Flanders
State of the Art

SPORTS TECHNOLOGY IN AUSTRALIA

FLANDERS INVESTMENT & TRADE MARKET SURVEY

FLANDERS
INVESTMENT &
TRADE

Marktstudie

SPORTS TECHNOLOGY IN AUSTRALIA

State of Play 2020

Flanders Investment & Trade Australia Pty Ltd
103/838 Collins Street
Docklands VIC 3008
Australia

T +61 3 96 14 09 80
E melbourne@fitagency.com

TABLE OF CONTENTS

In this study: $ = AUD

1. EXECUTIVE SUMMARY

In 2000, Australia set the standard for international sporting events with the Sydney Olympics. Since then a succession of high-quality events, including the Commonwealth Games in Melbourne in 2006 and on the Gold Coast in 2018, have cemented Australia's reputation for major sports events delivery. Events like the Australian Open and Formula 1 GP held in Melbourne each year showcase Australian sports on an international stage.

In 2018 $12.9 billion was spent on Australia's sporting landscape (including fan engagement), with an overall impact on the economy equivalent to 2-3% of Australia's GDP and an estimated total economic value (direct and indirect) closer to $50 billion.

But this should not be a surprise, considering that sports are an important part of Australian culture, dating back to the early colonial period. Cricket, Australian Rules Football, Rugby League, Rugby Union and Soccer are among the earliest organized sports in Australia. Nearly every sport that is played or watched in Australia has a corresponding national governing body that operates the top-tier sporting league and any relevant national team.

Sports in Australia are a complex ecosystem with more than 75,000 not-for-profit organisations at national, state and local levels. Currently, this system is supported and funded by various entities across all levels of government (Federal, State, Local), with dedicated sporting organisations. The system also relies on the investment of stadium and facility operators, equipment suppliers, private providers, gyms, sports technology companies, wagering operators, major events, professional sports and schools.

With more than 8 million Australians using community sporting infrastructure every year, community sports directly employ 57,000 people, contributing $5.5 billion in increased economic activity,
Following the investment of more than $600 million in sports infrastructure nationwide in the period 2013-2018, the Australian Federal Government launched "Sport 2030", Australia's first national sports plan which represents the long-term commitment to seeing Australian sports thrive. Last year $100.3 million were spent on the sports infrastructure as part of Sport 2030. Apart from federal funding, sports organisations can also receive funding from their State government, as well as their local council.

Industry revenue in the sports and athletic field construction sector (construct and install athletic and sports fields, install artificial turf or grass fields, lighting and athletic track, construct or install embedded equipment, and construct and install seating) has increased at an annualised 3.6% over the five years through 2018-19 to reach $942.1 million.

The online ticketing industry is expected to reach $385.7 million in 2019-20, with a projected annualised 3.7% growth over the five years through 2024-25, to $462.6 million.
Moreover, revenue for the sports betting industry is forecast to reach $6.4 billion thanks to an annualised 5.4% over the five years through 2023-24.

The sports broadcasting industry presents different scenarios with a free-to-air declining sector because of the shift to the pay television and IPTV (driven by subscriptions to video on demand services such as Netflix and Stan, with revenue growing at an annualised 6.5% over the five years through 2023-24, to reach $7.1 billion) and to sports streaming (OTT) services.
Modern technology continues to disrupt and evolve the world of sport, with some 39% of the local adult population who participates in sports, using some form of technology for sports or physical activity.

To prove its commitment to support sportstech, in 2012 the Australian Government facilitated the establishment of the Australian Sports Technologies Network, an industry-led Australian eco-system of organisations providing leadership in the commercialisation, development and promotion of Australian-inspired sports technologies

In all tiers of Australian sport, technology is evolving, outlining the importance of some domains, such as: [A] wearable devices, with revenues expected to amount to US$180 million in 2020; [B] disability sports technology (powered limbs, robotic arms, electronic eyeglasses for the legally blind, mind-control of limbs and 3D printing) to revolutionise the integration of people with disabilities and improve their sports performances; [C] sports analytics, with data analysed and coupled with deep learning machines to enable artificial intelligence applications to assist coaches, players and management to make better decisions more efficiently.

Australian clubs are giving more importance to the fan experience, as a digitally connected fan is becoming a sports venue's biggest online influencer. Stadium owners and teams that provide more personalised digital experiences through stadium apps, digital offers direct to mobile phones, and game information on digital boards increase fan engagement and generate new revenue opportunities.

Despite the fast development, the Australian sportstech ecosystem is still presenting some structural challenges: access to university collaboration and industry-leading research remains hard to navigate; accessing funding; approach to tech adoption is sometimes fragmented; and access to talent and skills might be an issue across the sector.
Nevertheless, there are several commercial opportunities for Belgian companies that can offer an innovative approach and solutions with regard to: sports participation rate (above all female), fan engagement, active recreation, inclusive sports and cross-pollination with other sectors (ie health).

1.1 COVID-19 IMPACT UPDATE

The sports industry is likely to be heavily impacted as a result of the global COVID-19 pandemic, with a significant negative effect on revenue for sports administrators, sporting clubs, sports betting, ad broadcasting companies, due to sporting events being cancelled or postponed across the world.

The present market study includes data as estimated before this tragic coronavirus spreading and so they will have to be reconsidered later in the year.

The major player in the sector, the Australian Football League (AFL), has already announced a shortened season and playing games in empty stadiums. This could have significant consequences for the sector as broadcast rights deals and fan engagement are key sources of revenue for operators.

Sports betting operators are also anticipated to record considerably lower turnover as sporting competitions, tournaments and events across the world are being postponed or cancelled.

Impact

Former Soccer Australia CEO, businessman and sports administrator David Hill says the Australian sports industry, which employs over 70,000 people, is in crisis: "All of them have contracts to spend money that they are not going to get. Both of them [the AFL (Australian Football League) and NRL (National Rugby League)] get nearly $10 million for a weekend's round of football from the television coverage, and they are not playing now, so they can't receive that. That means the end of the big source of money."

Compounding the problem for Australian sports are the broadcast businesses, which traditionally provided the primary source of revenue, are themselves on the verge of collapse. Australia's traditional free-to-air broadcasters, which have also contributed to the growth of sports in the past decade, are also under intense pressure. Seven West Media, which purchased the rights to the Olympic Games, has been hit hard by drops in advertising revenue and the migration of many consumers to streaming platforms.

Future

Hill believes Australian sport had already reached its financial peak before the virus hit. "There is going to be a big cut all the way down the chain. There will be a big drop in the amount of money that is flowing through the sporting organisations."

The question is "How many members will opt for a cheaper general admission ticket or even prefer to stay and watch at home?". This second option could benefit the media rights-holders who enjoyed a very brief surge in audiences during the fan-free games that preceded the postponement of the AFL and NRL. [https://www.abc.net.au/news/2020-03-31/coronavirus-afl-nrl-clubs-desperate-to-keep-fans/12103818]

Media analyst Peter Cox says sports might soon also be broadcasting more of their own content and looking more at a direct-to-consumer approach. The big three in the US – the NBA, MLB and NFL – all offer online access to games for fans. "The sports are breaking up into smaller groups now," Cox said.

But the absence of live sports has, according to The Guardian, prompted significant cancellation of Foxtel and Kayo Sports subscriptions, putting a business already challenged by rival streaming services under enormous pressure.

As traditional broadcast partners struggle, wagering companies could become more of an option for Australian sports. Tabcorp recently acquired the rights to show NBA and NFL matches on its Sky Sports channels.

2. AUSTRALIAN MACRO-FACTOR ANALYSIS

To gain a better understanding of the Australian sports technology industry, a preliminary overview of local key macro-factors is useful to understand the demographics of the population and the current (before COVID-19 impact) financial status that influences the interest for and adoption of innovative technologies for sports participation and engagement at different levels.

2.1 DEMOGRAPHIC FACTORS

As at 30 September 2019, Australia's preliminary estimated resident population (ERP) amounted to 25,464,116 people. The annual growth was 371,100 people (1.5%): 37.5% was due to natural increase, and 62.5% was due to net overseas migration.

Annual population change by state and territory

	Population at 30 Sep 2019 '000	Change over previous year '000	Change over previous year %
New South Wales	8 118.0	102.0	1.3
Victoria	6 629.9	129.6	2.0
Queensland	5 115.5	84.7	1.7
South Australia	1 756.5	15.4	0.9
Western Australia	2 630.6	29.3	1.1
Tasmania	535.5	5.3	1.0
Northern Territory	245.6	-1.4	–0.6
Australian Capital Territory	428.1	6.2	1.5
Australia (a)	**25 464.1**	**371.1**	**1.5**

Australia's ERP 31/12/2019 (Australian Bureau of Statistics, 2019)

Despite the fact that Australia is a vast geographical area, it is important to notice that approx. 90% of Australian populations live in urban areas, with 67% living in capital cities:

Capital city	Change over 2018-19 Number	Per cent	Population at 30 Jun 2019 Number
Melbourne	113,500	2.3	5,078,200
Sydney	87,100	1.7	5,312,200
Brisbane	52,600	2.1	2,514,200
Perth	27,400	1.3	2,086,000
Adelaide	13,900	1.0	1,359,800
Canberra	6,300	1.5	426,700
Hobart	3,400	1.5	236,100
Darwin	-1,100	-0.8	147,300
All capital cities	**303,100**	**1.8**	**17,160,400**

Australia's Regional Population Growth 2018-2019 (Australian Bureau of Statistics, 2019)

Just over 17 million people live in Australia's capitals (+303,100 people during 2018-19). Capital city growth accounted for 79% of Australia's total population increase in the year ending 30 June 2019.
Melbourne's population grew by 113,500 to reach 5 million residents during 2018-19. This was the largest growth for any capital city, and was followed by Sydney (up 87,100 people), Brisbane (52,600) and Perth (27,400). Melbourne also had the highest growth rate (2.3%), ahead of Brisbane (2.1%) and Sydney (1.7%).

The population of Australia consists of a unique composition. In 2018, there were 7.3 million migrants living in Australia. This means that 29% of the population was born abroad. The majority of the migrants are born in the following countries: a] England - 992,000 people; b] China - 651,000 people; c] India - 592,000 people; d] New Zealand - 568,000 people.

The median age of the Australian population has increased by two years over the last two decades, from 35 years at 30 June 1998 to 37 years at 30 June 2018.
Australians live longer than ever before, but half of the population lives with at least one chronic condition. Many of these chronic conditions such as overweight and obesity, insufficient physical activity and alcohol consumption are related to lifestyle factors.
Overweight and obesity - defined as abnormal or excessive fat accumulation - is a major public health problem in Australia. Obesity is one of the main causes of disease and premature death in Australia. Australia's measured obesity rate ranked ninth in 2016 among Organisation for Economic Co-Operation and Development (OECD) countries. In the same list, Belgium was ranked as twentieth.

2.2 ECONOMIC FACTORS

Australian GDP has grown for the last 27 years, with a growth rate above the OECD average, confirming the successful transition from the largest resources investment boom in Australian history to a broader-based growth. Official data reveals that the GDP growth reflected the strong performance of 15 out of 20 industries, with Health and Education (13% industry share of output), Mining (10%), Finance (9%), Construction (8%) and Manufacturing (6%) and professional scientific and technical services greatly performing.

- Estimated GDP of $1.89 trillion as of 2019 (14th GDP global rank), with estimated growth of 1.7% in 2019 and projected 2.3% for 2020 (but due to the recent bushfires and the restrictive measures related to COVID-19, the expectation is of a recession in 2020)
- Official cash rate 0.25% (following recent Australia's central bank cut due to COVID-19)
- Unemployment rate 5.3% (this is unfortunately predicted to double by the end of 2020)
- Inflation rate 1.8%
- Average weekly earnings $1,257 with a household saving ratio of 3.6%

https://rba.gov.au/snapshots/economy-indicators-snapshot/ (Reserve Bank of Australia, 4 March 2020)

Exchange rate Euro: 0.5556 (in units of foreign currencies per Australian dollar) on 2nd April
https://rba.gov.au/statistics/frequency/exchange-rates.html

The Australian cost of living stands is one of the highest with a consumer price index (CPI) of USD 110 (in Belgium USD 104): as a practical example, compared to an USD 123 value shopping basket in Australia, you can buy the same products in Belgium for only USD 100 (approx. € 115 versus € 93). This is also an indication of the purchasing power, which is worth USD 1.45 in Australia and USD 0.8 in Belgium (OECD, 2017).

Australia's political stability, transparent regulatory system, and sound governance frameworks underpin its economic resilience. Ranked in the global top five on the Index of Economic Freedom, Australia's effective governance provides multinationals with a safe, secure business environment.
Australia offers:

- A business environment that is ranked 15th out of 190 economies for ease of doing business;
- A robust regulatory system noted for its stable institutional framework and strong finance and banking regulations;
- Competitive rates for office space and the remuneration of professionals;
- A quality of life that is rated the seventh highest in the world.

In terms of purchasing power, consumer behaviour and multi-ethnic properties, Australia is somewhere between Europe and the US. In addition to Aboriginal and Torres Strait Islander peoples, the Australian population consists mainly of European immigrants. Australia is also a relatively young country, which means that it has many cultural similarities with the US, e.g. in terms of lifestyle or marketing. Economically stable, resilient and diversified, Australia is a low-risk environment in which to do business.

3. SPORTS IN AUSTRALIA

This chapter aims to provide an overview of the sports sector as whole, the most relevant entities, the most popular sports and yearly competitions as well as a brief introduction to horse and dog racing in Australia.

3.1 SECTOR OVERVIEW

Businesses in the sports sector are involved in sports administration, instruction or betting activities, or operating sports clubs or facilities. The sports sector is made up of a variety of entities that are all largely driven by the widespread popularity of sports in Australia.

Key Statistics Snapshot

Total Revenue in 2020	Annual Growth 2015–2020	Annual Growth 2020–2025	Profit Margin in 2020	Wages as a share of Revenue in 2020
$13.5bn	4.3%	3.5%	4.1%	22.4%

Number of Businesses 2015–2020
2.9%

The sector's largest segment is sports administrations[1]. Sports administrators have provided the sector with its main source of growth over the past five years, which has been the surging value of new broadcast rights deals for organisations such as the AFL, NRL and Cricket Australia. The AFL's broadcast rights deal grew in value due to its rising popularity across the country, despite continued strong competition between Australian Rules Football[2] and other codes such as Rugby League.

In 2018 $12.9 billion was spent on Australia's sporting landscape (including fan engagement). This investment across the country can be seen to impact the wider economy, it is equivalent to 2-3% of Australia's GDP and an estimated total economic value (direct and indirect) closer to $50 billion.

Revenues from broadcast rights have flowed through to professional sports clubs, although there has been a far smaller increase in spending on independent sports instructors, which rely on strong economic conditions and consumer sentiment. Strong growth in sports betting agencies have also contributed to

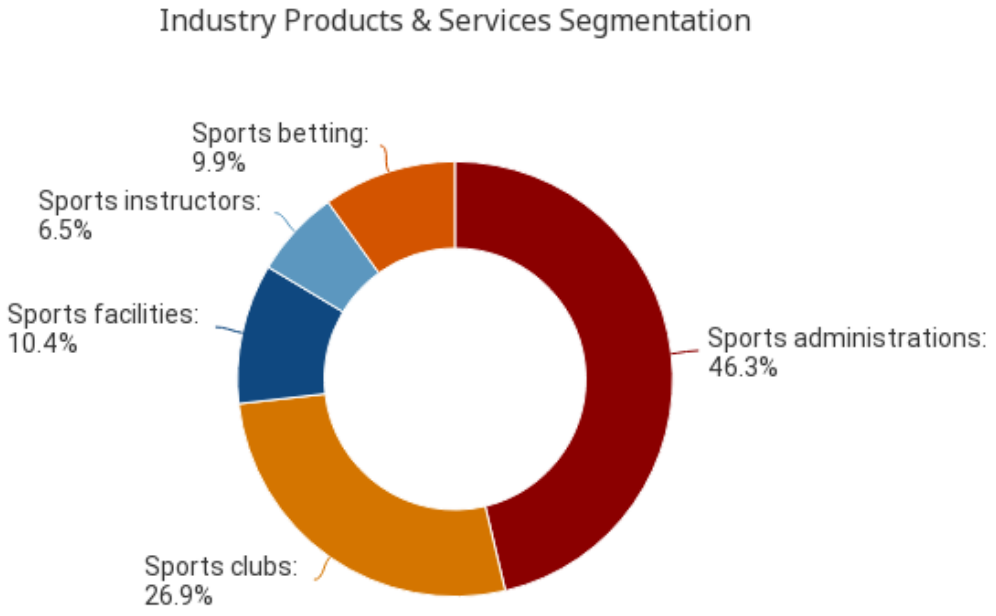
[1] Also referred to as 'entities' throughout this report.
2 In Australia, "football' or "footy" generally refers to Australian Rules football, which is governed by the AFL. It is not the same as 'voetbal' in Dutch which is named 'soccer' in Australia and is managed by Football Federation Australia.

sector growth, with the sector's revenue expected to rise by 2% in the current year. Overall, sector revenues have risen at an annualised 4.3% over the last five years through 2019-20, to $13.5 billion.
The sports sector is anticipated to continue growing over the next five years, albeit at a slower rate than over the past five years. Increasing government regulation will likely affect the performance of bookmaking operations, as authorities attempt to reduce the gambling problem. Increasing regulation governing sports betting agencies has the potential to limit revenue growth. However, sports administrations are likely to benefit from further growth in broadcast rights deals. TV channels have been finding live sports increasingly valuable, as consumers prefer to watch sports live rather than a replay or on-demand. Overall, sector revenues are forecasted to rise at an annualised 3.5% over the five years through 2024-25, to $16 billion.

The sector is also a large and growing employer, supporting a national workforce of more than 220,000 people as well as a large commitment by volunteers, who donate approximately 158 million hours to sports per year. The Australian Industry Skills Council (AISC) has recorded growth of approximately 47% over the period of 2008-18 of employment in sports and recreation activities.

3.2 TYPES OF PLAYERS IN THE FIELD

Sports administrations oversee professional and amateur sporting leagues, in which different sports clubs compete. Sports administrations and clubs use sports facilities, as do sports instructors that provide coaching lessons. In addition, bookmakers provide wagering services to consumers.



SPORTS ADMINISTRATIONS (ENTITIES)
Sports administrations deal with game rules, training, competition regulation and code promotion through marketing and broadcast deals. These bodies differ in stature depending on the popularity of the sport. Broadcast deals drive revenue for many organisations, affording them a much larger market share than those without access to such revenue. Surging broadcast deal values for the AFL, NRL, Cricket Australia

and Tennis Australia have driven growth in this segment's share of sector revenue over the past five years.

SPORTS CLUBS

The sports clubs segment covers the direct operation of a club's sporting activities. Most sports clubs operate as non-profit entities and therefore do not gain any significant market share from year to year. Professional sports clubs are the major drivers of revenue growth in the segment. Outside of the social club facilities that are excluded from the sector, these clubs fund their activities through sponsorship deals and membership drives. The sports clubs segment has declined as a proportion of sector revenue over the past five years due to growth in the sector's largest segment.

SPORTS FACILITIES

Sports facilities in Australia vary significantly. Many small-scale private establishments exist alongside government-operated grounds, ovals, courts, pools and stadiums. Outside sporting activity chains, such as bowling alleys, the facilities that attract the highest amount of revenue are stadiums used for professional sports. The share of sector revenue generated by sports facilities has fallen over the past five years despite the construction of several new stadiums and facilities, as sports administrations have increasingly negotiated larger broadcasting deals. More information is included in chapter 4.

SPORTS BETTING

The sports betting segment involves wagering on sporting events, but excludes horse and dog racing which is addressed in chapter 6.2 below. Sports betting has grown as a percentage of sector revenue over the past five years, as online betting has become increasingly accessible and popular with consumers. The market penetration of smartphones has further increased the popularity of online betting, with many punters preferring to place wagers on major sporting events such as AFL and NRL games, rather than on more traditional horse racing. Multi-bets on sports events have also contributed to the rising popularity of sports betting. Consumers can combine multiple bets across different sports and matches to increase and boost their expected pay-outs.

SPORTS INSTRUCTORS

Sports instructors provide coaching that is independent of sports clubs. This can include contract coaching of sporting teams and private tuition in sports such as golf and tennis. Swimming lessons account for a large portion of revenue for sports instructors. Surging growth in sports administration revenue has reduced the share of sector revenue attributed to sports instructors over the past five years.

3.3 MOST POPULAR SPORTS

Sports are an important part of Australian culture, dating back to the early colonial period. Cricket, Australian Rules Football, Rugby League, Rugby Union and Soccer are among the earliest organized sports in Australia.

In 2019, Sports Australia listed the results of its yearly, nationwide AusPlay survey which is Australia's largest and most comprehensive sports and physical activity survey. Below are the top 20 sports participated in by Australians, based on annual participation:

1. Walking (Recreational) - 8,783,064
2. Fitness/Gym - 6,874,541
3. Swimming - 4,505,531
4. Running/Athletics - 3,334,693
5. Cycling - 2,359,660
6. Football (=soccer) - 1,767,288
7. Tennis - 1,202,011
8. Bush walking - 1,189,493
9. Basketball - 1,017,968
10. Golf - 1,015,150
11. Yoga - 984,362
12. Australian Football (=AFL) - 913,668
13. Netball - 901,903
14. Cricket - 798,618
15. Dancing (recreational) - 688,293
16. Pilates - 585,706
17. Surfing - 508,015
18. Gymnastics - 489,058
19. Touch football (=rugby) - 464,721
20. Martial arts - 316,826

Some notes about these statistics:

1. Of the top 20 activities, 10 have predominantly **male** participants and 10 predominantly **female**:
   - The activities with the largest percentage of adult female participation are Pilates (90 per cent), Netball (89 per cent), Dancing (89 per cent), and Yoga (86 per cent).
   - The activities with the largest percentage of adult male participation are Cricket (88 per cent), Australian Football/AFL (84 per cent) and Golf (81 per cent)

2. Looking at **participation per capita per state**, the ACT (Australian Capital Territory) leads adult participation in six of the 20 top activities (Gym/Fitness, Running, Cycling, Bushwalking, Football and Martial Arts). Other leading states and territories for top 20 activities include: Victoria (Golf, Basketball, Pilates); Northern Territory (Yoga, AFL, Cricket); NSW (New South Wales) (Swimming, Tennis, Dancing, Surfing); Queensland (Touch Football); Tasmania (Walking); and South Australia (Netball).

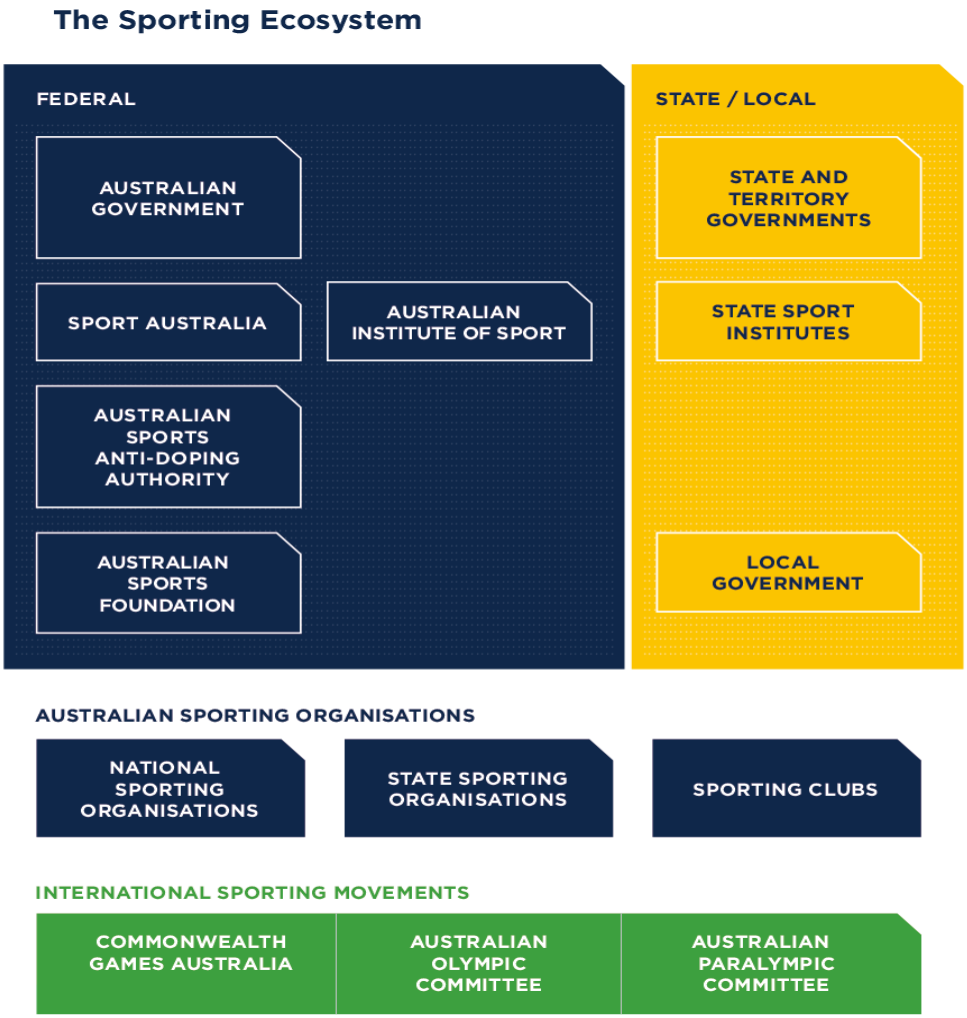
3. In Australia, **Golf** is a very popular sport among all levels of society. It is not considered an elite sport as in Belgium. An estimated 1500 golf courses can be found all over Australia, in every little town, in every climate zone (dusty golf courses are not an exception in Australia). Research conducted by Sports Australia in 2016 - 2018 indicated that nearly 1 million adults (15 years+) participated in golf. That amounts to 4.9% of the population. 81% of players were men. Golf is a rare sport/physical activity where participation rates increase with age, with peak participation occurring at 65+ years of age (59% of all Adult 15+ golf participants were aged 55 and over).

4. Historically, the **Rugby League** and **Rugby Union** football codes have been more popular in New South Wales and Queensland, whereas **AFL** has been more popular in Victoria, Tasmania, South Australia, the Northern Territory and Western Australia.

5. **Swimming** is a highly popular for children. As opposed to Belgium, swimming classes are not necessarily part of the national school curriculum as various state and territory governments have reduced mandatory learn-to-swim programs in schools.
   The federal government has therefore stated it will work with state and territory Education Ministers to ensure that all children have access to learn-to-swim programs in primary school. In reality, swimming lessons are usually taken privately, for instance at public swimming pools, at dedicated learn-to-swim venues such as King Swim or via learn-to-swim programs which might operate from swimming pools at private schools. One example in Victoria is Learn To Swim VIC.

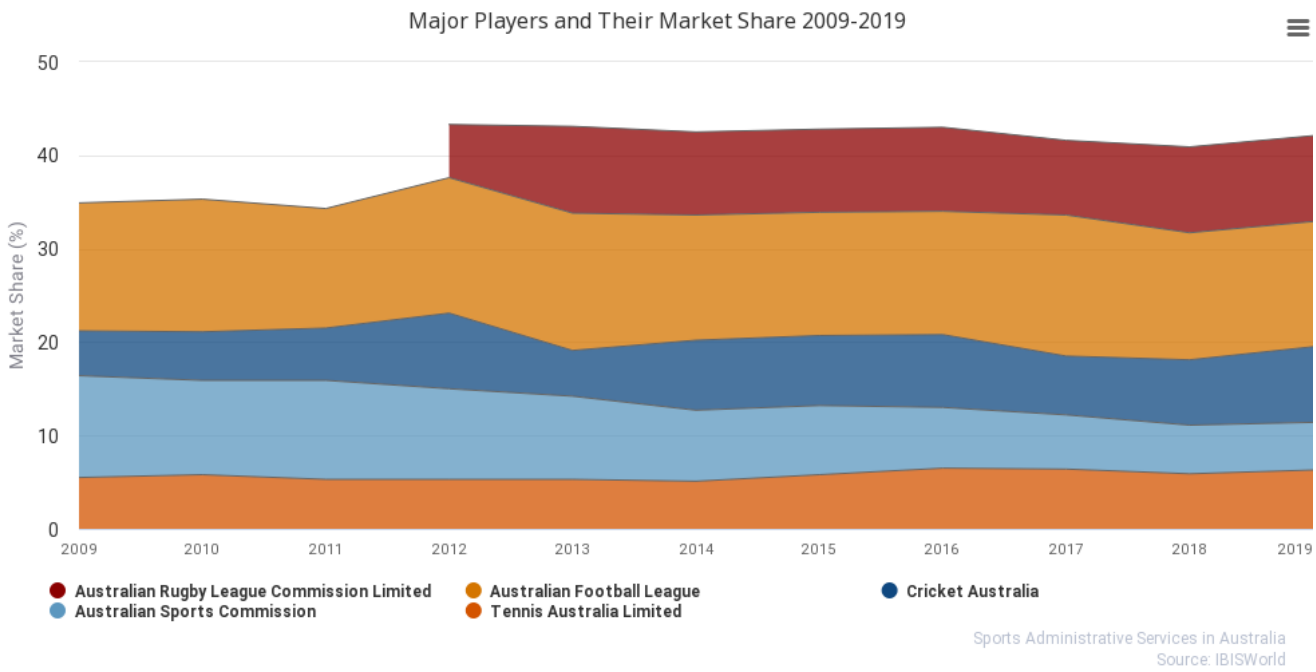
3.4 MAJOR SPORTS ENTITIES

The graph below gives a broad overview of the Australian sporting ecosystem, including involvement of the federal, state and local governments, sporting organisations (entities) and sporting movements.



Nearly every sport that is played or watched in Australia has a corresponding national governing body that operates the top-tier sporting league and any relevant national team. Sports that have the greatest

number of spectators, including those watching the sport on TV from overseas locations, tend to generate the most revenue. Sports such as soccer and rugby union remain popular throughout Australia, while big-ticket motor racing events also generate significant revenue.
Where possible FIT Melbourne lists these entities by market share (large to small). Entities for which this data is not available are listed alphabetically.



AUSTRALIAN FOOTBALL LEAGUE (AFL)

Market share:	13.4%
Address:	140 Harbour Esplanade, Docklands (Melbourne) VIC 3008
Tel:	+61 3 9643 1999
Email:	general@afl.com.au
Website:	www.afl.com.au
About:	The Australian Football League (AFL) is a national Australian Rules football competition that currently comprises 18 football clubs. The AFL developed from the Victorian Football League as a way to give the game national appeal. The AFL is the dominant sporting league in TV, print and radio news in Victoria, South Australia, Western Australia, the Northern Territory and Tasmania. To expand the league's presence and the sport's popularity in New South Wales and Queensland, the AFL introduced two new expansion teams into the competition. The Gold Coast Suns joined the competition in 2011 and the Greater Western Sydney Giants joined in 2012. The two regions serviced by these expansion clubs have fast-growing, dense populations and are largely dominated by the NRL. In October 2016, the AFL purchased Etihad Stadium for a reported $200 million. The establishment of AFL Women's, the national Australian Rules football league for women, has also

boosted the sport's popularity. The inaugural season of AFL Women's began in February 2017 and is currently made up of 14 clubs based across Australia.

AUSTRALIAN RUGBY LEAGUE COMMISSION LIMITED (NRL)

Market share: 9.2%
Address: Rugby League Central, Driver Avenue, Moore Park (Sydney) NSW 2021
Tel: +61 2 9359 8500
Email: reception@nrl.com.au
Website: www.nrl.com
About: The Australian Rugby League Commission (ARLC) was established in February 2012 and is the governing body that oversees the NRL, that is the local premier rugby league competition, which started in 1998. The ARLC markets the NRL Telstra Premiership on behalf of the clubs, and organises the competition draw, final matches and the grand final. The NRL is the most popular sports league in New South Wales and Queensland. There are 11 teams in New South Wales and the Australian Capital Territory, 8 of which are based in Sydney. Queensland has 3 teams, and New Zealand and Melbourne have 1 each, which completes the 16-team competition. Beyond the league itself, the ARLC also promotes representative matches. The annual three-match State of Origin series between New South Wales and Queensland provides substantial revenue to the ARLC. These matches are in addition to Australian international matches.

CRICKET AUSTRALIA

Market share: 8.1%
Address: 60 Jolimont Street, Jolimont (Melbourne) VIC 3002
Tel: +61 3 9653 9999
Email: public.enquiries@cricket.com.au
Website: www.cricketaustralia.com.au
About: Cricket Australia Limited is a company with members comprising the six state cricket associations. The organisation operates separate departments: A] the cricket operations division involves the management of elite Australian cricketers, including test and one-day teams; B] the cricket marketing services division oversees media rights, relationships with commercial partners and the promotion of Australian cricket; C] the game development division develops and supports club cricket across Australia. Cricket Australia's revenue often depends on the performance of the Australian cricket team and the opponents being played. The Ashes, a series of five test matches involving Australia and England, is generally highly popular. Cricket has transformed as a sport over the past decade, with the rise of Twenty20 cricket (a shortened version of cricket that allows the whole game to be shown in prime-time TV slots). Cricket Australia has emulated the Indian Premier League by launching its Twenty20 Big Bash League, which has bolstered revenue growth since its inaugural 2011-12 summer season. In 2018, Cricket Australia

negotiated a six-year deal worth just under $1.2 billion for the rights to broadcast various cricket competitions in Australia and involving the Australian national team. Women's cricket is becoming increasingly popular in Australia.

TENNIS AUSTRALIA

Market share:	6.3%
Address:	Olympic Boulevard, Melbourne Park, Melbourne VIC 3000
Tel:	+61 3 9914 4000
Email:	Online form
Website:	https://www.tennis.com.au/
About:	Tennis Australia, the governing body of Australian tennis, promotes and facilitates tennis participation across the country, and oversees participation of Australian teams in the men's Davis Cup and women's Fed Cup international team tournaments. The organisation also conducts local circuits and tournaments, including the Tennis Pro Circuit, the Australian Open Series and the Australian Open. The Australian Open tennis tournament generates most of Tennis Australia's revenue. Unlike other major industry players, Tennis Australia oversees operations that include amateur participation and professional tournaments: as a result, it invests more in participation than many other sporting codes. Attendance at tennis events has grown over the past five years: in 2018 approximately 743,667 people attended, in 2019 that number rose to over 780,000 and a total of 812,174 fans attending the AO over 14 days in 2020. In 2020, Tennis Australia organized the ATP Cup for the first time. The event took place in Brisbane, Sydney and Perth right before the annual Australian Open.

AUSTRALIAN SPORTS COMMISSION (SPORT AUSTRALIA AND AUSTRALIAN INSTITUTE OF SPORT)

Market share:	5.1%
Address:	Leverrier Street, Bruce (Canberra) ACT 2607
Tel:	+61 2 6214 1111
Email:	sportsgovernance@sportaus.gov.au
Website:	www.sportaus.gov.au
About:	The Australian Sports Commission is the Australian Government agency responsible for supporting and investing in sports and physical activity at all levels, and unites two entities: A] Sport Australia, responsible for driving the broader sports sector including participation, physical activity and industry growth. Its main goals are to increase sports participation and foster excellence in sports fields by investing in coaching, high-performance athlete development and sports science research. Sport Australia unified sporting strategies across states and territories, and within sporting organisations by supporting school and community initiatives, and built the capacity and sustainability of sporting organisations by delivering community education and training programs and encouraging volunteerism in sporting bodies.

B] the Australian Institute of Sport, leading the high-performance sports system, is responsible for training many of Australia's top athletes. Many AIS athletes go on to compete in top-level competitions such as the Olympic Games and Commonwealth Games, while others make their way into professional team sports.

RUGBY AUSTRALIA LTD (Rugby Union)

Market share:	3%
Address:	Rugby Australia Building, Corner of Moore Park Road and Driver Avenue, Moore Park (Sydney) NSW 2021
Tel:	+61 2 8005 5555
Email:	customer.service@rugby.com.au
Website:	www.australia.rugby
About:	Rugby Australia Ltd is a non-profit organisation and the governing body of Rugby Union in Australia. The company recently underwent a rebranding in 2017 and was previously known as the Australian Rugby Union. Rugby Australia is a member of the International Rugby Board (IRB) and is a shareholder in the South Africa, New Zealand, Australia and Argentina Rugby (SANZAAR) group. Rugby Australia has state-based Rugby Union member organisations and is responsible for Australian participation in test matches and state-based Rugby. Australia's international team, the Wallabies, competes in the Rugby Championship against New Zealand, South Africa and Argentina.

AUSTRALIAN GRAND PRIX CORPORATION

Market share:	2.3%
Address:	South Melbourne VIC 3006
Tel:	+61 3 9258 7100
Email:	enquiries@grandprix.com.au
Website:	https://www.grandprix.com.au/
About:	The Australian Grand Prix Corporation (AGPC) organises and manages the Formula One Grand Prix at Albert Park (Melbourne) and the MotoGP Motorcycle Grand Prix at Phillip Island, VIC. The Australian Formula One Grand Prix has been held at Albert Park in inner Melbourne since 1996, when Adelaide was replaced as Australia's host city of a Formula One race. Phillip Island replaced Eastern Creek in western Sydney as Australia's host to a MotoGP event in 1997. The AGPC largely derives its revenue from ticket sales and government grants to help cover the significant costs involved in infrastructure requirements and securing event licences.
Note:	The 2020 Australian Grand Prix was cancelled at the very last minute due to the COVID-19 virus.

FOOTBALL FEDERATION AUSTRALIA (FFA)

Market share:	2.3%
Address:	Level 22, 1 Oxford Street, Darlinghurst (Sydney) NSW 2010
Tel:	+61 2 8020 4000
Email:	reception@ffa.com.au
Website:	www.ffa.com.au
About:	Football Federation Australia (FFA) is a member of Federation Internationale de Football Association (FIFA), the international governing body for football (soccer). FFA, member of the Asian Football Confederation, is the governing body for soccer in Australia, responsible for ensuring this sport is conducted to the highest standard, and continuing the growth and development of the game. These responsibilities include operating premier domestic soccer leagues, men's A-League and women's W-League, and overseeing national soccer teams, the Socceroos (men's team) and the Matildas (popular and successful women's team).

ATHLETICS AUSTRALIA

Contact:	Darren Gocher, CEO
Address:	Athletics House, Level 2, 31 Aughtie Drive, Albert Park (Melbourne) VIC 3206
Tel:	+61 3 8646 4550
Email:	athletics@athletics.org.au
Website:	https://www.athletics.com.au/home/

CYCLING AUSTRALIA

Contact:	Steven Drake, Managing Director
Address:	Level 12, 459 Little Collins Street, Melbourne VIC 3000
Tel:	+61 3 9998 6810
Email:	online form
Website:	https://cycling.org.au/

GOLF AUSTRALIA

Contact:	Stephen Pitt, CEO
Address:	Level 2, 111 Coventry Street, South Melbourne VIC 3205
Tel:	+61 3 9626 5050
Email:	info@golf.org.au
Website:	https://www.golf.org.au/

GYMNASTICS AUSTRALIA

Address:	Level 3, 100 Albert Road, South Melbourne VIC 3205
Email:	online form
Website:	http://www.gymnastics.org.au/

HOCKEY AUSTRALIA

Address:	66 Jolimont Street, East Melbourne VIC 3002
Tel:	+61 3 9947 9900
Email:	ha@hockey.org.au
Website:	https://hockey.org.au/

NATIONAL BASKETBALL LEAGUE (NBL)

Address:	Level 13, 10 Queens Road, Melbourne VIC 3004
Tel:	+61 3 8391 6099
Email:	info@nbl.com.au
Website:	www.nbl.com.au

NETBALL AUSTRALIA

Address:	191 Johnston Street, Fitzroy (Melbourne) VIC 3065
Tel:	+61 3 8621 8600
Email:	infonet@netball.com.au
Website:	www.netball.com.au

SWIMMING AUSTRALIA

Address:	Level 2, 50-56 York Street, South Melbourne VIC 3205
Tel:	+61 3 9910 0700
Email:	admin@swimming.org.au
Website:	www.swimming.org.au

3.5 MAJOR SPORTS EVENTS

Below is an overview of major sports events in Australia. FIT Melbourne has divided these events into 'player sports' which indicates sports in which people actively participate (e.g. soccer) and 'spectator sports' which indicates sporting events that are mainly watched by the general public (e.g. Formula 1). There are separate sections for 'cricket' due to the number of different competitions held domestically and internationally and 'special events' such as the 2032 Olympic Bid by Queensland.

The following sports are not included in the overview:

- ATHLETICS: Marathons and running events are very popular in Australia, ranging from 'fun runs' to actual marathons and long-distance races. For a full overview, click here.
- SWIMMING: an overview of competitions can be found here;
- HOCKEY: an overview of competitions can be found here;
- GYMNASTICS: events are organized at a state level. To be directed to the relevant state, click here.

Lastly, FIT Melbourne would like to point out that cricket, tennis and soccer are considered summer sports in Australia and usually take place in the Australian summer (December – February). AFL and Rugby can be considered winter sports and are thus played during the cooler months, starting March until October.

3.5.1 Player Sports

Below is an overview of the main yearly competitions in Australia. This list is by no means exhaustive, but it gives a good indication of Australia's sporting calendar. For more information about some of the major sports infrastructure mentioned in this section, please refer to chapter 4.2.

TOUR DOWN UNDER (Cycling)

Where: South Australia
When: 11 days during the second half of January
Website: https://tourdownunder.com.au/
Organizers: Events South Australia, a division of the South Australian Tourism Commission, on behalf of the South Australian Government

AUSTRALIAN OPEN (Tennis)

Where: Melbourne
When: End of January until the beginning of February
Website: https://ausopen.com/
Organizers: Tennis Australia

SUPER RUGBY

What: 15 Teams from Argentina, Australia, New Zealand, South Africa and Japan
Where: The Australian games are played at Canberra Stadium, AAMI Park (Melbourne), Suncorp Stadium (Brisbane) and the Sydney Cricket Ground (SGC)
When: January until June (16 rounds + a three-week finals series)
Website: https://www.rugby.com.au/
Organizers: Rugby Union

WOMEN'S AUSTRALIAN OPEN (Golf)

Where: Kooyonga Golf Club, Adelaide
When: Dates to be confirmed (in 2020 the event was held in February)
Website: https://www.golf.org.au/womensausopen
Organizers: Golf Australia
More: For more golf events in Australia, please refer to these calendars by Golf Australia and PGA Australia.

AFL WOMEN'S/ AFLW

Where: Played in every state in Australia on smaller oval grounds
Season: February – March (8 rounds), plus two weeks of semi- and preliminary finals and 1 grand final in April
Website: https://womens.afl/
Organizers: Australian Football League
Covid-19: The 2020 competition was suspended early due to COVID-19. No finals in 2020.

AFL PREMIERSHIP SEASON & FINALS SERIES

Where: Mainly played in VIC, QLD, NSW, SA, WA at designated stadiums, mainly in the capital cities. Some games are played in TAS, NT, ACT and 1 game each year is even played in China. The Grand Final is always played at the MCG in Melbourne.
When: March until September (23 rounds + 4 week finals series)
Website: https://www.afl.com.au/
Organizers: Australian Football League
Note: The entire state of Victoria has a public holiday on the day before the Grand Final to celebrate the event.
Covid-19: Round 1 of 2020 competition went ahead but is currently suspended until at least the end of May 2020 due to COVID-19.

NRL SEASON & FINALS SEASON

Where: Played in most Australian states at big stadiums in the capital cities.
When: March until October (25 rounds in total + 4 week finals series)
Website: https://www.nrl.com/
Organisers: Australian Rugby League Commission
Covid-19: The 2020 season has been suspended until further notice due to COVID-19.

SUPER NETBALL

Where: Indoor stadiums in all six states and ACT.
When: May until August (14 rounds)
Website: https://supernetball.com.au/
Organizers: Netball Australia
Covid-19: The 2020 season is currently on hold due to the COVID-19 outbreak.

STATE OF ORIGIN (NRL)

Where: Three games in New South Wales, Queensland and one in another state (varies every year; the 2020 game will be held in Adelaide).
When: June - July
Website: https://www.nrl.com/origin/
Organizers: National Rugby League

BLEDISLOE CUP (Rugby Union)

What: The Bledisloe Cup is a rugby union competition between the national teams of Australia and New Zealand that has been played since the 1930s. It consists of an annual three-match series, reduced to a two-match series in World Cup years. The games are usually played in August and November.
2020 events: 8 August 2020, Marvel Stadium Melbourne
15 August 2020, Wellington (New Zealand)
17 October 2020, Suncorp Stadium Brisbane
Website: https://australia.rugby/
Organisers: Rugby Australia Limited

A-LEAGUE (Men's soccer)

What: The league is currently contested by 11 teams; 10 based in Australia and 1 based in New Zealand. A 12th team, Macarthur FC, based in Sydney, is scheduled to join the league in the 2020–21 season.

Where: A-League games have been played in 33 stadiums since the inaugural season of the A-League in 2005. Hindmarsh Stadium, the home of Adelaide United, is currently the smallest used in the A-League, with a capacity of 16,500. Marvel Stadium, one of the homes of Melbourne Victory, has the greatest seating capacity of any stadium currently used by an A-League club.

When: October until May (including Finals Series)

Website: https://www.a-league.com.au/

Organisers: Football Federation Australia

NBL (Men's Basketball)

What: Basketball competition including Australian teams and 1 New Zealand team

Where: Indoor stadiums in Adelaide, Brisbane, Cairns, Canberra, Sydney, Melbourne, New Zealand

When: October - February

Website: https://nbl.com.au/

Organisers: National Basketball League

WNBL (Women's Basketball)

Where: Indoor stadiums in most Australian states and ACT

When: October - February (16 rounds)

Website: https://nbl.com.au/

Organisers: National Basketball League

W-LEAGUE (Women's soccer)

What: The league is currently contested by 9 teams

Where: Games are played in VIC, NSW, SA, ACT, QLD

When: November - February (12 round season + Finals play-off)

Website: https://www.w-league.com.au/

Organisers: Football Federation Australia (FFA)

Note: Women's soccer is very popular in Australia, both at a grassroots level and a professional level, largely due to the success of the 'The Matildas' (national women's team) on the international stage.

AUSTRALIAN OPEN (Golf)

Where: In 2020 and 2022 the event will be held in Victoria

When: Dates to be confirmed (in 2019, the event took place in December)

Website: https://www.golf.org.au/ausopen

Organisers: Golf Australia

3.5.2 Cricket

As Cricket is one of the most popular sports in Australia at international, national and local level, FIT Melbourne dedicates a chapter to the various cricket competitions to provide a clear overview.

The national Australian men's team is one of the most successful teams in international cricket. They generally play a test series against a visiting team, and a one-day series between two other teams at home each (Australian) summer, and tours overseas for the remainder of the year. On a domestic level, each of the six states has a cricket team which competes in two separate competitions over the Australian summer: A four-day first-class competition known as the Sheffield Shield and a one-day competition. Moreover, eight city-based franchises compete in the domestic Twenty20 competition known as Big Bash League (BBL or WBBL for women's league). Over the last few years, women's cricket has become more professional which has led to separate high-profile women's competitions alongside the men's.

The information below relates to the most recent season (2019-2020) and varies every year. Even so, it gives a good indication of the amount of cricket being played in Australia, as well as the variety of locations.

GENERAL

Organizers:	Cricket Australia
Website:	https://www.cricket.com.au/fixtures

WOMEN'S CRICKET (INTERNATIONAL)

T20s:	September - October at North Sydney Oval
One-Day-Internationals:	October at Allen Border Field (QLD)
T20 tri-series:	From January until February at Manuka Oval (Canberra) and Junction Oval (St Kilda, Melbourne)

WOMEN'S CRICKET (DOMESTIC)

WNCL:	September and also in January and February in all six states and ACT.
Twenty20 / WBBL:	From October until December in all six states and ACT.

MEN'S CRICKET (INTERNATIONAL)

T20s:	October - November in Adelaide, Brisbane, Melbourne, Canberra, Sydney and Perth
Test Series:	December - January in Perth, Sydney and Melbourne (note: includes day-night matches and is highly popular!)
One-Day-Internationals:	March in Sydney and at Blundstone Arena (TAS)

MEN'S CRICKET (DOMESTIC)

Sheffield Shield:	October - March in all six states
One-Day-Cups:	September - November in all six states
Twenty20/BBL;	December - January in all six states and ACT.

3.5.3 Spectator Sports

SUPERCARS (V8 cars)

Where: Most Australian States and NT. Also one race in New Zealand.
When: February - December. 2020 calendar via this link.
Website: https://www.supercars.com/
Organizers: Supercars Group

AUSTRALIAN GRAND PRIX (Formula 1)

Where: Albert Park, Melbourne
When: Mid-March
Website: https://www.grandprix.com.au/
Organizers: Australian Grand Prix Corporation
Covid-19: The 2020 Australian GP was cancelled at the very last minute due to Covid-19.

AUSTRALIAN MOTORCYCLE GRAND PRIX

Where: Philip Island, south of Melbourne
When: 23-25 October 2020
Website: https://www.motogp.com.au/
Organizers: Australian Grand Prix Corporation

SYDNEY TO HOBART YACHT RACE

Where: Sydney – Hobart
When: Starts on 26th December
Link: https://rolexsydneyhobart.com/
Organizers: Cruising Yacht Club of Australia (CYCA)

3.5.4 Special events

CRICKET MEN'S TWENTY20 WORLD CUP

The 2020 ICC Men's T20 World Cup is scheduled to be the seventh ICC Men's T20 World Cup tournament, with matches to be held in Australia from 18 October to 15 November 2020. The final will be held at the Melbourne Cricket Ground. Teams come from Australia, Afghanistan, Bangladesh, England, India, Ireland, Oman, Namibia, The Netherlands New Zealand, Pakistan, Papua New Guinea, Scotland, South Africa, Sri Lanka and the West Indies.

Where: Adelaide, Brisbane, Geelong, Hobart, Melbourne, Perth, Sydney
When: 18 October – 15 November 2020
Website: https://www.cricket.com.au/series/icc-mens-world-t20/mymMSvoUVkCtL_shMdT2GA
Organizers: Cricket Australia
Note: Women's Twenty20 World Cup was held in Australia in early 2020.

ARAFURA GAMES

The Arafura Games is a well-developed international multi-sports event that attracts participants from the Asia-Pacific region and beyond, with the 2011 Games attracting 2,200 visiting athletes. The Games foster goodwill between sporting neighbours and share sporting and cultural knowledge within the Asia-Pacific region. The Arafura Games 2019 featured 17 sports disciplines, including, Athletics, Badminton,

Basketball, Basketball 3X3 Pro Hustle, Beach Volleyball, Boxing, Football, Indoor Volleyball, Muaythai, Netball, Sailing, Sepak Takraw, Squash, Swimming, Table Tennis, Tennis and Weightlifting.

Where: Darwin, Northern Territory
When: 14-22 May 2021
Website: https://arafuragames.nt.gov.au/
Organizers: Northern Territory Major Events Company (NT Government body)

FIBA 2022 WOMEN'S WORLD CUP

FIBA has awarded the hosting rights for the FIBA Women's Basketball World Cup 2022 to Basketball Australia (second time following the 1994 edition). Played every four years, the FIBA Women's Basketball World Cup is the biggest international women's basketball competition, bringing 12 basketball powerhouse nations for 38 games across the tournament. Fox Sport reported that "the next edition of the men's event – the 2027 FIBA World Cup – is yet to secure a host, and Basketball Australia plans to submit a bid".

Where: Two venues at Sydney Olympic Park
When: 10 days in September and October 2022
Website: https://australia.basketball/blog/2020/03/27/sydney-to-host-fiba-womens-basketball-world-cup-2022/
Organizers: Basketball Australia with the support of the NSW Government

UCI ROAD WORLD CHAMPIONSHIPS

The Union Cycliste Internationale (UCI) announced that the 2022 edition of the UCI Road World Championships has been awarded to Wollongong (NSW), following the successful 2010 edition organized in Melbourne - Geelong. The Championships will feature the Team Time Trial Mixed Relay, Individual Time Trials, Road Races, Community events and Activations throughout the eight days. The Championships are expected to attract more than 1,000 competitors, 5,000 staff and 300,000 spectators to the Wollongong region during the Championships. Cycling Tips reports that "just as the 2010 Geelong Worlds paved the way for the Cadel Evans Great Ocean Road Race – races which feature a similar finishing circuit in Geelong – Cycling Australia hopes to spin a legacy event out of Wollongong 2022".

Where: Wollongong, situated 100km south-west of Sydney
When: 18-25 September 2022
Website: https://cycling.org.au/
Organizers: Cycling Australia with the support of the NSW Government

FIFA 2023 WOMEN'S WORLD CUP

The FIFA Women's World Cup 2023 will be the first Women's World Cup featuring 32 teams. FIFA received bids from Australia & New Zealand (joint bid titled "As One"), Brazil, Colombia and Japan. Australia and New Zealand's bid outlines that it has the backing of all governments involved and expects 1,5 million visitors to the region. The bidding committee further proposes the cup be played in 13 stadiums in 12 host cities: Adelaide, Brisbane, Launceston, Melbourne, Newcastle, Perth and Sydney in Australia and Auckland, Christchurch, Dunedin, Hamilton and Wellington in New Zealand. FIFA conducted inspection visits to the bidding nations in early 2020 and is expected to select the host(s) at its meeting in Addis Ababa in September 2020. Forbes reports that Australian and New Zealand are considered favourites by many observers. This claim has been repeated in other media outlets, including SBS's The World Game website.

More information about Australia and New Zealand's bid can be found here.

OLYMPICS 2032

In December 2019, the State Government of Queensland announced that it would bid to host the Olympics in 2032. State Premier, with the support of the Prime Minister, announced plans for a South East Queensland joint bid, featuring facilities across Brisbane, the Gold Coast (South of Brisbane) and the Sunshine Coast (North of Brisbane). Preliminary planning suggested some football events could be held in Townsville (approx. 1400 km north of Brisbane) and Cairns (approx. 1700km north of Brisbane) and sailing in the Whitsundays (approx. 1100 km north of Brisbane).

Brisbane hosted the 1982 Commonwealth Games and the Gold Coast hosted the Commonwealth Games in 2018, so up to 85% of Olympic infrastructure is already in place, but the state will need to upgrade transport infrastructure between the Sunshine Coast, Brisbane and the Gold Coast. These transport improvements are needed anyway because of the rapidly growing population in this area.
Ms Palaszczuk highlighted possible upgrades to the Queensland Sports and Athletics Centre and possibly Albion Park Raceway. Another sports infrastructure upgrade consists of proposed changes to the Gabba, with early speculation the 42,000 capacity stadium could be turned into a stadium with capacity for up to 80,000 spectators.

For a complete overview of the bid (incl. feasibility study) and all the latest news, please refer to this webpage by the Australian Olympic Committee.

3.6 HORSE AND DOG RACING

3.6.1 General

Industry companies administer horse and dog racing activities, or operate horse and dog racing venues. Firms that operate horseracing stables or dog racing kennels, own racehorses or greyhounds, or provide related training services are also included in the industry.

Key Statistics Snapshot

Total Revenue in 2020	Annual Growth 2015–2020	Annual Growth 2020–2025	Profit Margin in 2020	Wages as a share of Revenue in 2020
$1.5bn	-1.4%	-0.8%	1.2%	18.6%

Number of Businesses 2015–2020

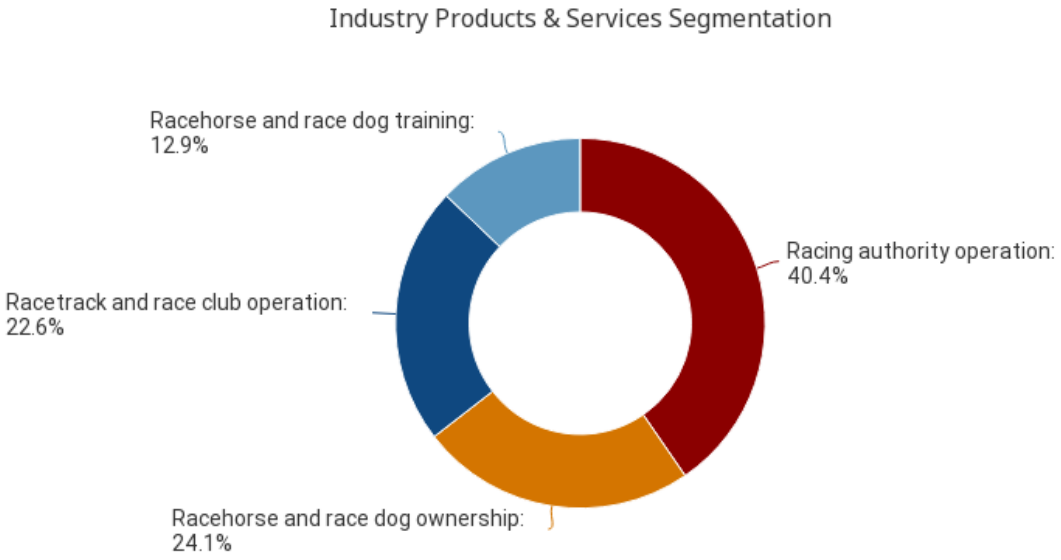
-0.7%

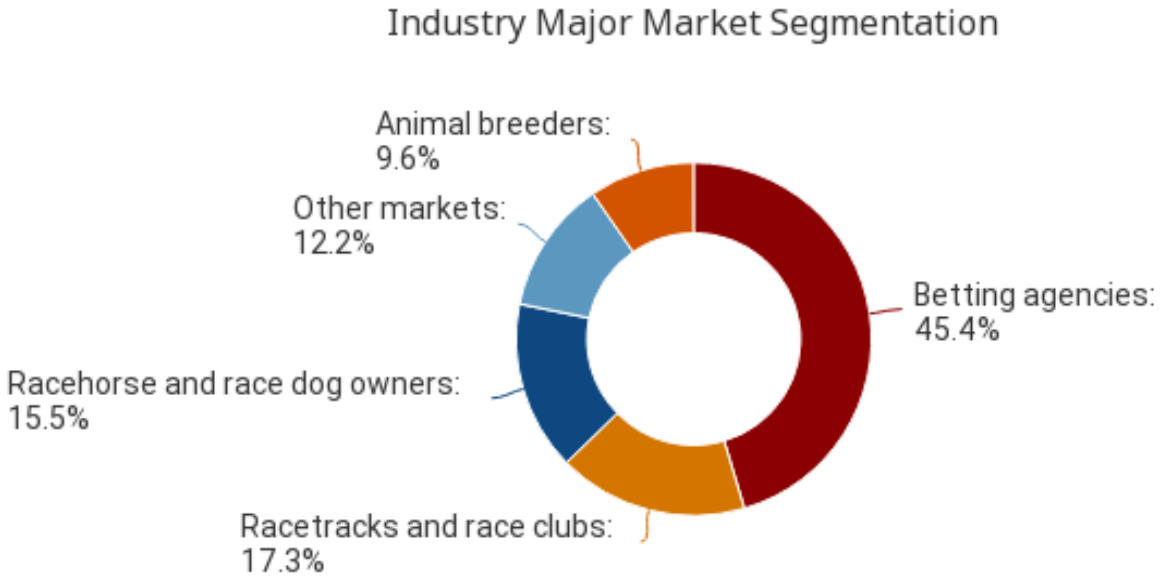
Horse and greyhound races are fixtures of Australia's sporting culture and the annual Melbourne Cup is the highlight of the Horse and Dog Racing industry. However, industry participants have faced challenges over the past five years. Declining attendance at racing events and rising interest in alternative forms of entertainment and gambling have negatively affected industry operators over the period. Additionally, ticket sales and revenue from other thoroughbred, harness and greyhound races have declined over the past five years. Growing animal welfare concerns among the Australian public have also softened demand for racing events. In particular, media coverage of former racehorses being sent to abattoirs and an inquiry into greyhound racing in New South Wales have damaged the industry's reputation.

In contrast, many industry operators have benefited from increased expenditure on dining, catering and hospitality offerings over the past five years. Most of the industry's major players have successfully targeted high-value consumers, including inbound international tourists. Furthermore, large race days have increasingly become important events for corporate sponsors. These factors have limited the industry's overall decline over the period.

The increasing popularity of sports betting sites that are accessible on a range of different platforms has reduced the share of gambling expenditure on racing. This trend has constrained a key revenue source for racing authorities and race clubs over the past five years. As a result, industry revenue is expected to decline at an annualised 1.4% over the five years through 2019-20, to $1.54 billion. Industry revenue is anticipated to fall by 2.2% in the current year as gamblers continue to shift towards online sports betting platforms.

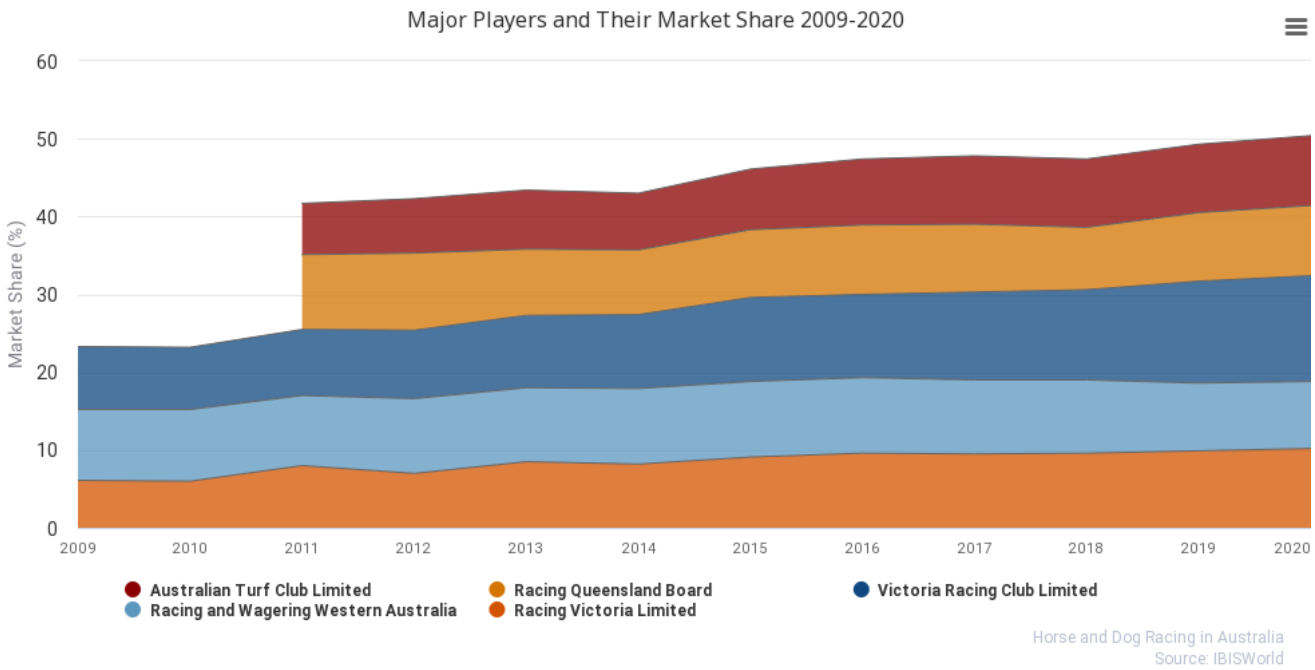
These challenges will continue to negatively affect the industry's performance over the next five years. Forecast declines in per capita gambling expenditure are anticipated to negatively affect many industry operators over the next five years. Continued declines in thoroughbred, harness and greyhound racing attendance numbers are projected to limit industry revenue. The industry will also likely continue consolidating, as smaller and less profitable participants are forced out of the industry. Overall, industry revenue is forecast to decrease at an annualised 0.8% over the five years through 2024-25, to $1.49 billion.





3.6.2 Major Industry Players

The largest companies in the industry are typically racing authorities, racing boards and racecourse operators. However, racehorse and race dog owners and trainers, and racing stable and kennel operators are also included in the industry. These operators tend to be small and generate negligible revenue compared with the major players.



VICTORIA RACING CLUB LIMITED

Market Share: 13.6%
Address: 448 Epsom Road, Flemington (Melbourne) VIC 3031
Tel: +61 3 8378 0747
Email: customerservice@vrc.net.au
Website: https://www.flemington.com.au/
About: Victoria Racing Club Limited (VRC) is an Australian-owned public company that facilitates race meetings and provides horse training facilities. The VRC organises and runs 25 race meetings every season. Its internationally recognised race days include the Victoria Derby Day, the Melbourne Cup Day and the Oaks Day. Due to the high quality and variety of racing at Flemington, the VRC is successful from a racing perspective. The club offers over $53 million in annual prize money, which provides a major incentive for both industry participants and international competitors to attend the VRC's races.

RACING VICTORIA LIMITED

Market Share: 10.2%
Address: 400 Epsom Road, Flemington (Melbourne) VIC 3031
Tel: +61 3 9258 4258
Email: online form
Website: https://www.racingvictoria.com.au/

About: Racing Victoria Limited is an Australian-owned unlisted public company established in December 2001. The body functions as the principal racing authority and club for thoroughbred horseracing in Victoria. Like other state racing authorities, its objectives include maintaining industry integrity, representing the state's thoroughbred racing interests and allocating money gained from wagers across Victoria's racing clubs. Racing Victoria's main source of revenue is derived from its joint agreement with Tabcorp, so that the company gains a 50% share of all wagers placed on horseraces in Victoria.

RACING QUEENSLAND BOARD

Market Share: 9%
Address: Sandgate (Brisbane) QLD 4017
Tel: +61 7 3869 9777
Email: info@racingqueensland.com.au
Website: https://www.racingqueensland.com.au/
About: Racing Queensland Board (RQB) is the controlling body of thoroughbred, harness and greyhound racing in Queensland, overseeing 118 racecourses throughout the state, which typically host over 12,000 races each year. RQB has laid out an infrastructure development plan that is estimated to cost nearly $200 million.

AUSTRALIAN TURF CLUB LIMITED

Market Share: 9%
Address: Randwick (Sydney) NSW 2031
Email: info@australianturfclub.com.au
Website: https://www.australianturfclub.com.au/
About: Australian Turf Club Limited is an Australian-owned public company that primarily operates racecourses in New South Wales, such as Royal Randwick, Rosehill Gardens, Warwick Farm and Canterbury Park.

RACING AND WAGERING WESTERN AUSTRALIA

Market Share: 8.6%
Address: 14 Hasler Road, Osborne Park (Perth) WA 6017
Tel: +61 8 9445 5333
Email: info@rwwa.com.au
Website: https://www.rwwa.com.au/
About: Racing and Wagering Western Australia is a state government body that promotes and develops the welfare and integrity of thoroughbred, harness and greyhound racing in Western Australia. Unlike other states in Australia, this government body controls and oversees all wagering activities in Western Australia. As a result, wagers that are placed on thoroughbred, harness and greyhound races account for RWWA's revenue contribution to the industry.

MELBOURNE RACING CLUB

Address: Gate 22, Station Street, Caulfield (Melbourne) VIC 3145
Tel: +61 3 9257 7200
Email: contact@mrc.net.au
Website: https://mrc.racing.com/

About: The Melbourne Racing Club (MRC) is an association that primarily conducts thoroughbred racing activities and operates gaming venues. The MRC conducts race meetings across its three Melbourne racecourses in Caulfield, Mornington and Springvale. In addition to the racecourses, the MRC also owns 13 hotels and club venues across Victoria.

GREYHOUND RACING NEW SOUTH WALES
Address: Level 23, 1 Oxford Street, Darlinghurst (Sydney) NSW 2010
Tel: +61 2 8324 7600
Email: online form
Website: http://www.grnsw.com.au/

GREYHOUND RACING VICTORIA
Address: 46-50 Chetwynd Street, West Melbourne VIC 3003
Tel: +61 3 9329 1100
Email: online form
Website: https://www.grv.org.au/
About: Greyhound Racing Victoria regulates, conducts and promotes greyhound racing and welfare in Victoria. The organization also organizes racing events in Victoria.

3.6.3 Major Events

There are plenty of horse and dog racing events in Australia. For an overview per club, please visit the website of the relevant clubs above.

The main Australian **horse races** are held in spring and they include the Victoria Derby, the VRC Oaks and – most importantly – the Melbourne Cup. This race is referred to as 'the race that stops the nation'. It is an extremely popular event that is watched online or on tv by many Australians. The state of Victoria (where the race is held) has a dedicated public holiday on the day of the cup which is held each year on the first Tuesday of November. For more information about other high-profile horse races, please refer to this calendar of 60+ Group 1 races in Australia.

Australia is one of eight countries with a significant **greyhound racing** industry. In 2015, there were more than 300,000 greyhounds in 40,000 races in Australia. There are 65 racing venues in Australia, including at least one in each state capital. NSW hosts the world's richest race, the Million Dollar Chase in October at Wentworth Park. The Melbourne Cup for greyhounds was previously the world's richest greyhound race, with a prize pool of A$600,000 in 2015. In Sydney, the 2013 Golden Easter Egg had a first prize of $250,000.

4. SPORTS INFRASTRUCTURE

4.1 FUNDING

Sports in Australia are a complex ecosystem with more than 75,000 not for profit organisations at national, state and local levels at its centre (please refer to chapter 3.4 for a graphic picture of this ecosystem). Currently, this system is supported by various entities across all levels of government through the Australian Government Office for Sport and National Integrity of Sport Unit in the Department of Health, Sport Australia, the Australian Institute of Sport, the Australian Sports Anti-Doping Authority, the Australian Sports Foundation, state and territory institutes and academies, state sports and recreation agencies. The system also relies on the investment of stadium and facility operators, equipment suppliers, private providers, gyms, sports technology companies, wagering operators, major events, professional sports and schools.

Funding for Australian sports infrastructure is undertaken by various entities, including:

- The federal government;
- State and territory government;
- Local (=city/town) governments;
- Educational institutes;
- Private sports clubs.

4.1.1 Government

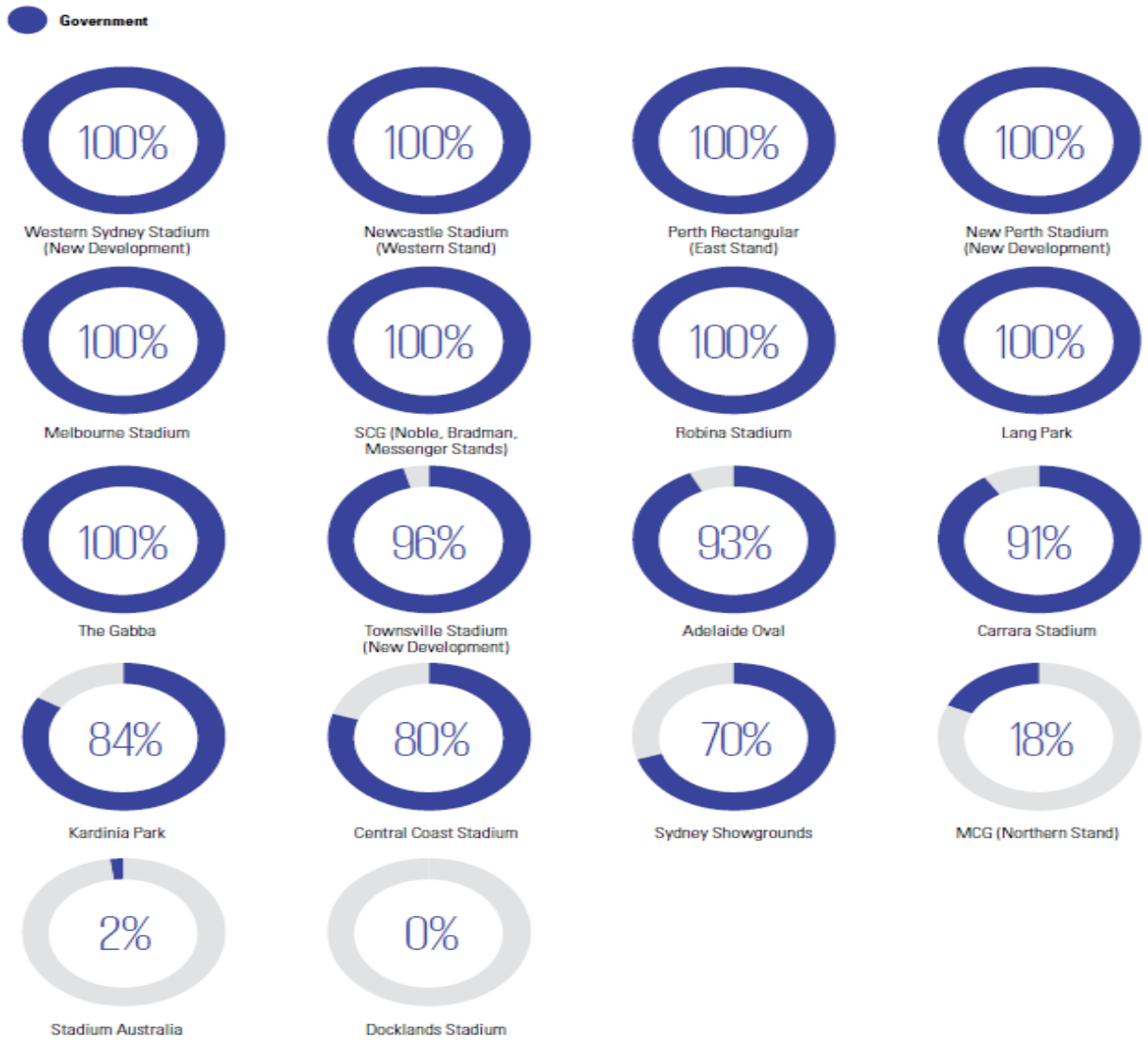
Community sports infrastructure is a sound investment by all levels of government with more than eight million Australians using community sporting infrastructure every year. Community sports directly employs 57,000 people, contributing $5.5 billion in increased economic activity, $4.9 billion in personal health benefits and $4.2 billion in social capital uplift.

The Australian federal Government invested more than $600 million in sports infrastructure nationwide in the period 2013-2018. In 2018 it released Sport 2030, Australia's first national sports plan which represents the Australian Government's long-term commitment to seeing Australian sports thrive. The program is to be delivered in partnership with Australia's sporting, physical activity, technology, education and corporate community.

So far, the Australian government spent $100.3 million on the sports infrastructure grants as part of Sport 2030. The initial 2018 grant round consisted of $28.3 million and experienced overwhelming interest with over 2,050 applications. In response to program demand, the Australian Government announced an additional $32.3 million to the grant program in December 2018. In March 2019, a further $40 million was announced to support the grant program for existing eligible applicants only.

Apart from federal funding, sports organisations can also receive funding from their State or Territory government, as well as their local council. Funding for sports field development at community and recreation clubs primarily falls to the owner of the asset (the local government). The clubs then lease the grounds from the local government.

In 2017 KPMG released an overview of how much (percentage) governments invest in stadium development:



Overviews of available funding and grants are provided by Sport Australia, Sports Community and Clearing House for Sport.

4.1.1.1 Case study from Victoria

In November 2019, the Victorian government announced a $22 million program which will provide high-quality, female friendly, safe and accessible facilities to ensure all Victorians can enjoy the benefits of participating in sports and active recreation. Eligible projects include aquatic centre upgrades, sports grounds and pavilion developments, new sports surfaces, lighting installations, strategic and regional planning, and active recreation facilities such as play spaces and recreation trails. The fund is part of an $850 million Victorian government investment in community sports and active recreation infrastructure since 2014, providing better health, wellbeing, social and economic outcomes for Victorian communities.

4.1.1.2 Case study from New South Wales

Each year the NSW Office of Sport provides millions in government grants to nurture sporting talent, help build sports facilities and develop the industry as a whole. In July 2019, it launched the "Greater Sydney Sports Facility Fund" (applications closed September 2019). The fund will invest in new and existing facilities to improve the quality and quantity of sports infrastructure across Greater Sydney. It will prioritise investment in the provision of sports facilities that support women and girls. An allocation of $100 million is available over three years for sports facility projects. There will approximately be $33 million available per year.

4.1.2 Private Sports Clubs and Educational Institutes

Educational institutions fund the construction of sporting grounds to facilitate the development of good active lifestyle habits through sports and to allow students to gain skills across a variety of sports. Private schools are more likely to have state-of-the-art facilities reserved for student use, such as tennis courts and football ovals, while public schools are more likely to use existing community infrastructure.

Private sporting clubs directly fund the construction of sporting fields for use by members. They use member contributions as well as community grants and sponsorships to fund new and existing facilities. There are many not-for-profit sporting clubs across Australia that own sporting infrastructure, such as tennis and basketball courts or golf courses.

4.2 EXISTING INFRASTRUCTURE

4.2.1 Victoria

Melbourne is Australia's sports capital. It offers award-winning multi-purpose venues, facilities and unrivalled infrastructure within walking distance of the city centre and serviced by the majority of metropolitan Melbourne's train services, as well as plenty of tram and bus lines.

SportBusiness lists six international standard sporting venues in the heart of Melbourne:

1) MELBOURNE CRICKET GROUND (MCG)

   Capacity: 100,000

   Website: https://www.mcg.org.au/

   About: The MCG is one of Australia's premier cricket and AFL venues. It hosts the annual Boxing Day test cricket match, AFL matches throughout the season and the AFL Grand Final. It also hosted the women's and men's finals for the International Cricket Council's Twenty20 World Cup in 2020. Furthermore, the AFL Grand Final will be played at the MCG until 2057 after the AFL and the Victorian Government reached a deal. Other sporting spectacles to have been held there include World Cup soccer qualifiers, rugby league home and away matches and State of Origin, international rugby union and Austral Wheel Races. It is also a concert venue.

2) DOCKLANDS/MARVEL STADIUM

Capacity: 55,000 for sports – 77,000 for concerts

Website: https://marvelstadium.com.au/

About: The Australian Football League owns Docklands Stadium, commercially known as Marvel Stadium due an eight-year deal with Disney till 2026. The league acquired the stadium in October 2016. Several AFL clubs and the Melbourne Renegades Twenty20 Big Bash League team currently use Marvel Stadium as their home ground. Marvel Stadium primarily hosts AFL games, but also accommodates A-League matches and other events. Marvel Stadium has also hosted some of the biggest international sporting events such as UFC193, Soccer World Cup Qualifiers and International Rugby Union tests. Throughout its years, Marvel Stadium has hosted many memorable concerts for some of the world's biggest stars. Its retractable roof, the only one of its kind in the Southern hemisphere used for any football code, can open or close in eight minutes.

MELBOURNE AND OLYMPIC PARKS

https://mopt.com.au/

The Melbourne and Olympic Parks Trust operates various stadiums and centres in Melbourne, including Rod Laver Arena, Melbourne Arena, Margaret Court Arena, the National Tennis Centre, AAMI Park, Gosch's Paddock and Olympic Park Oval, and the Holden Centre. These facilities are located on a 40-hectare precinct in Melbourne.

1) AAMI Park

Capacity: 30,050

Website: https://www.aamipark.com.au/

About: Playing tenants include A-League's Melbourne Victory and Melbourne City (FFA – Soccer), National Rugby League's Melbourne Storm (NRL) and Melbourne's Super Rugby team the Melbourne Rebels. The venue can also host concerts.

2) Rod Laver Arena

Capacity: 15,000

Website: https://www.rodlaverarena.com.au/

About: The arena is the centrepiece of the Australian Open (tennis) and hosts to a wide range of sports and entertainment events, from tennis matches to international rock stars and motorbike super-cross.

3) Melbourne Arena

Capacity: 10,500

Website: https://melbournearena.com.au/

About: Melbourne arena is a state-of-the-art indoor/outdoor facility that can host a variety of sports (ie basketball, netball, tennis, boxing, gymnastics, ice hockey, dance sports and cycling in its own velodrome). It is currently home to sporting

clubs the Melbourne United (basketball), Melbourne Vixens and Collingwood Magpies (netball). A fully retractable roof takes only 10 minutes to close.

4) Margaret Court Arena
   Capacity: 7500
   Website: https://www.margaretcourtarena.com.au/
   About: In addition to Tennis, Margaret Court Arena can host basketball, netball and an array of concerts and special events. Melbourne United (basketball), Melbourne Vixens and Collingwood Magpies (netball). The venue features a retractable roof which is the fastest of its kind in the world - opening and closing in just five minutes.

These facilities are complemented by other world-class venues on Melbourne's fringe, including:

1) Flemington Racecourse (capacity 120,000);
2) Kardinia Park, also known as GMHBA Stadium in Geelong, approx. 75 km from Melbourne (36,000);
3) Lakeside Athletics Stadium (7,400);
4) State Netball & Hockey Centre (3,050 – 8,000);
5) Melbourne Convention and Exhibition Centre (70,000 sqm – capacity varies per internal venue);
6) Melbourne Sports & Aquatic Centre (3,000);
7) State Basketball Centre (3,200);
8) National Ice Sports Centre, O'Brien Icehouse (1,500).

Melbourne is also home to one of the world's greatest golfing regions – the Melbourne Sandbelt, a cluster of eight of the best golf courses in Australia just 20 minutes from the city.

4.2.2 New South Wales

SYDNEY OLYMPIC PARK

https://www.sydneyolympicpark.com.au/

The Sydney Olympic Park precinct was originally developed to provide sporting facilities for the 2000 Olympic Games. Since then, the precinct has been redeveloped as a residential, commercial, recreation and cultural centre. Like many other stadiums and sporting parks, cultural events have become a major drawcard to the area, with events such as the Sydney Royal Easter Show representing a key contributor to revenue. Apart from the facilities listed below, Sydney Olympic Park also includes an Aquatic Centre, Archery Centre, Athletic Centre, Hockey Centre, Netball Centre, Quay Centre (gymnastics), Sports Hall (futsal – 'zaalvoetbal' in Dutch), and Tennis Centre.

1) Stadium Australia (ANZ Stadium)
   Capacity: 83,500
   Website: https://www.anzstadium.com.au/
   About: Purpose built as the main Stadium and centrepiece for the Sydney 2000 Olympic and Paralympic Games, ANZ Stadium now hosts five professional sporting codes –

Rugby League, Rugby Union, Football, AFL and Cricket - and has hosted some of the world's biggest international artists like AC/DC, Taylor Swift and U2, and the Monster Jam.

Note: The NSW Government is redeveloping Stadium Australia into a world-class 70,000-seat rectangular stadium, which will bring 46,000 seats closer to the action than ever before. The $810 million investment forms part of the biggest investment in sports and entertainment in NSW since the Sydney 2000 Olympics. Infrastructure NSW has commenced the procurement process for a Principal Contractor to deliver the Stadium Australia Redevelopment. Expressions of Interest (EOI) are now being requested from suitably qualified and interested parties. For more information on the EOI process please visit the NSW e-Tendering website at the following link.

2) Sydney Showground (Spotless Stadium/Giants Stadium)

Capacity: 45,000

Website: https://www.sydneyshowground.com.au/; https://www.sydneyshowground.com.au/venues/giants-stadium/

About: Sydney Showgrounds it is a world-class venue, delivering close to 150 national and international events each year, including music festivals, sporting events, exhibitions and trade shows. The AFL's most recent expansion team, the Greater Western Sydney Giants, uses the precinct's Sydney Showground Stadium, commercially known as Spotless Stadium, as its home ground.

3) Qudos Bank Arena

Capacity: 21,000

Website: https://www.qudosbankarena.com.au/

About: Qudos Bank Arena is largest indoor entertainment and sporting Arena in Australia. The arena is used for NBL (basketball) games and has played host to a number of international superstars including Beyoncé, Bruce Springsteen, Taylor Swift, Madonna, Stevie Wonder, P!NK, Bruno Mars, Lady Gaga, Metallica and Kendrick Lamar. Other events include family shows such as Disney on Ice, The Wiggles and indoor sport, such as Fast4 Tennis, International Netball and AusX Open Motocross.

SYDNEY FOOTBALL STADIUM (Allianz Stadium)

Website: https://www.scgt.nsw.gov.au/allianz-stadium/

About: In 2017, as part of a wider stadium overhaul plan by the New South Wales Government, it was decided that the Allianz Stadium was to be demolished and rebuilt. The new venue is expected to include 45,000 seats and be finished by 2022. Allianz Stadium previously hosted the A-League's Sydney FC, the Sydney Roosters and the NSW Waratahs Super Rugby team.

SYDNEY CRICKET GROUND (SCG)

Capacity: 48,600

Website: https://www.scgt.nsw.gov.au/sydney-cricket-ground/

About: The SCG is used for cricket, as well as AFL, NRL, Rugby Union, and soccer games. It is the home ground for the New South Wales Blues cricket team, the Sydney Sixers (Cricket) and

the Sydney Swans (AFL). It is also the temporary home of the Sydney Roosters of the NRL and the NSW Waratahs of Super Rugby, during the redevelopment of the Sydney Football Stadium.

WESTERN SYDNEY STADIUM (Bankwest Stadium)
Capacity: 30,000
Website: https://bankweststadium.com.au/
About: Bankwest stadium is a brand-new stadium which opened in 2019. It is the home of the Parramatta Eels in the NFL and Western Sydney Wanderers in the A-League (soccer), playing host to Rugby League, Union and Football. The Wests Tigers and NSW Waratahs are also set to play some home games at the venue. It cost $360 million to develop and boasts some of the steepest stands of any stadium of its type in Australia.

4.2.3 Other states

ADELAIDE OVAL (South Australia)
Capacity: 53,500
Website: https://www.adelaideoval.com.au/
About: Home teams include Adelaide Crows, Port Adelaide Power (both AFL), Adelaide Strikers, West End Redbacks, SA Scorpions (all three are cricket teams).

AUSTRALIAN INSTITUTE OF SPORT - AIS (Canberra)
https://ais.gov.au/
The Australian Institute of Sport, along with the ACT Academy of Sport, runs its Canberra-based high performance services training centre, that hosts the following venues: track and field Centre, aquatic and fitness centre, recovery centre, basketball and netball centre, volleyball courts, FIFA quality synthetic field, gymnastics centre, combat centre, strength and conditioning gym, tennis courts and grass playing fields.

GIO STADIUM CANBERRA
Capacity: 25,000
Website: https://giostadiumcanberra.com.au/
About: Home ground of the Brumbies (Rugby Union) and Canberra Raiders (NRL). It also hosts a number of international and community events and provides function and conference facilities.

MANUKA OVAL (Canberra)
Capacity: 13,550
Website: https://manukaoval.com.au/
About: Manuka Oval hosts many local and national AFL matches, as well as local and international cricket including the iconic PM's XI game.

STADIUMS QUEENSLAND
https://www.stadiums.qld.gov.au/
Stadiums Queensland is charged with the management of major sports facilities that are declared under Queensland Government regulation as being venues having the capacity to stage national or international sports events, recreational or entertainment experiences. Apart from the venues listed below, it also

manages Sleeman Sports Complex (aquatic, velodrome, BMX, gymnastics), Brisbane Entertainment Centre (focus is mainly on events), Queensland Tennis Centre, Queensland Country Bank Stadium (located in Townsville, mainly for NRL games).

1) The Gabba (Brisbane)
   Capacity: 42,000
   Website: https://www.thegabba.com.au/
   About: The Gabba has hosted many major events including cricket, AFL, baseball, rugby league, rugby union, Olympic soccer and major sell-out concerts. It is the home ground for the Brisbane Lions (AFL), Brisbane Heat (cricket) and Queensland Bulls (cricket).
   Remark: See section 3.5.4 'Special Events' for information about Queensland's bid to host the 2032 Olympics

2) CBUS Super Stadium (Gold Coast)
   Capacity: 27,400
   Website: https://www.cbussuperstadium.com.au/
   About: CBUS Super Stadium is a rectangular sporting and entertainment venue. The stadium is the home of the Gold Coast Titans NRL team and has also hosted rugby union, Nitro Circus and community events. The venue hosted Rugby events as part of the Gold Coast 2018 Commonwealth Games and continues to operate as the premier rectangular competition and training facility on the Gold Coast.

3) Queensland Sports and Athletics Centre (Brisbane)
   Capacity: 48,500 (main stadium), 2,100 (state athletics facility)
   Website: https://www.qsac.com.au/
   About: The Queensland Sports and Athletics Centre (QSAC) is an event space and a premier training hub for junior and elite athletes, as well as members of the public. It is home to the Queensland Academy of Sport, Queensland Athletics, Little Athletics Queensland, Softball Queensland and Special Olympics Queensland. QSAC features two state of the art international standard running tracks and is the only facility in Australia with two 400m ten lane tracks. The venue has a Main Stadium with a seating capacity of 48,500 and a State Athletics Facility with a seating capacity of 2,100, as well as an eight-court beach volleyball complex, eight court netball centre, recovery centre, indoor sports arena and numerous function and meeting spaces. In addition to numerous national and local athletics events and school sports carnivals, QSAC frequently hosts exhibition matches, concerts and major events.
   Remark: See section 3.5.4 'Special Events' in relation to Queensland's 2032 Olympics bid.

4) Suncorp Stadium (Brisbane)
   Capacity: 52,500
   Website: https://www.suncorpstadium.com.au/
   About: Suncorp Stadium accommodates a range of uses including Rugby League (Brisbane Broncos home games in the National Rugby League, other NRL games, annual State of Origin games, International (cricket) Test Matches, and the Queensland Rugby League's Intrust Super Cup Grand Final); Rugby Union (Queensland Reds home games in the Super Rugby competition and International Tests featuring the

Wallabies); Soccer (Brisbane Roar home games in the Hyundai A-League and international matches including World Cup qualifying games featuring the Socceroos); Concerts; Boxing; Extreme Sports.

5) Metricon Stadium (Gold Coast)
   Capacity: 25,000 (capable of being extended to 40,000 seats)
   Website: http://www.metriconstadium.com.au/
   About: Metricon Stadium features an AFL oval that is capable of holding ICC cricket matches, concerts, festivals, IAAF athletics events and FIFA World Cup soccer matches.

VENUES WEST (Perth)
https://www.venueswest.wa.gov.au/
VenuesWest owns and manages Western Australia's best sports and entertainment venues on behalf of the WA State Government. Their portfolio currently consists of 13 venues including RAC Arena and Optus Stadium. It is home to Bendat Basketball Centre, Champion Lakes Regatta Centre, HBF Arena (based in Joondalup, northern Perth – sports include: aquatics, netball, netball, futsal, soccer, touch rugby), HBF Stadium (based in Mount Claremont, inner-north Perth – sports include: aquatics, gymnastics, triathlon), RAC Arena (Tennis, e.g. Hopman Cup, concerts, basketball, netball, UFC), Perth Motorplex (motor sports), SpeedDome (indoor cycling velodrome and roller sports complex), Gold Netball Centre, WA Athletics Stadium, WAIS High Performance Service Centre (High performance testing and training, athlete recovery and rehabilitation), WA Rugby Centre (indoor training facilities, a gymnasium, a sports medicine clinic and an outdoor training field).

1) HBF Park (also known as Perth Oval)
   Capacity: 20,500
   Website: https://www.hbfpark.com.au/
   About: HBF Park is a state-of-the art rectangular stadium providing world class sporting and concert events to all fans. Home ground of Perth Glory (soccer) and the Western Force (Rugby).

2) Optus Stadium
   Capacity: 60,000
   Website: https://optusstadium.com.au/
   About: Optus Stadium is a multi-purpose Stadium which hosts a variety of sports and entertainment events including Australian Football League, International and Big Bash League cricket, soccer, rugby league and union plus large-scale entertainment concerts.

4.3 SPORTS AND ATHLETIC FIELD CONSTRUCTION

4.3.1 General

Companies included in this sector overview construct and install athletic and sports fields such as those used for football, baseball, soccer and lacrosse. Industry companies also construct artificial turf for sports fields, install grass fields, lighting and athletic track, construct or install embedded equipment such as goal posts, cages, protective netting and scoreboards, and construct and install seating.
Note: this section does not include sports stadium construction.

Key Statistics Snapshot

Total Revenue in 2019	Annual Growth 2014–2019	Annual Growth 2019–2024	Profit Margin in 2019	Wages as a share of Revenue in 2019
$942.1m	3.6%	2.8%	7.2%	31.6%

Number of Businesses 2014–2019
7.0%

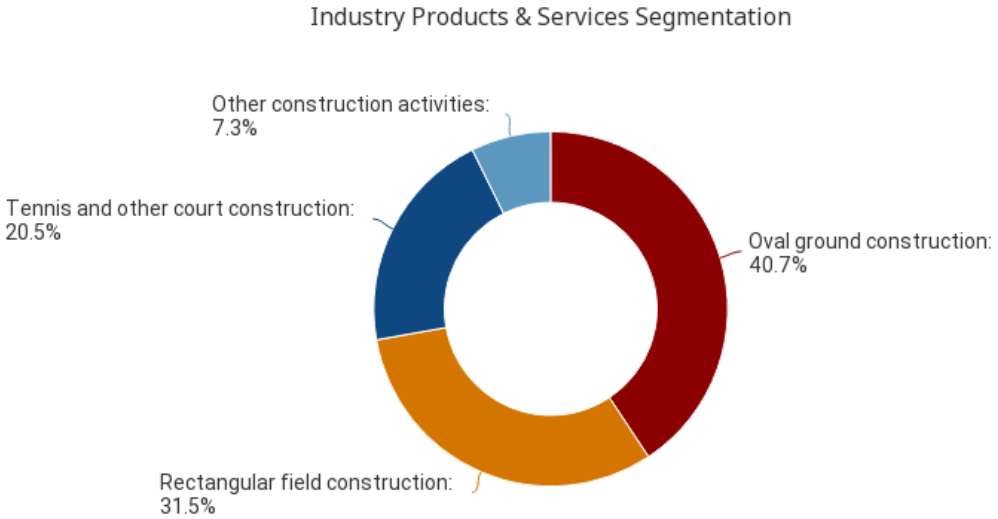
Funding by all tiers of government, along with funding by commercial sponsors, organised sports associations such as the AFL and NRL, and from philanthropic grants, affects the performance of the Sports and Athletic Field Construction industry.

Industry revenue increased at an annualised 3.6% over the five years through 2018-19, to reach $942.1 million. This solid pace of expansion corresponded with the growth in capital expenditure by state and local governments. The industry also derived stimulus from the sports field construction associated with the 2018 Gold Coast Commonwealth Games, and the playing surfaces of the Perth (Optus) Stadium, the Western Sydney (Bankwest) Stadium and the North Queensland Stadium in Townsville. Industry revenue climbed by 5.9% in 2018-19, on the back of peak construction work on several major NRL sports fields.

The construction of sporting fields for the NRL, including the new Sydney Football Stadium at Moore Park (Allianz Stadium, see section 4.2.2 above) and the redevelopment of the Olympic Stadium at Homebush (Stadium Australia, see section 4.2.2 above), is anticipated to support solid revenue growth over the next five years. Industry revenue is projected to rise at an annualised 2.8% over the five years through 2023-24, to reach $1.1 billion. The industry is projected to continue to benefit from ongoing growth in Australia's population, along with favourable trends in capital expenditure by state and local governments and strong public funding for education.

4.3.2 Products segmentation

The industry constructs a range of sports and athletic fields that have various dimensions and often require different installation methods. The scale of projects undertaken by industry participants ranges from tennis court installation for households and suburban tennis clubs, through to the playing surface of major football stadiums. Industry services range from developing new sports fields, which involves levelling and shaping the field and installing turf and other infrastructure, through to refurbishing existing playing areas.



OVAL GROUND CONSTRUCTION

The largest segment of industry operations involves the construction of oval sporting grounds, which are typically surfaced with natural turf for the playing of cricket and Australian Rules football, although most ovals are also used for various other recreation and sporting pursuits.

Oval ground construction involves levelling and shaping the field. Industry operators install the sub-base, drainage and reticulation system for the playing field, while machinery is used to aerate the ground to make it harder or softer, to plant grass seeds and to roll out prepared turf. Most industry operators provide drainage systems as part of their service offerings, but some opt to subcontract this aspect of construction to drainage specialists, such as Turf Drain Australia. Similarly, industry operators often subcontract the installation of embedded infrastructure, such as goal posts and fencing, to specialist firms and often the suppliers of the equipment.

Athletic tracks are commonly surfaced with artificial materials, with the installation company providing the permanent lane-marking and embedded infrastructure.

Demand for this segment has remained stable over the past five years. However, many operators have benefited from the injection of funding for the refurbishment of existing ovals to better conserve water and to withstand heavier usage. Some of the larger contractors have benefited from the construction of several high-profile oval playing fields over the past five years, including the Optus Stadium in Perth and the redevelopment of the Carrara (Metricon) Stadium in preparation for the 2018 Gold Coast Commonwealth Games.

RECTANGULAR FIELD CONSTRUCTION

The construction of rectangular playing fields has gradually increased as a share of industry revenue over the past five years due to investment in major rugby and soccer stadiums such as the North Queensland Stadium in Townsville, QLD, and the Western Sydney (Bankwest) Stadium in Parramatta, Sydney.

This segment has also been supported by the steady upward trend in soccer participation over the past five years, along with the preparation of hockey fields and lawn bowls facilities for the staging of the 2018 Commonwealth Games.

Rectangular fields include the same preparations as oval fields, including the construction of the sub-base, drainage and reticulation systems, and the levelling of the playing field and the installation of natural turf and artificial surfaces. Over the past five years, there has also been substantial refurbishment of the natural playing surfaces of rugby and soccer fields to reduce their exposure to water shortages and to improve their usage capacity. The installation of artificial grass and other surfaces is gradually gaining acceptance for sports such as field hockey and for sporting facilities in educational institutions. However, most major football codes are generally reluctant to use synthetic alternatives.

TENNIS AND OTHER COURT CONSTRUCTION

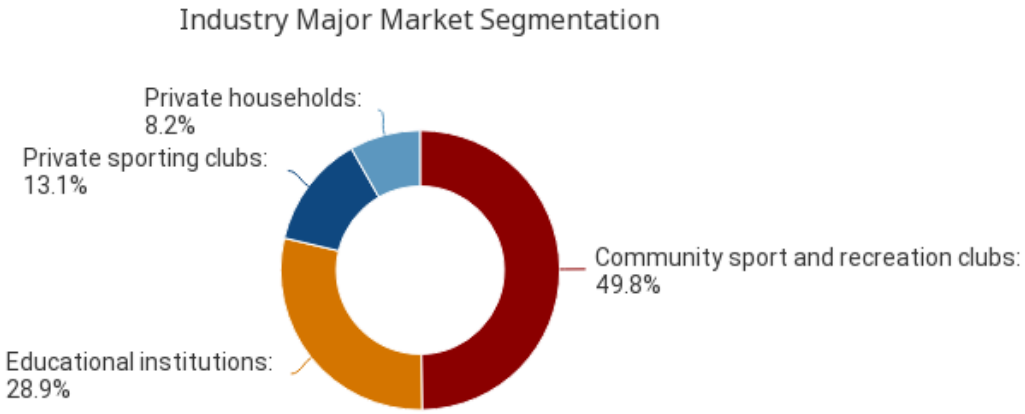
This segment principally involves industry participants installing artificial playing surfaces for outdoor tennis, netball and courts, and it includes the installation of courts for households, and for commercial and educational customers. Tennis and other court construction have declined as a share of industry revenue over the past five years due to subdued growth in household income and the escalation in housing prices, which has constrained spending on domestic tennis courts and sporting club memberships. Artificial playing surfaces tend to be more expensive to install, but generally require much less maintenance than natural surfaces, making them cheaper over the long term.

OTHER CONSTRUCTION ACTIVITIES

The industry derives revenue from many other construction-related activities. These activities mainly include installing embedded infrastructure, which is the equipment required for sports, such as goals, posts, backboards, athletics netting (e.g. shot put), cricket practice nets, fencing, lighting, scoreboards, occasional seating, player benches and signage. Much of this installation work is supplied by the manufacturer or wholesaler of the equipment or subcontracted to independent operators. While demand for the installation of electronic scoreboards and lighting for existing sporting fields has risen, this segment has remained stable over the past five years.

4.3.3 Markets segmentation

Sports and athletic fields are used by private individuals, people playing sports and people engaging in basic fitness activities.
Sports participation is highest for individuals still at school and therefore educational institutions represent an important market for the industry. Most sports and athletic fields are constructed for public use and may also be used by educational institutions.



COMMUNITY SPORTS AND RECREATION CLUBS

The industry derives about half its revenue from community sports and physical recreation clubs. These includes football, cricket and netball clubs, which operate as custodians of sporting facilities that are leased from local councils. The funding for sports field development primarily falls to the owner of the asset (the local government) but improvements to the facility are typically funded in part by the tenant (the sporting club). The share of revenue generated from this market has grown steadily over the past five years, corresponding with rising demand from sports and physical recreation clubs and targeted investment by local councils. According to the ABS, there are 11.1 million people aged 15 and over that participate in physical activities for recreation. A substantial amount of these people participate in organised sports and physical recreation and many use public playing fields and ovals.

EDUCATION INSTITUTIONS

Educational institutions represent an important source of industry revenue, although this share has trended down in the aftermath of the completion of the Building the Education Revolution stimulus spending program in 2010-11. Primary and secondary schools generally make sports a compulsory activity for students and have differing facilities for students to use. Certain industry products, such as multi-sports courts, are more popular in this market due to their versatility.

PRIVATE SPORTING CLUBS

The contribution from this market is estimated to have fallen due to the weak rates of membership of sporting clubs, as private sporting clubs use member contributions, community grants and sponsorships to fund new and existing facilities. There are many not-for-profit sporting clubs across Australia that either own sporting infrastructure or are custodians of publicly owned sporting assets. Compared with community sports and recreation clubs, private clubs make up a small segment of the industry. However,

industry operators may gain more revenue from these clubs, as the revenue generated from membership fees allows them to purchase more expensive facilities and undertake more frequent refurbishments.

PRIVATE HOUSEHOLD

Private households represent a small but lucrative market for industry services. Affluent households may choose to install sports courts, typically tennis or multi-sports courts, on their property. The segment has shrunk as investments into single-unit housing construction has fallen due to escalating land values.

4.3.4 Major Industry Players

The sports and athletic field construction industry is highly fragmented and includes many small-scale operators. However, several larger civil construction and engineering consulting firms also have a presence in the industry. For example, Watpac Limited (acquired by Besix) worked on the redevelopment of the Lakeside Oval in South Melbourne, and Arup has consulted on major stadium developments, including the Adelaide Oval and Optus Stadium in Perth. The industry's larger players tend to specialise in categories such as artificial turf construction, multi-sports courts and low-maintenance field construction, or natural grass and large field construction.

ALLSPORTS CONSTRUCTIONS PTY LTD

Address: Lutwyche (Brisbane) QLD 4030
Tel: +61 7 3857 0555
Email: admin@allsportsconstructions.com.au
Website: http://www.allsportsconstructions.com.au/
About: Allsports Constructions constructs and installs a variety of sporting fields, mainly in the Brisbane area. Allsports Constructions mainly constructs low-maintenance, multi-functional courts laid with grass or synthetic surfaces, including tennis courts, hockey fields, athletic tracks, bowling greens, netball courts and basketball courts. Allsports Constructions conducts earthworks and landscaping, constructs fences and bases, and installs sports surfaces and lighting for sporting field and court construction projects.

DYNAMIC SPORTS FACILITIES GROUP PTY LTD

Address: Sydney
Email: sales@dynamicsportsfacilities.com.au
Website: https://dynamicsportsfacilities.com.au/
About: Dynamic Sports Facilities specialises in designing and constructing low-maintenance multi-functional sports facilities, such as tennis courts, netball courts, basketball courts, cricket facilities, hockey fields and athletic tracks. Dynamic Sports Facilities' construction and refurbishment services are mainly provided through subcontractors. The company plans, designs, constructs and restores sports facilities, and provides a range of services including preparing sites and conducting earthworks; laying concrete and asphalt slab bases; installing drainage, retaining walls, fencing, lighting, and line marking; and laying acrylic and synthetic grass surfaces. Over the past five years, the company has worked on many small-to-medium scale projects, including the installation of four synthetic cricket pitches for Hobson Bay City Council in Melbourne; outdoor netball NSW and the Lalor Tennis Club in VIC; and the multi-sports synthetic court completed in 2018 in Springvale South, VIC.

HG SPORTS TURF (AU) PTY LTD

Address: 526 Whitehorse Road, Mitcham (Melbourne) VIC 3132
Tel: +61 3 9329 8154
Email: info@hgsportsturf.com.au
Website: https://hgsportsturf.com.au/
About: HG Sports Turf has been involved in the design, construction and maintenance of sports fields in Australia, New Zealand, the Middle East and Asia since the late 1990s. HG Sports Turf has constructed sports and athletic fields for the staging of the Sydney 2000 Olympic Games, Melbourne's 2006 Commonwealth Games, the 2015 ICC Cricket World Cup, the 2015 Asian Cup and the 2018 Commonwealth Games on the Gold Coast.
The company installs a range of surface products, including natural turf, stabilised turf, hybrid turf and synthetic turf. HG Sports Turf has worked on several elite sports venues, including the installation of special stabilised turf on the MCG, the Olympic Stadium at Homebush, the nib Stadium in Perth, and the design and construction of Melbourne City Football Club's training facilities at Latrobe University in Bundoora, Melbourne.

PITCHCRAFT PTY LTD

Address: 68 East Derrimut Crescent, Derrimut (Melbourne) VIC 3026
Email: enquiries@pitchcraft.com.au
Website: https://www.pitchcraft.com.au/
About: Pitchcraft Pty Ltd specialises in designing, installing and maintaining sporting facilities, particularly turf playing surfaces for sports such as AFL and cricket. The company manufactures and installs drop-in wickets (portable pitches) for cricket and other sports, and tailors its services to the needs of its clients.
Pitchcraft's services include total construction, reconstruction and maintenance services such as laser levelling, turf laying, seeding, scarification, grooming, aeration and power harrowing of sporting fields. Over the past five years, Pitchcraft has worked on the $2.6 million turf installation component of the upgrade and reconstruction of Eureka Stadium and the North Ballarat Number Two Oval for the City of Ballarat. Pitchcraft has also secured long-term maintenance contracts for several high-profile AFL and VFL venues, including the three-year turf management contract for Kardinia Park (now GMHBA Stadium) in Geelong and the playing surface of the Junction Oval in St Kilda for Cricket Victoria. In 2016-17, Pitchcraft also delivered the oval upgrade component of the $1.7 million redevelopment of the Marty Busch Recreation Reserve in Sebastopol for the City of Ballarat. During 2017, the company worked on Stage 1 of the redevelopment of the Colac Central Reserve in Western Victoria.

TURF DRAIN AUSTRALIA

Address: Mt Kuring-gai, NSW 2080
Tel: +61 2 8117 8100
Email: info@turfdrain.com.au
Website: https://www.turfdrain.com.au/
About: Turf Drain Australia specialises in constructing sporting fields and drainage systems for sporting fields, making it a popular construction agency for areas that are subject to flooding due to heavy rainfall. The company operates throughout Australia, providing sports field design and construction, drainage, laser-controlled trenching, sand grooving, turf wicket and bowling green construction. The company's larger projects include reconstructing the Sydney Grammar School sporting field; construction of a new bowling

greens for the Royal Sydney Golf Club and the Blacktown Workers Club; and refurbishing the cricket pitch at Memorial Oval in Bankstown. In 2014, the company worked on the one-off construction of a baseball diamond on the Sydney Cricket Ground for hosting a US Major League Baseball exhibition match. The company operates mostly in New South Wales, although the firm upgraded the turf cricket wicket and field at Blundstone Arena in Hobart.

5. SPORTS TECHNOLOGY IN AUSTRALIA

Sportstech lies at the intersection of technology and sports. Wherever a technological solution is designed for a sporting context, that technology is known as sportstech.

Sportstech includes social, marketing and fan engagement; stadium and facilities technologies; wearables and performance enhancement; sports analytics; management and event technologies; e-sports; Media, broadcasting and sponsorship; online ticketing and betting.

The global sportstech industry was valued at US$27.5 billion in 2018 and it is expected to grow to US$ 93.8 billion by 2027 (average 14.7% annual growth rate).

5.1 OVERVIEW

According to the Australian Sports Commission's "Corporate Plan 2019-2023", modern technology continues to disrupt and revolutionise the world of sports and Sport Australia must set the standard digitally and support a vision. By 2024 the future of sports should look like this:

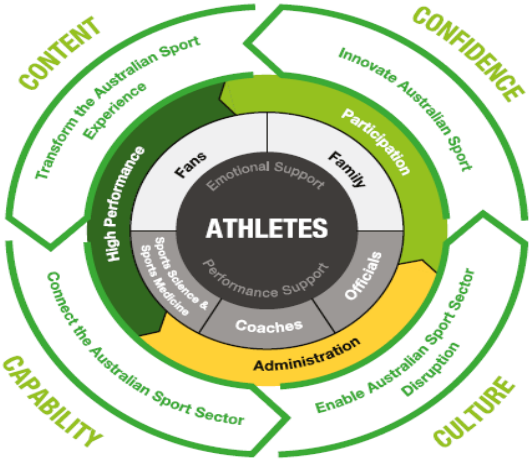
Connecting Digital and Technology with Australia's Competitive Sport Obsession

Transform the Australian Sport Experience

People in sport have personalised sport experiences that are meeting or exceeding their expectations.

Innovate Australian Sport

Australia will have a globally recognised sport innovation ecosystem, through public, private and non-profit partnerships, that is acknowledged as the global launchpad for sport digital and technology innovation.



Connect the Australian Sport Industry

Australian sport is a connected national digital network that leverages the knowledge, access and reach of Australia's sport industry.

Enable Australian Sport Sector Disruption

Barriers have been removed so that Australian sport organisations have access to shared digital knowledge, tools and support to respond quickly to customer and stakeholder needs.

Sport Australia is planning to create SportAUS Connect, a shared platform to connect the sector's organisations and software vendors through data and analytics, to help enable sports to respond to consumers' needs in the digital world. To help attract, maintain and retain participants, sports will be

supported to embrace the greater use of digital solutions and design their services to make it easier for participants to find, book, pay and engage in sports.
As the Australian sports industry has the strategic priority to improve its digital capability, it started to create a shared sports data and analytics platform, with the view to develop and implement the SportAUS Connect digital platform with 12 sports in the One Management program and to establish a community of practice for sports and partners on digital and data analytics, to drive higher capabilities in sport.

Fans' expectations are changing with a shift in behavement towards using newer digital channels and features, consuming more personalized digital content on mobile devices, and creating and sharing digital information

Technology in sports business is growing at a fast pace in Australia: according to Australian Government's commissioned "Sport 2030" report (four objectives: Build a more active Australia; Achieving sporting excellence; Safeguarding the integrity of sports and Strengthening Australia's sports industry), some 39% of the local adult population which participates in sport, use some form of technology for sports or physical activity, with 17% using apps for tracking activity or training and 14% using wearable technology or heart monitors.

Innovative Australian-born companies continue to sell expertise to support online communities around the world to train and compete in groups where, and whenever they want to be active.

To prove its commitment to support SportsTech, in 2012 the Australian Government facilitated the establishment of the Australian Sports Technologies Network (ASTN), an industry-led Australian eco-system of organisations providing leadership in the commercialisation, development and promotion of Australian-inspired sports technologies. ASTN programs are geared to assist Australian sports technology companies to scale and commercialise their technologies into international markets and assist universities and research institutions to commercialise projects.
This ecosystem includes leading sports technologies businesses, national sporting organisations, research institutions, sports distributors and retailers, government agencies, service providers and investors.

Some domains of Australian sportstech: action sports and booking platforms, data collection and analytics solutions, AR and VR software, medical monitoring platform and biometric devices, athlete testing and training, sports simulator, audience engagement devices and solutions, streaming and broadcasting systems integration solutions and content distribution, coaching software, custom sportswear and equipment, e-sports and gamification, stadia architecture and illumination, online betting and ticketing.

5.1.1 Wearable fitness technologies

In Australia, while there have been a huge number of products released such as smart watches activity bands and clip-on trackers, there has been little development in technology beyond style design and aesthetics. Smarter wearable devices such as those that can be weaved into clothing implanted in shoes or concealed on the wearers skin are only now being developed into marketable products.

Revenue in the wearables segment in Australia is expected to amount to US$180 million in 2020, presenting an annual growth rate (CAGR 2020-2024) of 2.1%, and so resulting in a market volume of US$195 million

by 2024. There are 2.1 million users, with user penetration of 8.2% in 2020 and average revenue per user (ARPU) currently amounting to US$85.67.

Companies (examples):

- Public-listed DorsaVi produces wearable sensors, software and sophisticated algorithms that objectively measure movement and muscle activation at 200 frames per second.
- Sensarii manufactures swimmer powerbands to be worn on the hand. Using high-accuracy sensors, it measures the force and direction of every stroke, giving performance metrics and visualing force output and fix inefficiencies with the stroke.

5.1.2 Disability Sports Technology

From powered limbs, robotic arms, electronic eyeglasses for the legally blind, mind-control of limbs and 3D printing, Australian cutting-edge technologies are revolutionising the integration of people with disabilities and improving their sports performances.

Disability Sports Australia is Australia's peak national body representing athletes with a physical disability, engaging people across Australia from the grass roots to elite paralympians who compete or work in sporting endeavours of all abilities.
DSA provides funding and resources support for its members to conduct programs and development activities, and for the training and accreditation of coaches and officials, juniors, clubs, individual volunteers and regional area members. DSA partners with organizations that connect more than 6000 members.

Thanks to its Centre for Disability Sports Tech in Australia, ASTN contributes to research and practice in assistive technology and wellness in sport, using technology to drastically reduce mobility barriers and promote inclusion across Australia.

5.1.3 Data analytics and Artificial Intelligence

There is an ongoing revolution regarding sports analytics across all professional sports in Australia. Access to data has been a bit tighter so far in Australia compared to countries like USA, but the status is changing as local sports leagues are realising how much third-party, engaging content can be generated by sharing data.

New innovations and technological advancements continue to make a sizeable impact on the sports field. For over 20 years, IBM has been the main technology partner for the Australian Open, employing technology to analyse countless data points including player position, net clearance, and ball placement for every ATP tour-level singles match since 2005. When analytics is applied to this vast sum of data, IBM is able to deliver their well-known 'Keys of the Match' that provide insights into the outcome of singles and doubles matchups.

In most sports, such as NRL and AFL, data analytics companies first predict the performance of each individual player, based on hundreds of algorithmic factors for each sport, and then use this range of player performances to run match simulations.

The Australian Football League has been described as the most data-rich sport on earth. Each season, an army of analysts work in real-time to capture as many as 5,000 data points throughout each game. Football clubs are able to make better decisions (also with regard to athletes to sign) and to confidently determine where they can improve thanks to the recommendations that data analytics provide.
A clear case-study is represented by Hawthorn Football Club: in 2005, they were one of the worst in the league for kicking efficiency, while by 2008, they were the competition's most efficient, going on to win three consecutive Grand Finals from 2013. And it was the power of data that helped them unlock this winning insight.

Australian clubs are giving more importance to the fan experience, as a digitally connected fan is becoming a sports venue's biggest online influencer. Stadium owners and teams that provide more personalised digital experiences through stadium apps, digital offers direct to mobile phones, and game information on digital boards increase fan engagement and generate new revenue opportunities.

An example is offered by the Australian Open, that attracts more than 640,000 fans on average per year and, by using data and analytics, offers CrowdTracker technology, providing live match scores, real-time venue and court information, and social network activity. CrowdTracker employs technology around the grounds and courts which generates massive amounts of data. This, in addition to information from GPS information drawn from attendee's mobile phones, can be used to pinpoint crowds and ensure that people can avoid crowded areas, or make personalized sales offers to fans at the nearest kiosk.

Activity data obtained from wearables and game equipment, data from peripheral devices such as videos and images from games (previous or in real-time) or training, speech and text analysis from stakeholders (fans, employees, customers, suppliers, etc.) and data from other internal / external systems are analysed and coupled with machine and deep learning based on subject matter expertise, to enable artificial intelligence applications to assist coaches, players and management to make better decisions more efficiently and in some areas, automate the entire decision-making process and reduce FTE.

In 2019 Australian fans tuning into the cricket series were offered the new feature Monty, a machine learning model that predicts when wickets are likely to fall. A collaboration between cable provider Foxtel, marketing agency Mindshare and Google, Monty watched every ball bowled by the Australian men's team 500,000 times and developed a pattern recognition system that alerted fans to tune in up to 5 minutes in advance of a wicket falling, helping reduce the risk that fans miss a big moment live.

Companies (examples)

- Stats Insider has the vision is to evolve the sports fan's experience by making data-driven content widely available to sports fanatics and operators
- Gain Line Analytics is an operations and management consultancy with a unique perspective on success in professional sports and business: by placing a strong focus on data analysis and quantitative research, and understanding the factors associated with increasing cohesion. The company can assist teams and organisations to develop best practice systems to enhance performance.

5.1.4 E-Sports

E-sports are also providing both opportunities and challenges with the number of e-sports enthusiasts expected to globally rise to 286 million by 2020. South Korea, China, the US, Germany, Sweden, the UK and Japan are the biggest markets for e-sports around the world, and Australia certainly lags behind.
But that is starting to change after several key developments over the past year. In 2018, the country's first dedicated e-sports arena opened in Sydney's Moore Park. Gfinity Esports Australia and the Hoyts cinema chain launched a partnership to roll these arenas out at existing cinema locations across the nation. The Sydney Cricket Ground opened the first ever dedicated e-sports high performance centre after tying up a deal with the University of Technology in Sydney.

It's now possible to watch Rocket League on Network 10, and improved connectivity and broadband speed has helped millions stream big tournaments. Nielsen's sports and entertainment department claims that the number of e-sports fans in Australia has doubled over the past two years, while rival firm Gemba estimates that there are now 1.8 million e-sports fanatics down under.

The industry faces challenges when it comes to cracking Australia, due to its geographical isolation from major e-sports regions and the legacy network infrastructure. That caused it to be slow in getting off the mark, but it is now really catching on and considerable growth is expected in the years ahead.

Another challenge in Australia was a lack of localised content, but in 2018 there was the launch of Melbourne E-sports Open, that attracted 12,000 fans to Melbourne Park, while the content was viewed more than 12 million times across Twitter, Facebook and Reddit.
Sydney hosted twice a leg of global competition Intel Extreme Masters, showing it is firmly on the map. Gfinity also pulled teams from across Australia's major cities to compete in CS:GO (Counter-Strike: Global Offensive), Street Fighter V and Rocket League tournaments at Sydney's first E-sports stadium, and it attracted crowds of spectators, while an impressive 4.5 million people streamed the event.

E-sports' popularity is largely driven by younger generations that have grown up with video games and internet connection. Across Australia, 98% of households with children have computer games and 65% of them have three or more consoles. First person shooters like CS:GO and multiplayer online battle arena games like Dota 2 and League of Legends are leading the e-sports charge and this simply was not possible before broadband and the rise of streaming services like Twitch. To ramp up the excitement fans experience when watching it, they can now also bet on big matches and tournaments on sites such as Unikrn.com, and global e-sports wagering is now a multibillion-dollar business.

The growth of battle royale games like Fortnite and PUBG is driving further interest and helping e-sports reach greater numbers of viewers. It is now estimated that a third of Australians have either watched or participated in an e-sports event, and that is often enough to leave people hooked. Traditional sports teams know they cannot stop this juggernaut, so they are jumping aboard instead, as multiple AFL clubs have snapped up e-sports teams. Leading brands are investing heavily in the industry, with the likes of Hungry Jacks and St. George Bank joining global giants such as Coca-Cola and Intel in sponsoring events, while rappers and singers are also muscling in.

Companies (examples):

- Wicked Witch, with over 20 year experience in the ever-evolving world of games and technology, is an established leading studio specialized in all areas of software development games and e-

sports, The company creates original IP for mobile, console and PC, co-develops and invests in a range of projects, such as the development of all AFL (and some NRL) e-sports versions.

- Legacy Esports, one of Australia's fastest-growing e-sports teams, manages high-performing teams across a range of worldwide top-tier games and is one of the most established organisations in the Oceanic Region. In 2017, professional AFL club Adelaide Football Club acquired Legacy Esports.

5.2 TRENDS

In all tiers of Australian sports, technology is evolving and advancing. The following paragraphs provide insights into key trends across the Australian Sportstech market segments:

High performance elite sports

Australia has eight major players' and athletes' associations, representing over 3,500 athletes.

Key Trend Sportstech is utilised as a tool to enhance elite performance and gain a competitive advantage.

Organised sports

21% of Australian adults participate in netball, cricket, tennis, AFL, soccer and basketball.

Key Trends a) Funding models are tied to participation rates, with fan engagement being a core driver;
b) Professional e-sports tournaments are emerging in prominence, with Australia participating in the inaugural Nations Cup;
c) Clubs are largely reliant on volunteers, and lack access to sophisticated back-office services and management support.
Note: many tier 2 and 3 sports don't have access to sufficient resources and funding, largely requiring similar types of solutions for the business management issues they are experiencing. There is an opportunity to aggregate the back-office end of community sports club management in an effort to achieve successful sports business management at a community level.

Social and community sports

There is a growing trend towards active recreation, underpinned by strong government support, with 59% of Australians nationally participating in active recreation, including: jogging and running, pilates, yoga and fitness or gym activities.

Key Trends a) There is demand to engage participants in unstructured and social sports and active recreation, with growing focus on health and wellbeing, increased participation by women and people with disabilities;
Consequent focus on technology that fuels active recreation and aims at increasing sports participation across the board, creating opportunities for disability, mobility and inclusive sports for participants with a disability or mobility issues (ie "Absolutely Everyone: State disability plan 2017-20", outlining Victoria's commitments to improve opportunities for people with a disability to access sports and recreation, through actions such as funding a para innovation award for new tech developments in equipment that can be specifically used by elite para-athletes).
b) There has been a surge in active wear sales, anticipated to grow by 5.7% from $201.8 million to a market value of $266 million in 2023-24;
c) Growth in wearable devices, representing 1% of Australian household expenditure on sports in 2018.

Note: Importance of testimonials to launch / consolidated market share of sportstech products, as these "weekend warriors" are more open to innovating and adopting technology, but will look to the industry and what elite athletes are using for proven results.

5.3 STARTUPS ECOSYSTEM – VICTORIA

There are currently 112 sportstech organisations in Victoria, mostly located in Melbourne. The local sportstech sector has successfully leveraged the strength and global credibility of the Australian and Victorian sports sector to establish Melbourne as the undeclared sportstech capital of Australia.

Key influencing factors:

- Concentration of the sports sector, co-location of sporting codes headquartered in Melbourne;
- Extensive calendar of major sporting events;
- Victoria's high-density, tight-knit sports community that spans professional and community sports.

Industry strength and global connections: 57% of Victorian startups (including eight unicorns) export outside of Australia, with US, UK, New Zealand, China and India the key markets.

5.3.1 SportsTech cluster ecosystem

For investment and funding, there are 31 startup investors supporting startups in Victoria and $1.73 billion has been invested into Victorian startups and scale-ups (766 deals and 504 companies) in the last five years.

Melbourne is ranked "Top 25 Global Ecosystems for Talent", with a total of approximately 26,000 FTE employed by Victorian startups and nearly 1 in 5 founders are considered serial entrepreneurs with experience in firms valued $20 million or higher.

Victoria has approximately 30 accelerator programs and approximately 60% are specialist/sector focused, including the following Melbourne-based sportstech programs:

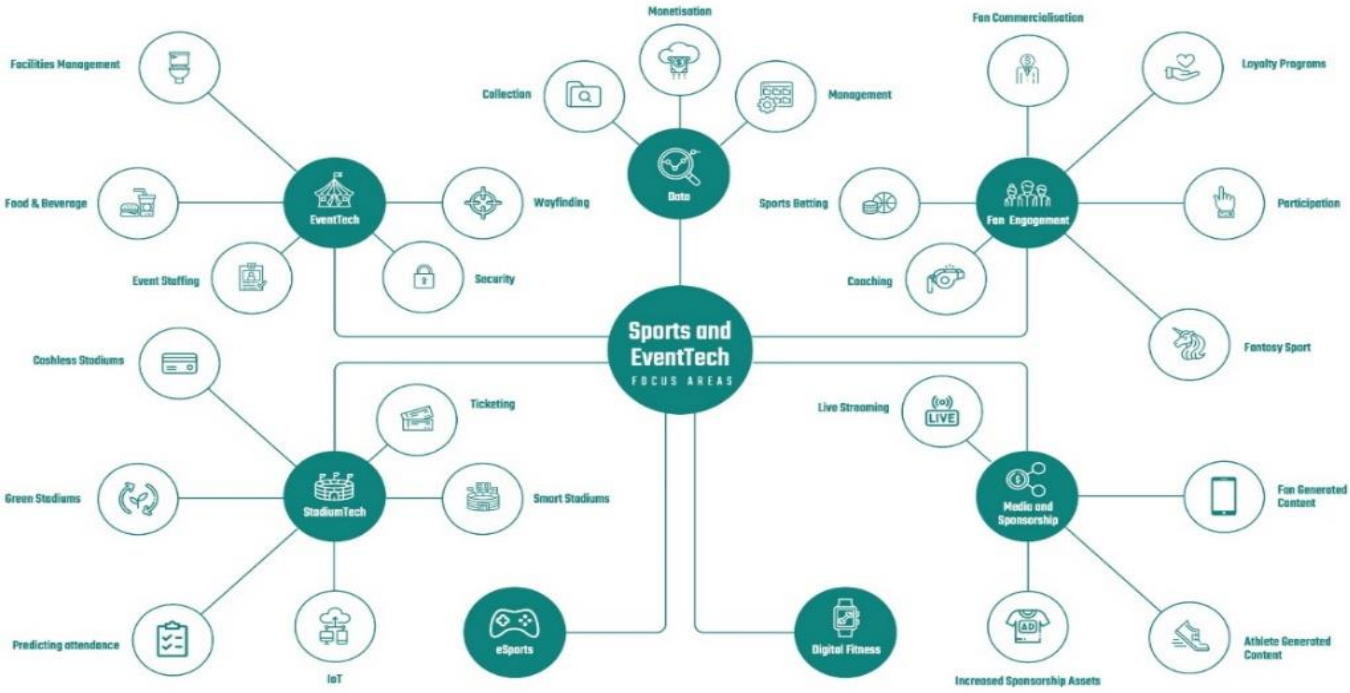
a] Techstars Sports & Event Tech – This accelerator is "on a search for the most exciting early stage SportsTech companies with the greatest potential anywhere in the world."

b] Startupbootcamp Sport & EventTech - This accelerator supports early-stage tech founders to rapidly scale their companies by providing direct access to an international network of the most relevant mentors, partners, and investors in their industry.

c] Australian Sports Technology Network Accelerator Program – The program is structured to assist sports startups scaling up, with a focus on human performance and sports technology sectors, including areas such as stadiums and venues, injury prevention, high performance, fan engagement, business leadership, coaching, virtual reality and artificial intelligence. ASTN also runs two sports analytics championships (hackathons) and two masterclasses to celebrate sports data, sports marketing and human performance.

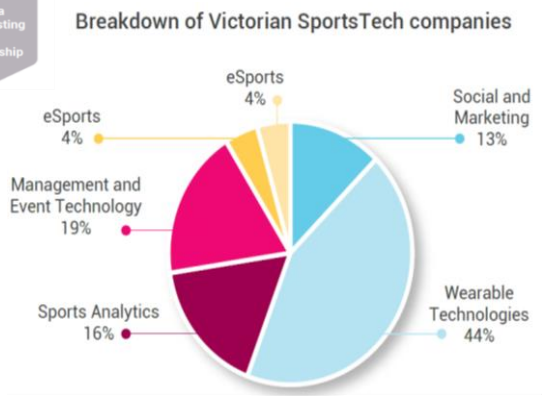
d] Accelerator programs and dedicated masters run by universities, such as:

- Deakin Centre for Sport Research focuses on improving the health and performance of people and organisations participating in sports, with the broader goal of publishing high-quality research that will inform policy makers and influence the work of other researchers, practitioners and professionals working in exercise and sports science, sports development and sports management.
- Griffith School of Engineering conducts research into human and sports technologies, multidisciplinary expertise to develop portable sensors that monitor human movement and sports performance. This research also spawned Sports and Biomedical Engineering Laboratories,– an enterprise and research group that develops sports and wearable technologies. As part of a larger ecosystem, Griffith University reaches into the wider local and international community as a member of the Queensland Sports Technology Cluster, the Australian Sports Technologies Network and the International Sports Engineering Association.
- Victoria University runs courses to learn how to store, analyse, consolidate and interpret sports data and communicate this information to coaches and support staff in a timely manner. The objective is to introduce students to data analytics and its use in sport.
- La Trobe University Master of Sport Analytics offers the opportunity to gain advanced skills in data warehousing and analytics, with a specialist focus on elite sports content, and to learn to deliver insights on strategy, recruitment and performance using data visualisations taught in La Trobe's state of the art VisLabs. This project-based learning model is designed by industry partners (Carlton F.C., Melbourne City F.C., Catapult, Optus)



5.3.2 SportsTech startups segmentation

Victoria is the undeclared sportstech capital of Australia as 65% of Australian companies are based in Victoria, followed by Queensland with 28% sportstech startups.
The SportsTech Report 2019 from KPMG identified 112 active and relevant sportstech companies across Victoria, categorised under one of seven market segments below.



5.4 INDUSTRY CHALLENGES AND OUTLOOK

While most of the Australian sportstech companies usually indicate "facilitated introductions to sports markets" and "dedicated networking sessions" as the most valuable support to help them scale, the market presents some clear challenges:

a] Access to university collaboration and industry-leading research remains hard to navigate. The sportstech sector recognises the strength of the higher education sector's sports and technology research capabilities, however, it indicates that it is not always easy to navigate as there is a lack of clear pathways to collaborate with universities and commercialise on university research. This barrier to technology commercialisation is quite common for several industries in Australia;

b] Accessing funding, with the majority of companies able to access funding only domestically (including Government grants and Venture Capital);

c] Approaches to tech adoption in the sporting sector are sometimes fragmented and ad hoc;

d] Access to talent and skills is an issue across the sector, with the most difficult skills to access being computer/IT skills, followed by sales and business development skills.

However Australian government leadership and support for new technology has acted as a catalyst to drive sportstech sector establishment and growth. Therefore, based on projected private and public expenditure on sports, the Australian sports market is predicted to grow at an approximate CAGR of 6.7% over the next decade. This equates to an estimated total sports expenditure of $17.5 billion - $21.4 billion. The projected size of the market ranges from just under $1 billion to just over $3 billion per year.

5.5 MARKET OPPORTUNITIES

1. Focus on increasing participation in sport:

- Key national government agencies (including Aus Sport, Sport and Recreation Victoria, VicHealth and VicSport) are all seeking to drive sports participation rates;

- At national and state level, governments are investing in innovative models and technologies to drive participation, with a particular emphasis on diversity and inclusion;

- Sports associations who see community participation as a pipeline for fan engagement and athlete development, are looking to new innovations and technologies as a key enabler;

- There is a growing trend towards active recreation, suggesting a need for solutions that also address consumer preferences in less-structured sports.

2. Advanced Technologies – The Australian sports industry is embracing technology such as AI and AR to enhance the fan experience. Data collected during games and training are being used to improve player performances. As advanced technology is changing the nature of many codes, success will depend on Australian fan reception.

3. Female sports participation is growing at a phenomenal rate in Australia, as it is underpinned by government commitment to drive female engagement, coupled with the growth in professional leagues for women over the past five years.

4. Disability, mobility and inclusive sports are growth markets nationally. The government commitment to drive inclusive participation has been proved by the support to the Paralympics and Invictus games. This is driving a need for innovation and enabling technologies, with potential crossover application in other sectors relating to enhanced human performance (i.e. health, aged care, defence, data and analytics).

5. The ability to cross-pollinate with other sectors provides an opportunity to accelerate the growth and the relatively low regulation applied to sportstech makes it attractive for product testing and refinement, creating a positive environment for development.

5.6 SPORTSTECH CONFERENCES

Australia Sports Tech Conference (Melbourne, 3rd September 2020) - Australian chapter of Sports Tech World Series that will engage local and international experts / operators driving technological, data analytics and digital innovations in Australia.

Australia and New Zealand Sports Technology Awards (Melbourne, 2020 date tbc) - ANZSTA recognises and celebrates excellence in data, digital and technology across the sports, media, entertainment, health and technology landscapes.

Wearable Technologies Conference (Melbourne, 2020 date tbc) – The Conference is the essential Australian forum for key opinion leaders, investors, decision makers and innovators that are looking at ways to enhance their current wearable applications as well as roll-out wearables within their respective industries and organisations.

5.7 AUSTRALIAN (GLOBAL) SPORTSTECH COMPANIES (EXAMPLES)

1. Catapult
In mid-1990s, a team of researchers focusing on emerging micro-technology partnered with the Australian Institute of Sport (AIS) on projects to measure physical performance. In 1999, the team invented wearable technology for elite sports teams, providing a legitimate solution to a long-standing problem in performance measurement and management. Catapult was founded in 2006 to commercialise the product. The company has the head office in Melbourne and almost 400 FTE in 30 locations

Catapult designed sports technology with solutions for every element of the performance ecosystem; from wearable tracking to athlete management and video analysis.
The last few years have seen Catapult complete a number of key acquisitions: the purchase of Canberra-based GPSports (market leader in video-based technology XOS Digital) in 2014, as well as Ireland-based PlayerTek in 2016, and SportsMed Elite and Baseline athlete management systems in August 2017.

2. Rosterfy
The co-founders identified a market opportunity to connect university students with jobs at sporting events. As their business grew, they realized they needed an online technology solution to manage their growing workforce. In 2015, they created a software platform for workforce management, and Rosterfy was born. Rosterfy, initially focused on sports events, has broader applicability and includes charities and not for profits, and event suppliers.
Rosterfy has its head office in Melbourne, with secondary offices in San Francisco and London.

The company plans to expand its offer across a range of verticals, building on the flagship events they are supporting including Expo 2020, Dubai, London Marathon, the Super Bowl and Rugby Sevens World Cup.

3. Champion Data
Originally established to provide data and statistics to support high performance coaching at AFL clubs, the company has greatly evolved as a leading digital business, leveraging the core data capture platform to provide automated statistics and live data feeds across sports clubs, services and venues. Since 1999, it

has held a licence as the AFL's official provider of statistics and live data feeds and is the official provider for Netball Australia and Netball New Zealand.
The company has the head office in Melbourne and 75 FTE (plus approx. 300 casuals).

The company is constantly innovating and exploring different technologies and partnerships on a global scale that align with their growth strategy.

4. Genius Tech Group
Genius Tech Group was born out of passion and driven by an obsession to build genuinely innovative products to generate large scale consumer engagement through data analytics and gamification. Their flagship product, iSport Genius, is a sports data platform that provides unprecedented sporting insights through highly innovative statistical analysis of trillions of pieces of data.
Genius Tech Group has a Head office in Melbourne, with more than 100 FTE in the UK, US, India, Poland, Philippines and Israel.

The company has created a game engine, Genius Games, to service consumer demand by allowing sports fans to predict any outcome within a sporting event. The games division has recently expanded to include animated arcade games to fuel further fan engagement. The suite of games is live in markets globally and the company is committed to continue global growth.

6. SUPPORTING SERVICES TO THE SPORTS INDUSTRY

6.1 ONLINE EVENT TICKET SALES

6.1.1 General

Industry firms primarily sell tickets online to live events. The industry also includes online ticket resellers, but does not include ticket sales at bricks-and-mortar outlets or sales made over the phone.
Operators in the online event ticket sales industry act as agents for promoters and organisers of sporting, performing and other live events, selling tickets to these events on behalf of their clients.

Key Statistics Snapshot

Total Revenue in 2020	Annual Growth 2015–2020	Annual Growth 2020–2025	Profit Margin in 2020	Wages as a share of Revenue in 2020
$385.7m	5.7%	3.7%	22.6%	13.3%

Number of Businesses 2015–2020
4.9%

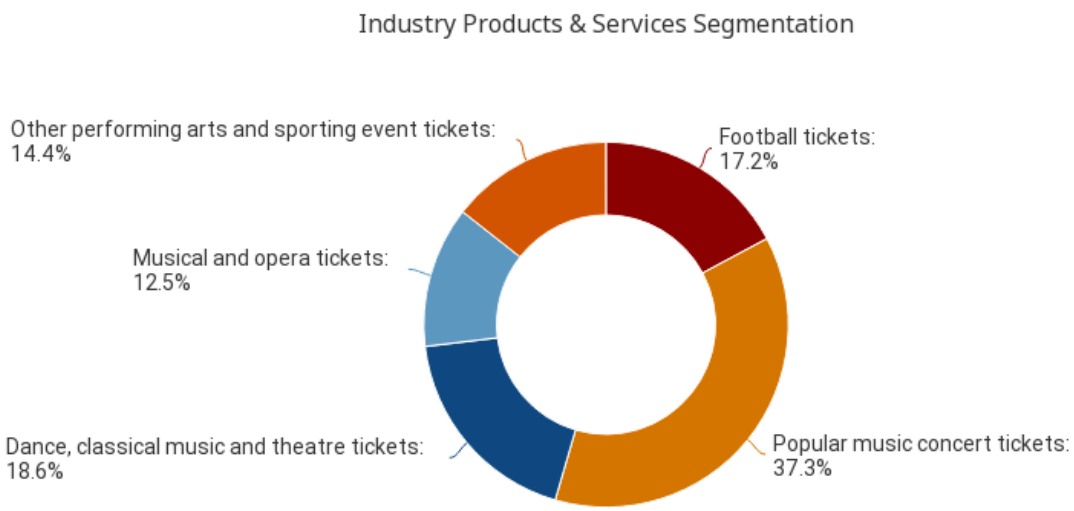
The industry generates revenue through fees charged for this service. Industry firms have benefited from individuals increasingly using online and mobile platforms as a channel for making purchases and conducting transactions over the past five years. Growing demand for convenience, which includes purchasing goods and services online, has led many ticket agencies to shift their operations online. In particular, rising smart device use has boosted online ticket sales over the past five years as consumers increasingly opt to purchase tickets while on the move.

Attendance rates to live events have varied over the past five years due to fluctuating consumer sentiment and falling discretionary incomes. Rising ticket prices have also discouraged consumers from attending live events, with prices rising faster than attendances over the period. However, this trend has not affected online ticket sales as much as bricks-and-mortar ticket sales over the past five years, due to the convenience offered by online and mobile ticketing platforms. Overall, industry revenue is expected to increase at an annualised 5.7% over the five years through 2019-20, to $385.7 million. This growth includes an anticipated rise of 3.4% in the current year.

As the online space becomes increasingly saturated, online and mobile ticketing adoption rates are anticipated to have less influence on industry revenue over the next five years. As a result, consumer sentiment and discretionary income are projected to primarily influence the industry's long-term performance over the period. Major players Ticketek and Ticketmaster are forecast to retain their significant market power in the industry over the next five years, as they have long-term contracts with major sporting venues and other entertainment companies. As a result, smaller firms are anticipated to struggle making significant inroads in the industry over the period. Overall, industry revenue is projected to rise at an annualised 3.7% over the five years through 2024-25, to $462.6 million.

6.1.2 Products and Services segmentation

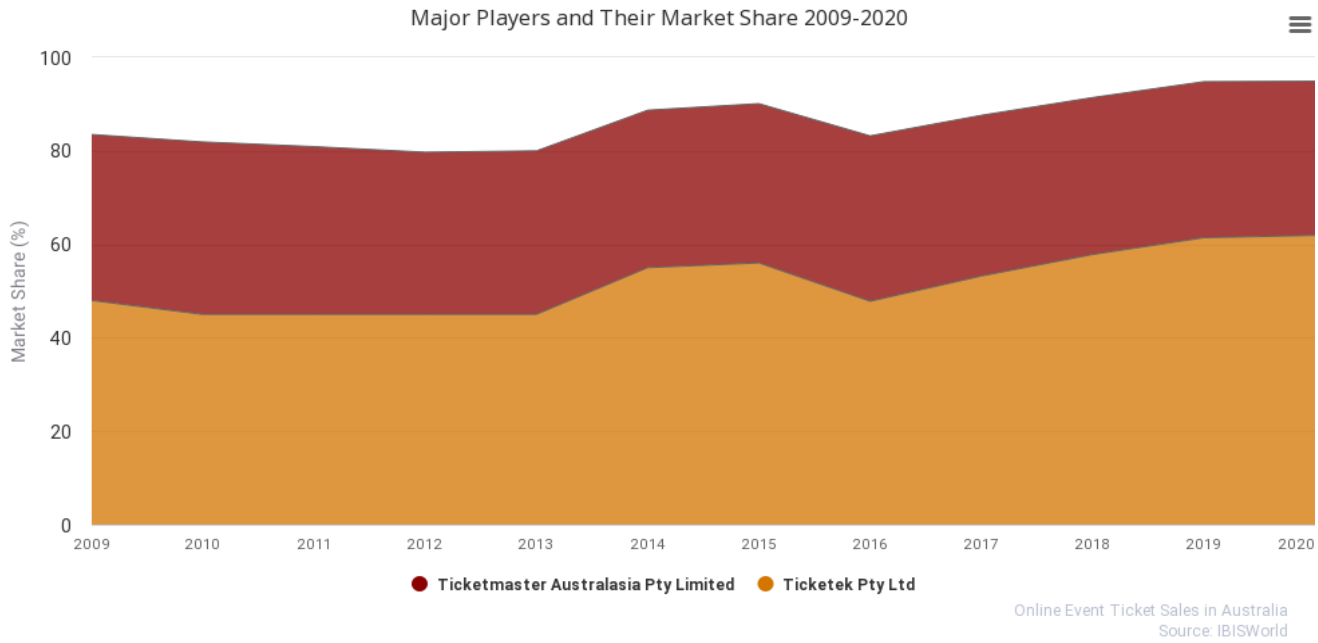
The Online Event Ticket Sales industry generates revenue from selling tickets for popular music concerts, musicals, operas, dance performances, classical music concerts, theatre performances, football matches and other sporting events. Industry operators sell tickets for these events on behalf of venue clients, such as stadiums, performing arts venues and theatres. Ticketing agencies charge service and handling fees on tickets and retain a percentage of the ticket price.



The football tickets segment includes tickets sold online to Australian Rules, Rugby League, Rugby Union and soccer matches. While sporting events are the most popular form of live entertainment in Australia with high attendance rates, tickets are also sold through club memberships and box office locations at the venue. Nonetheless, this segment has increased as a share of industry revenue over the past five years due to a rising number of tickets to football matches sold online. Many Australians have a strong interest in football and the Australian Football League draws in some of the highest average attendances for a sporting league in the world. Competition for spectators among different football codes has led to increased marketing efforts over the past five years.

6.1.3 Main Industry Players

Outside of the major players, which dominate the Online Event Ticket Sales industry, there are several firms that operate as ticket resellers or service niche events and markets. An increasing number of companies are entering the industry due to low initial start-up costs and opportunities presented by these niche markets.



TEG PTY LTD (TICKETEK)

Market share:	61.9%
Address:	175 Liverpool Street, Sydney NSW 2000
Tel:	+61 2 9266 4073
Email:	info@ticketekmarketplace.com.au
Website:	www.teg.com.au
About:	TEG Pty Limited operates in the industry through its Ticketek business, that holds ticketing rights contracts with many venues and events (i.e. Melbourne Cricket Ground, ANZ Stadium, Australian Open tennis tournament, Melbourne Cup, and he Supercars Championship). Ticketek benefits from exclusive venue arrangements and general dominance in the ticketing services segment.

TICKETMASTER AUSTRALASIA PTY LTD

Market share:	33%
Address:	2 Southbank Boulevard, Melbourne VIC 3006
Email:	mail.bookings@ticketmaster.com.au
Website:	www.ticketmaster.com.au
About:	Ticketmaster Australia is the country's second largest ticketing agency, forming a segment duopoly with Ticketek. Ticketmaster holds several ticketing rights agreements with venues and events (i.e. Marvel Stadium, Sidney Myer Music Bowl, Melbourne International Comedy Festival and Australian Formula 1 Grand Prix).

VIAGOGO

Tel:	+61 2 8318 0255
Email:	customerservice@orders.viagogo.com
Website:	https://www.viagogo.com/
About:	Viagogo operates in the ticket resale market through its online marketplace where individuals can buy and sell tickets for live events. The Switzerland-based company entered the Australian market in January 2013. Viagogo purchased StubHub in November 2019, which also operates in the industry. This acquisition is expected to have significant ramifications in overseas markets. However, in the Australian industry StubHub has only a minor share of the market.

6.2 HORSE AND SPORTS BETTING

Industry operators provide gambling services, including totalisator and betting services. Gamblers generally place wagers on horseraces and sports matches. The industry includes online gambling services but excludes casinos and lottery operations.

Key Statistics Snapshot

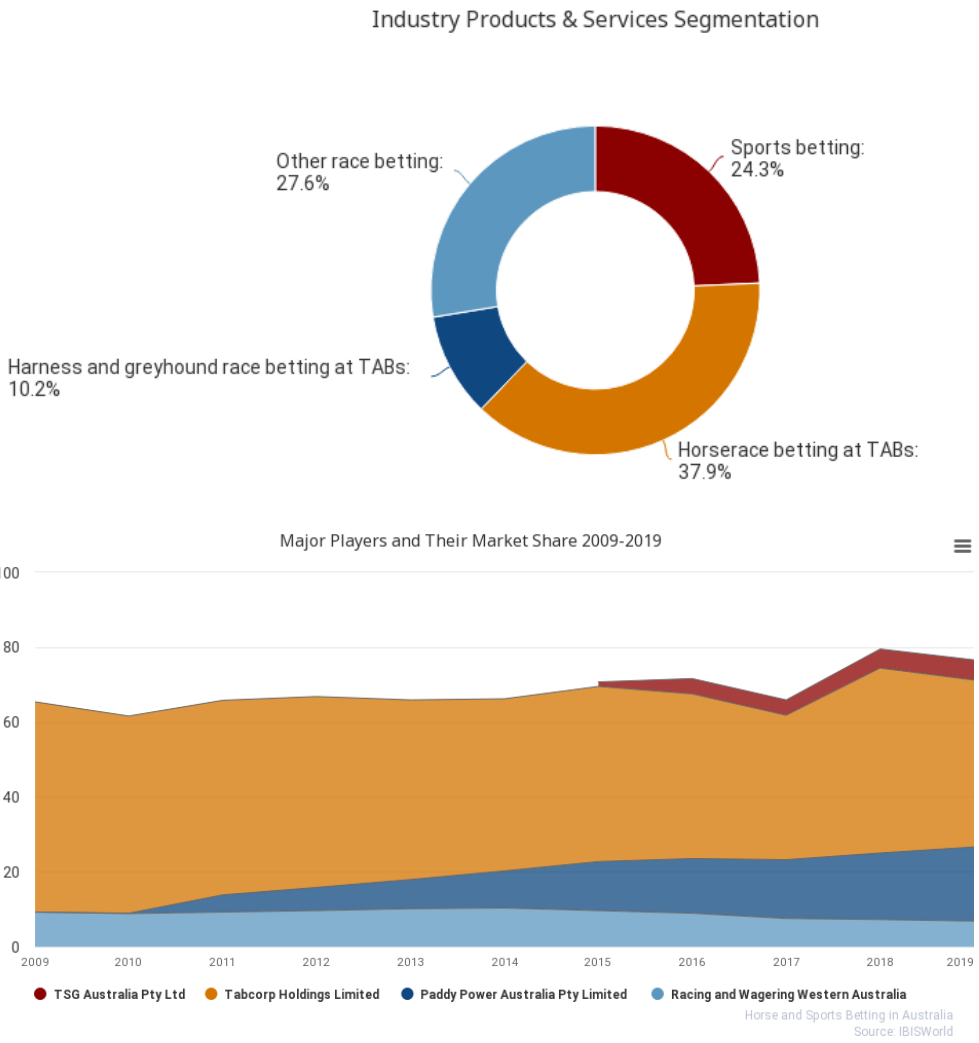
Total Revenue in 2019	Annual Growth 2014–2019	Annual Growth 2019–2024	Profit Margin in 2019	Wages as a share of Revenue in 2019
$4.9bn	6.5%	5.4%	13.1%	9.7%

Number of Businesses 2014–2019
-4.0%

The Horse and Sports Betting industry has undergone significant changes over the past five years. Online and mobile betting websites have gained a greater foothold in the market due to changing consumer preferences and the improved accessibility of these websites. Increasing internet connectivity and spectator sports participation rates have further contributed to the industry's revenue growth over the period. Industry revenue increased at an annualised 6.5% over the five years through 2018-19 to $4.9 billion. However, rising competition from other gambling activities, and declines in horseracing attendances and on-course totalisator wagering have slightly restricted the industry's pace of expansion of the period. Other gambling activities not included in the industry include casinos, lottery products and electronic gaming machines, all of which compete for gamblers' discretionary income.

Industry revenue rose by 4.7% in 2018-19, to $4.9 billion. Sports betting was the industry's fastest growing segment due to strong growth in wagers placed through digital channels and fixed-odds betting. This sector allows punters to place wagers on sporting events through websites and smartphone applications, and through traditional totalisator methods. This sector has grown over the past five years, to the detriment of on-course totalisators at horseraces. Consolidation has also occurred over the period, with several larger companies increasing their revenue and market share by acquiring smaller betting firms. Industry concentration was affected by the 2017 merger between Tabcorp and Tatts Group and Stars Group's acquisition of CrownBet and William Hill's Australian operations.

Industry revenue is projected to continue growing over the next five years, despite facing several key challenges including a point-of-consumption tax and a nation-wide ban on credit betting. Traditional TAB outlets are likely to struggle significantly due to the rising popularity, accessibility and user-friendliness of online and mobile betting platforms. The revenue generated from wagers placed on horse and harness races at TABs is also anticipated to continue declining, as online betting and sports betting continue to expand, boosted by aggressive marketing. The overall, industry revenue is forecast to rise at an annualised 5.4% over the five years through 2023-24, to $6.4 billion.



6.3 BROADCASTING

Sports broadcasting in Australia can be divided into three main groups: free-to-air tv, pay tv and streaming services.

6.3.1 Free-to-air TV Broadcasting

Industry players broadcast visual content on free-to-air TV. Players broadcast TV programs at no cost to consumers.

6.3.1.1 General

Operators in the Free-to-Air Television Broadcasting industry have faced various challenges over the past five years.

Key Statistics Snapshot

Total Revenue in 2019	Annual Growth 2014–2019	Annual Growth 2019–2024	Profit Margin in 2019	Wages as a share of Revenue in 2019
$4.4bn	-3.6%	-2.8%	2.9%	22.6%

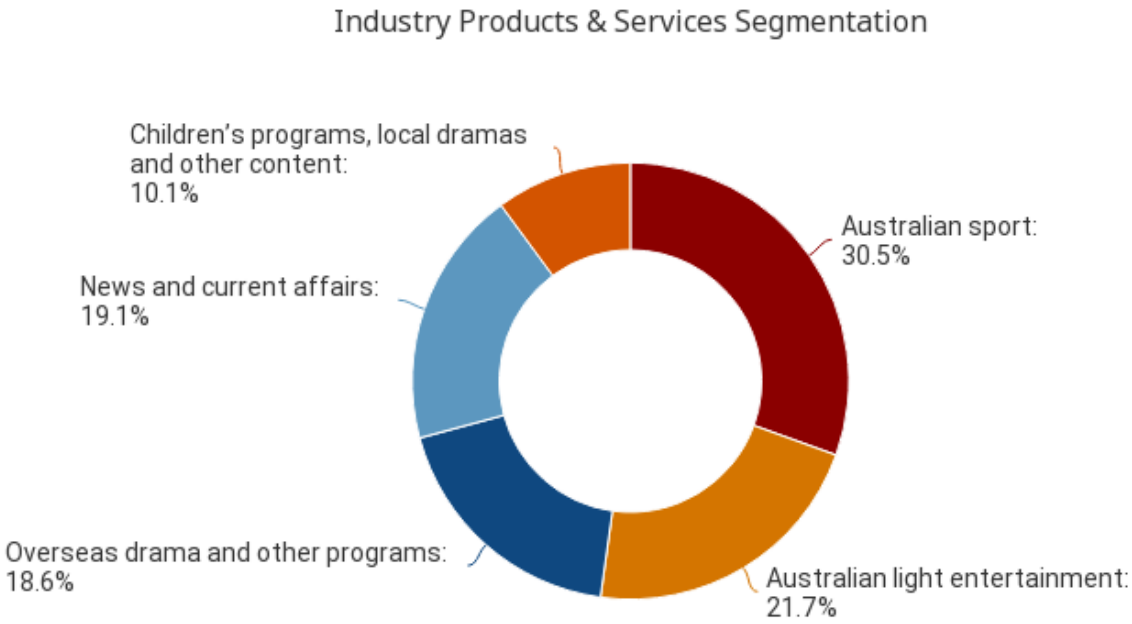
Number of Businesses 2014–2019
0.0%

Industry revenue declined at an annualised 3.6% over the five years through 2018-19, to $4.4 billion. Many Australians shifted away from watching free-to-air TV programs, instead choosing to consume media on a range of different platforms. In response, some advertising agencies moved towards more lucrative online advertising markets, limiting demand for advertising timeslots on free-to-air TV networks. Foreign entities, such as Facebook and Google, now command an increasing share of advertising revenue in Australia. This trend has negatively affected traditional media outlets, particularly TV networks.

Growing competition from online media has been the key factor behind the industry's poor performance over the past five years, as more viewers have streamed films and TV programs online. The internet has become the go-to destination for alternative forms of video media, with websites, such as YouTube, providing legal video viewing platforms. Furthermore, subscription video-on-demand (SVOD) services have increased in popularity over the period. Netflix entered the Australian market in March 2015, joining local competitor Stan. Netflix has expanded rapidly since its launch, with over half of Australia's population now expected to have access to a Netflix subscription.

Advertising demand for free-to-air TV networks is in a long-term decline. Online media is forecast to continue rapidly growing in popularity and accessibility over the next five years, shifting advertising revenue away from industry players. Several media ownership laws were removed in September 2017. This deregulation will likely lead to significant media consolidation, such as the merger between Nine Entertainment and Fairfax Media, and provide TV networks with a better avenue to compete against external digital threats. However, advertising revenue is anticipated to continue being diverted away from free-to-air TV networks, with Australians projected to watch less TV over the next five years. As a result, revenue is forecast to fall at an annualised 2.8% over the five years through 2023-24, to $3.8 billion.

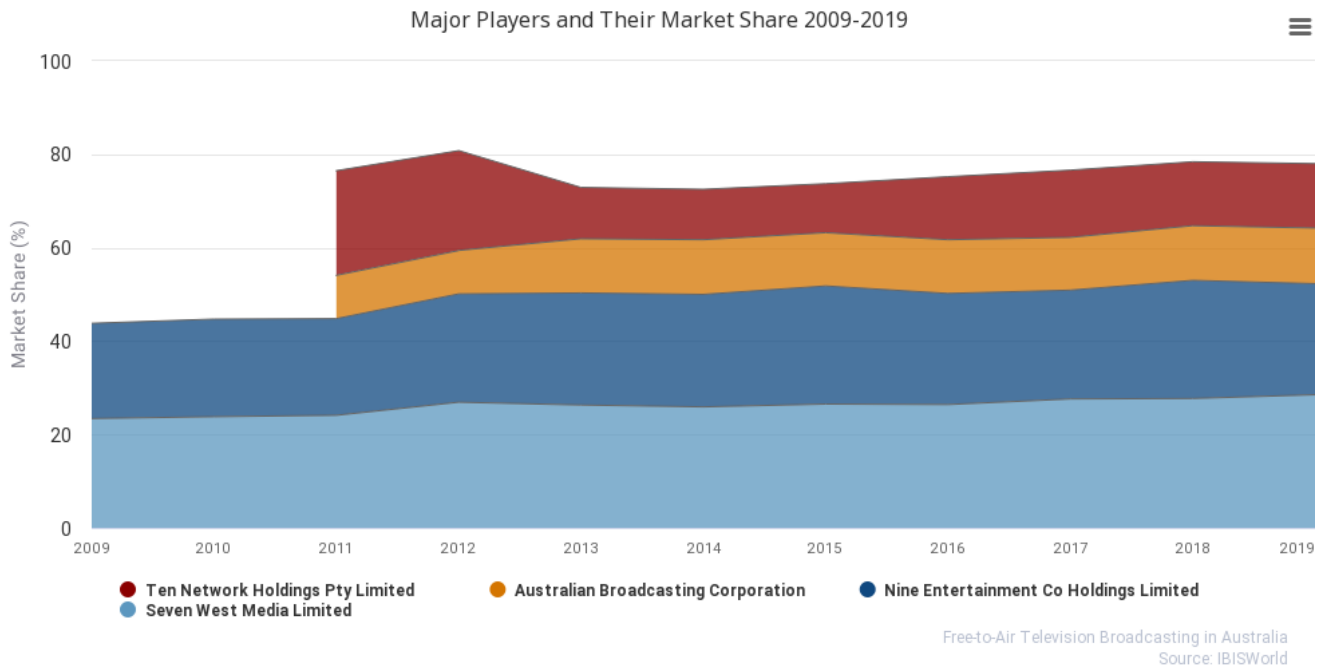
6.3.1.2 Products and Services



Sports broadcasting rights have become increasingly sought after over the past five years. Live sports are a key driver of ratings growth for many major players. Over the past five years, Seven West Media has held the broadcast rights for the AFL, the Spring Carnival (horse racing) and the Australian Open (tennis); Nine Entertainment owned the rights for test cricket and the NRL; and Network Ten owned the rights for the Big Bash cricket league. The cost of acquiring sports broadcast rights has increased significantly over the past five years, as FTA TV networks, Foxtel and digital competitors have aimed to outbid each other to acquire key broadcast deals. In April 2018, Seven West Media won the rights to test and Big Bash cricket, in conjunction with Foxtel, winning the rights from Nine and Ten, respectively. Nine also acquired the rights to the Australian Open (tennis) over Seven in early 2018. This segment has increased as a share of program expenditure over the past five years due to strong price inflation in the cost of sports broadcasting deals.

6.3.1.3 Main Industry Players

Large commercial and government-funded TV networks dominate the industry. However, several smaller regional, community, non-profit and rural free-to-air TV channels also operate in Australia. Smaller industry players include WIN Corporation, SBS, Prime and Southern Cross.



SEVEN WEST MEDIA LIMITED

Market Share:	28.5%
Brand Names:	Seven Network
Address:	Newspaper House, 50 Hasler Road, Osborne Park (Perth) WA 6017
Tel:	+61 8 9482 3111
Website:	https://www.sevenwestmedia.com.au/

Seven West Media Limited is a public Australian company that operates as a multi-platform media business. The network has sought to increase its presence in the sports broadcasting market over the past five years. The firm is currently involved in the $2.5 billion AFL broadcasting rights contract, a six-year deal in conjunction with Foxtel and Telstra. Seven West Media's contribution is $900.0 million, which provides it with the rights to broadcast seven games a fortnight during the AFL home-and-away season. The deal also gives the company exclusive access to the AFL Grand Final. In April 2018, the network won a joint $1.2 billion bid with Foxtel to gain the rights to Australian international cricket matches. Other major sporting events broadcast by the network include the Spring Carnival (horse racing) and the Australian Open Tennis, although Seven West Media lost the rights of the tennis to rival network Nine.

The company has also focused on its digital and online offerings over the past five years. Seven launched 7plus in November 2017, which offers video on demand, catch-up services and online live streaming of the company's channels free of charge. The app can also be used on various devices, such as phones and tablets.

NINE ENTERTAINMENT CO HOLDINGS LIMITED

Market Share:	23.8%
Brand Names:	Nine Network, NBN Network
Address:	24 Artarmon Road, Willloughby (Sydney) NSW 2068
Tel:	+61 2 9906 9999
Website:	https://www.nineforbrands.com.au/

Nine Entertainment Co Holdings Limited is a publicly listed Australian media company. Nine Entertainment also owns Stan, a SVOD service, and Pedestrian TV, an online youth publishing business. Nine Entertainment operates in the industry through its TV networks Nine and NBN Television. The firm's major sporting contracts include the NRL, in conjunction with Foxtel and Telstra, and the Australian Open. The network lost its long-standing rights to broadcast domestic Australian test matches and other cricket events in April 2018 to competitor Seven. Nine Entertainment launched 9Now, a streaming and video on demand service, in January 2016. The service allows viewers to stream content live and catch up on content broadcast on Nine Entertainment's TV networks free of charge.

TEN NETWORK HOLDINGS PTY LIMITED

Market Share:	13.8%
Brand Names:	Network Ten
Address:	1 Saunders Street, Pyrmont (Sydney) NSW 2009
Tel:	+61 2 9650 1010
Website:	https://network10.com.au/

Ten Network Holdings Pty Limited is a foreign-owned TV broadcaster. It is a wholly owned subsidiary of US company CBS Corporation. The firm operates in the industry through its Network Ten Moniker. Network Ten broadcasts news, current affairs, sports and children's programs. Ten Network Holdings acquired the rights to the T20 Big Bash League in June 2013. The network made the deal, which was worth $20.0 million a year over five years, in response to the other major commercial networks' involvement in sports broadcasting. However, the firm lost a bid to both retain the broadcast rights to the Big Bash League and acquire the rights to international cricket matches to Seven West Media. As a result, the network currently has little premium sports content, but will likely aim to bid for new broadcasting deals when they are up for renegotiation over the next five years.

AUSTRALIAN BROADCASTING CORPORATION (ABC)

Market Share:	11,9%
Brand Names:	ABC, ABC HD, ABC KIDS, ABC ME, ABC NEWS, ABC COMEDY
Address:	ABC Ultimo Centre, 700 Harris Street, Ultimo (Sydney) NSW 2007
Email:	Online form
Website:	https://www.abc.net.au/

The Australian Broadcasting Corporation (ABC) produces and broadcasts radio, TV and online programs. The Federal Government owns and funds the corporation. The ABC operates in the industry through its TV segment, and operates six channels on free-to-air TV: ABC, ABC HD, ABC KIDS, ABC ME, ABC NEWS and ABC COMEDY. In 2019, the ABC announced it had come to an agreement with FFA to become the free-to-air home for soccer in Australia. Under this two-year deal, the ABC will become the home of A-League, W-League, Socceroos (international men's team) and Matildas (international women's team) matches.

The ABC can be compared to VRT in Flanders. It is one of two state-owned broadcasters. The other one is SBS (see below). The ABC focuses mainly on Australian content, whilst SBS has a diverse range of programming from all over the world to reflect Australia's multicultural and indigenous society. ABC has its own free streaming service called iView.

PRIME MEDIA GROUP LIMITED

Market Share:	4-5%
Brand Names:	Prime7, GWN7
Address:	363 Antill Street, Watson (Canberra) ACT 2602
Email:	news.canberra@prime7.com.au
Website:	http://www.primemedia.com.au/

Prime Media Group Limited is an Australian media corporation. The company is affiliated with the Seven Network and operates in the industry through its Prime7 and GWN7 networks. The company services mainly regional areas, including regional Western Australia, the Gold Coast, QLD, the Australian Capital Territory and areas throughout New South Wales and Victoria.

SOUTHERN CROSS MEDIA GROUP LIMITED

Market Share:	4-5%
Brand Names:	Southern Cross Austereo
Address:	Level 15, 50 Goulburn Street, World Quare, Sydney NSW 2000
Tel:	+61 2 9375 1041
Email:	online form
Website:	https://www.southerncrossaustereo.com.au/

Southern Cross Media Group Limited is an Australian public company that broadcasts free-to-air commercial TV and radio programs throughout regional Australia. Southern Cross has numerous TV stations across a range of Australian regional markets, and operates in most states and territories. The company has affiliation agreements with all of the major commercial networks.

SPECIAL BROADCASTING SERVICE CORPORATION (SBS)

Market Share:	4-5%
Brand Names:	SBS, Viceland, SBS Food, World Movies, NITV
Address:	14 Herbert Street, Artarmon (Sydney) NSW 2064
Email:	comments@sbs.com.au
Website:	https://www.sbs.com.au/

The Special Broadcasting Service Corporation (SBS) is a public Australian TV and radio broadcasting network that was established in January 1975. The Australian Government provides funding for the SBS. The network is required to broadcast a range of multicultural TV programs. The SBS also generates a limited amount of funding from advertising, sponsorship and retail sales. The SBS has a relatively low share of commercial TV viewers and its share of TV advertising revenue is quite small.

SBS's sports related content includes soccer, cycling, basketball (Australian and US), French and US Open (tennis), ice skating, all forms of motorsport, gymnastics, lawn bowls and rugby. For soccer, its content includes FIFA World Cup games, EUFA Champions League, Premier League, Primera Division. In the past it also broadcasted live Euro-cup games.

SBS is one of two state-owned broadcasters. The other one is the ABC (see above). The ABC focuses mainly on Australian content, whilst SBS has a diverse range of programming from all over the world to reflect Australia's multicultural and indigenous society. It regularly features Belgian (Flemish & French-speaking) content such as Salamander (season 1+2), Professor T, The Twelve ("De Twaalf"), Team Chocolate, Enémi Public, Bullhead ("Rundskop") and Girl. SBS also provides content in various languages, including Dutch. However, the focus of this content is aimed at Australian residents with an ethnic and cultural background coming from The Netherlands.

SBS has its own free streaming service called SBS On Demand. The company also has an office in Melbourne.

WIN CORPORATION PTY LTD

Market Share:	4-5%
Address:	Television Avenue, Mount St Thomas (Wollongong) NSW 2500
Tel:	+61 2 4223 4199
Website:	https://www.wintv.com.au/

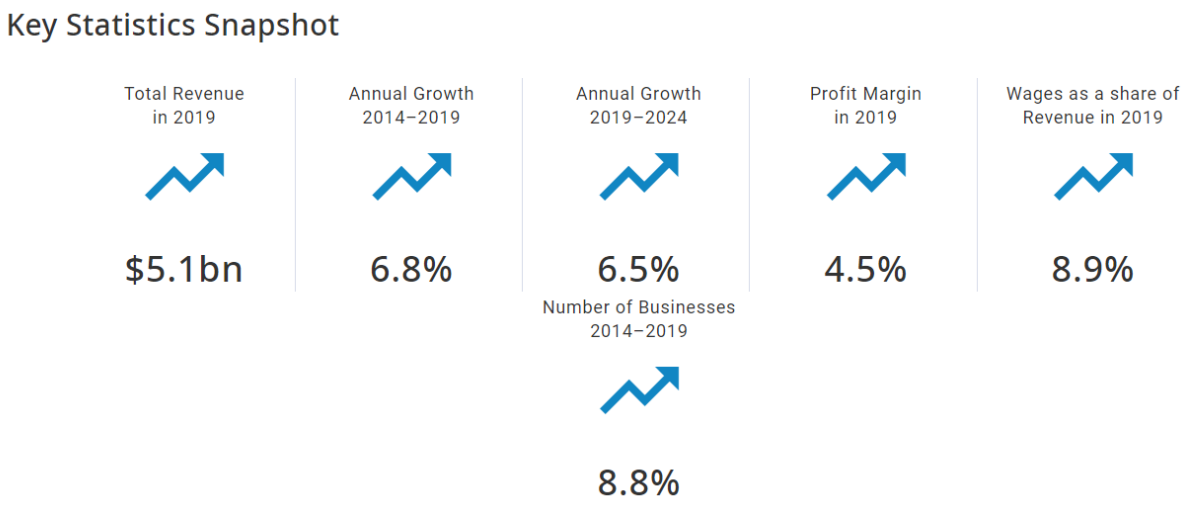
WIN Corporation Pty Ltd is an Australian-owned proprietary company that provides TV and radio broadcasting services throughout Australia. The company is the largest regional broadcaster in Australia.

6.3.2 Pay TV in Australia

Industry firms primarily broadcast movies and TV programs on a subscription or fee basis. These services are delivered through cables, satellites or via the internet. The industry also includes operators that provide live, catch-up or on-demand versions of free-to-air television; provide digital rental or purchases of movies or television content via the internet to download; or resell pay-TV services. The industry excludes physical sales of movies and television shows.

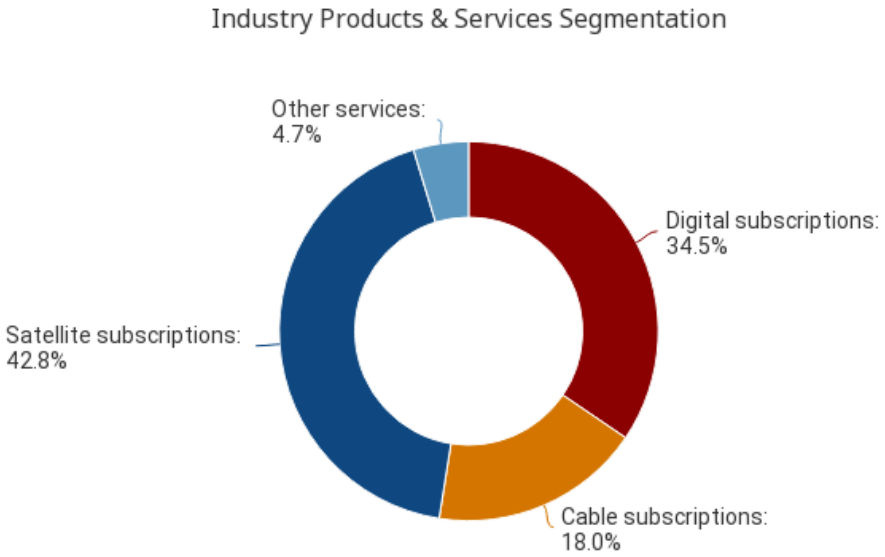
6.3.2.1 General

The Pay Television and Internet Protocol Television Services (IPTV) industry has grown rapidly over the past five years, driven by the success of subscription video on demand (SVOD) services such as Netflix and Stan.



Despite the rise of IPTV services, Foxtel remains the industry's largest player. However, the pay-TV segment has faced significant competition from cheaper SVOD services. Foxtel was forced to slash its subscription prices at the beginning of the past five-year period to attract customers and retain existing ones. Foxtel has increasingly focused on providing premium sports content to help differentiate the company from other industry operators, including launching its own sports streaming service, Kayo, in November 2018 (more information about Kayo and Foxtel Now in chapter 6.3.3 below). However, the pay-TV segment has consistently lost market share to SVOD operators offering cheaper services over the past five years.

The industry is anticipated to continue expanding over the next five years. The NBN rollout (fibre internet rollout across the country) will likely increase the speed, accessibility and convenience of IPTV services, driving the industry's expansion. Foxtel is anticipated to increasingly focus on its IPTV services Foxtel Now and Kayo, diverting more revenue from the pay-TV segment. Industry revenue is forecast to increase at an annualised 6.5% over the five years through 2023-24, to $7.1 billion.



6.3.2.2 NXE Australia Pty Ltd

Market Share: 60.8%
Brand Names: Foxtel
Address: 5 Thomas Holt Drive, North Ryde (Sydney) NSW 2133
Tel: +61 3 8325 2701
Email: corporateaffairs@foxtel.com.au
Website: https://www.foxtel.com.au/index.html

NXE Australia Pty Ltd, trading as Foxtel, was formed following the merger of Foxtel Group and broadcaster Fox Sports Australia in April 2018. News Corporation holds a 65.0% share in the company, with Telstra (Australian telecom provider, similar to 'Belgacom' in Belgium) holding the remaining 35.0%. The company broadcasts a range of content, including films, TV shows, documentaries, informational programs and live sports broadcasts.

Foxtel gained the rights to broadcast every AFL match live from 2012. In 2015, Foxtel was involved in the new $2.5 billion AFL broadcast rights deal that extended its AFL coverage until 2022. The company's other sports broadcasts include rugby, golf, cricket, tennis, soccer, netball, basketball, cycling and motor racing. Live sports are a key selling point for Foxtel, as it has remained in high demand from viewers. In April 2018, the firm announced it had won the rights to domestic cricket broadcast in a $1.2 billion joint bid with free-to-air TV network Seven West Media. As at December 2018, Foxtel had approximately 2.8 million subscribers across its cable, satellite and IPTV services. Of these subscribers, approximately 2.5 million individuals are anticipated to subscribe to the firm's traditional pay-TV services, with the remainder subscribed to IPTV services Foxtel Now and Kayo. Foxtel has increasingly focused on its IPTV services over the past five years. Increasing subscribers to these services has offset falling subscription numbers to Foxtel's traditional pay-TV services.

The firm launched a beta version of Kayo in November 2018, which is a streaming service exclusively for sports content. The service grants access to broadcasts of over 50 sports including AFL, NRL and NBA, and has a lower price-point than traditional pay-TV services.

While Foxtel services are primarily provided by NXE Australia, other companies act as resellers for Foxtel services. In particular, both Telstra and Optus (both telecom companies) resell Foxtel services, offering bundle packages that combine Foxtel, broadband services and phone services. Telstra is the largest reseller, and in 2017-18 the company reported revenue of $768 million from reselling Foxtel services. However, most of this revenue is already accounted for by the operations of NXE Australia and previously Foxtel Group, which includes revenue received from resellers. As a result, while resellers account for an important share of Foxtel's revenue, they account for a small share of the industry.

6.3.3 Sports Streaming (OTT) Services

Australians can choose between many different options to stream sports, either live or on demand. There are broadly two categories:

- Stand-alone sports streaming services, such as Kayo and Foxtel Now;
- Sports streaming options as an extra to mobile telecom plans with e.g. Telstra, Optus and Ovo.

All services below are Over-The-Top (OTT) media services, delivered directly to the customer via the internet. In some cases like Kayo and Foxtel Now, they are direct spin-offs from traditional Subscription-based Video-on-Demand (SVOD) companies like Foxtel.

Below is an overview of the most commonly used services, which is largely based on information collected by Whistle Out, Canstar Blue and the companies listed below.

6.3.3.1 Kayo

Cost: Between $25-35 per month. No lock-in contract.
Website: https://kayosports.com.au/

The service from Kayo, a streaming app by Foxtel, has proven popular since its launch in February 2019, with approx. 115,000 subscribers. Kayo features over 50 sports, including NRL, AFL, State of Origin (replays only), Super Rugby, Cricket, Soccer, Tennis, NFL, NBL, NHL, UCF, Golf, Formula One, World Surf League.

Kayo also includes special sports streaming features like split screen, which allows customers to watch up to four different programs at once, and key moments which show the best parts of a match.

In March 2020, CMO reported that Kayo "just hit over five billion minutes of live sports streams since its launch and has 370,000 paid subscribers (as of 5 February 2020)".
According to The Guardian Australia, Kayo was already in a slump before the COVID-19 crisis hit Australia. Event thought it has been named as "the most successful media business to have been launched in Australia in the last 25 years" it reportedly lost 32,000 customers in the quarter to 5 February 2020 potentially due to a slow Australian cricket season. Due to the suspension of AFL, NRL and A-League games until further notice, the streaming service is now unable to offer live broadcasts of these games. It is offering replays of big matches and sports documentaries instead. A spokeswoman said Kayo offered more than 15,000 hours of on-demand sports content including match and race replays.

6.3.3.2 **Foxtel Now**

Cost: $25 Essentials Pack + $29 Sports Pack
Website: https://www.foxtel.com.au/now/home.html

Foxtel Now is another streaming offer by Foxtel and has been described as its answer to Netflix. It's cheaper than a traditional Foxtel subscription and all content is streamed online, rather than via a classic TV subscription. Content on Foxtel Now is divided in 'packs', with the Essentials pack as a basis. Customers who want sports content, need to add on a Sports pack which includes the same content as Kayo, except for the 'split screen' and 'key moments' options.

Similarly to Kayo, FOXTEL is reportedly also struggling with the fall-out from the COVID-19 crisis in Australia. It had already been competing heavily with Netflix and Stan which caused a decline in its subscriber base from 2.326m in the September 2019 quarter to 2.268m at the end of 2019. In the face of the current crisis Foxtel Chief Patrick Delany said "he was confident people would keep their subscriptions because they wanted to keep the whole family entertained in these "challenging" times." Until the end of May 2020, Foxtel customers will have access to more sports content, including a new show with "38 hours of live content across the week in which league stars and broadcasters will talk about the greatest tests and State of Origin matches of all time".

6.3.3.3 **Optus Sport**

Cost: Minimum $14.99 per month, or free with Optus postpaid mobile telecom plan.
Website: https://sport.optus.com.au/

Ideal for soccer fans, Optus Sport offers 24/7 international soccer with access to all matches from the English Premier League, plus FIFA Women's World Cup, the UEFA Champions League, the UEFA Europa League and other international matches. Customers can stream the games live or replay on demand. The service also offers news, interviews, highlights and press conferences. Can be watched on mobiles and tables, Fetch TV, Apple TV and Google Chromecast, computers and game consoles. No other sports offered.

6.3.3.4 beIN SPORTS

Cost: $19.99 monthly plan or $199.99 yearly plan (no lock-in contract)
Website: https://www.beinsports.com/au/

beIN SPORTS is a sports channel that is used predominantly for European sports, with coverage broadcasted to overseas markets, including Australia. beIN SPORTS offers football, rugby union and tennis. Customers can watch every Liga, Serie A and Bundesliga match, plus the Carabao Cup, EFL Championship, Ligue 1, WTA Tour, Six Nations. Content can be watched online (laptop, computer) or via the beIN Sports Connect app. It's also available at no extra cost to Foxtel Sports pack customers.

Note: The Asia-Pacific market is serviced from beIN SPORTS' Singapore office.

6.3.3.5 Fetch TV

Cost: Set-top box between $169 and $449; Monthly subscription $6 per package.
Website: https://www.fetchtv.com.au/

Fetch TV offers a different entertainment experience to the ones listed above. It allows customers to bundle the package they desire and can include content from streaming services such as Netflix and Stan. Its sports offering is bundled in the 'Vibe' package and includes Australian sports such as AFL and NRL as well as US sports and games (ESPN). Customers can opt to add on other packages such as Optus Sport and beIN SPORTS.
Fetch TV requires a set-top box, with two choices: the Fetch TV Mini ($169) or the Fetch TV Mighty ($449). The cost of the set-top box as well as Fetch TV starter channel packs can be bundled with internet broadband from telecom providers such as Optus, iiNet, Dodo, iPrimus, Internode and Westnet.

Note: Fetch TV is an Australian owned business, with backing from one of Asia's leading pay TV providers, Astro All Asia Networks which is registered in Malaysia.

6.3.3.6 OVO Play

Cost: Free for some content
Website: https://play.ovo.com.au/

Ovo is a smaller Australian telecommunications provider which offers free streaming of certain sports. Users don't need an OVO sim-card to use the app or watch sports via a web browser. However, for live sports streaming, viewers need to be OVO customers or have a subscription. Sports offered include motorsports, gymnastics, wrestling, badminton, rugby and water polo. They also partner with the Hit network and Triple M (radio stations) to provide additional sports content. Their website indicates they will announce new partnerships soon.

6.3.3.7 Telstra streaming apps

Cost: $313.85 per season or free for Telstra Mobile customers
Website: https://www.telstra.com.au/tv-movies-music/sports-offer

Telstra customers get free access to an ever-growing list of sports streaming apps. These apps give customers the ability to stream live or on-demand a variety of sports, as well as access all the latest in sports news. Telstra Mobile currently collaborates with 5 apps which allow livestreaming and on-demand sport: AFL app, AFLW app, NRL app, Netball Live App, and My Football Live App. The first three allow

customers to livestream the entire seasons of those respective codes, while the Netball Live Pass lets them stream every Suncorp Super Netball game, Fast 5 World Series and Constellation Cup. Finally, the My Football Live Pass gives customers access to stream every A-League game, as well as select FFA Cup games and international Matildas match-ups.

6.3.3.8 League Live Passes

Whistle Out reports that many Australian sports leagues now allow customers to buy "live passes" to stream matches via the league's mobile and tablet apps. Games can be streamed live or on demand. Some examples:

- NRL Live Pass – $3.99 per week or free for Telstra mobile customers
- AFL Live Pass – $4.99 per week or free for Telstra mobile customers
- My Football Live App – $4.99 per week or free for Telstra mobile customers
- Netball Live – $2.99 per week or free for Telstra mobile customers

Telstra mobile customers have free access to the plans listed above (see above also).

7. RELATED ASSOCIATIONS

Below is a list of related associations for which FIT Melbourne has not provided any contact details in the report above.

AUSTRALIAN COMMUNICATIONS AND MEDIA AUTHORITY

Address: Level 5, The Bay Centre, 65 Pirrama Road, Pyrmont (Sydney) NSW 2009
Tel: +61 2 9334 7700
Email: info@acma.gov.au
Website: https://www.acma.gov.au/
About: The Australian Communications and Media Authority is an independent Commonwealth statutory authority. They regulate communications and media services in Australia.

AUSTRALASIAN GAMING COUNCIL

Address: Suite 4.12, 365 Little Collins Street, Melbourne VIC 3000
Tel: +61 3 9670 4175
Email: info@austgamingcouncil.org.au
Website: https://www.austgamingcouncil.org.au/
About: The Australasian Gaming Council (AGC) is a national industry body that aims to support a sustainable gambling industry providing entertainment and economic benefits while promoting gambling education, responsible gambling awareness, quality gambling research and evidence-based policy.

AUSTRALIAN INSTITUTE OF SPORTS (AIS)

Address: Leverrier Street, Bruce (Canberra) ACT 2617
Tel: +61 2 6214 1111
Email: online form
Website: https://www.ais.gov.au/
About: The purpose of the Australian Institute of Sports (AIS) is to build sustainable winning systems for Australian athletes. The AIS leads the Australian high performance sports system, which has an agreed vision and success factors reflected in the national sports plan, Sport 2030 and in the National High Performance Sport Strategy 2024.

AUSTRALIAN OLYMPIC COMMITTEE (AOC)

Address: Level 4, 140 George Street, Museum of Contemporary Art, Sydney NSW 2000
Tel: +61 2 9247 2000
Email: aoc@olympics.com.au
Website: https://www.olympics.com.au/
About: The Australian Olympic Committee is a non-government, not-for-profit organisation, committed to the development of youth and sport. It is our responsibility to select, send and fund Australian Teams to the Olympic Games.

AUSTRALIAN PARALYMPIC COMMITTEE

Address: 1 Herb Elliott Avenue, Sydney Olympic Park NSW 2127
Tel: +61 2 9704 0500
Email: info@paralympic.org.au
Website: https://www.paralympic.org.au/
About: The Australian Paralympic Committee is responsible for preparing the Australian Paralympic Summer and Winter Teams for the Paralympic Games, which they have done successfully since 1990. At the Rio 2016 Paralympic Games, Australia placed fifth on the gold medal tally with 22 gold, 30 silver and 29 bronze medals out of 159 countries.

AUSTRALIAN SPORTS BETTING

Website: http://www.aussportsbetting.com/
About: Australia Sports Betting providing tools, data, news and other resources for sports betting enthusiasts. This includes analysis of upcoming fixtures, and excel betting tracker, bookmaker promotions, forum, online calculators, bookmaker odds comparison, live scores, historical betting data, head to head form guides, bookmaker reviews, bookmaker margin surveys and betting tips. They also publish a weekly newsletter.

AUSTRALIAN SPORTS FOUNDATION

Address: Leverrier Street, Bruce (Canberra) ACT 2617
Tel: +61 2 5112 0990
Email: Online form
Website: https://asf.org.au/
About: The Australian Sports Foundation helps Australian fundraise to achieve their sporting dreams. It was founded by the Federal Government in 1986 and has helped over 1600 athletes, organisations and sporting clubs, from the grassroots level through to the elite, to raise more than $350 million to fund their sporting projects and needs.

AUSTRALIAN SPORTS TECHNOLOGY NETWORK

Address: 140 William Street, Melbourne VIC 3000
Email: info@astn.com.au
Website: http://astn.com.au
About: Established in 2012, the Australian Sports Technologies Network is an industry-led Australian eco-system of organisations providing leadership in the commercialisation, development and promotion of Australian-inspired sports technologies.

COMMONWEALTH GAMES AUSTRALIA

Address: Level 2, 180 Albert Road, South Melbourne VIC 3205
Tel: +61 3 9453 9300
Email: enquiries@commonwealthgames.com.au
Website: https://commonwealthgames.com.au
About: Commonwealth Games Australia (CGA) is a member-based organisation (their members are the National Sporting Organisations (NSO's) representing the sports participating in Commonwealth Games), which receives no Federal Government funding and exists to administer, control and coordinate the participation of program sports and their respective athletes and officials in the Commonwealth Games.

DISABILITY SPORTS AUSTRALIA

Address: 8 Parkview Drive, Sydney Olympic Park NSW 2127
Tel: +61 2 8736 1221
Email: info@sports.org.au
Website: https://www.sports.org.au/
About: Disability Sports Australia is Australia's peak national body representing athletes with a physical disability, coordinating the efforts of 10 highly committed and active mainly State-based wheelchair and physical disability sports groups.

FREE TV AUSTRALIA

Address: 44 Avenue Road, Mosman (Sydney) NSW 2088
Tel: +61 2 8968 7100
Email: Online form
Website: https://www.freetv.com.au/
About: As the peak industry body for Australia's commercial free-to-air broadcasters, Free TV Australia advances the interests of its members in national policy debates, positions the industry for the future in technology and innovation and highlights the important contribution commercial free-to-air television makes to Australia's culture and economy.

RACING AND SPORTS

Address: Weston Creek (Canberra), ACT 2611
Tel: +61 2 6288 4080
Email: support@racingandsports.com.au
Website: https://www.racingandsports.com/
About: Racing And Sports provides free on-line information for the racing community. Every day the Racing And Sports website offers users important details such as the acceptances, scratchings, barrier trials and jockey/trainer data.

SPORTS AUSTRALIA

Address: Leverrier Street, Bruce (Canberra) ACT 2617
Tel: +61 2 6214 1111
Email: Online form
Website: https://www.sportaus.gov.au/
About: The Australian Sports Commission (ASC) is the Australian Government agency responsible for supporting and investing in sports and physical activity at all levels.

SPORTS CONTRACTORS' ASSOCIATION

Address: Mona Vale (Sydney) NSW
Email: admin@sportscontractors.com.au
Website: https://www.sportscontractors.com.au/home
About: The Sports Contractors Association Limited (formerly known as the Tennis Court & Sportsfield Builders Association) is a not-for-profit industry association representing the most experienced, technically advanced sports surface builders and sporting equipment suppliers in Australia and New Zealand. Members directory via this link.

SPORTS & PLAY INDUSTRY ASSOCIATION

Address: Mona Vale (Sydney) NSW
Email: office@sapia.org.au
Website: https://www.sapia.org.au/
About: The Sports and Play Industry Association is the peak industry body for sports and recreation construction in Australasia. Their members are specialists in the design, construction, installation, maintenance, manufacture, supply and testing of sports and play spaces, both domestic and commercial.

SPORTS TURF ASSOCIATION

Address: Sandringham (Melbourne) VIC 3191
Tel: +61 2 9654 9130
Email: info@sportsturf.asn.au
Website: http://www.sportsturf.asn.au/
About: STA Australia is an association dedicated to the development and professionalism of sports turf management. The STA Australia Committee is made up of representatives from the various STA states. Click here for the trade directory.

8. SOURCES

8.1 IBISWORLD

- Horse and Sports Betting in Australia (March 2019)
- Horse and Dog Racing in Australia (March 2020)
- Online Event Ticket Sales in Australia (February 2020)
- Sports Administrative Services (April 2019)
- Sports and Athletic Field Construction in Australia (June 2019)
- Sports and Recreation Facilities Operation in Australia (March 2019)
- Sports in Australia (March 2020)

8.2 OTHERS

- ABC News, ABC strikes deal with FFA to become free-to-air home of football in Australia, 04.10.2019
- AusGolf, Website
- Australian Greyhound Racing, Website
- Australian Olympic Committee, 2032 Olympic Games Candidature
- Australian Sport Commission, Connecting Digital and Technology to Sport 2019
- Australian Sport Commission, Corporate Plan 2019-2023
- Brisbane Times, Queensland to bid for 2032 Olympic Games, 9.12.2019
- Canstar Blue, Australian Pay TV & Streaming
- Canstar Blue, beIN SPORTS: Review & Guide (October 2019)
- Canstar Blue, Go Fetch: A Guide to Fetch TV (June 2019)
- Clearing House for Sports, Website
- CMO, The sports streaming service that allows customers a team pause, 12.03.2020
- Compare TV, Streaming Sport in Australia
- Cycling Tips, Why Wollongong? How New South Wales got the 2022 Road World Championships, 11.10.2018
- Forbes, FIFA Inspectors Assess Potential Hosts Of 2023 Women's World Cup, 02.03.2020
- Fox Sport, Sydney, Australia announced as host for 2022 FIBA Women's Basketball World Cup, 27.03.2020
- Infrastructure NSW, Stadium Australian redevelopment
- KPMG, SportsTech – a growing startup landscape in Victoria, Article (August 2019)
- KPMG, SportsTech report (August 2019)
- KPMG, Stadium Ownership report (2017)
- News.com.au, Queensland 2032 Olympic Games bid explained, 10.12.2019
- PwC, Artificial Intelligence Application in the Sports Industry (February 2019)
- SBS, Dates for Wollongong 2022 worlds confirmed, 30.09.2019
- SBS, Australia, NZ 'considered the front-runners' as World Cup bidding race heats up, 10.03.2020
- SportBusiness, Melbourne Unrivalled, 7.11.2018
- Sports Australia, Sport 2030 report (2018)

- Sports Australia, AusPlay Survey (April 2019)
- Sports Australia, website
- The Guardian Australia, Subscribers flee Foxtel and Kayo as sport seasons cancelled due to coronavirus, 26.03.2020
- WhatPhonePlan, OVO Play: Your Go-To App for Uninterrupted Live Sports and Data Rewards
- Website of Basketball Australia, Sydney to host FIBA Women's Basketball World Cup in 2022, 27.03.2020
- Website of FIBA, Australia announced as host of the FIBA Women's Basketball World Cup in 2022, 26.03.2020
- Website of Sports Community, Open Grants
- Website of the NSW Government Office for Sport, Greater Sydney Sports Facility Fund
- Website of the Premier of Victoria, Media Release: Communities To Win Through Sports Facilities Grants, 11.11.2019
- Website of UCI, 2022 UCI Road World Championships awarded to Wollongong (Australia), 05.10.2018
- Whistle Out, 7 Ways to Stream Sport in Australia (June 2019)
- Whistle Out, Foxtel Now: Everything you need to know (September 2019)

Date of publication: 04/2020