

TASMANIA DEVILS



Project of State Significance Planning Process

MACQUARIE POINT STADIUM DEVELOPMENT

TASMANIA FOOTBALL CLUB

CONTENTS

EXECUTIVE SUMMARY	1
1. MACQUARIE POINT STADIUM DEVELOPMENT AS CONDITION FOR AFL LICENCE	2
2. STADIUM ECONOMICS AND CLUB SUSTAINABILITY	3
2.1 REVENUE REQUIREMENTS FOR SUSTAINABILITY	3
2.2 TASMANIA STADIA ANALYSIS	3
3. STATEWIDE SOCIAL AND ECONOMIC BENEFITS	6
3.1 COMMUNITY IDENTITY AND PRIDE	6
3.2 YOUTH ENGAGEMENT AND DEVELOPMENT	6
3.3 CULTURAL ENRICHMENT AND INCLUSIVITY	6
3.4 ECONOMIC AND SOCIAL REVITALISATION	6
3.5 DIRECT ECONOMIC IMPACT	7
3.6 UNITED TASMANIA	8
4. CONCLUSION	9

EXECUTIVE SUMMARY

The Tasmania Football Club ("**TFC**") submits this document in strong support of the Macquarie Point Stadium ("**MPS**") development as a Project of State Significance. The proposed 23,000-seat stadium represents not merely a sporting venue but essential infrastructure that will determine the viability and success of Tasmania's historic entry into the Australian Football League (**AFL**).

The AFL represents the pinnacle of elite, professional sporting competition in Australia, commanding significant economic influence across the nation with annual AFL industry revenue exceeding \$2 billion. For individual clubs within this competitive landscape, financial stability and strength forms the foundation upon which on-field success is built. Stadium returns—revenue generated directly from match-day attendance, corporate hospitality, and venue-related activities—constitute a critical component of this financial ecosystem, often determining the difference between premiership contention and perennial struggle.

In fact, modern stadium infrastructure represents the single most important economic factor determining the viability and competitiveness of AFL clubs. Clubs with advantageous stadium arrangements consistently outperform those with suboptimal facilities, both financially and competitively. The proposed MPS emerges not merely as desirable sporting & entertainment infrastructure, but as an essential prerequisite for Tasmania's successful entry into the national AFL competition. Without this purpose-built facility, Tasmania's AFL club would face severe and potentially insurmountable financial constraints that would significantly limit on-field performance regardless of management capability, community support or player talent.

This submission outlines:

1. MPS status as a non-negotiable condition for AFL licence approval.
2. The critical relationship between stadium infrastructure and financial sustainability,
3. The transformative social and economic benefits the development would deliver statewide.

We respectfully urge the Planning Commission to recognize both the necessity and profound benefit of this infrastructure to Tasmania's sporting, economic, and cultural future.

1. MACQUARIE POINT STADIUM DEVELOPMENT AS CONDITION FOR AFL LICENCE

On 3rd May 2023, the TFC was officially granted a conditional licence to enter the AFL, representing the culmination of decades of tireless and passionate advocacy for Tasmania's rightful place in our national sporting competition. This momentous and historic achievement brings with it a clear and unambiguous condition: the development of a purpose-built 23,000-seat roofed stadium at Macquarie Point meeting specific AFL requirements.

AFL Commission Chair Richard Goyder explicitly stated around the time that "the stadium is not optional—it represents a fundamental requirement for Tasmania's entry into the competition."

Similarly, AFL CEO Andrew Dillon has emphasised that "appropriate stadium infrastructure represents the most critical determinant of Tasmania's competitive viability."

The stadium was one of 11 key workstreams that the AFL worked through – based on the original proposal by the Tasmanian Taskforce – to determine the viability of a 19th licence for Tasmania. Importantly, it's worth emphasising that it was the Taskforce who identified the need for a purpose built stadium to support the commercial requirements of a team. It was only when this viability was proved that the AFL agreed to a licence. Quite simply, without the Tasmanian Government committing to a 23,000 roofed stadium at Macquarie Point, no provisional licence would have been issued – and no full licence will be issued without it.

The statements by the AFL Chairman and CEO not only reflect the stadium requirement outlined by the Tasmanian Taskforce to obtain the licence in the first place, but also, the AFL's experience-based understanding that inadequate infrastructure would predetermine financial disadvantage, undermining on-field competitiveness regardless of management capability or broad community support. The stadium requirement therefore represents not an arbitrary hurdle, but essential protection of the AFL as the custodian of our national game, its eighteen member clubs, the Tasmanian Government and the TFC's own competitive interests. In short, in insisting that an AFL licence be conditional upon the delivery of a fit for purpose stadium at Macquarie Point, the AFL's intentions are clear – it wants to set up the TFC for success.

2. STADIUM ECONOMICS AND CLUB SUSTAINABILITY

Modern AFL economics creates an inextricable link between stadium returns and financial sustainability. For the TFC to establish competitive viability, and because of our relatively smaller size and scale, stadium-generated revenue must meet benchmarks at least comparable to other sustainable AFL operations.

2.1 REVENUE REQUIREMENTS FOR SUSTAINABILITY

Traditional market AFL clubs generate average Net Stadium Returns (NSR) of \$20m (as at 2023) from their stadia match day, which represents approximately 50% of Club Generated Income (increased from 44% in 2014). This represents an increased reliance on clubs to generate NSR from their matchdays out of their members and fans.

Recent case studies of club's transitioning to commercially beneficial stadia have created significant upside for club revenues in the first year of operation, with elevated levels sustained and improved in subsequent years:

- Adelaide Oval – Adelaide (+63%) and Port Adelaide (+130%) experienced significant uplifts to match day revenues, enabling the clubs to become profitable, fund competitive football programs and eliminate debt.
- Optus Stadium – Fremantle (+16%) and West Coast (+18%) also experienced uplift to strong revenue bases, allowing the clubs to reinvest into substantially redeveloped Training & Administration bases and back into community programs.
- GMHBA Stadium – Geelong has benefitted from 10+ years of redevelopments at Kardinia Park, increasing their revenue base to continuously fund competitive football programs and allow the club to affordably exit their gaming venues. GMHBA stadium has also created new business opportunities (function centres, restaurants, merchandise stores and cafés) while being a powerful tool to attract and retain players.

2.2 TASMANIA STADIA ANALYSIS

Financial modelling for the TFC assumes that whilst NSR from the first year of operation of MPS will be less than the AFL club average NSR (\$20m in 2023), a sustainable business model can still be established to support competitive football programs. However, by way of illustration and

comparison, were MPS not an option, and instead, the TFC was required to play at the existing stadium at Ninja Stadium (Bellerive) the club would be approximately \$5.4m to \$5.9m worse off per year. This is driven by lower revenues across sponsorship, hospitality, membership, match receipts, plus reduced intangible benefits. The AFL has developed conservative estimates informed by industry benchmarks and revenue analysis:

- **Sponsorship (incl. AFLW):**
 - » **\$1.2m lower** annually
 - » Driven by reduced appeal to sponsors and fewer brand activation opportunities.
- **Corporate Hospitality:**
 - » **\$1.8m lower** annually
 - » Due to limited premium seating and event-hosting infrastructure
- **Membership (incl. AFLW):**
 - » **\$1.3m lower** annually
 - » Weaker Foundation Member to Reserved Seat member conversion due to reduced stadium-driven value proposition.
- **Match Receipts (net):**
 - » **\$0.2m lower** annually
 - » Lower revenue (\$0.41m) offset slightly by lower costs (\$0.23m) at Ninja/UTAS
- **Merchandise:**
 - » **\$0.1m lower** annually
 - » Attributed to smaller crowds and fewer retail opportunities on match days
- **Intangible Impact:**
 - » **\$0.9m–\$1.4m lower** annually
 - » Due to diminished brand positioning, fan experience, and market growth potential
 - » New Stadiums generally deliver halo effect with additional hype and opportunity for new/additional Club revenues.

In short, without a new purpose-built stadium at Macquarie Point the TFC would be an estimated \$5.4m to \$5.9m worse off per year. The Club would face a perpetual competitive disadvantage that no amount of management excellence could overcome. The TFC would be locked into a low revenue and low performance future. The cost of underperformance would be borne by both the AFL and

public funders. This underlines why a purpose-built stadium is a condition of a full AFL licence being issued to the TFC. It is the critical determinant of the TFC's competitive viability.

We don't want the TFC to be a team that makes up the numbers. We want a team representing Tasmania to regularly contend finals in both the AFL and AFLW competitions and to ultimately bring premiership glory to the island.

We have set the club up to be the best it can be. We have a Board that is the equal of any AFL club.

We are developing a management team that is attracting the best people from around the country to represent our club on and off the ground.

We already have the strongest membership base of any AFL club with more than 208,000 members of the club – a record that puts us among the top sporting clubs anywhere in the world.

We have an active database of more than 208,000 resident Tasmanians, expatriate Tasmanians and national and international supporters of Tasmania who are regularly updated on our progress.

We have sold more than 18,000 "Map" jumpers which is an incredible result and better than the majority of clubs who are currently competing in the AFL.

We have real corporate demand from sponsors who want to be part of the story of this Tasmania team.

We have engaged all of Tasmania in this endeavour and held dozens of meetings across the State and made sure that all communities in the south, the north and north-west understand that we represent them and they are important to the future of this club.

Everything is trending strongly for this club but what is absolutely critical is a stadium that provides the right economic returns to sustain and support a team to be competitive on and off the field.

3. STATEWIDE SOCIAL AND ECONOMIC BENEFITS

The TFC is a club like no other, in that it represents an entire state. It is **By Tasmania, For Tasmania** and we have a shared belief in its potential to **Unite and Inspire Tasmania**. It is a significant responsibility but a powerful opportunity. While the TFC's primary focus remains establishing a sustainable AFL presence, we recognise and strongly emphasise the transformative statewide benefits the stadium development and consequential TFC, would deliver:

3.1 COMMUNITY IDENTITY AND PRIDE

The TFC's entry into the AFL provides the state with its own representation in Australia's premier elite sporting competition, fostering a sense of unity and pride among Tasmanians. This development offers a platform for local talent to aspire to and participate in elite-level competition, strengthening community bonds and regional identity. It will create confidence. Tasmanians will walk taller.

3.2 YOUTH ENGAGEMENT AND DEVELOPMENT

Since the launch of the TFC in March 2024, there was a notable 40% increase in Auskick registrations across the state, throughout the 2024 season, indicating heightened interest and participation in grassroots football. Early into the 2025 season there has been another 25% Auskick and 121% Superkick increase (year to date) on top of the 2024 numbers. This surge reflects the club's potential to inspire youth engagement, commit to self-improvement, promote healthy lifestyles. It will deliver better education outcomes and better health outcomes, as well as providing structured pathways for young athletes to progress to professional levels.

3.3 CULTURAL ENRICHMENT AND INCLUSIVITY

MPS is envisioned as a multipurpose venue that will host a variety of events, including sports, concerts, conventions, festivals, and community gatherings. This versatility ensures that the stadium will serve as a cultural hub, accommodating diverse interests and fostering inclusivity. By providing a space for various cultural expressions, the stadium will enhance Tasmania's cultural landscape and offer residents and visitors alike opportunities for shared experiences.

3.4 ECONOMIC AND SOCIAL REVITALIZATION

Beyond its cultural significance, the stadium will contribute to the economic revitalization of Hobart and the broader Tasmanian community. By attracting national and international events,

the venue will stimulate local businesses, create employment opportunities, and promote tourism. The integration of the stadium into the urban fabric of Hobart will invigorate the city's social life, providing a central gathering place that enhances community cohesion. As an example, the redeveloped Adelaide Oval now holds some 1,800 non match day events, driving more than \$10 million annually into the oval's revenue base and attracting interstate and international conferences, conventions and events that were not previously possible.

3.5 DIRECT ECONOMIC IMPACT

Organisations and experts much better placed than the TFC to evaluate the economic impact of the MPS have consistently maintained that the MPS and the introduction of the TFC will have a profound positive economic benefit on Tasmania. It has been suggested that both together will generate \$2.2b in economic activity over 25 years. The MPS will attract multiple sporting and major events, boost tourism, support local businesses, and create jobs – both during construction and through ongoing operations. The TFC will drive increased visitor spending and commercial activity, providing consistent economic stimulus throughout the entire state.

Detailed quantitative analysis has already been undertaken by consultants such as MI Global, PWC and KPMG, the findings of which are all publicly available, and which have highlighted the significant economic benefits that MPS will deliver to Tasmania. As recently as April 2025, an independent report commissioned by the Hobart City Council found that the proposed MPS would deliver:

- \$140m in economic impact per year during the construction phase and \$178m per year when fully operational
- \$65m per year growth in the city's gross regional product
- \$44.7m rise in incomes; and
- 385 full time jobs

This positive economic impact is critically important to Tasmania now because the State is confronting significant challenges including declining economic and population growth. Both MPS and introduction of the TFC are uniquely placed to address Tasmania's challenges because it combines immediate stimulus with long term structural growth across multiple sectors. This is a once in a generation catalyst for Tasmania's economy – driving immediate jobs through construction,

sports and entertainment, reigniting tourism, and visitor spending, lifting the state's brand nationally, and creating long term economic growth across hospitality, tourism, retail, and entertainment. This investment will establish an enduring economic flywheel that will create confidence, attract people and businesses, and energise communities throughout the entire state.

3.6 UNITED TASMANIA

Perhaps most significantly, the stadium development in conjunction with Tasmania's AFL entry offers a unique opportunity to transcend traditional regional divides. While the stadium's physical location is necessarily in the state's capital, the TFC is implementing comprehensive strategies ensuring genuinely statewide engagement, including:

- Strategic scheduling maximizing accessibility for all Tasmanians at upgraded UTAS Stadium and Dial Park
- Regular community programs across all regions
- Talent identification and development pathways in all population centres
- Administrative presence in multiple locations

The stadium thus represents not a Hobart development but a Tasmanian asset that will drive economic and social benefits extending to all corners of the state.

The MPS and the TFC participation in the AFL are poised to deliver substantial social and cultural benefits to Tasmania. These initiatives promise to strengthen community identity, engage youth, enrich the cultural scene, and contribute to the state's economic and social vitality. Embracing this opportunity will not only elevate Tasmania's presence in national sports but also foster a more connected and vibrant society.

4. CONCLUSION

The TFC respectfully submits that the MPS development represents essential infrastructure meeting the criteria for Project of State Significance designation:

1. It is essential to Tasmania's entry into Australia's largest, elite professional sporting competition. Without it there is no licence.
2. It creates the financial foundation necessary for sustainable sporting success.
3. It delivers transformative economic and social benefits extending statewide.

We emphasise that this development together with the introduction of the TFC transcends conventional economic analysis—it represents Tasmania's opportunity to secure its rightful place in our national sporting landscape after decades of exclusion. It will ignite identity, pride and generational opportunity for all Tasmanians.

The MPS will be at the heart of this opportunity: a world class venue that will drive investment, energise our economy, inspire our youth, and unite our communities. By declaring this project as one of State significance, Tasmania signals to the nation and the world that we are ready to grow, ready to lead and ready to seize our place on the national stage. This is a once in a generation opportunity and now is the time to back it.

The TFC stands ready to provide any additional information that would assist the Planning Commission in its evaluation of this transformative project.