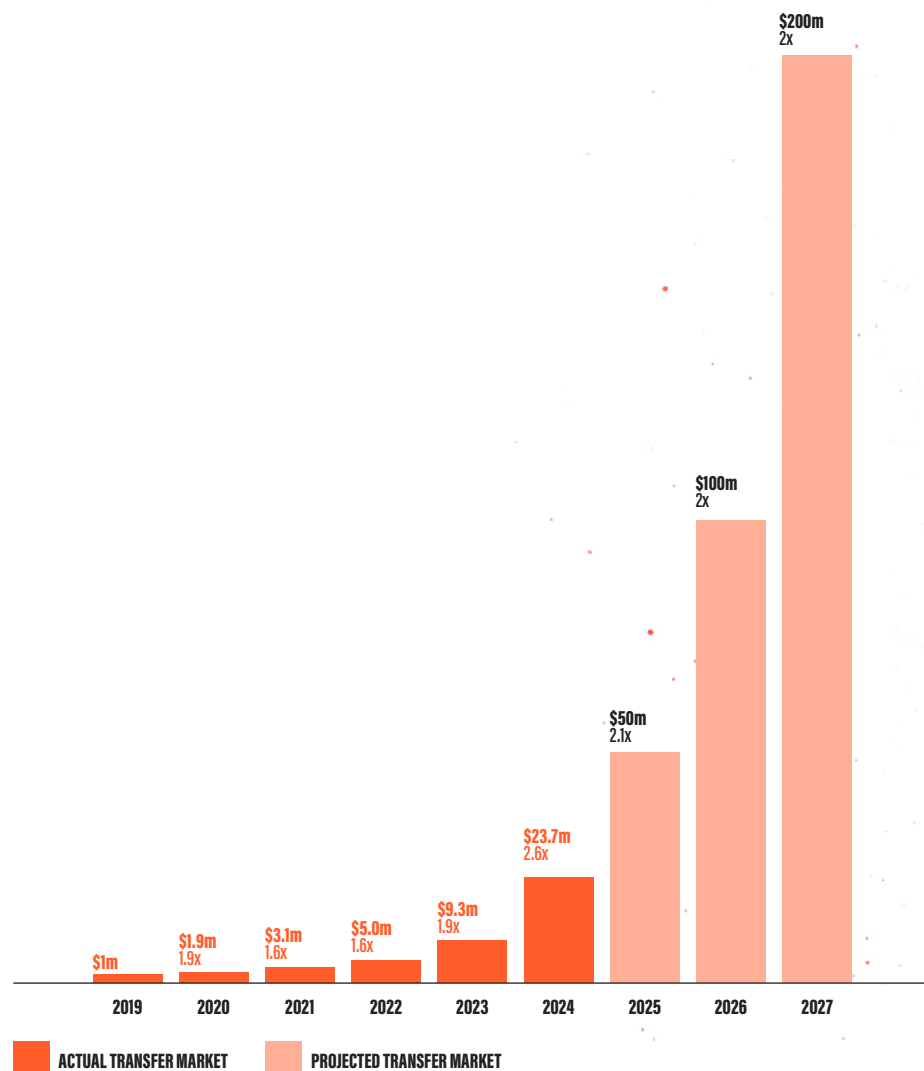
## TRANSFER REVENUE

The global women's transfer market is growing exponentially. Total fees in 2024 reached US\$15.6m (approx. A\$24m).<sup>21</sup> This is about 2.6x the total in 2023. For the previous four years, the market grew by between 1.6x and 1.9x annually. FIFA has not yet released full-year data for 2025, but the 2025 January window saw 2.8x more than the amount spent in January 2024.<sup>22</sup> The midyear window for 2025 was 1.8x larger than the same period in 2024. A small amount of spending sits outside these windows and remains unaccounted for, but at the time of writing, 2025 looks set to be just over twice as large as 2024.

The growth is being driven by clubs in the US and the UK; those markets accounted for two thirds of transfer spending in 2024. The previous section highlighted the massive, continued uplift in revenues and club valuations in those markets. On the other hand, their dominance shows that the growth in other European leagues has not yet fully manifested in transfer spending. Every sign suggests that the women's transfer market will continue to expand rapidly.

If we assume a continued doubling of transfer spending for the next few years, total transfer spending would reach \$200m Australian dollars in 2027. This sounds like an extraordinary figure, and is, but it is still only 1.5% of the global men's transfer market in 2024.<sup>23</sup>

Women's global transfer market, projected growth to 2027



<sup>21, 22, 23</sup> <https://inside.fifa.com/transfer-system/transfer-reports>

Note: Figures in AUD based on conversion rate of A\$1 = US\$0.66





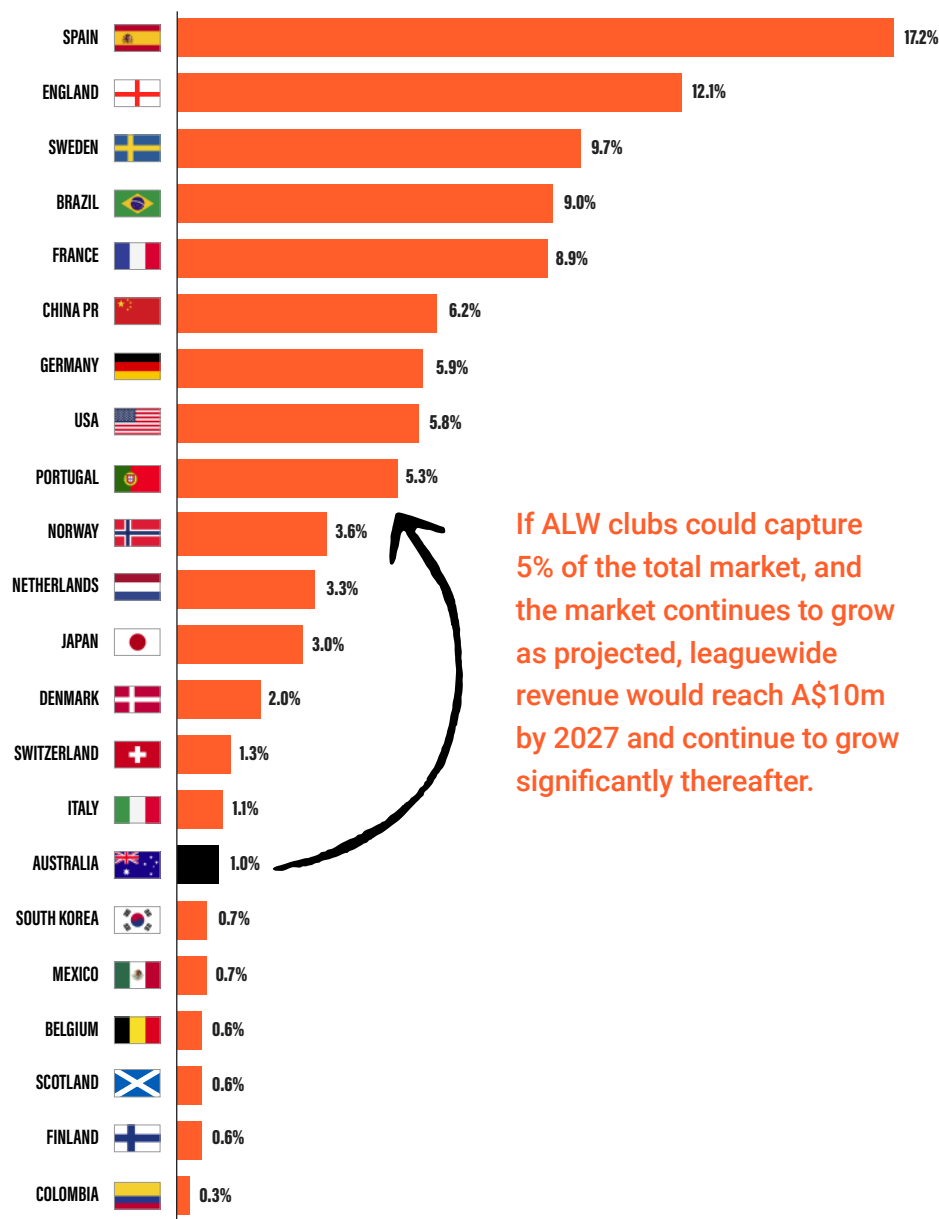
To estimate the opportunity for the ALW, the other half of the equation is what share of the global pie it will receive. In 2024, Australian clubs received about 1% of global women's transfer spending. Even 1% of the figures above would quickly become a gamechanger for the ALW economy. But if the league made the step to full-time professionalism, that share would certainly increase, because of two key reasons. Firstly, the quality of players in the league would increase. Secondly, the share of players whose transfer value was protected by multiyear contracts would increase significantly. Between 2022-23 and 2024-25, only around 15%-20% of ALW players were contracted beyond the end of each season.

In 2024, when it received 1%, Australia was ranked 16th among all nations for women's transfer fees received. According to FIFA, the average salary in the top 22 women's leagues in 2024 was US\$24,030, or around A\$36,000.<sup>24</sup> Clearly, doubling the ALW's minimum salary from A\$26,500 to something like A\$60,000 would have a massive impact on the league's ranking.

The ALW has a clear track record of developing world class players, such as UEFA Women's Champions League winners and World Cup semi-finalists. On the men's side of the game, leading 'development' markets such as Netherlands and Belgium each receive around 5% of total men's transfer spending.

Given all of the above, it is realistic to assume a fully professional ALW could move towards the top ten of women's leagues in terms of talent value and achieve at least a 5% share of global women's receipts.

### Share of global women's transfer receipts, 2024



If ALW clubs could capture 5% of the total market, and the market continues to grow as projected, leaguwide revenue would reach A\$10m by 2027 and continue to grow significantly thereafter.

<sup>24</sup> [https://digitalhub.fifa.com/m/4e63f61e61a63a93/original/FIFA-Womens-Football-Benchmarking-Report\\_EN.pdf](https://digitalhub.fifa.com/m/4e63f61e61a63a93/original/FIFA-Womens-Football-Benchmarking-Report_EN.pdf)

## PRIZE MONEY

The ALW's position near the summit of Asian women's football provides outsized opportunities. Not only is the relaunched AFC Women's Champions League (AWCL) potentially lucrative for our current solo entrant, but from 2028-29, multiple clubs from each nation will be entitled to enter. Better performance means more prize money now and much more later based on having several clubs competing for the top positions.

Being a big fish in a (relative to Europe or North America) weaker continent also makes FIFA's new women's club tournaments incredibly relevant. The first quadrennial FIFA Women's Club World Cup will run in 2028, with a smaller Women's Champions Cup in all other years starting from 2026 (Melbourne City would have qualified had they won the final of the 2024-25 AWCL). FIFA has not yet announced prize money for these new tournaments, but as we have seen from FIFA's Men's Club World Cup and its World Cup Club Benefits for both genders, FIFA has tended to set its financial incentives at a level required to sate the world's biggest clubs. Smaller clubs then benefit disproportionately.

If we assumed that professional ALW teams would advance on average one stage further in the AWCL than semi-professional ones, the increase in prize money would be about A\$500k per entrant at current AFC prize levels, not including any FIFA money. But having more teams in this competition and then qualifying semi-regularly for FIFA's tournaments would be worth millions each four-year cycle.

The difference between being Asia's clear dominant league and merely one contender is hard to overstate. And due to the gains the ALW has made, this difference could be bridged with a relatively modest investment.

## FIFA WORLD CUP CLUB BENEFITS

A full-time professional ALW would develop, attract, and retain more talent, increasing its capacity to earn FIFA Women's World Cup Club Benefits. Like transfer revenue, this stream is itself expected to grow significantly, offering the ALW a chance to capture a growing share of a growing pie.

For providing players for the 2023 FIFA Women's World Cup, Australian clubs received Benefits of about A\$600k, including A\$400k for ALW clubs. The total Benefits pool was US\$11.3m, a fraction of the US\$209m awarded for the 2022 FIFA Men's World Cup. The men's pot will grow to US\$335m for the 2026 and 2030 tournaments. For the sake of this exercise, let us assume FIFA increases the women's pool as a share of the men's from 5% in 2022-2023 to 20% in 2026-2027. This would equate to US\$66m or A\$100m for the next Women's World Cup. If a full-time professional ALW increases its share of that pool from 2.2% in 2023 to 3% for 2027, by virtue of developing and retaining more Matildas and attracting more internationals from across Asia with its superior conditions, ALW clubs would expect to receive A\$3m for the upcoming tournament.





## BUSINESS CASE FOR PROFESSIONALISATION

In summary:

A leap to full-time professionalism, including staff and other costs, might require an increased investment of around \$1m per club per season (\$11m league-wide).

If the ALW can increase its share of the women's transfer market to 5% through better talent retention and multiyear contracting, annual transfer revenue could be \$10m by 2027 and growing.

If the ALW's current sole entrant into the AWCL went one step further in the competition on average, it would be worth an additional \$500k in annual prize money. If the ALW becomes Asia's dominant league, prize money could grow to millions per season as more Australian clubs are permitted in the AWCL and our clubs qualify semi-regularly for FIFA's new global tournaments.

If FIFA increased its Women's World Cup Club Benefits pot to 20% of the men's pot, and Australia grows its share of total Benefits from 2.2% to 3%, the 2027 tournament would be worth \$750k to Australian clubs on an annualised basis.

The league is projected to generate nearly \$4m in additional annual ticket revenue by 2029 if it grows at a rate professionalisation has been demonstrated to unlock. Similar upticks in broadcast and commercial categories would each equate to multimillion-dollar opportunities.

In the NWSL, club licence values have increased from around A\$3m-\$8m prior to 2022 to between \$100m and \$400m in 2025.

“

If you're a business person and you look at sports investment as an asset class, I do not actually see a world where it could justifiably be viewed through the lens of DEI and social cause. It is the same fundamental business as the men's leagues who have achieved incredible growth via the same exact investments and revenue streams that we have already begun to tap, and in many ways remain untapped. And I think that's why you're seeing the valuations continue to be validated.”

NWSL COMMISSIONER JESSICA BERMAN



### REVENUE SHARING

As mentioned in the introduction to this pillar, the ALM-focused brother document to this Vision discusses the concepts of revenue sharing and economic league-think more extensively.

In brief, the world's most successful 'closed' leagues in football and other sports feature integrated, dynamic economies which balance the needs of larger and smaller market teams for the benefit of all. One common feature of such leagues is revenue sharing: strategically redistributing the league's resources to optimise collective growth.

If the ALW was to adopt a more proactive revenue sharing policy, the challenge would be to identify which revenue lines to target. Currently, central league broadcast and commercial revenues are shared equally through club distributions. The ALW (and ALM) could tip the scales further and adopt AFL's 'variable distribution' model, where more needy clubs receive larger shares, but this would achieve little at a time when the central distribution is low.

That leaves football revenues, such as transfer fees, prize money, and FIFA Benefits. As illustrated above, these streams are an increasingly large and growing part of the ALW economy. There is logic to considering sharing parts of these revenue streams to ensure a league-wide focus on talent development and retention to a level that balances individual and collective club needs.

Revenue sharing is also predicated on all clubs being net contributors to the growth of the ALW; clubs must not be allowed to free ride on the investments of others. Conditions can be imposed on the receipt of shared revenues to ensure all clubs contribute to the league's goals.





# SUITABLE MATCHDAY INFRASTRUCTURE



# RECOMMENDATIONS

4.1

ALL ALW CLUBS SECURE MODERN, PURPOSE-BUILT AND WELL LOCATED BOUTIQUE HOME VENUES THAT HAVE THE CAPACITY TO CATER TO THE DISTINCT WOMEN'S FOOTBALL AUDIENCE AND ACCOMMODATE THE GROWTH TRAJECTORY OF FANS

4.2

MATCHDAY FACILITIES MEET MINIMUM STANDARDS THAT ARE APPROPRIATE FOR WOMEN PLAYERS AND SUMMER SCHEDULING

4.3

STADIUM AMENITIES, INCLUDING FOOD AND BEVERAGE, REFLECT THAT OF AN ELITE NATIONAL COMPETITION

4.4

THE ESTABLISHMENT OF A NATIONAL FOOTBALL INFRASTRUCTURE BODY THAT INCLUDES ALL STAKEHOLDERS, TO STREAMLINE FOOTBALL'S APPROACH TO GOVERNMENT-SUPPORTED INFRASTRUCTURE DEVELOPMENT



# CURRENT CONTEXT

ALW matches are played at venues ranging from glorified training pitches to cavernous stadia. Most clubs use more than one home venue each season. Many venues in use have substandard facilities for players and amenities for fans.

For the league to fulfil its potential, clubs need to have consistent home grounds which are the right size, well equipped, and well located. Fans must be allowed to form match-going habits at homes they want to come back to.

This matchday infrastructure challenge is different for women's and men's football, because the market size of women's football is a moving target. *For the Fans* called for "boutique" stadia sized between 10,000 and 15,000. That recommendation still stands for the ALM. However, it is hard to be so precise on the women's side. *Ready for Takeoff* demonstrates the potential growth in support if the league adopts full-time professionalism and rethinks its fan engagement. These should be sequenced first before we can define the ideal stadium size. Outgrowing existing venues will also help clubs make the case for investment into fit for purpose permanent homes.

Other women's leagues are also still at the stage of figuring out their matchday infrastructure. At the time of writing, Kansas City Current of the NWSL is the only professional women's club in the world with its own exclusive, purpose-built stadium; all 11,500 seats have been filled for every home match since it opened in 2024. In England, several WSL clubs still commonly use multiple venues as they experiment with marquee fixtures at larger stadia. Size is not all that matters: research into the unique requirements of women-dominated sporting crowds, and how venues must adapt to them, is starting to emerge.

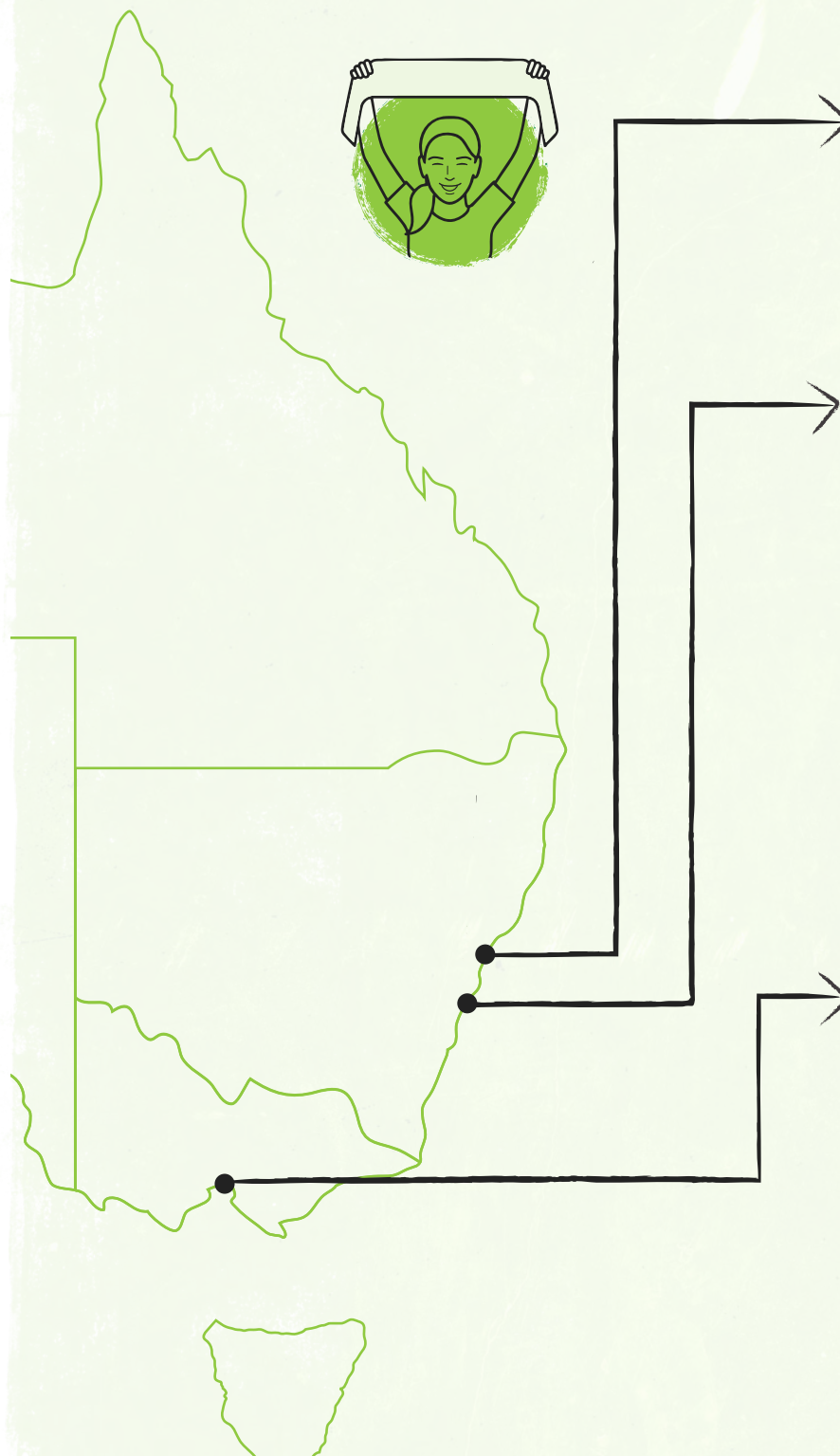
This pillar presents new evidence from Gemba's market research, the PFA's fan focus groups, and player feedback to identify the biggest opportunities to improve ALW matchdays right now, while also recommending longer-term reforms to the industry's approach to infrastructure.



### STADIUM CONFIGURATION

In the PFA's fan focus groups, ALW venues were either praised or criticised based on the infrastructure in place for fans. A lack of shaded seating was a major bugbear regarding venues such as Melbourne City's Casey Fields base, particularly since ALW matches are more likely to be played during the daylight hours. The presence of grassed hills in addition to grandstand seating was seen as a positive that enabled a family friendly experience.

It is noted that Melbourne City is in the process of constructing a mini stadium at Casey Fields that will serve as the future home ground for its ALW team. The project meets many of the criteria recommended in this section, including that its pitch for public funding was undertaken in partnership with NRL(W) club Melbourne Storm. Discussion of the current ctrl:cyber Stadium is included here because the insights are generalisable.



#### **No.2 Sportsground, Newcastle, Newcastle Jets**

*"Jets games were really great. I think because Newcastle is a small city. The field is in a good spot. It has that mix of being able to sit in the stadiums or sit around the grassy hill. It's very comfortable, very family friendly."*

#### **Leichhardt Oval, Leichhardt, Sydney FC**

*"Leichhardt Oval is a great place to watch the game because it has the [mix of grandstand and grass hill]. Very family friendly. The kids can, as kids do, get bored and run around. There's space to watch, there's space to play. It does create a really great vibe in the stadium."*

*"In terms of the facilities, I think Sydney has got it quite good. I think there's public transport, there's shade for more than 100 people. When it does fill up, there are some people who get relegated to the hill, but I think that was only in the semi-final game that that happened."*

*"I like that Leichhardt is small. I like that it's really relaxed. You can sit on the hill, we bring a picnic. It is a really nice day. I also think we're really lucky at Sydney to have the Cove. They're always so loud and so active."*

#### **ctrl:cyber Stadium, Casey Fields, Melbourne City**

*"The facilities there are really great for training, but not for being a spectator. Being that it was stinking hot summer days, a lot of the time you'd be down there watching a couple of matches and just thinking, 'I'm going to get so sunburnt here'. There's seating for maybe about 60 people, and people just standing in the hot sun. And I think as much as I've enjoyed my time with the A-League for my first season, I think the fan experience is really just lacking in terms of investment."*

*"We're driving to Casey Fields. It's a hike to get there, to stand in 43 degrees. It's really challenging."*

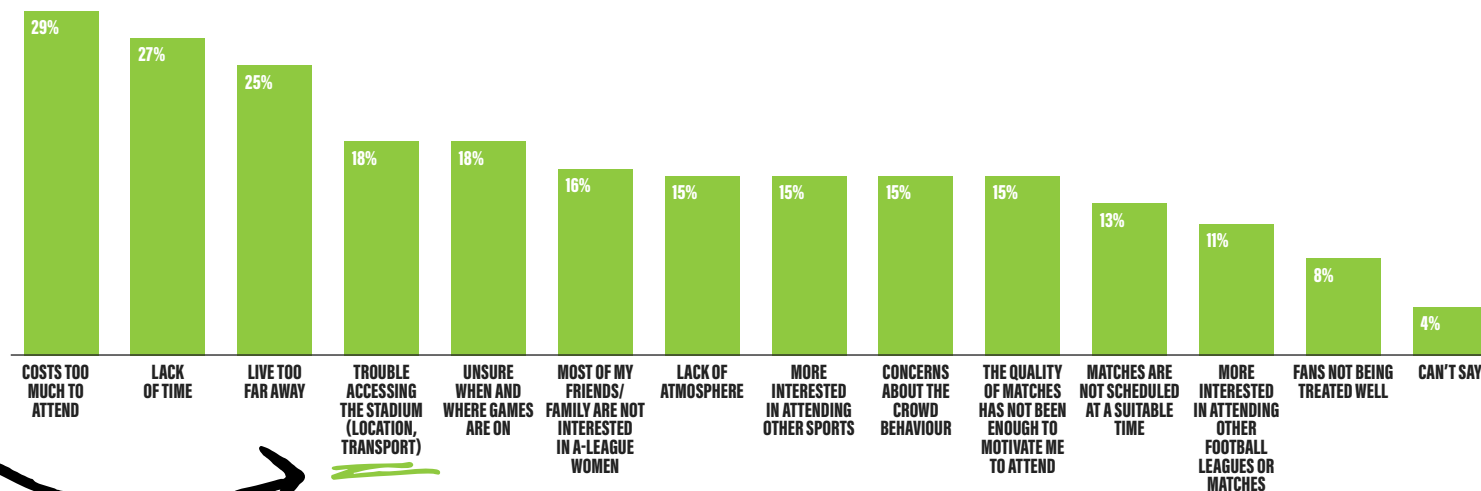


## LOCATION

According to the football fan survey conducted by Gemba, “trouble accessing the stadium (location, transport)” was one of the biggest barriers to people attending ALW matches, with 18% of fans citing that as a reason to attend less or not at all. This was higher than the 13% of fans who cited that factor as a barrier to attending ALM matches.



### Barriers to attending ALW matches among ALW fans



Of course, this barrier applies in some markets and not others. Comments from the PFA's fan focus groups help us decode the survey results. A Melbourne-based fan who had recently converted to the Matildas was looking for an ALW club to support and found the location of the clubs' venues to be a challenge:



Melbourne Victory's home ground is Bundoora. City's is Casey Fields. Western United's is Tarneit. None of those are particularly easy to get to, especially if you don't drive. If we were going to a Melbourne City game, that's like two hours one way. They're just not very accessible for people."

ALW FOCUS GROUP PARTICIPANT



By contrast, fans of Sydney FC and Newcastle Jets commented positively about the location and transport links of Leichhardt Oval and No.2 Sportsground, respectively.

## SIZE AND STANDARDS

The PFA's 2024-25 post-match player surveys found that mid-sized venues had the best average atmosphere ratings.

Two of the venues where atmosphere was rated by away team players as less than 3.0 on a 1-5 scale were the largest main stadia used for double headers: Melbourne's AAMI Park and Western Sydney's CommBank Stadium. The more modest sized main stadia in Adelaide and Central Coast had scores of 3.5 and 3.4 respectively.

Sydney FC, which has built support for its women's team relatively effectively, did receive an average rating of 3.5 across its two matches at Allianz Stadium. But in focus groups, its supporters noted the different feeling between matches there and at Leichhardt Oval:

“

I went to the first game and I was like, 'oh, God, the game is slow'. But I think because the game was at Allianz Stadium, it did feel a bit mismatched for the size of the crowd, I think, and it makes it feel weird.”

ALW FOCUS GROUP PARTICIPANT



Once the games did move over to Leichhardt [from Allianz], I felt much more comfortable. It felt like the place was the right size. There were enough people to fill the place. The Cove didn't feel like it was a million miles away.”

ALW FOCUS GROUP PARTICIPANT



The other venues that scored less than 3.0 on average were Melbourne City's ctrl:cyber Stadium and Western Sydney's Wanderers Football Park, which are technically training venues with limited seating.

Venues with the best atmosphere scores tended to be those mid-sized stadia with a major grandstand on one side of the pitch, concentrating fans together. Canberra's McKellar Park (capacity 3,500) and Brisbane's Perry Park (5,000) are among these archetypal ALW venues, both with the benefit of being the sole venues used by their teams. The highly-rated Leichhardt Oval has a large capacity of 20,000 when including its wraparound grass hill, but its configuration (before impending upgrades) is more akin to those aforementioned stadia.



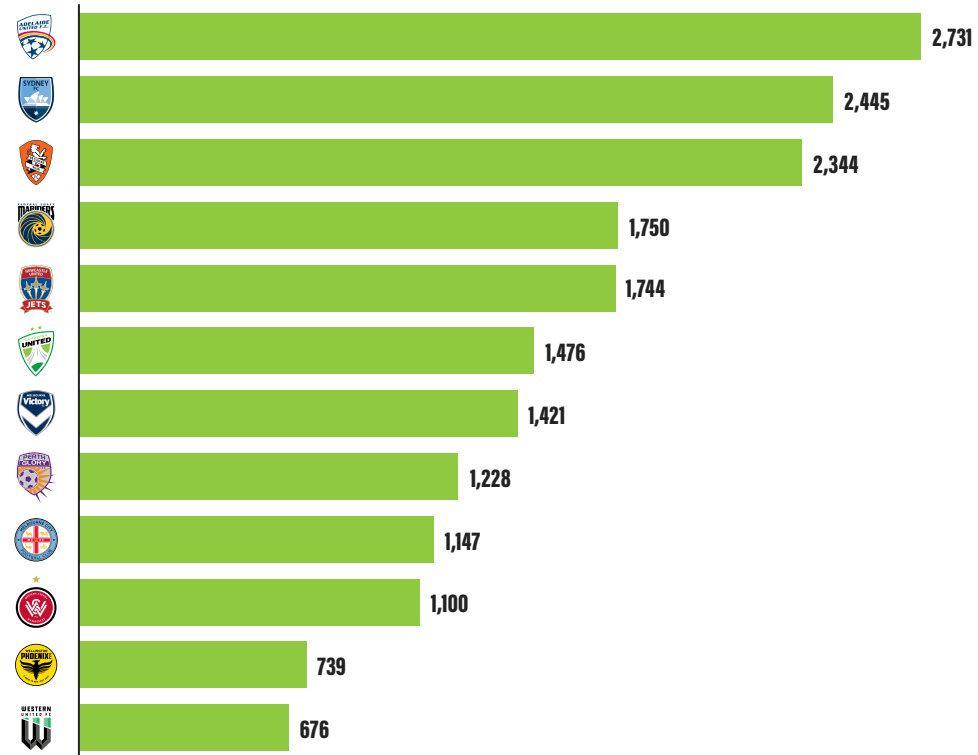


2024-25 ALW average stadium ratings, from the PFA's post-match surveys



Club	Stadium	Pitch quality	Atmosphere	Facilities	Games surveyed
	Coopers Stadium	★★★★★	★★★★★	★★★★★	4
	Marden Sports Complex	★★★★★	★★★★★	★★★★★	2
	ServiceFM Stadium	★★★★★	★★★★★	★★★★★	1
	Perry Park	★★★★★	★★★★★	★★★★★	9
	McKellar Park	★★★★★	★★★★★	★★★★★	9
	Industree Group Stadium	★★★★★	★★★★★	★★★★★	5
	Woy Woy Oval	★★★★★	★★★★★	★★★★★	2
	ctrl:cyber Pitch	★★★★★	★★★★★	★★★★★	4
	AAMI Park (MCY)	★★★★★	★★★★★	★★★★★	3
	Home of the Matildas	★★★★★	★★★★★	★★★★★	4
	AAMI Park (MVC)	★★★★★	★★★★★	★★★★★	2
	No.2 Sportsground	★★★★★	★★★★★	★★★★★	4
	McDonald Jones Stadium	★★★★★	★★★★★	★★★★★	1
	Maitland Sports Ground	★★★★★	★★★★★	★★★★★	1
	Cessnock Sportsground	★★★★★	★★★★★	★★★★★	1
	Sam Kerr Football Centre	★★★★★	★★★★★	★★★★★	6
	Leichhardt Oval	★★★★★	★★★★★	★★★★★	5
	Allianz Stadium	★★★★★	★★★★★	★★★★★	2
	Porirua Park	★★★★★	★★★★★	★★★★★	10
	Wanderers Football Park	★★★★★	★★★★★	★★★★★	5
	CommBank Stadium	★★★★★	★★★★★	★★★★★	1
	Marconi Stadium	★★★★★	★★★★★	★★★★★	1
	Ironbark Fields	★★★★★	★★★★★	★★★★★	7
	Netstrata Jubilee Stadium	★★★★★	★★★★★	★★★★★	5

Average ALW attendances, 2024-25



A challenge for the ALW is that there is often a correlation between the size of a venue and the quality of its facilities and amenities. Perry Park in Brisbane is an ideal size for Brisbane's ALW crowds at this stage of their growth, but its dated facilities received an average score of just 2.4 by visiting players.

Many older venues lack sufficient cooling in the changerooms to deal with the ALW's summer schedule. Players have reported this issue consistently and temperatures have been measured to be hotter inside the changerooms than outside.

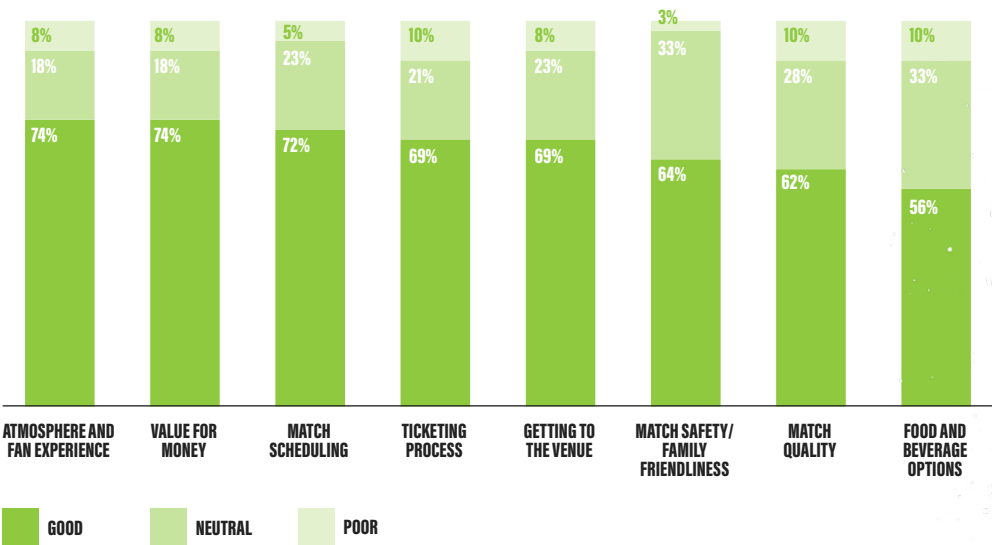
The only regular ALW venue which truly balanced the needs of players and fans was Western United's purpose-built mini stadium at Tarneit.

AMENITIES

Among ALW attendees, “food and beverage options” was the worst-rated aspect of going to a match among eight options provided. Through the focus groups, it became clear that this aspect falls short for different reasons at different places.



Perceptions of attending an ALW match in 2023-24



Some of the smaller ‘training centre’ type venues are simply not designed to cater for elite league fixtures, and feature only small canteens with limited fare.

Fans in the focus groups said that when some of the major stadia are opened early for double headers, concession stands have been left closed to save costs, giving the ALW fans a second-rate experience.

The Effective Fan Engagement pillar of this Vision describes how a unique women’s football audience see the ideal matchday experience: family-friendly, with entertainment and activities wrapped around the match itself to make fans feel welcome, appreciated, and involved.

If venues do not provide decent meal options for families, or do not reflect the ‘care factor’ supporters are sensitive to, they are not enabling the experience which will see crowds reach their potential.





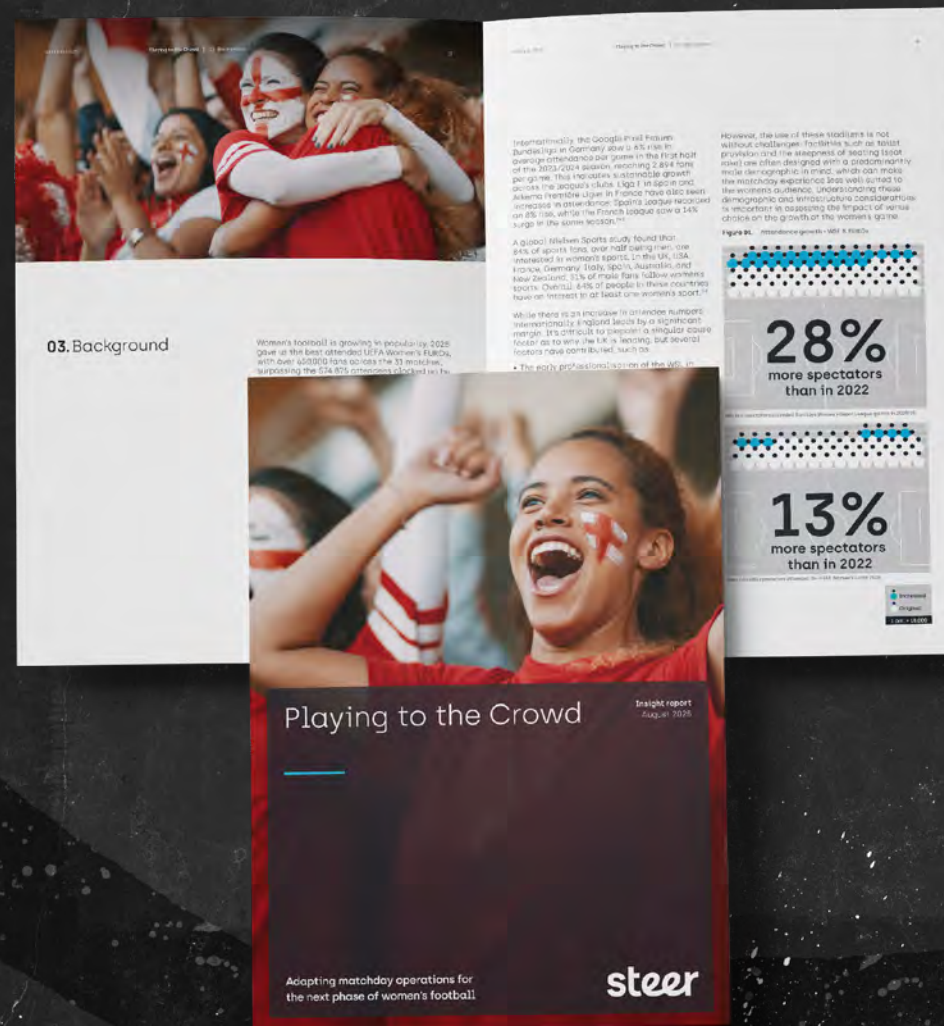
# STEER GROUP INFRASTRUCTURE REPORT

A new report by global consultancy Steer Group has zeroed in on the ways football infrastructure and match delivery must adapt to the growing and distinct women's football audience.<sup>25</sup>

*Playing to the Crowd* found that stadium design, fan communications, transport, staffing, and operations all required a different approach for a demographic featuring more women, children, and football newcomers. Merely copying and pasting from the men's game would prevent women's football from "sustain(ing) spectator experience, engagement and opportunities for long-term revenue generation".

Recommendations were wide ranging, including:

- ▶ Tailoring pre-match and in-stadium communications to fans without an established routine
- ▶ Taking a more nuanced approach to security and safeguarding
- ▶ Catering for families with grouped digital tickets and increased bag size limits, for example
- ▶ Providing appropriate gender splits for toilets, plus baby-changing and breastfeeding facilities
- ▶ Considering fans other than adult males in design elements such as seat configurations, sightlines, and toilets
- ▶ Ensuring safe, affordable public transport access matched to the women's crowds' unique arrival profiles



<sup>25</sup> [https://steergroup.com/sites/default/files/2025-08/Steer\\_Insight\\_Report\\_Playing\\_to\\_the\\_Crowd.pdf](https://steergroup.com/sites/default/files/2025-08/Steer_Insight_Report_Playing_to_the_Crowd.pdf)

# DELIVERING SUITABLE MATCHDAY INFRASTRUCTURE

## SHORT-TERM ENHANCEMENTS

In the immediate term, clubs should reflect on how their venues balance the factors outlined above: capacity, configuration, amenities, accessibility, and standards.

Investments should be prioritised to address shortfalls that can be solved, such as by upgrading player facilities and expanding food and beverage options.

Venue hopping must end. Clubs should have consistent home venues that can accommodate the aggressive growth trajectory demonstrated by the Effective Fan Engagement pillar of this Vision. If current venues cannot carry crowds of at least double their current size, then clubs should explore alternative options sooner rather than later. Specifically, training centre style venues should be replaced by small stadia designed for fans to watch football. One option could be using the home grounds of local NPL clubs.

## LONG-TERM STRATEGY

The corresponding pillar of the PFA's new Vision for the ALM tells the story of Major League Soccer establishing two dozen new 'soccer-specific' stadia during the time that Australia has been merely talking about our need for the same.

It was not necessarily planned this way, but football in the US has benefited from a significant double dividend where most NWSL teams now share those same venues built for their neighbouring men's clubs. The stadia are sized between 18,000 and 30,000. MLS clubs generally fill their capacities, with an overall average attendance of over 23,000, while their NWSL cohabitants average around half that figure and growing.

This case study lights the path for Australian football. If we can finally make progress on establishing the boutique stadia called for in *For the Fans* and countless documents since, these would likely provide appropriate homes for both ALW and ALM teams. Initially, their capacities

might be more ideal for the men's teams than the women's, but the research in this document, and the example of the Matildas and Socceroos, suggests that the sizes of the two fanbases are likely to converge to a degree where the pros of shared tenancy would easily outweigh any cons.

So, whether privately or publicly funded, the long-term play for both professional leagues is to establish the modern, purpose-built, well located boutique football venues that are currently absent from the landscape.

A new approach to government lobbying is required to ensure the next decade does not repeat the inaction of the previous two. It will only help this effort that our ALM and ALW teams will likely converge with regard to their required capacities.







This can be an advantage football has over the AFL(W) and NRL(W), which will likely continue to feature a much larger gap between the size of support for their men's and women's leagues. The AFL has recognised this dynamic and has publicly announced it intends to invest in a 15,000-capacity boutique oval stadium in Melbourne to provide a dedicated common home for several of its women's teams.<sup>26</sup>

If the NRL similarly realises that its nascent women's competition needs better rectangular venues, it could be a strategic partner in the A-Leagues' infrastructure push. NRL clubs have been extremely successful in securing public funds to upgrade and upsize their stadia, such as the \$309m for a bigger Penrith Stadium.<sup>27</sup> West Tigers' public strongarming of the NSW government for a nine-figure investment into Campbelltown Stadium further demonstrates rugby league's lobbying power.<sup>28</sup> The flipside to these developments is that bigger NRL stadium capacities become even less appropriate for their NRLW teams, further necessitating alternatives in the range that could suit our clubs.

Melbourne City has shown the way in this regard by partnering with Melbourne Storm in its successful pitch for government funding for its future mini stadium at Casey Fields. Storm said the stadium will host junior representative matches and could host NRL trial matches and NRLW fixtures.<sup>29</sup>

Another advantage of knowing in advance that any new boutique stadia should equally serve women's and men's football is that they can be designed with both audiences in mind. New venues should apply the lessons from Steer Group's report and be designed with proper access and facilities for women and families, space for children to move around, and sightlines for all heights. Modular solutions should be considered for bag checks and ticket scanning, precinct activations, toilet gender splits, and security presences.

<sup>26</sup> <https://www.afl.com.au/aflw/news/1366728/afl-considering-new-boutique-stadium-in-melbourne-to-be-new-home-of-aflw-as-it-looks-to-consolidate-venues>

<sup>27</sup> <https://penrithstadium.insw.com>

<sup>28</sup> <https://www.weststigers.com.au/news/2025/04/09/backing-campbelltown-weststigers-call-for-investment/>

<sup>29</sup> <https://www.melbournestorm.com.au/news/2025/03/31/election-commitment-for-casey-mini-stadium/>





# METHODOLOGY



## GEMBA RESEARCH



In 2024, the PFA commissioned exclusive A-Leagues market research from leading sports intelligence agency, Gemba.

Gemba provided 'opportunity sizing' for the ALW and ALM using its proprietary insights, including its regular tracking of 'fanatics' of sports properties. Gemba's fanatics are people who rate their support for a property as being either 4 or 5 on a scale of 1-5. Those who rate their support as a 3 are defined as casual supporters. Fanatics have been found to make up the vast majority of a league's engaged customers, in terms of attending matches, buying merchandise, and so on.

Gemba also conducted a survey of football fans in Australia. The sample was n=504 and fieldwork was conducted during the A-Leagues off-season in 2024. Topics included key drivers and barriers to supporting the A-Leagues, supporter behaviours, and interest in other sports and leagues.

Where you see the Gemba icon in this document, the data are from Gemba's research.

## PLAYER SURVEYS



At the end of each season, the PFA conducts mass surveys of its A-Leagues members. In 2024-25, the ALW end of season survey received a record response of n=251, with at least 16 players from each squad participating. The ALM end of season survey received a record response of n=276, with at least 17 players from each squad participating. In 2023-24, the samples were n=197 and n=191 respectively. Topics range from player careers and lives, club environments, league policy, and the PFA.

The PFA also attempts to survey at least one player from the away team after each match during the A-Leagues seasons. These post-match surveys cover the quality of the pitch, refereeing, atmosphere, facilities, and extreme weather. During the 2024-25 season, responses were received for 68% of ALW matches and 78% of ALM matches.

Where you see the player survey icon in this document, the data are from the PFA's player surveys.

## FAN FOCUS GROUPS



In June, 2024, the PFA conducted its own mini focus groups with Australian football fans. The ALW focus groups targeted participants who were recent converts to the Matildas, in an attempt to better understand how this support could be parlayed into the ALW. The participants were all women, not by design but because they were the only suitable candidates available to attend. There was a broad range of ages, but a common profile was middle-aged with teenaged children. Several identified as being from the LGBTQ+ community. The PFA has published the insights from the ALW focus groups in full on its website.<sup>30</sup>

Where do see the fan feedback icon in this document, the quotes are from the PFA's focus groups.

## OTHER SOURCES

The ALW Vision is also the products of desktop research, literature reviews, and expert interviews conducted throughout 2024 and 2025. References to public sources are included throughout the document.

<sup>30</sup> <https://pfa.net.au/report/pfa-a-league-women-fan-focus-groups/>



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