



Ontario Player Development League

Eight Year Review (2014-2022)

December 2022



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INTRODUCTION

It gives me great pleasure to submit this second evaluation that Capitis Consulting has had the privilege of undertaking of Ontario Soccer's Ontario Player Development League (OPDL).

Following from the initial two year review of the program, carried out in 2015/16, this eight year review examines the OPDL in a more detailed manner, focusing on the core value-add the program was intended to bring when it was created, centred around the advancement of Ontario Soccer's top talent (be it players, coaches or match officials).

In undertaking the evaluation study and compiling this report, we have taken a strong evidence-based approach by, where possible, gathering data from the eight years of activity the OPDL now has completed, and combining this with opinion-based data from the program participants and leadership personnel within Ontario and Canada Soccer.

There are times where the events of the recent Covid-19 pandemic have impacted on what data can be used in 2020 and 2021, particularly for longitudinal analysis purposes. However, we are confident that we have strong evidence-based content in this report that we are hopeful will guide Ontario Soccer in its continued management and development of the OPDL, as part its overall soccer development and governance mandate.

Best regards,

PAUL VARIAN

President

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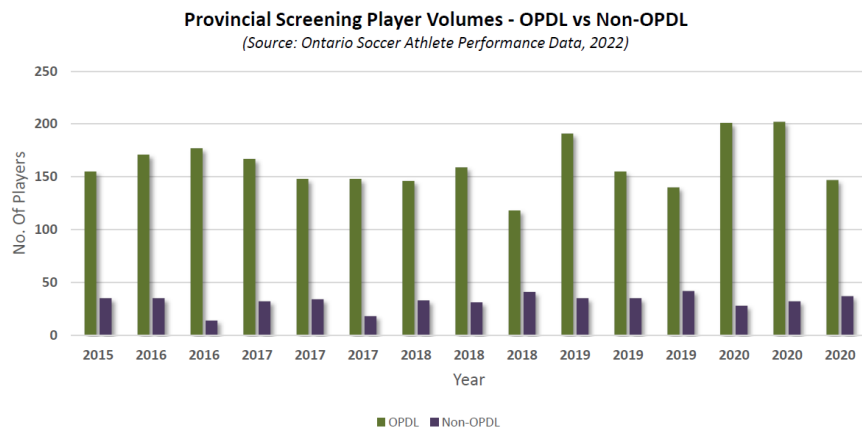
PROGRAM ANALYSIS

For the purposes of this study, Capitis Consulting has analysed and evaluated the OPDL ('the program') through the lens of the stakeholders the program is designed to better, namely Ontario's players, coaches, match officials, the program's licence holders (LHs) and the program itself (and, by extension, its holding agent Ontario Soccer).

Players

Performance-Based Progress

Since its inception in 2014, the OPDL has been positioned at Ontario Soccer's chief instrument for the development of advanced soccer talent in the province. Accordingly, and unsurprisingly, most of the talent coming through the performance stream of Ontario Soccer's player pathway is being actively sourced from the OPDL. Since 2015, between 74.2% (2018) and 92.7% (2016) of Ontario Soccer's provincial program has been identified from the OPDL¹. While there is inconsistency in terms of the number of players identified from the OPDL over time, there is no doubt that the program has become Ontario Soccer's chief talent development and ID instrument for male and female (able-bodied) soccer, albeit by clear design.



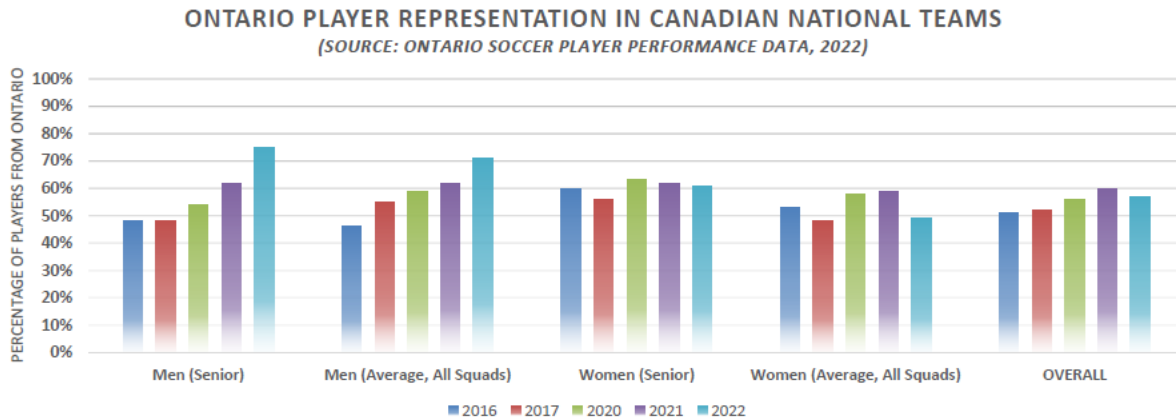
Further to this, there are clear signs that the pursuit of the OPDL and what it is aimed to bring to the LTPD stage 4-5 development of Ontario soccer athletes is translating into results at higher soccer levels.

On an overall basis, the percentage of Ontario players making up Canada's national team squads has steadily increased since 2016, rising from 51% in 2016 to a high of 60% in 2020, with a slight drop-off in 2022 to 57%. Representation is particularly marked for Ontario's male players, that have risen from 46% in 2016 to 71% in 2022 across all squads. The rise in representation in the men's senior national squad has been even more dramatic – rising from 48% in 2016 to 75% in 2022. Conversely, Ontario's representation in Canada's female national team programs has weakened, dropping from 53% in 2016 to 49% in 2022,

¹ The remainder has been identified through Talent-On-Location days around the province to capture talent that is not participating in, or cannot access, the OPDL or any of its licence holder clubs.



with a minor increase reported in the Canadian women’s national team squad (60% in 2016 vs 61% in 2022).



OPDL players have also increasingly been promoted to professional soccer academy environments, namely to TFC Academy (Toronto FC). 37% of Ontario players entering these academy environments in 2016/17 were OPDL players, with this number rising to 80% in 2018/19. OPDL also dominates the intake of talent in Canada’s REX program, with 94% of all Ontario players that were selected for that program in 2018/19 coming from the OPDL.

OPDL players are also clearly progressing well into adult professional and pro-am playing environments within Canada. In Canada’s only national-level, professional men’s soccer league, the Canadian Premier League (CPL), six former OPDL players have progressed to CPL franchise rosters².

In League1 Ontario, of the 1,511 player rostered to League1 Ontario teams in 2022, 436 have come through the OPDL (28.9%). 56.1% of these players are female. Many of these players have come through League1 Ontario teams that are directly part of OPDL licence holder clubs, with five large clubs³ being responsible for 42.4% of them.

² Three at York United, two at Valour FC, one at FC Edmonton and one at Forge FC. 10.1% of all CPL Ontario players.

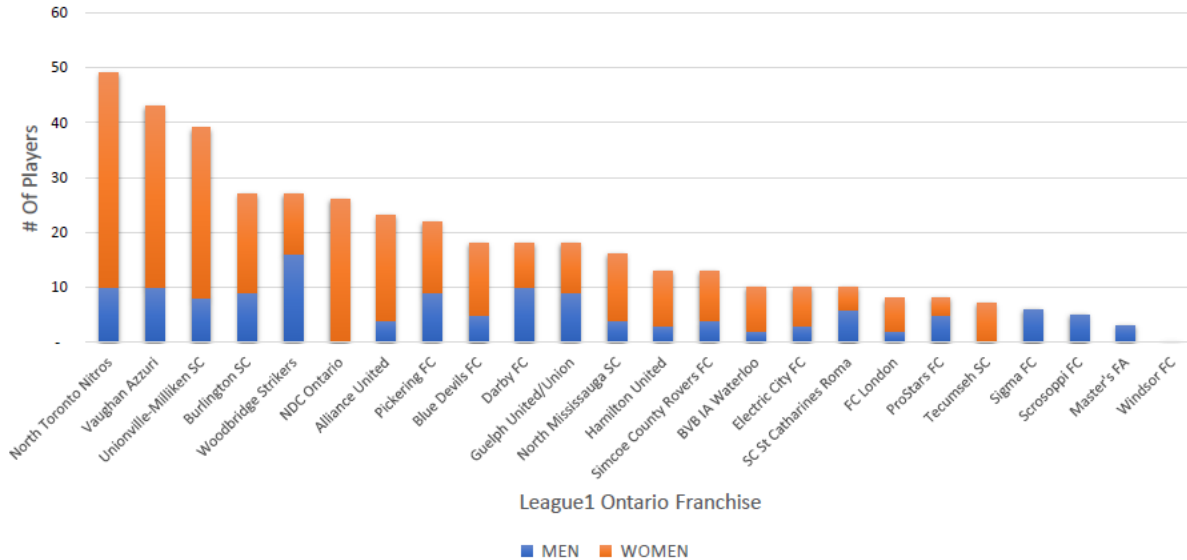
³ North York Nitros, Vaughan Azzuri, Unionville-Millikin FC, Burlington SC and Woodbridge Strikers.



This strong progression of players indicates that the OPDL is fulfilling its core role – to develop the province’s top playing talent into higher soccer opportunities, availing of Ontario’s significant community-level club infrastructure to help get them there.

Number Of Former OPDL Players Playing In League1 Ontario in 2022

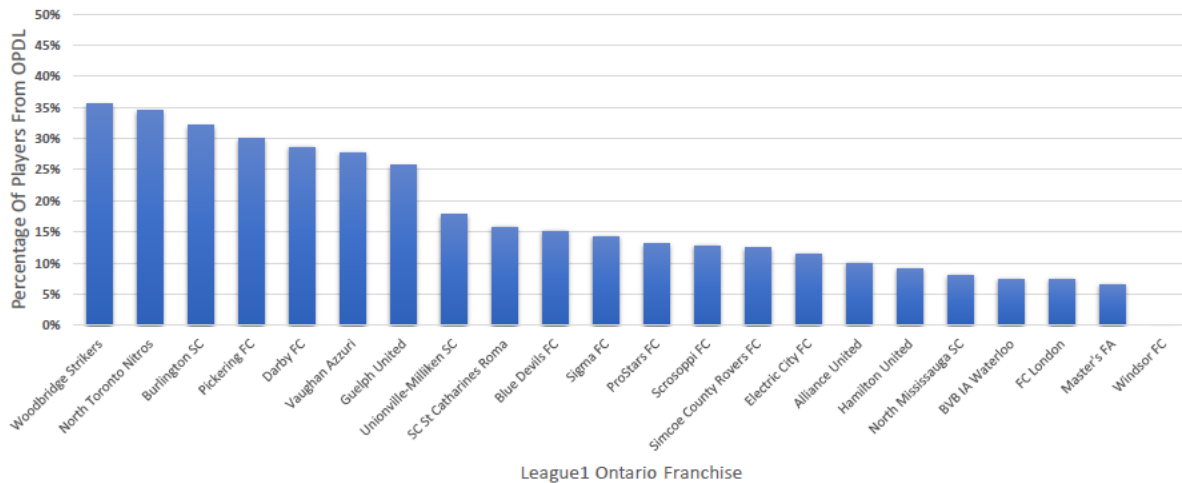
(Source: Ontario Soccer & League1 Ontario Player Data, Oct 2022)



With respect to performance-based progress by gender, there are some LHs that are heavily vested in the progression to League1 Ontario as core to the development of female players, more than is the case with male players.

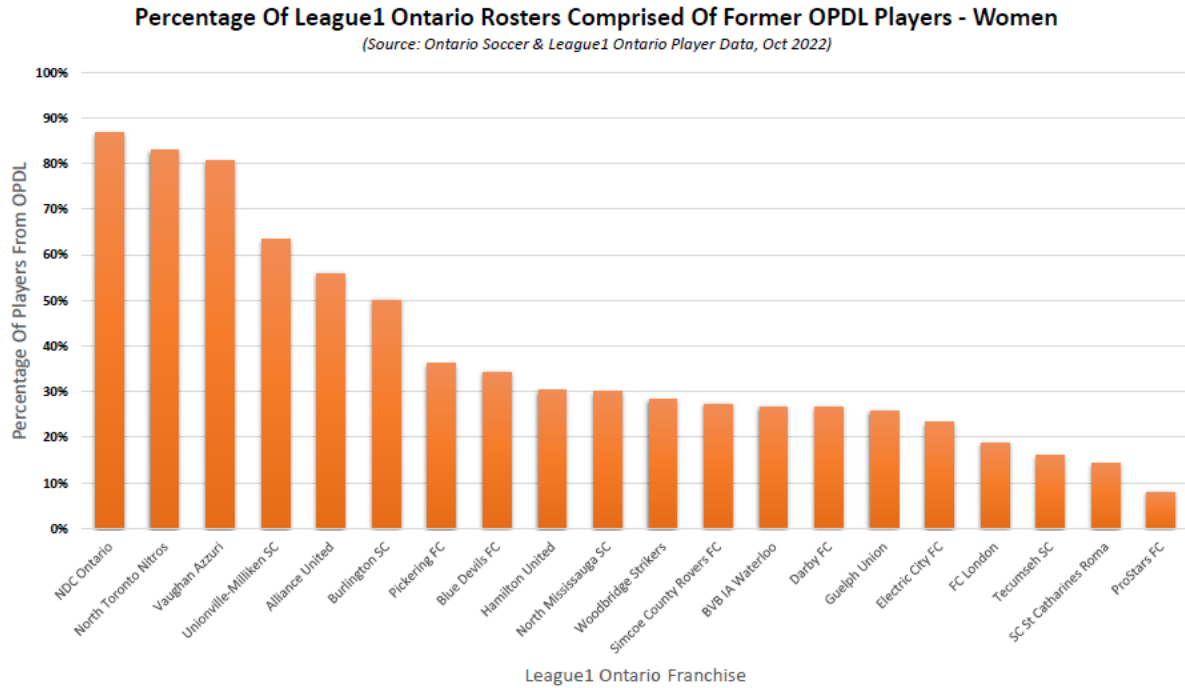
Percentage Of League1 Ontario Rosters Comprised Of Former OPDL Players - Men

(Source: Ontario Soccer & League1 Ontario Player Data, Oct 2022)





For example, over 80% of female players on the rosters of NDC Ontario, North Toronto Nitros and Vaughan Azzuri have over graduated from the OPDL. This is considerably less in the case of male players, where the highest OPDL contingent in a League1 Ontario franchise comes from Woodbridge Strikers, at 35.6%.



OPDL players and their parents, however, are not generally as satisfied with the player development offered by the program as these advancement results would suggest should occur. Players over the age of 16 rate the development they have received from participating in the program at 61.8% and rate the effectiveness of the evaluations that they have received from their coaches at 54.6%. The parents of player aged 15 or younger rate their child’s development through the OPDL at 69.4%, and score the effectiveness of their child’s evaluation at 65.2%. The results are higher for younger age groups, but are still low compared to how effective the OPDL has been in progressing youth players to higher soccer opportunities.

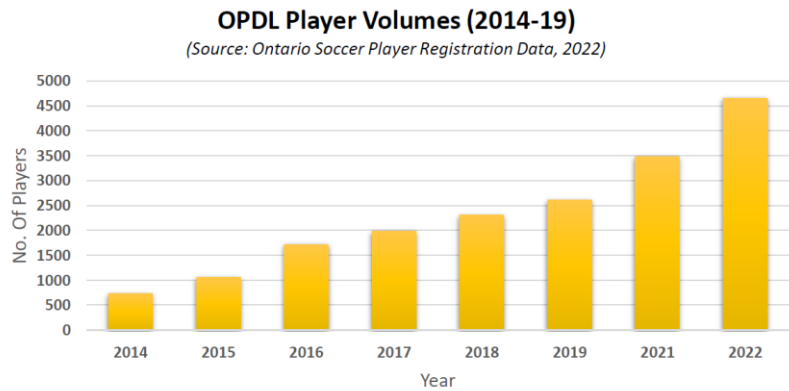
Player Volume, Retention & Distribution

As the OPDL has scaled out from its initial launch in 2014 with 16 Licence Holder clubs, fielding just two age groups each at U13 level, boys and girls (for a total of 32 teams and approximately 750 players) so has

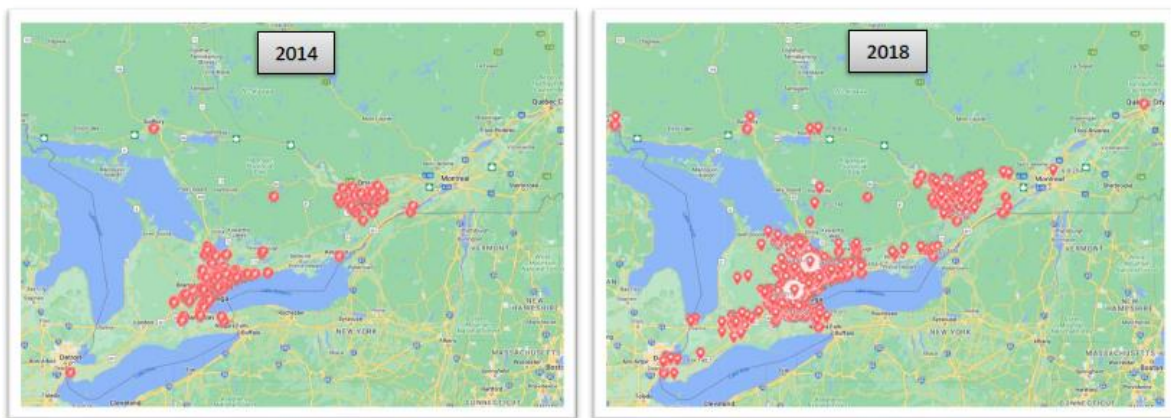


its overall player base both in terms of player volume and distribution. Players have scaled up to over 4,500 players participating in the program in 2022, including 1201 development players⁴ in 2022.

Player retention has improved from the program's early years of operation, strengthening from 70.2% in 2014-15 to 74.6% in 2018/19.



Player location has become more dispersed across the province as the OPDL has expanded, and new licences have been granted to clubs outside the GTA, that permit greater access to the program for players in more rural and/or remote locations. That said, the program still remains heavily skewed towards large urban markets in the GTA and Ottawa. This is not unexpected, nor unreasonable given the fact that the standards and associated costs required by a club to operate an OPDL license as it currently stands makes it very difficult and an extremely high risk endeavour for smaller, rural clubs to undertake. However, there is no doubt that players can access the OPDL from many more locations in 2018 (and likely more so in 2022) than in 2014. This is particularly the case for locations in Ontario's southwest, Niagara region and Kingston and Thousands Islands region.



OPDL Player Distribution (2014 vs 2018)

(Source: Ontario Soccer Player Data Files, 2014-2022)

⁴ Development players are players who are not yet playing fulltime in the OPDL, but are being graduated in at entry level by Licence Holder clubs, playing a maximum of 6 OPDL games in the 2022 season.

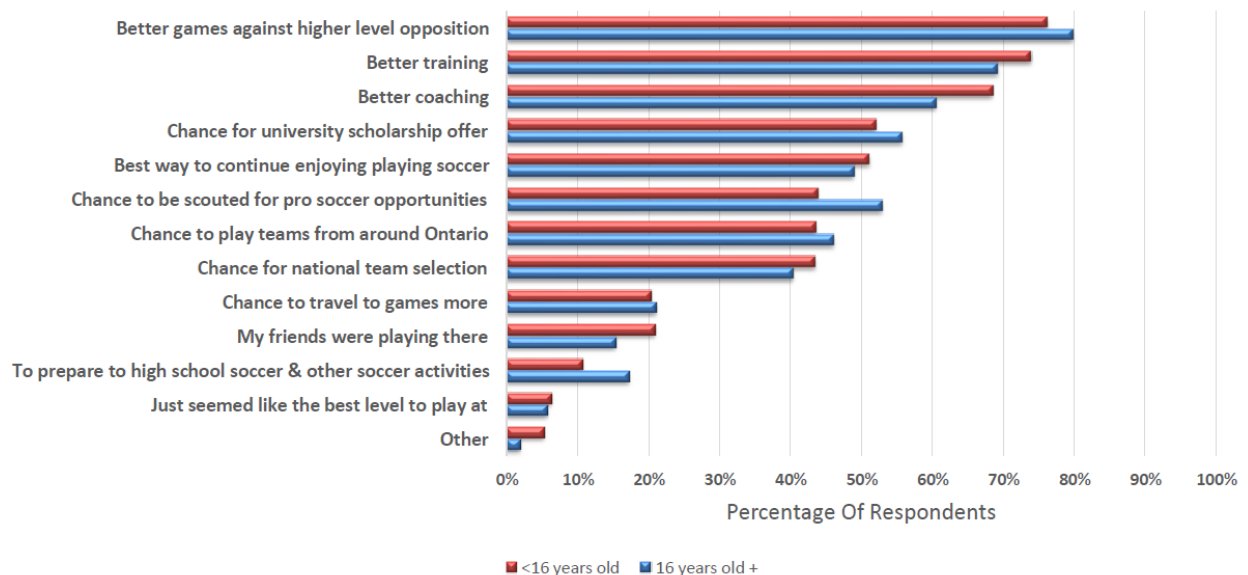


Reasons For Playing In The OPDL

The draw of the OPDL as a high level, competitive playing environment that best supports player development and advancement is the largest attraction for its player base, cited by almost 80% of OPDL players surveyed. Associated reasons relating to quality of training, coaching and scholarship opportunities also rate highly.

It is also noteworthy that there is relatively strong consistency in perception of value in playing in the OPDL across younger player age groups (aged 15 or younger) and older ones (aged 16 or older, who have matured somewhat in their development, have a greater understanding of their opportunities and limitations, and may have other priorities as they age towards adulthood). This indicates that the presentation of the OPDL value proposition is relatively consistent across its player/parent base across the province.

Reasons For Playing In The OPDL (Players)
(Source: Capitis Consulting OPDL Participant Survey, July 2022)



Former OPDL Players

Of those players who are no longer participating in the OPDL, 76.9% of those below the age of 16 continue to play soccer elsewhere. This percentage drops to 73.1% for older players aged 16 or older. For these players aged 15 or younger, the majority are returning to Ontario Soccer sanctioned regional youth soccer programs.

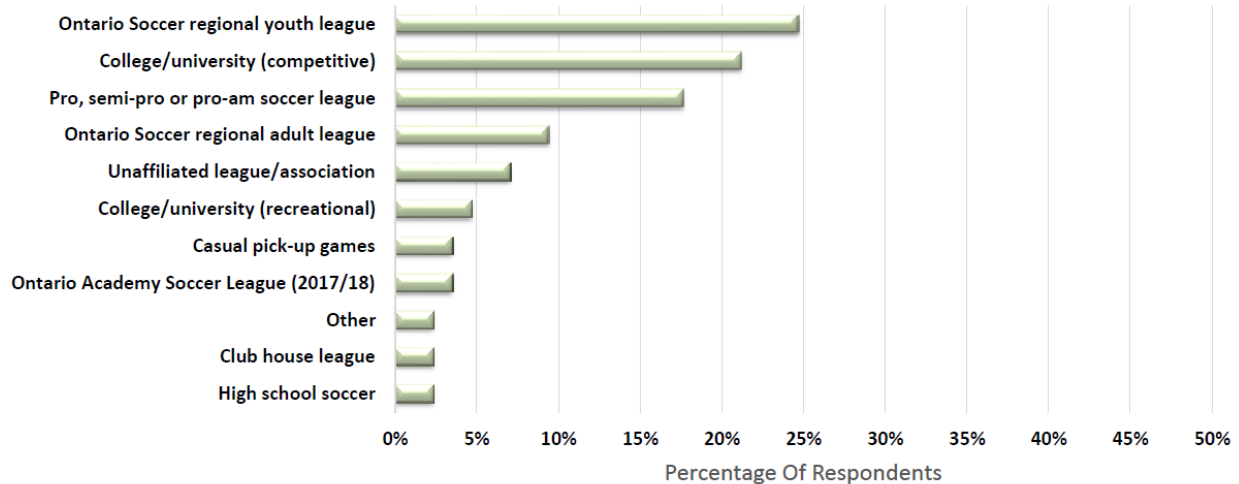
For older players, aged 16 or more, many (just under 25%) have also returned to affiliated youth soccer competition. However, many surveyed (38.8%) report to be playing at higher levels of soccer (pro, semi-pro, pro-am or competitive college/university level soccer).





Where ex-OPDL Players Currently Play Players Aged 16 And Older

(Source: Capitis Consulting OPDL Participant Survey, July 2022)



Reasons For Leaving The OPDL

For older players aged 16 or older, the chief reasons⁵ behind their decision to leave the OPDL were dissatisfaction with their coach, a lack of enjoyment of the game, and the costs of participation.

Notably, the fourth highest reason cited was that which underpins the chief intent of the program – the movement to higher soccer playing environments⁶.

Intensity of training, lack of selection or quality of competition/game play were rated low in terms of reasons for leaving the program.

With respect to younger player in the OPDL (aged 15 and younger), few of whom would be expected to be leaving the program for advancement or ‘aging out’ reasons, the chief reasons for leaving appear to centre around the cost of participating in the program, lack of enjoyment of the game and dissatisfaction with a coach. Lack of selection also rates higher in these age groups than with older age groups. Travel

⁵ Note that in both age cohorts surveyed, the category of ‘other’ in Reasons For Leaving is cited more frequently than usual in consumer surveys such as this. This is largely on account of the fact that the reasons behind these ‘other’ responses often relate to a specific incident or circumstance related to the player (often in relation to the specific licence holder or OPDL program therein), or a combination of unique factors.

⁶ This was cited by 16.9% of survey respondents.

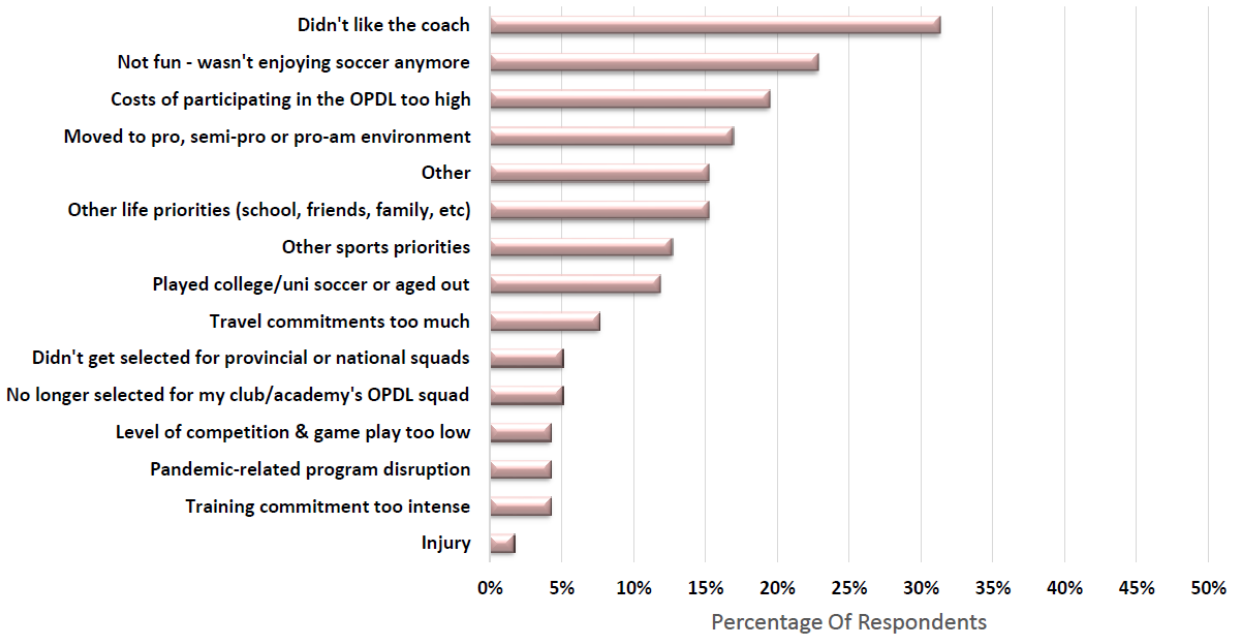


and training commitments related to the program rate very low in these age groups with respect to reasons for leaving.

Reasons For Leaving The OPDL

Players Aged 16 And Older

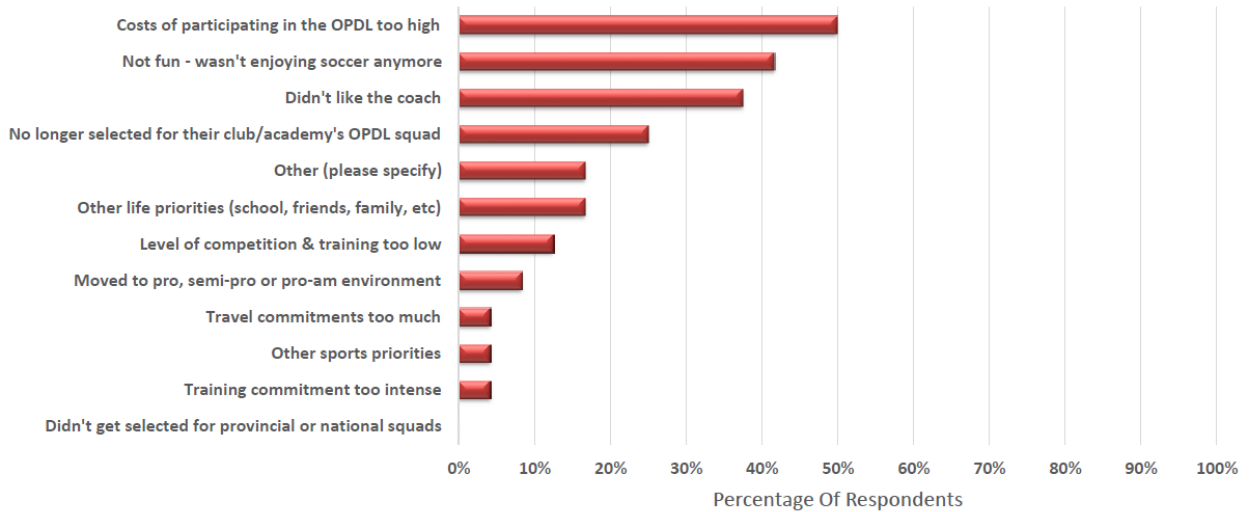
(Source: Capitis Consulting OPDL Participant Survey, July 2022)



Reasons For Leaving The OPDL

Players Aged 15 Or Younger

(Source: Capitis Consulting OPDL Participant Survey, July 2022)





Given the nature and intent of the OPDL, and its design, these results are unsurprising and generally speaking in line with what Capitis Consulting has observed in other high performance sports environments, including at Olympic and international level.

High performance sport, of which the OPDL is unquestionably an early component, inevitably becomes more expensive⁷, inconvenient and time-intensive the further it progresses. Furthermore, the returns become fewer. Most athletes who engage in it invest enormous amounts of time, commitment and financial capital at the expense of other endeavours but come out with unachieved goals, not because they didn't do the work, but because there were simply others better than them. This element of sport is ostensibly a tough business in which far more people ultimately don't 'make it' (and are, hence, 'rejected') than 'make it'. As such, it is extremely common for the coach to be 'disliked', either due to the intensity of the program being imposed on the player, or the fact that most players fail to progress (and the coach is blamed). So, while coaching shortcomings undoubtedly occur, the nature of high performance sport can skew satisfaction-based surveying such as this, where the target of 'making everyone happy' isn't the ultimate goal, nor a realistic one.

To that end, satisfaction-based surveying such as has been presented should be taken into consideration of the overall context of what the program is designed to accomplish.

Key Outcome

The OPDL is succeeding in progressing players to advanced soccer opportunities. This has been enhanced by the creation of League1 Ontario, particularly for Ontario's female soccer players.

Coaches

Coaching Qualifications

The early two-year evaluation of the OPDL indicated that the program was impactful at incentivizing licence holder clubs to invest in qualified coaching expertise and the strength of the OPDL brand in the market place has validated this and allowed club Boards of Directors to make these investments with the reassuring knowledge that it is what parents of competitive youth soccer players want (and will pay for).

As the OPDL has grown and matured, the early fears that there would not be enough qualified coaches to support the program's expansion has not occurred (although pressures on the coaching community remain). Supported by an aggressive program of coach education clinics from Ontario, together with the modification of coach qualification requirements in the OPDL and modernization of youth soccer

⁷ Comparable development programs in highly technical individual sports such as skating, gymnastics or swimming routinely cost athletes \$8,000-\$10,000/yr or more. Advanced hockey development programs can be as much as \$12,000 or more, especially if the player is a goaltender and requires expensive equipment.

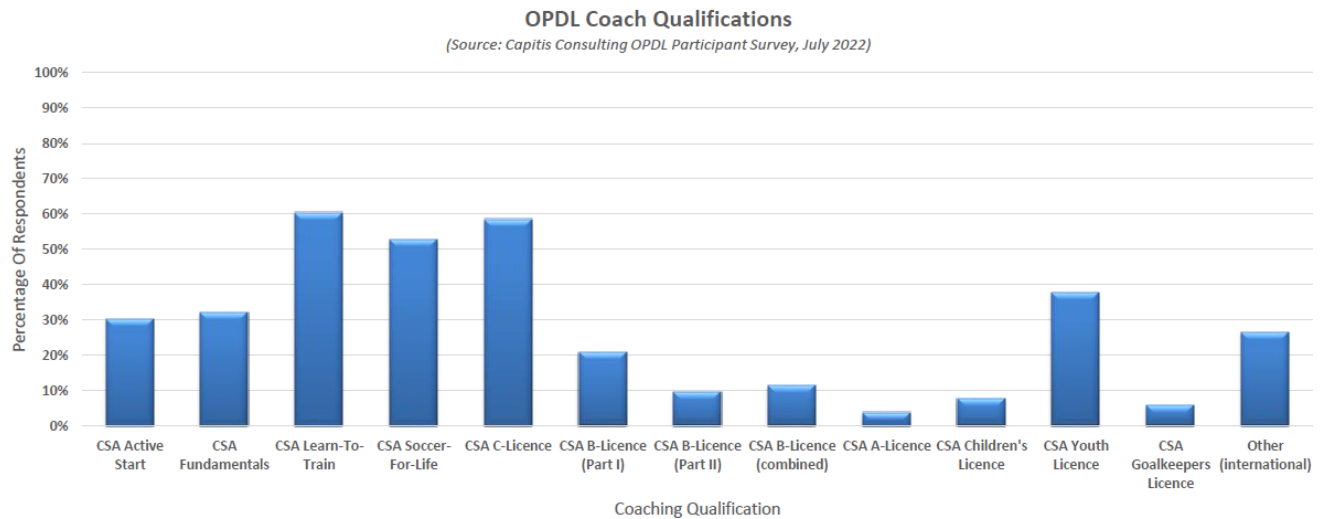


qualifications from Canada Soccer⁸, the association of higher level coaching qualifications with advanced youth soccer development seems to have become accepted as the norm.

That said, OPDL licence holders indicate that maintaining these standards remains a challenge. Licence holders rate the ease of finding OPDL coaches at 47% and female coaches at 43.8%. The volume of licenced coaches at OPDL licence holder clubs has dramatically increased (particularly in Ontario’s largest clubs) but the majority of these coaches (56.3%) are coaching in their OPDL programs.

Surveying also indicates that coaching qualifications are diversifying. The program’s original requirement was that all team head coaches had to have a minimum National B level coaching award. Surveying in 2022 indicates that only 20.8%now of coaches hold a Part I National B licence and just 9.4% hold a Part II level of this award. However, 58.5% hold a C licence and importantly 37.7% have taken the new NCCP-CSA Youth Licence.

The OPDL’s coach licencing requirements continue to incentivize coaches to enhance their qualifications. Over half (56.6%) of coaches surveyed indicated that they had taken coaching qualifications within the last two years and nearly half (48.9%) indicated that the OPDL was a significant of deciding factor in them deciding to take this further coaching education.



The OPDL has shown clear signs of success in driving its coaching community to be younger and more gender diverse. Average OPDL coach age has dropped from 47 years and 5 months in 2014 to 44 years and 5 months in 2021. Female coach incidence has more than tripled from 12.8% in 2014 to 38.6% in 2021. This significant increase in female coach incidence is almost certainly due to OPDL standards in this area, given OPDL coaches do not particularly agree with the existence of gender inclusion standards in the

⁸ Of particular note is the development of Child and Youth National Licences, the creation of a NCCP-CSA C Licence and the redevelopment of the CSA’s B Licence.



program, nor do LHs at large see the OPDL as a particularly effective vehicle to attract/develop female coaches⁹.

In terms of coach development within OPDL licence holders, there is indication that the program's status is having influence. OPDL licence holder clubs report to sourcing on average of well over half (54.6%) of their OPDL coaches from within their coaching groups. This indicates a significant degree of sustainability that LHs are building into their OPDL coaching teams, rather than relying heavily on the external coaching market that is often dominated by 'highest bidder' coaches who are simply looking for the best paid contract and tend to have limited club loyalty.

58.8% of coaches say that the OPDL has helped with their development as a coach but only 61.7% of coaches surveyed stated that they intend to continue coaching at their current licence holder club and just 38.3% say that the OPDL is influencing their decision. The quality of coach education at OPDL licence holder clubs is rated at 67.2% by incumbent OPDL coaches. Coach education budgets at OPDL licence holder club has also dropped from an average of \$23,354 in 2014 to \$21,228 in 2021¹⁰.

Perceived Coaching Quality

In spite of the growing pool of qualified coaches in the OPDL, general perception of coaching quality is not in line with what one would expect from a program such as the OPDL and how it presents itself. OPDL players (aged 16 or older) rate the quality of coaching they received in the program at just 60.5% with the parents of players aged 15 and younger rating their coaching higher, but still just 68.4%. For a program that presents itself with coaching quality as the cornerstone of its brand, these satisfaction scores indicate clear room for improvement¹¹.

Key Outcome

Ontario Soccer's coaching community is more qualified, younger and more gender diverse because of the OPDL and (importantly) the notion of becoming well qualified as a coach has become enshrined in the culture of Ontario soccer due to OPDL coaching standards. Coach education in LHs can be improved.

⁹ OPDL coaches rated coach gender requirements at the technical standard they agree with least, rating their agreement at 60%. LHs rate the OPDL as a factor in helping them attract/develop female coaches at only 43.8%.

¹⁰ The impact of the Covid-19 pandemic on regular operating expenditure in 2020 and 2021 should be noted when evaluating this statistic.

¹¹ Only 65.3% of OPDL coaches report to being completing the biannual Individual Development Planning (IDP) evaluations of their players, required by the OPDL. Less than a third of OPDL players report having regular evaluations of their development conducted by their coaches.



Match Officials

As with player and coach development, the OPDL has been positioned as a central tool for the development of match officials within Ontario Soccer’s long term officials development plan. Challenges have existed, however, given the fact that the assigning role for match officials is (for the large part) not held directly by Ontario Soccer, but its affiliate districts, programs and clubs. This has created challenges for Ontario Soccer in establishing a controlled and monitored officials development pathway, when simple competition for match officials (particularly post-pandemic) has resulted in officials choosing matches to officiate based on financial reward, proximity and convenience.

Experience Officiating OPDL Games - OPDL Match Officials

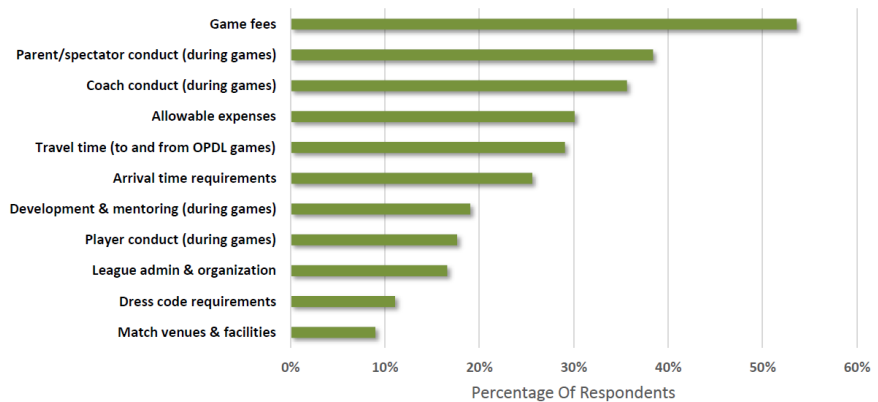
(Source: Capitis Consulting OPDL Participant Survey, July 2022)



Surveying suggests that the OPDL does not compete well in that regard, in the eyes of match officials. OPDL match officials rate the program at just 52.3% in terms of its contribution to their development as a match official and their overall experience with the program at 62.2%. Policy with respect to game fees and expenses covered also appear to be an issue and hindrance to match

Elements Of The OPDL That Are A Hindrance To Match Officials Deciding To Officiate In The OPDL

(Source: Capitis Consulting OPDL Participant Survey, July 2022)



officials participation in the OPDL over other match officiating opportunities. Match official performance is rated at just 54.2% by OPDL players aged 16 and older, and 55.3% by the parents of players aged 15 and younger¹².

¹² By comparison, player/parent satisfaction with OPDL MOs was at 76.0% in 2014 and 71.3% in 2015.



That said, the OPDL has shown itself to be a valuable tool in the development of match officiating capital in Ontario and providing an important game load for emerging advanced, high grade officials to develop.

Match Official Game Load

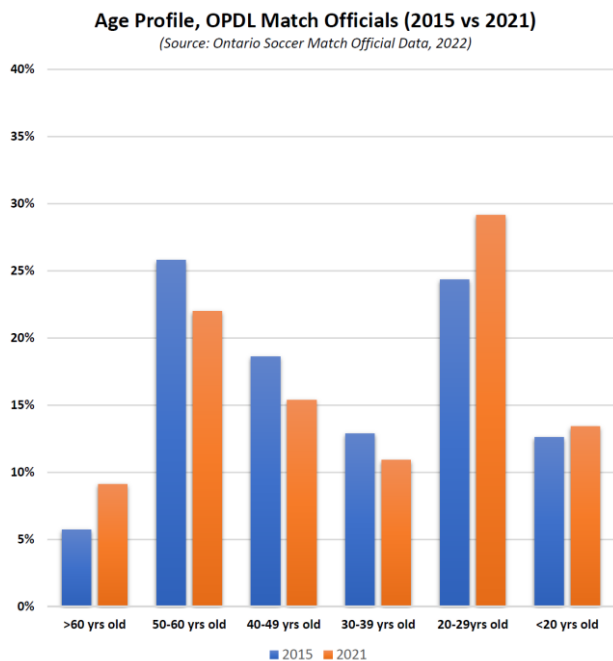
The total number of match officials used to officiate the OPDL increased from 355 in 2015 to 560 in 2021. In spite of this, match officials have trended to officiating more games in the OPDL than less. Average games officiated per official rose from 6.1 in 2015 to 7.3 in 2021, but have declined on the initial figure of 8.2 for 2014/15. The number of match officials taking over 20 OPDLs more than doubled from 16 in 2016 to 37 in 2021, indicating that, although the OPDL is being used as a match officials development instrument, there is still a core of senior match officials who are used to manage a high game load.

Match Official Gender, Age, Level & Retention

The average age of OPDL match officials has not changed with any significance¹³. However, there are more match officials aged 20-29 officiating in the OPDL in 2021 compared to 2015.

The percentage of female match officials used for the program has dropped slightly from 9.5% in 2015 to 8.8% in 2021.

The percentage of OPDL match officials at regional level or higher is also largely unchanged over the years of the program's existence to date¹⁴. OPDL match officials are on average progressing to higher officiating levels, with the average level for OPDL match officials in 2016 standing at 6.97 and improving to 7.06 in 2021. Younger match officials are also improving their ratings more than older match officials, some of whom regressed in their levels¹⁵.



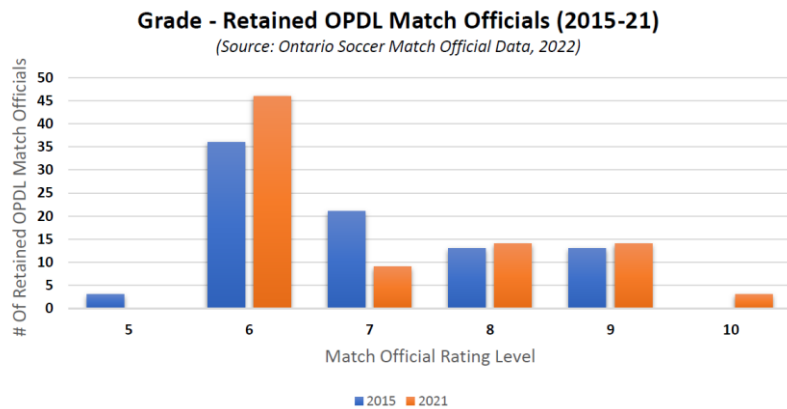
¹³ The average age of OPDL match officials (on 31st December 2022) is 38 years and 10 months in 2015, compared with 38 years and 6 months in 2021.

¹⁴ 7.4% in 2015 compared with 7.2% in 2021.

¹⁵ OPDL match officials aged 40 younger improved their levels from an average of 7.29 in 2016 to 7.83 in 2021. By contrast, OPDL match officials aged 60 or older reduced their levels from an average of 6.91 in 2016 to 6.36 in 2021.



Looking at match officials who have been retained by the program, 86 officials who officiated OPDL games in 2015 also officiated in 2021 (24.6% retention rate). Fewer are female (only 7%) and they are on average much older and more qualified¹⁶. The volume of retained match officials at level 6 has also increased from 2016 to 2021, indicating the growth and development of match officials who have persisted with officiating in the program.



Key Outcome

The OPDL has become a useful tool in the development of Ontario match officials, and OPDL match officials are becoming younger and advancing their levels, particularly at younger ages. However, the OPDL's effectiveness will be limited if match officials do not choose OPDL game assignments over other match officiating opportunities.

Licence Holders

OPDL Brand Strength

Although the holding of an OPDL licence is a considerable, costly and even risky endeavour for many Ontario Soccer-affiliated youth soccer clubs, the program appears to present significant brand strength that is recognized by licence holder clubs. Being an OPDL licence holder means something in the eyes of clubs' fee-paying parents and licence holder clubs recognize this, and also buy-in to what the program is trying to accomplish.

Licence holder clubs are in 80% agreement that holding an OPDL licence has bettered their organization and are in 81.4% agreement that being associated with the program has strengthened their own organizational brand.

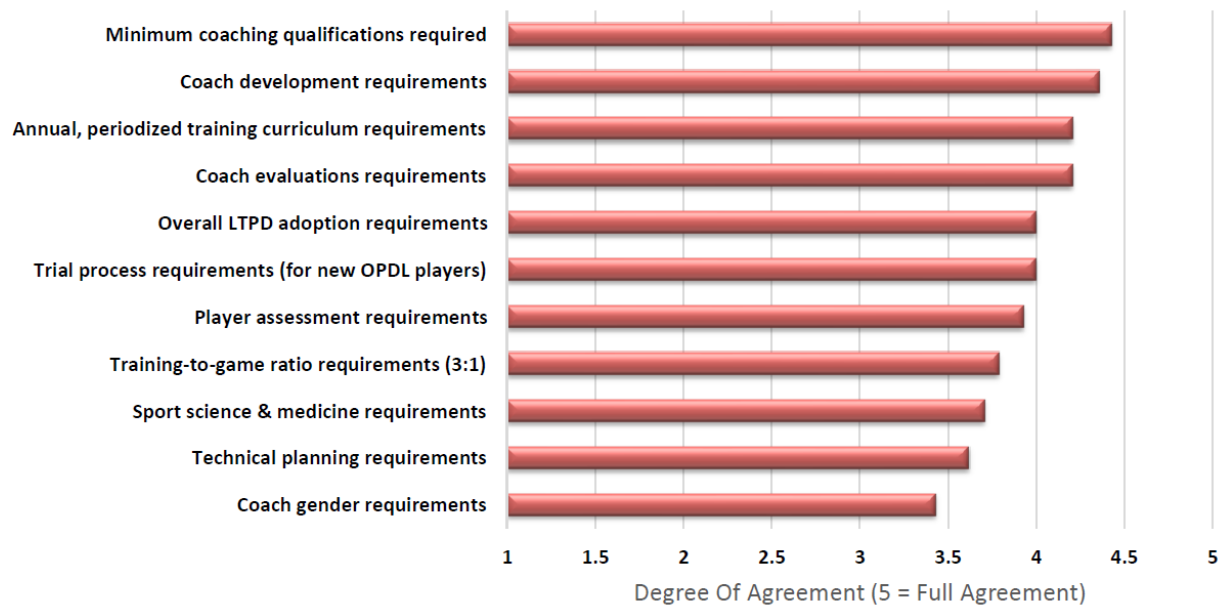
¹⁶ Average age of retained OPDL match officials (on 31st December 2022) is 48 years old, with the percentage who are qualified at regional level or higher is 16.3% and an average grade of 7.06 in 2021 (up from 6.97 in 2016).



They are also in 70% agreement that the program has been effective in helping them develop top coaches, are in 74.2% in agreement that the program has helped them develop their top players and are in 77.2% agreement with the OPDL's technical standards.

Agreement With OPDL Technical Standards - Licence Holders

(Source: Capitis Consulting OPDL Participant Survey, July 2022)



In particular, licence holders agree with standards related to coaching qualifications, coach education and evaluation, and training curriculum requirements. They are least supportive of standards in relation to coach gender and technical planning requirements.

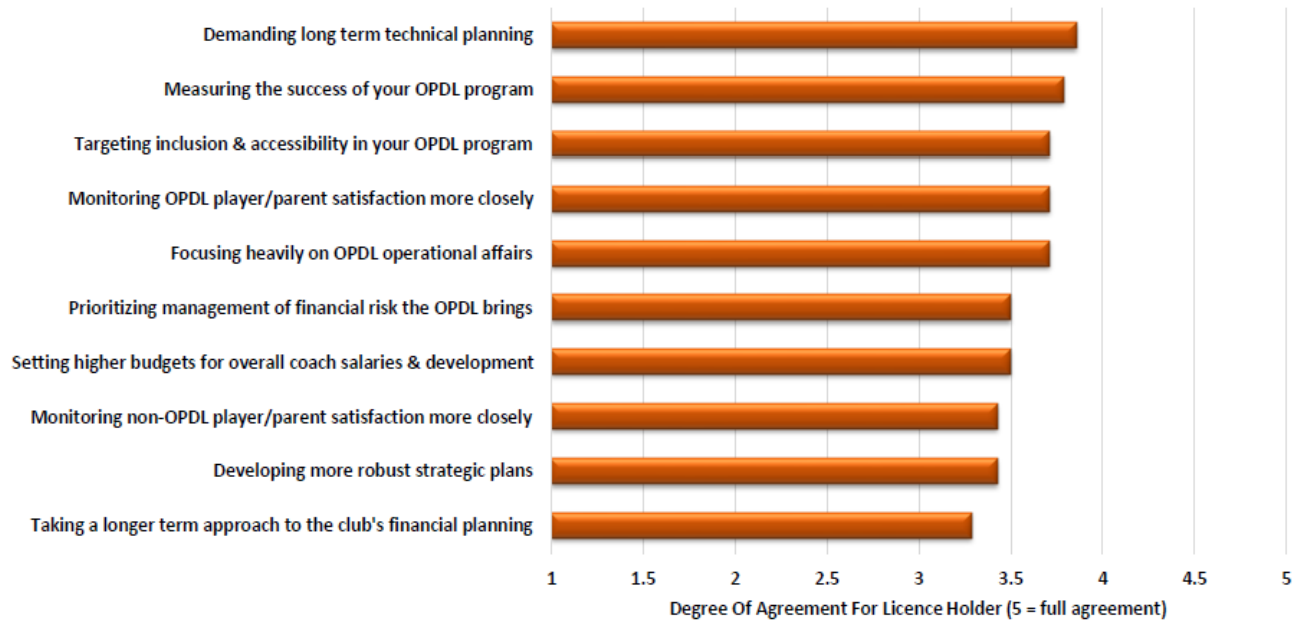
Licence holders also, for the large part, attribute the OPDL to driving effectiveness in their Boardrooms, particularly with respect to program measurement/evaluation, technical oversight and (somewhat paradoxically) long term technical planning.

Also, over three quarters (75.7%) of OPDL players aged 16 or older say that the OPDL is either a quite or extremely important reason that they play at their chosen club. 63.9% of parents of OPDL players aged 15 or younger state that the holding of an OPDL licence is quite or an extremely important reason why they have enrolled their child at their club and 76% of parents say they would move the child to a different club if their club no longer held an OPDL licence. Over half of these parents (55.2%) would recommend the OPDL to a friend.



OPDL's Perceived Impact On Licence Holder Board Effectiveness

(Source: Capitis Consulting OPDL Participant Survey, July 2022)



Licence Holder Financial Strength

There is no question that the acquisition of OPDL licences has presented significant financial risk to licence holder clubs, particularly those with small or fragile balance sheets. This risk was identified by licence holders in the Two-Year OPDL Review in 2016¹⁷. With average annual costs to run an OPDL team at approximately \$70k in 2015, the financial exposure of running a fully expanded OPDL program, with eight teams, runs over half a million dollars annually.

However, on average, licence holder clubs appear to have been able to manage this financial risk well and are showing themselves to be in stronger financial health than they were when they acquired their licences.

Licence Holder Financial Health					
(Source: Licence holder financial statements)					
Year	Net Surplus/Deficit	Net Assets	Current Ratio	% Non-Fee Based Revenue	Staff Productivity Ratio
Year-Of-Entry	\$5,457	\$526,641	6.3	6.9%	32.5%
2019	\$56,730	\$484,497	4.7	6.4%	27.0%

Importantly, licence holder balance sheets are, on average, strengthening. This indicates improvement of long term financial security and a reduction in financial risk. Licence holders are also on average improving their revenue diversity (albeit by a small amount) and are consistently posting operating surpluses (although the average surplus size has decreased significantly from year-of-entry to 2019).

¹⁷ P25, Ontario Player Development League Two Year Review, Capitis Consulting, Jan 2016



Finally, licence holders' average staff productivity ratio has increased through 2019. This indicates that these organizations have taken on more payroll that is not returning itself through revenue considerations. While this is not an optimal trend for this measure (a lower percentage figure here indicates greater efficiency of payroll use), it is unsurprising given the professional human capital that most licence holders will have had to invest in to properly scale their OPDL programs and associated support services/functions out.

Licence Holder Player Volumes

In spite of this, having an OPDL licence does not appear to be having a profound effect on overall player registration volumes at licence holder clubs. Player registration at licence holder clubs who acquired licence in 2016 or earlier have on average dropped in player registration (across their entire enrolment, including adult) by 19.9%. This is, in fact, worse than the overall reduction in player registrations for this period across the whole of Ontario Soccer, which is 18.4%.

To that end, having an OPDL licence adds to a club's brand strength, matters very much to those who are involved in the program and appears to benefit the overall management of the club, but does not translate into overall club growth from a player base standpoint.

Key Outcome

The OPDL has established standards of club excellence that are becoming entrenched in the cultural 'norm' of Ontario Soccer, particularly in its larger club affiliates. The program does, however, have scalability challenges that are brought about by the standards-driven design of the program and the clear capacity restrictions that Ontario Soccer has which limit its ability to optimally enforce standards that are set across the entire program.

CONCLUSION & RECOMMENDATIONS

With the OPDL approaching the completion of its eighth year of operation, it is clear that much work and commitment has been made to it by both Ontario Soccer, its licence holder clubs, and those who have participated in it, either as a player, a parent, a coach or a match official. The program has evolved and changed as it has scaled out and this journey has presented challenges, but also ultimately produced some important results.

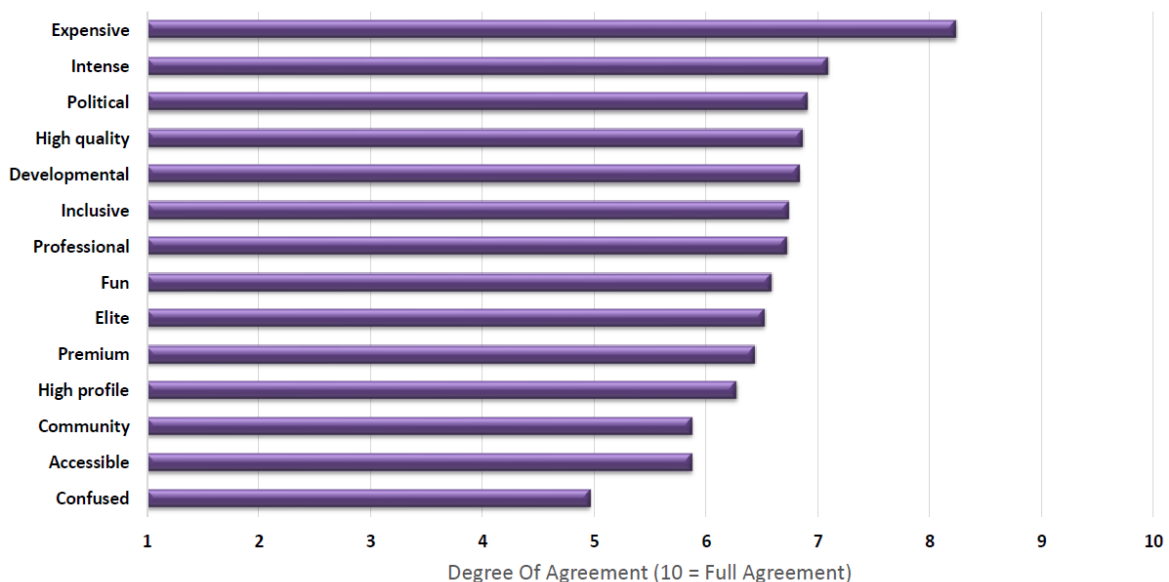


Based on the data gathered, the following observations about the OPDL are noteworthy.

- **The OPDL is unquestionably providing heightened opportunity for Ontario’s top player, coach and match official talent**, which has been assisted with the development of other advanced development leagues at adult level, notably League1 Ontario.
- **The OPDL remains a substantial investment for players and their parents¹⁸**, but these costs are not dissimilar to other sports at this level of athletic development and both Ontario Soccer and its LHs have taken steps to mitigate this potential barrier to program entry¹⁹.

Perception Of The OPDL Brand - Licence Holders

(Source: Capitis Consulting OPDL Participant Survey, July 2022)



- **The OPDL brand is very strong** and continues to attract players who want opportunities to play at the highest level possible and develop to be the best they can be. This demand has translated into brand strength at club and organizational level within Ontario Soccer, as clubs are clearly seeing value in the league, not only in terms of developing their players, but strengthening their overall organization as well.

¹⁸ The average annual fee charged by licence holders to participate in their OPDL program was \$4,447 in 2022, up from an average of \$3,766 in the program’s first year of operation in 2014. The average household income of OPDL families is \$155,848, nearly double the current average household income in Ontario of \$80,322.

¹⁹ Ontario Soccer have maintained athlete assistance program since the OPDL’s inception in 2014 (now called an athlete scholarship program) and many LHs also have parallel financial assistance programs that they run within their own clubs to attempt to combat financial barriers to soccer participation.



- **The OPDL has challenges with respect to scalability**, driven largely by the standards-driven program design that has placed strain on the role of oversight of these standards from Ontario Soccer. There are signs that the program’s continued growth will place significant strain on Ontario’s coaching and match officials resources, that remain in high demand across the entire system. There is also the risk of oversaturation of certain markets within Ontario, particularly in the broader GTA, with too many OPDL licence holder organizations. This potentially runs the risk of ‘watering’ down talent within the program and creating a sub-optimal game environment to overlay training on, which may be starting to show itself in recent years through heightened match ‘blow out²⁰’ rates (which have increased from 6.4% in 2018 to 13.8% in 2021).

OPDL Game Competitiveness						
<i>Source: OPDL game results data, 2014-21</i>						
Year	10 or more	6 to 9	3 to 5	2 or less	Blow Out ¹ Rate (6+ goal diff ¹)	Competitive Game ¹ Rate (2 or less goal diff ¹)
2015	11	34	88	433	11.8%	61.5%
	6	32	100	433		
	17	66	188	433		
2016	8	35	139	670	9.7%	64.6%
	10	48	127	670		
	18	83	266	670		
2017	4	34	172	742	7.0%	62.2%
	6	40	194	742		
	10	74	366	742		
2018	7	37	179	926	6.4%	65.7%
	8	38	214	926		
	15	75	393	926		
2019	9	74	214	911	11.5%	59.2%
	8	86	236	911		
	17	160	450	911		
2021	26	65	185	810	13.8%	56.8%
	25	81	234	810		
	51	146	419	810		

²⁰ A match is taken to be a ‘blow out’ if the goal differential in the match result is by 6 goals or more.



Recommendations

From the data analysed and the observations noted and formulated in this report, it is recommended that Ontario Soccer consider the following:

1. Retain the OPDL as the core channel for advanced youth player development in Ontario

There is now clear evidence that the training habits and daily training environments that are encouraged in OPDL licence holders through technical standards and supported by appropriate competition match play is converting into clear, measurable player advancement. To that end, Capitis Consulting sees no reason from a player development standpoint to move the OPDL from its current position as the central vehicle for LTPD stage 4-5 development of Ontario player talent.

2. Continue to track OPDL player progression accurately and more broadly

As the OPDL matures and more and more players graduate out of it, Ontario Soccer should consider tighter ongoing tracking of player movement, not only into Canada Soccer national team programs, but into other playing environments as well, including college and university.

3. Consider a rename and rebrand of the program to remove referral to a 'League'

In hindsight, one of the initial errors that was made with respect to the OPDL was in its very name. In calling it a 'league', the OPDL has often been misconstrued as a regular play-to-win provincial level league where games (and winning them) mean everything. The reality is that the OPDL is embryonic high performance development program, where games are ostensibly training games that exist as an extension of training. It is recommended that Ontario Soccer considers changing the OPDL's name to remove the word 'league' and perhaps using this opportunity to rebrand the program now that it is fully scaled out age group wise. This may also present an opportunity to harness a naming rights corporate sponsor to help continue to combat the affordability issues that continue to be associated with the program.

4. Be judicious with respect to further expansion of licence holder volume

While further expansion of the program from a licence holder standpoint is not wholly out of the question, it is recommended that any further planned expansion should be carefully scrutinised to ensure that such expansion adds value. In particular, it is recommended that any further expansion is limited to targeted areas of the province what the OPDL has no local presence at all. Further expansion in GTA areas should be carefully considered against the risk that such additions will merely cannibalize markets that are already well served by pre-existing LHs and/or damage the quality of game play needed to support training at this level.

5. Maintain strong partnership with Canada Soccer in advanced player development

Ontario Soccer has shown strong leadership in embracing Canada Soccer's national youth club licencing standards and incorporating them into the standards required of OPDL licence holders. Moreover,





Capitis Consulting understands that there has, to date, been a high degree of co-operation and partnership between Canada Soccer, Ontario and other high performance player development stakeholders, including League1 Ontario and the CPL. It is recommended that Ontario Soccer continues to be vigilant in this crucial area of strategic oversight of the advanced player development system within Ontario and as it pertains to the OPDL, to ensure the pathway remains co-ordinated, seamless and always serving the best interests of the development of the player. Ontario Soccer may want to consider the creation of a committee or other body to strategically oversee the development of the entire advanced player development system in Ontario, comprised of the various organizations that have a hand in it, including the OPDL.

6. Drive and support strong Board and technical leadership in licence holder clubs

It is clear that the OPDL is ultimately only as effective as its licence holder clubs. To that end, the quality of leadership in these organizations, both at a Board and technical level, is germane to licence holder clubs choosing to do the right thing with respect to standards of excellence, as opposed to being forced to. It could be argued that it is also the only way the OPDL becomes truly self-sustaining and self-governing. To that end, OPDL recommends an ongoing focus on the leadership development of these organizations, both as leadership individuals, and collectively as a broader LH-based OPDL leadership team. This is essential to not only ensure LHs work effectively within their organizations, but also externally with each other as a collective s a holistic player development system.

7. Invest in collective, in-house OPDL coach education and development

Supporting the above, it is recommended that the OPDL attempt to return to the levels of contact with and development of all OPDL coaches as a collective, as was undertaken in the program's early years. It is understood that the size and scope that the program has now grown to makes this a more challenging undertaking than was the case in 2014/15. However, collective development of OPDL coaches is important for them to operate collectively as a team and is important given so many (nearly half) are now being recruited to OPDL teams from within their respective licence holders (and as such are new to the program) and are becoming increasingly younger and more gender diverse.

8. Improve the competitiveness of the OPDL vis-à-vis other leagues with respect to match officiating

As mentioned in this report, a major challenge to the application of the OPDL as a central development component of LTOD in Ontario is the lack of control that Ontario Soccer has over game assignment. Accordingly, Ontario Soccer must do what it can to make OPDL assignment offers to its development match officials as attractive as possible to incentivize match officials to choose this route. This not only relates to basic pay rates, but also game volume, travel cost and spectator discipline.



APPENDIX

Research Methodology

Capitis Consulting undertook substantial research from April 2022 through October 2022 to gather the data and other information needed to establish this evidence-based review of the OPDL program. Specifically, the following was undertaken:

Documentation Review

In compiling this report Capitis Consulting reviewed the following documents:

- ✓ Ontario Soccer audited financial statements, 2014-21
- ✓ Ontario Player Development League statement of financial activities, 2014-19
- ✓ Ontario Player Development League Two-Year Review, 2016
- ✓ Ontario Player Development League player enrolment data, 2014-22
- ✓ Ontario Player Development League licence holder listings, 2014-22
- ✓ Ontario Player Development League management report, 2019
- ✓ Ontario Player Development League game data, 2014-19
- ✓ Ontario Player Development League player intakes, 2014-21
- ✓ Ontario Player Development League coach lists, 2014-21
- ✓ Ontario athletes, national team invites, 2020, 2021, 2022
- ✓ Ontario Player Development League player identification lists, 2014-21
- ✓ Pro academy and REX tracker data
- ✓ League1 Ontario player data, 2016-21
- ✓ Ontario Soccer annual member meetings operations reports, 2018-20
- ✓ OPDL-eligible match officials listings, 2014-22

Interviews

Capitis Consulting conducted one-on-one interviews with the following individuals:

- ✓ Jason de Vos, Director of Development, Canada Soccer
- ✓ Bryan Rosenfeld, Interim Director of Soccer Operations, Ontario Soccer
- ✓ Nicky Pearson, Senior Manager of Match Officials Development, Ontario Soccer
- ✓ Matt Ferreira, Manager of Coach Education, Player Development & Club Licensing



Participant Survey

Capitis Consulting conducted a web-based survey, canvassing the opinions of the following OPDL participant types:

1. Players (aged 16 and older) & parents of players (aged 15 or younger)
 - ✓ *Combined player/parent response rate of 59%, 2% error rate, 95 confidence margin*
2. Individuals coaching (or having coached) in the OPDL
 - ✓ *Response rate of 14.9%, 10% error rate, 95 confidence margin*
3. Match officials who have officiated (either as referee or assistant referee) in the OPDL
 - ✓ *Response rate of 93.4%, 1% error rate, 95 confidence margin*
4. Technical Directors of existing and/or past OPDL licence holder clubs
 - ✓ *Response rate of 90%, 6% error rate, 95 confidence margin*
5. Overall (participant types combined)
 - ✓ *Response rate of 57.2%, 1% error rate, 95 confidence margin*



ASSUMPTIONS & LIMITING CONDITIONS

1. The intended use of the report is as a broad examination of historical operations of the Ontario Player Development League (OPDL) to date, as it pertains to the program's continued growth and development. More detailed analysis, planning and risk management that may be considered to be required before execution of action on the OPDL contained herein has not been undertaken.
2. This report has been compiled based on information received from the research methodology outlined alone. It is acknowledged that further information that may impact the report, that has not been gathered through the research methodology may exist and has not been considered.
3. Information furnished by others, including parties outlined in the research methodology section of this report, or others, upon which all or portions of this report are based, is believed to be reliable, but has not been verified in all cases. No warranty is given as to the accuracy of such information.
4. Financial scenarios produced in conjunction with our study contain hypotheses and assumptions which are based on a set of anticipated courses of action that may be reasonable and appropriate in Capitis Consulting Inc.'s judgement, and are consistent with the purpose of the projections, but which may not materialize as set out therein.
5. Responsible ownership and competent organizational management of all parties are assumed.
6. No investigation has been made of, and no responsibility is assumed for, any legal proceeding, fraudulent activity or third party activities that may impact the contents (including recommendations) of this report.
7. No responsibility is assumed for changes in market conditions and no obligation is assumed to revise this report to reflect events or conditions which occur subsequent to the issue date of this report.
8. Any observations, conclusions and recommendations contained in this report are the opinions of Capitis Consulting Inc. only. It is acknowledged that Capitis Consulting Inc. places no burden of expectation or requirement that information in the report is acted on in any way. It is understood that adoption of any or all components of the report are solely and wholly undertaken at the discretion of the Ontario Soccer Association. The Ontario Soccer Association indemnifies and hold Capitis Consulting Inc. harmless against any losses, damages or harm it may incur through actions it may choose to undertake based on information in this report.
9. Neither Capitis Consulting Inc., nor any of the individuals signing or associated with this report shall be required by reason of this report to give further consultation, to provide testimony or appear in court or other legal proceedings, unless specific arrangement thereof have been made.
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