

We are the AFL Fans Association
Giving fans a voice

2022 AFL FANS SURVEY



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1. BACKGROUND

Role of the AFL Fans Association (AFLFA)

The AFL Fans Association (AFLFA) was formed in December 2013 by a group of grassroots supporters who felt that the game's largest stakeholder – AFL fans – needed a collective voice. The AFLFA aims to give fans a strong and independent voice, ensuring they are not treated as consumers but stakeholders who should be consulted.

AFLFA Survey

In 2021, the AFLFA launched its inaugural light touch survey to prove the concept would be meaningful. The results released in early 2022 generated [significant media attention](#). The AFL Fans Association is pleased to provide the results of the second annual fans survey reflecting a more 'normal' fan season following the easing of COVID-19 pandemic restrictions.

This survey was promoted to AFL Fans Association members and subscribers on Facebook, Twitter and email channels. The survey was offered for distribution by AFL clubs however these opportunities were not accepted. There was some cross promotion of the survey by The Age and through the survey being shared to fan supporter groups on social media channels.

In the design of the 2022 survey, the following factors were considered:

- Maintaining some level of consistency with the first survey to demonstrate trends whilst accommodating changes in fan experience with the easing of the COVID-19 pandemic.
- Ensuring a broader reach of respondents outside of Victoria to reflect a national focus and in light of concerns from the 2021 survey that the AFL is too 'Victorian-centric'.
- Introduction of an AFL specific satisfaction rating and feedback questions.
- Introduction of club specific satisfaction rating and feedback questions.
- Obtaining more data from specific questions relating to common issues that are raised to the AFL Fans Association and new issues that emerged in last year's survey.

Fans were asked for their feedback on the following:

- **Main concern as an AFL fan (main concern)**
- **Identify all the issues that concern them as an AFL fan (all concerns)**
- **AFL specific questions**
 - Overall satisfaction rating with the AFL (score out of 5)
 - Ranking of issues relating to the AFL
 - What one thing should the new AFL CEO prioritise first to improve your fan experience?
 - What is the best thing about the AFL?
- **Club specific questions**
 - Overall satisfaction rating with your club (score out of 5)
 - Ranking of issues relating to your club
 - What one thing would best improve your experience with your club?
 - What is the best thing about your club?
- **Feedback on common fan issues**
 - Grand final ticket allocation
 - Grand final timeslot
 - AFL Gambling sponsorship and advertising
 - Support for a Tasmanian team

- **Diversity, inclusion and combatting racism:**
 - Feedback on whether the AFL should hold a pride round for AFL and AFLW
 - Questions regarding fan experience with racist comments witnessed at AFL matches (towards players, umpires, supporters)
 - Whether each club should undertake an external review on the treatment of indigenous players
 - Whether clubs and the AFL are doing enough to combat racism
- **Role of the AFL Fans Association (AFLFA)**
 - Whether the media should continue to engage the AFLFA
 - Whether the AFL should engage the AFLFA on issues impacting AFL fans
 - Whether clubs should encourage fans to become members of the AFLFA
- **Demographic information**
A range of demographic information on survey participants to enable filtering of results by club supported, volume of games attended/watched, whether fans are members, by age and an analysis of results from fans outside of Victoria.

Distribution

Results of the Part A survey will be distributed as follows:

- The Age who assisted in promotion of the survey.
- CEO AFL/Executive.
- Club CEOs and Presidents – including club-specific results relative to other clubs.
- Media release and distribution via AFL Fans Association social media and email channels.
- Other organisations including Responsible Gambling organisations.

The survey results will be released in two parts:

- Part A (This report): outlining key results and trends.
- Part B (Second report): outlining a summary of qualitative text responses, favourite commentators and club specific results.

Next Steps

Fans tell us they want their voice heard and they want action on the feedback they provide us. There is concern that the fan voice is less important as evidenced in the survey results. The AFL Fans Association welcomes a formal response by the AFL, clubs and other stakeholders to the feedback received. This will ensure continuous improvement of the AFL fan experience in areas managed by the AFL and clubs. Annual surveys will allow trends to be identified as well as any improvements that have been implemented.

2. EXECUTIVE SUMMARY

Key Fan Issues

- **Gambling ads** has now surpassed umpiring/rule changes as the *most common* concern of AFL fans. This feedback is based on fans selecting all issues they are concerned about. In addition to the recognised issues of problem gamblers destroying families, there is concern about the normalization and grooming of children as future gamblers due to the sheer volume of gambling advertising.
- When considering all the issues that concern fans, **umpiring/rule changes** remains the *main concern*. Qualitative feedback from fans highlights that the frequency of rule changes is very unpopular and makes it difficult to umpire consistently. Like the previous year, the stand rule remains a common concern.
- As identified in last year's survey, the **floating fixture** is not popular with fans and is the third most common concern for AFL fans. Fans were told this was a temporary measure during the COVID-19 pandemic, but it now exists due to broadcasting considerations. Some fans want to see a full fixture to determine if it is worthwhile buying a membership, others need to plan well in advance to attend games and a floating fixture makes this difficult and more expensive.
- **Affordability** is an increasing area of concern for fans with rises in the cost of living.
- **Grand final ticket allocation** to competing club members remains a high priority issue of fans. As demonstrated in figure 5.2 below, 92% support an increasing allocation to competing club members.

Fan Satisfaction

This year, fans were asked to rate their satisfaction with the AFL and their club hence no prior year comparison is available. Survey results will be released in two parts:

- The overall **fan satisfaction rating with the AFL** is 3.3 out of 5.
- The overall **fan satisfaction rating with clubs** is 4.1 out of 5. Club list/recruitment and retention of players is the biggest concern of fans. Note: Individual club results will be released in Part B of the survey results.

Common Fan Issues

Specific questions were asked on issues commonly raised with the AFLFA. The results highlight:

- 73% of fans want the **grand final time** to remain at the traditional 2.30pm AEST time. From all polls and surveys conducted by the AFL Fans Association, this figure remains consistent, despite a significantly higher proportion of participation from fans outside of Victoria. Refer figure 5.1 below.
- 91% of fans are in favour of a **Tasmanian team** but only 47% are supportive if that results in no existing clubs merging or relocating. Refer figure 8.1 below.
- 92% of fans want a redistribution of **grand final ticket allocation** so more competing club members can see their club participate in the grand final. Refer figure 5.2 below.

Promoting Inclusion and Combatting Racism

In relation to supporting inclusion and combatting racism within the AFL (refer section 6 below):

- 47% of fans have **observed racist comments** towards an AFL player. On whether enough is being done to address racism in the AFL, 53% of fans believe the AFL is not doing enough to combat racism. 85% of fans believe their club is doing enough to support indigenous players.
- 62% of fans suggest the AFLW should have an **annual pride round** and 59% believe the AFL men's competition should have an annual pride round.
- 66% of fans believe the **AFL should be more proactive in promoting inclusion and combatting racism** in the AFL.
- Qualitative feedback also provides some contrary views encouraging a focus on the game of AFL and not politics or the 'woke agenda'.

Role of the AFL Fans Association (AFLFA)

Fans were asked to provide their views on the role of the AFLFA with the aim of ensuring the fan voice is heard by all stakeholders. The results as outlined in section 9 below highlight:

- 93% of fans believe the media should continue to engage the AFLFA as the voice of fans on issues impacting fans.
- 92% state the **AFL should include the AFLFA in the consultation process** before they introduce changes that impact fans.
- 78% believe that the AFL clubs should encourage fans to sign up as members of the AFLFA.

Survey Response

As outlined in section 10 of this report:

- There were 2924 responses received from AFL fans, three times more than the last survey. Respondents ranged in age from under 18 to the 85 years and older.
- Respondents were asked to select the main team they support. Fans of all clubs participated in the survey with a minimum of 100 responses obtained from all clubs except Western Bulldogs, Fremantle and North Melbourne. The highest response was from Collingwood fans (13%) largely due to stronger uptake on Collingwood fan social media channels.
- 80% of respondents are members and 24% of respondents are members of the AFL Fans Association.
- 51% of respondents live outside of Victoria. State specific feedback will be further explored in Part B of the survey results release.

Other Qualitative Feedback

Qualitative feedback from fans will be further explored in Part B of the release of survey results. In addition to the issues outlined above, the following themes are apparent:

- Fans have an appreciation for the difficult role of the umpires in making consistent decisions compounded by rule changes. There is a common question as to why the rules are changed so much particularly when contrasted to other sporting codes (e.g. soccer). The stand rule remains noticeably unpopular.
- There is significant feedback from fans on the impact of gambling ads. Fans are most concerned that the bombardment of gambling advertising for their kids watching football is grooming them as future gamblers and normalising gambling. Whilst there is some recognition of the need for responsible gambling and fans' right to gamble of AFL if they wish, there is a clear consensus that the volume of gambling advertising is morally inappropriate and should be banned given the social and family impacts.
- There is a clear theme of fans requesting the AFL to focus on maintaining what is great about the game of Australian Rules football with consistent umpiring, less rule changes and a fair draw. There is a concern that issues such as a focus on broadcasters, inclusion, gambling, digital ticketing, noise and lights at the game are distracting from the core focus of the game itself.
- With cost-of-living pressures rising since the 2021 survey, affordability is becoming increasingly important. There is a desire for uniform pricing and a view that attending matches is more affordable in Victoria.
- A concern about the Victorian centricity of the AFL remains a common issue particularly in relation to the fairness of scheduling and location of the grand final.
- Fans who are unable to attend matches largely due to lack of proximity to the stadium are seeking accessibility to view the game ideally on free-to-air television and without being bombarded with gambling ads.

Conclusion

The top two concerns of fans – gambling ads and umpiring/rule changes are consistent with last year. The floating fixture which emerged as a post-pandemic issue is a particular concern to fans given that it was originally stated as a temporary measure during COVID-19 restrictions. The floating fixture impacts fans' ability to determine if a membership is value for money (based on what games they can attend), impacts commitments outside of football and for those willing to travel to matches, they face higher accommodation and flight costs closer to the match timing. This is compounded by increased cost-of-living pressures which have increased markedly since the last survey.

The survey results are consistent with feedback raised to the AFL Fans Association and we seek a formal response from the AFL and other relevant stakeholders to these survey results on behalf of AFL fans. As outlined by respondents in this survey, fans welcome the AFLFA representing the fans voice on AFL issues impacting fans. We appreciate the recent positive dialogue with AFL executives and look forward to a constructive relationship with the new AFL CEO and the media in continuing to ensure the sport of AFL remains the best it can be for the AFL's biggest stakeholder – the fans.

3. KEY FAN ISSUES

Fans were asked to rank their main concern and all the issues that concern them. Fans were asked to consider a list of 14 common fan issues raised to the AFLFA plus a category for 'other' issues.

In comparison to 2021, the following changes were made to the standard categories:

The following categories were added:

- Scheduling – floating fixture (based on the significant concern about this raised in the last survey).
- Media/social media – continued negative focus on players. This is seen as an emerging issue since the last survey based on feedback from fans. With “clickbait” and sensationalisation of player specific issues seen as detrimental to the player and their mental health as well as the overall AFL brand.
- Affordability – combining two previous cost questions outlined below.

The following categories were removed from the 2021 survey

- Game access – COVID due to easing of pandemic.
- Cost (tickets/membership) and cost (overall cost of attending), These categories were replaced with a combined question on affordability.

ALL AREAS OF CONCERN		MAIN CONCERN	
2022	2021	2022	2021
1. Gambling Ads	1. Umpiring/ Rule Changes	1. Umpiring/ Rule Changes	1. Umpiring/ Rule Changes
2. Umpiring – Rule Changes	2. Gambling Ads	2. Gambling Ads	2. Game access – COVID
3. Scheduling – floating fixture	3. Game access – COVID	3. Affordability*	3. Gambling Ads
4. Affordability*	4. Scheduling (non-COVID)	4. Scheduling (floating fixture)	4. Scheduling (non-COVID)
5. Scheduling - excluding floating fixture	5. Grand final tickets	5. Other ^	5. Cost (Overall cost of attending)*
6. Grand final tickets	6. Cost (Overall cost of attending) *	6. Scheduling (non-floating fixture)	6. Cost (Price of tickets/ membership) *

Notes:

* In 2021 there were two cost categories (tickets/membership cost, overall cost of attending). In 2022 these two categories have been merged under 'Affordability'. The combined results of the two 2021 categories are approximate to the 2022 results for affordability for both the main and all areas of concern of fans.

^ Main themes include noise/lights at games making it difficult to hear, fan proximity to the AFL ground making it difficult to attend and unable to watch the match on television.

Main Concern of AFL Fans

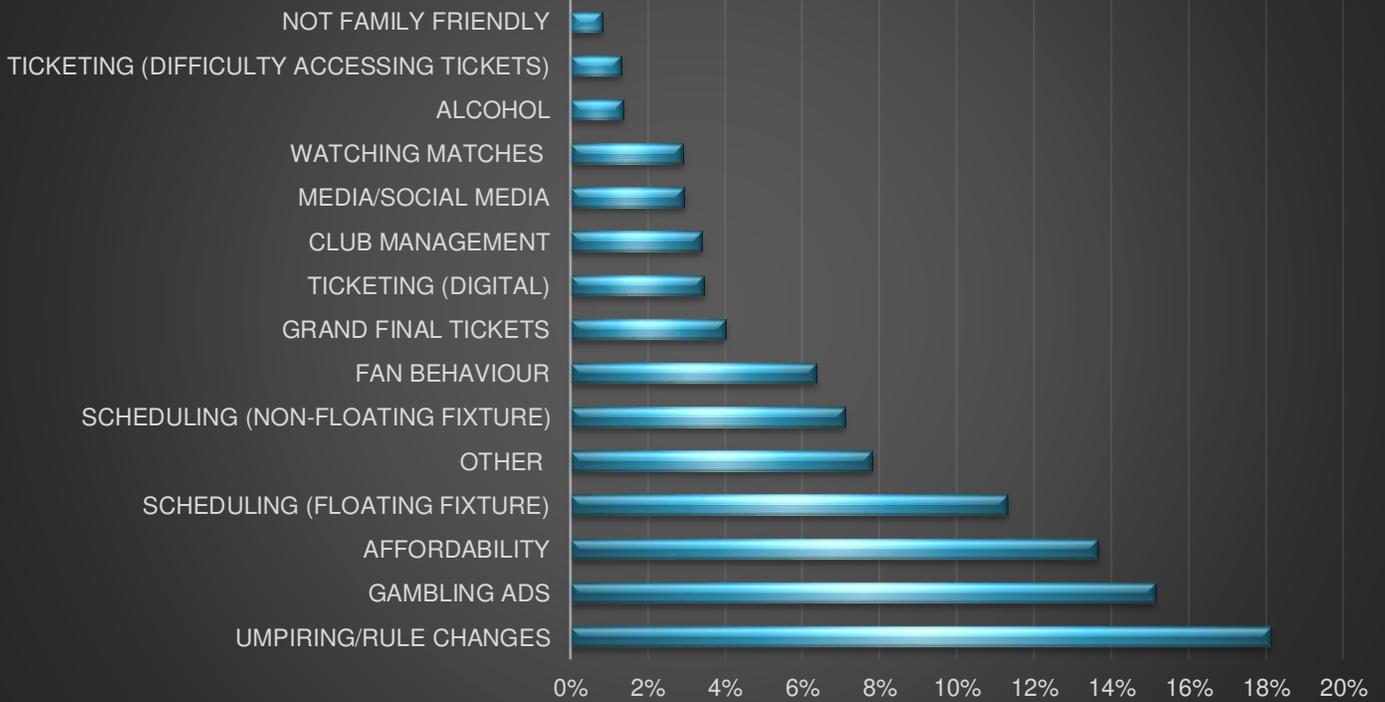


Figure 3.1 Top Concern of AFL Fans

Concerns of AFL Fans - Select All That Apply

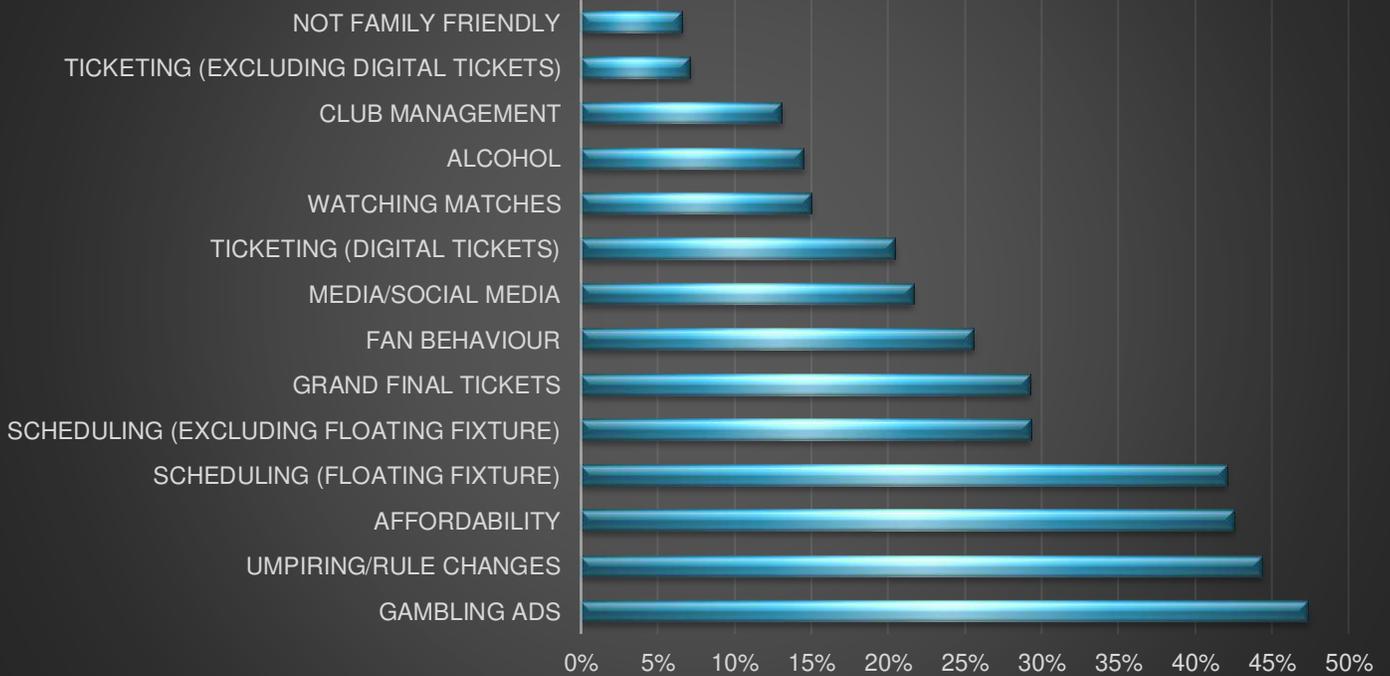


Figure 3.2 All Concerns of AFL Fans

Gambling ads are now the most common concern of AFL fans. The AFL Fans Association calls on the AFL, stadiums, broadcasters and clubs to prepare a plan to remove any revenue from gambling advertising and to stop all gambling promotional activity at AFL matches. Refer section 7 for more information.

Umpiring and rule changes remains the number one concern and the AFL Fans Association appreciate there has been a range of initiatives introduced on umpiring and rule changes since the last survey however this issue remains a key concern.

4. FAN SATISFACTION

Fans are on average 24% more satisfied with their club (4.1 out of 5) than with the AFL (3.3 out of 5).

AFL Satisfaction

Fans were asked to rank from the following topics, what they were most concerned with, to least concerned with (ranked 1 to 11) regarding the AFL. The consolidated ranked results show:

1. Umpiring/Rule changes (most concerned with)
2. Gambling advertising and revenue
3. Scheduling
4. Ticketing
5. Management/Governance of the AFL
6. Pricing
7. Broadcasting/Streaming
8. Match review panel and score review
9. Inclusion and racism
10. Not a national competition (Vic-centric)
11. Noise/lights at games (least concerned with)

Fans were asked to rank from the following topics, what they were most concerned with, to least satisfied (ranked 1 to 6) with overall club results as follows:

1. Club list/recruitment/retention of players (most concerned with)
2. Performance in the competition
3. Governance management of the club
4. Communication
5. Service responsiveness
6. Diversity and inclusion (least concerned with)

5. COMMON FAN ISSUES

Specific survey questions were included on the following topics based on the volume of enquiries and concerns that are raised to the AFLFA by fans.

Preferred Grand Final Time

This topic remains one of the most common issues raised to the AFLFA by fans. We have conducted numerous polls and surveys on this issue and the figure supporting the current 2.30pm AEST timeslot remains constant. This is despite a significantly higher portion of responses in this survey from outside of Victoria. There are recurring media reports suggests the change to a twilight or night game is inevitable however based on consistent fan views, there appears no basis for such a move.

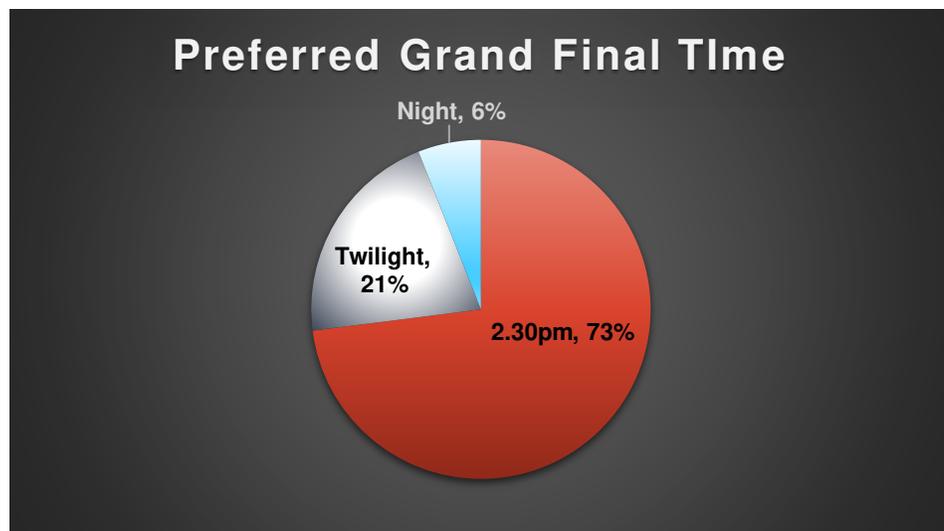


Figure 5.1 Preferred Grand Final Time from Surveyed Respondents

GF Ticket Allocation to Competing Club Members

92% of fans support more than the current 34,000 tickets allocated to competing club members for the grand final. Qualitative comments from fans recognize the importance of sponsors and revenue but believe the allocation needs to be increased given the importance of fans to the competition. Fans also question the proportion allocated to MCC members noting it is a national game. The AFLFA believes that there is scope to revisit the Grand Final ticket allocations and develop a plan to increase competing club member allocation over a period of time.

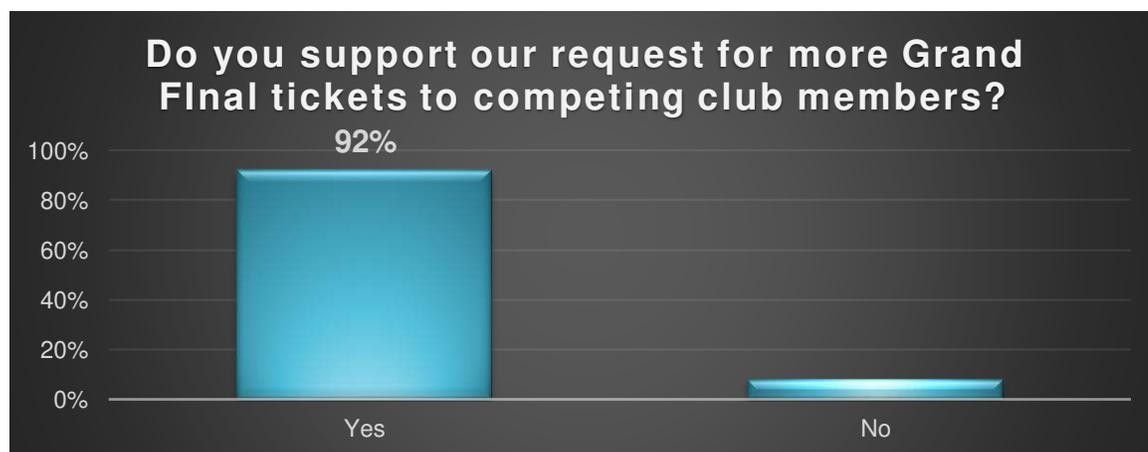


Figure 5.2 Support for an increase in grand final ticket allocation to competing clubs

6. PROMOTING INCLUSION AND COMBATTING RACISM

In considering measures to promote inclusion and combat racism, fans were asked:

- about racist behaviour they may have observed at an AFL game
- whether clubs and the AFL are doing enough to combat racism and support indigenous players
- whether all clubs should conduct a review of the treatment of indigenous players
- whether they support an annual pride round for the AFL men’s and women’s competitions; and
- whether the AFL is being proactive enough to support inclusion and combat racism.

Behaviour Observed at AFL Games:

- 36% of fans have observed racist comments from one fan to another fan
- 47% have witnessed racist comments to an AFL player/s.
- 25% have witnessed racist comments to an AFL umpire/s.

Note: some fans commented they have not attended AFL matches and for these questions selected a ‘no’ response for these questions only.

STATEMENT	YES	NO
a. Do you think the AFL is doing enough to combat racism in the AFL?	47%	53%
b. Do you believe all clubs should conduct a review of treatment of indigenous players?	69%	31%
c. Do you believe your club is doing enough to support indigenous players?	85%	15%

Pride Round

62% of fans support an annual pride round for AFLW and 59% for AFL.

Promoting Inclusion

66% of fans believe the AFL should be more proactive in improving inclusion and combatting racism in the AFL.

Qualitative comments from fans vary on these matters with some strongly advocating for more being done whilst others are concerned that these issues are distracting from the game of football and addressing what fans want. There is also concern from the qualitative comments that there is too much emphasis on the ‘woke agenda’ with some fans even questioning why questions on these topics are included in the fan survey.

7. GAMBLING ADVERTISING AND REVENUE

Following the level of focus generated from the 2021 AFLFA survey on gambling advertising, the specific following questions were included in the 2022 survey:

Gambling advertising should be banned from the AFL grounds.	79% Agree
Gambling advertising should be banned from broadcasting (including TV and radio)	76% Agree
AFL Clubs should not receive money from pokies revenue or gambling advertising	67% Agree
Gambling on AFL matches should not be allowed at the ground	65% Agree
Gambling on AFL matches should not be allowed online	44% Agree
The AFL should not receive any revenue from gambling (advertising, gambling revenue, other)	62% Agree

Qualitative comments contain the full spectrum of fan views on these topics and include:

- Particular concerns about the bombardment of gambling ads leading to young children being 'groomed' by the AFL to gamble. This is leading to a reluctance of some fans to attend matches with their children or allow them to watch matches (TV or streaming).
- Recognition of the significant social and family problems caused by gambling including the destruction of families.
- Questioning the AFL's values and morals through allowing gambling advertising and that support of gambling leads to integrity risks for the competition and potential corruption as demonstrated by the umpire Brownlow betting scandal.
- An appreciation that it is an individual's choice to choose whether to gamble.
- Questioning why Victoria football clubs accept pokie revenue when WA clubs are not sustained by such income.

We call on all stakeholders supporting the AFL competition to develop a plan to remove any revenue from, or promotion of, gambling activities due to the detrimental effects gambling can have on fans. In particular, the concerns about children being groomed as gamblers given the level of gambling advertising when watching a game at the ground, via streaming or free to air.

8. TASMANIAN TEAM

The AFLFA welcomes the [announcement](#) by the AFL to spend \$360m on a Tasmanian team and is hopeful stadium funding will be secured to enable the 19th AFL license to be provided to a Tasmanian team. 91% of fans support the introduction of a Tasmanian team to the AFL. However, this figure drops to 47% in support of a Tasmanian team only if it means no existing teams need to relocate or merge.

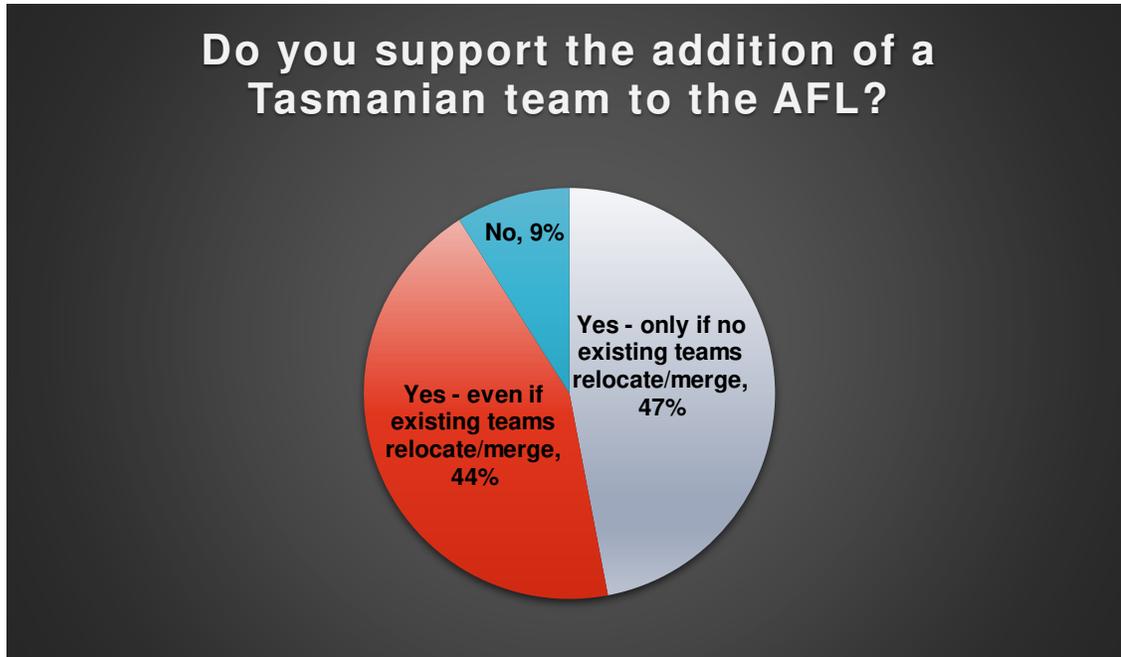


Figure 8.1 Support for Tasmanian AFL team

9. ROLE OF AFL FANS ASSOCIATION

The proportion of fans surveyed in agreement with the following statements regarding the role of the AFL Fans Association (AFLFA) is outlined below:



Figure 9.1 AFL Fans View on Role of the AFL Fans Association (AFLFA)

The AFL Fans Association supports continued engagement in representing the voice of fans to key stakeholders.

10. RESPONDENT DEMOGRAPHICS

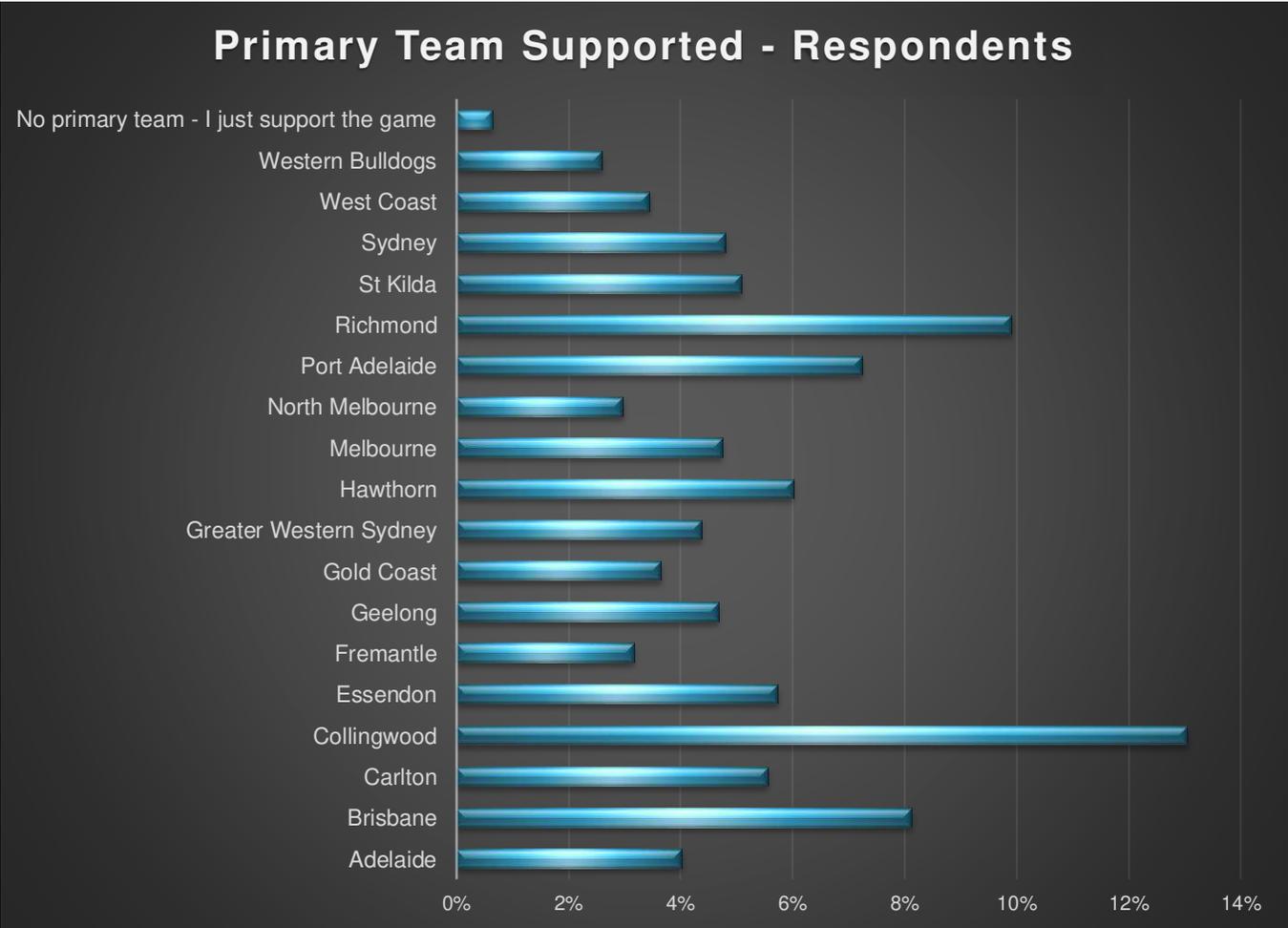


Figure 10.1 Primary Team Supported by Survey Respondents

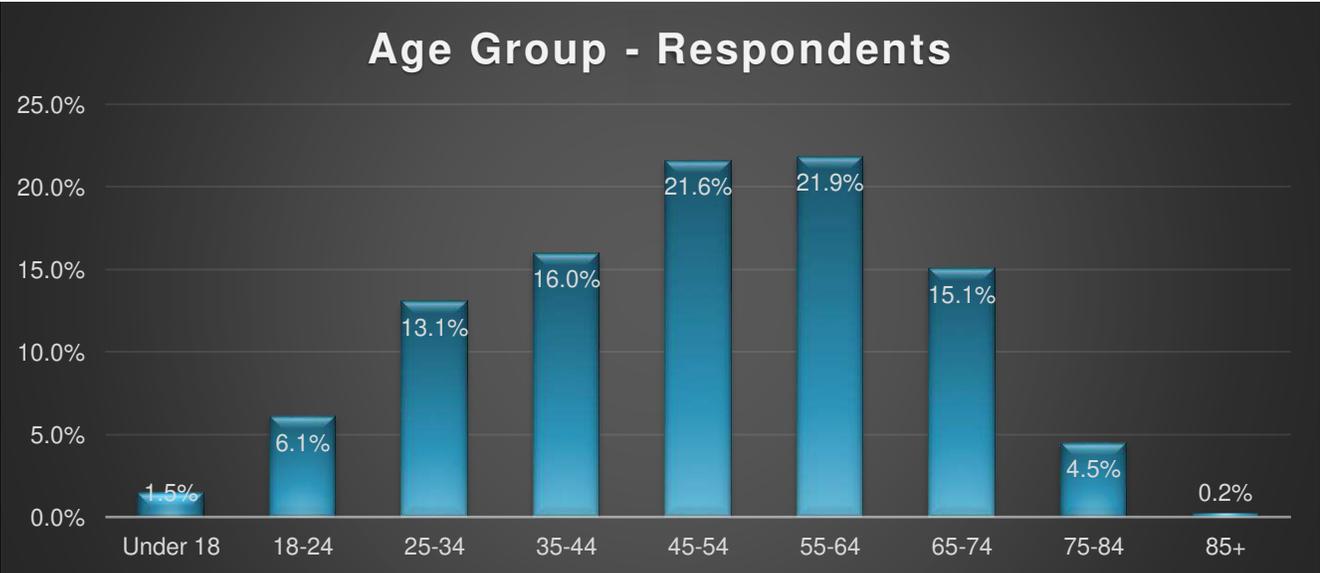


Figure 10.2 Age Group of Survey Respondents

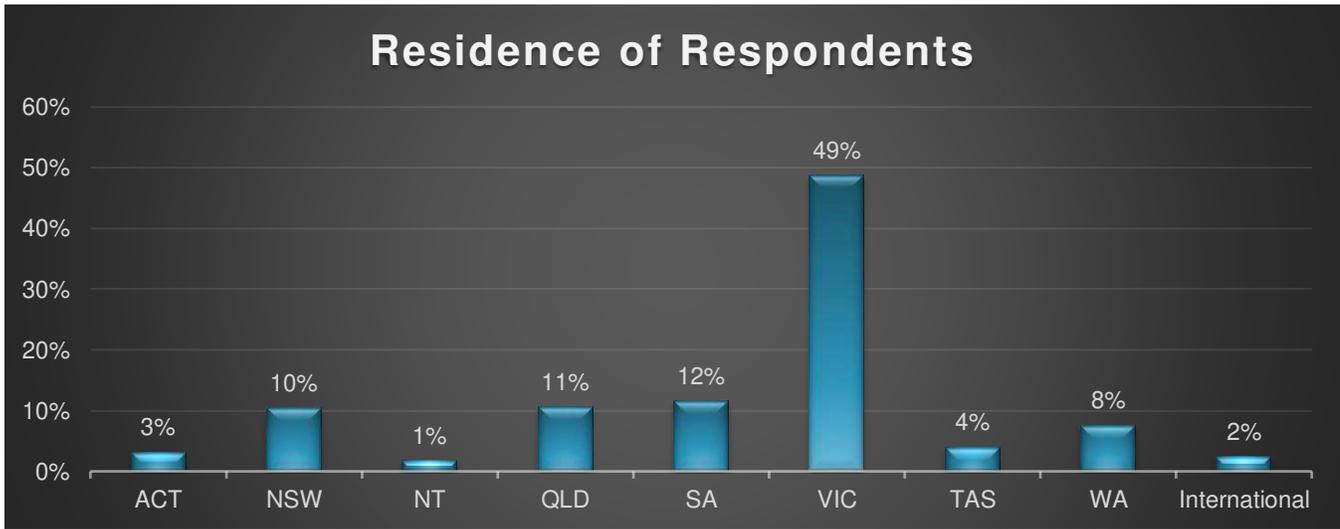


Figure 10.3 Residence of Survey Respondents

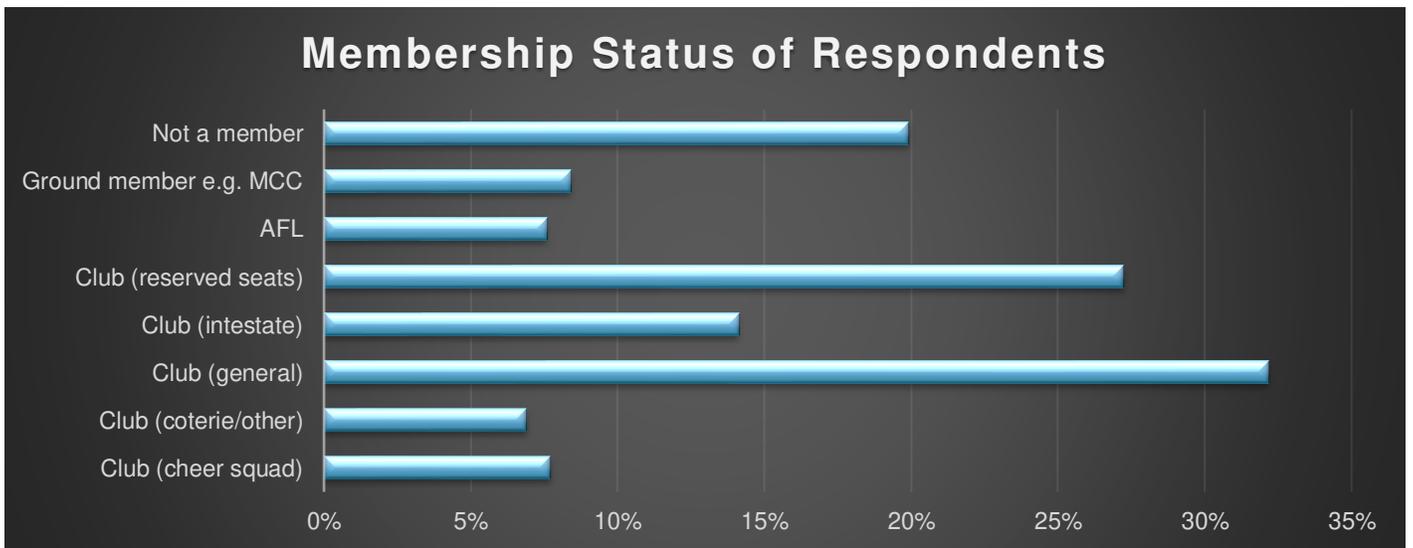


Figure 10.4 Membership Status of Survey Respondents. Note: respondents may be members of more than one category e.g. Club and AFL members.

11. NEXT STEPS

The AFL Fans Association calls on the AFL and other stakeholders as relevant to provide a formal response on matters raised in this report. This can be undertaken in conjunction with the AFLFA so that fan feedback can be provided during the process to obtain a fair outcome.

As the independent voluntary voice of fans, we would like to be consulted on issues that impact fans before changes are introduced by the AFL and as supported by 92% of fans.

The AFL will be invited to a meeting to discuss the results in more detail particular in relation to specific AFL issues and qualitative text responses including what the new AFL CEO should prioritise.

Clubs will be given an opportunity to discuss their club specific results. Results of club satisfaction levels will be released in Part B including a club satisfaction ranking.

We encourage clubs and media to support ongoing engagement with the AFL Fans Association to ensure that the AFL can be the best it can be.