



Flanders
State of the Art



SPORTS TECHNOLOGY

IN AUSTRALIA

FLANDERS INVESTMENT & TRADE MARKET SURVEY

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.



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		Population at 30 Jun 2019
	Number	Per cent	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)

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



The sector’s largest segment is sports administrations¹. 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 Football² 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 sector growth, with the sector’s revenue expected to rise by 2% in the current year.

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.



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.



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



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.

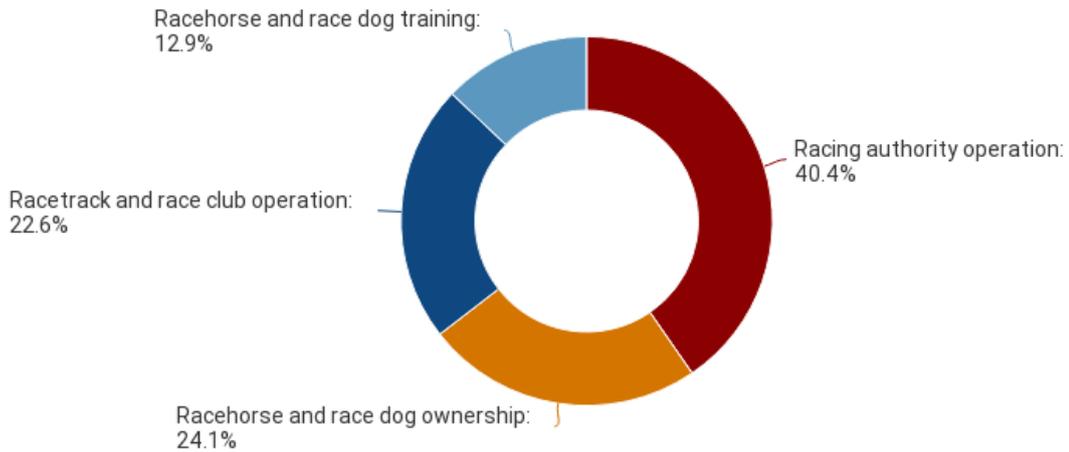
In contrast, many industry operators have benefited from increased expenditure on dining, catering and hospitality offerings over the past five years. Most of the industry’s major players have successfully targeted high-value consumers, including inbound international tourists. Furthermore, large race 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.

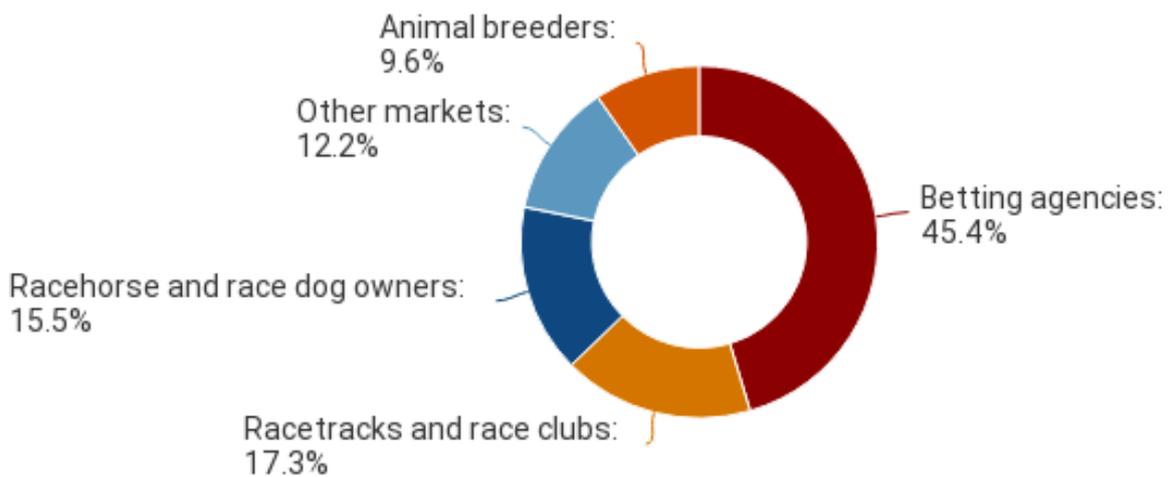


These challenges will continue to negatively affect the industry's performance over the next five years. Forecast declines in per capita gambling expenditure are anticipated to negatively affect many industry operators over the next five years. Continued declines in thoroughbred, harness and greyhound 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.

Industry Products & Services Segmentation



Industry Major Market Segmentation



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.

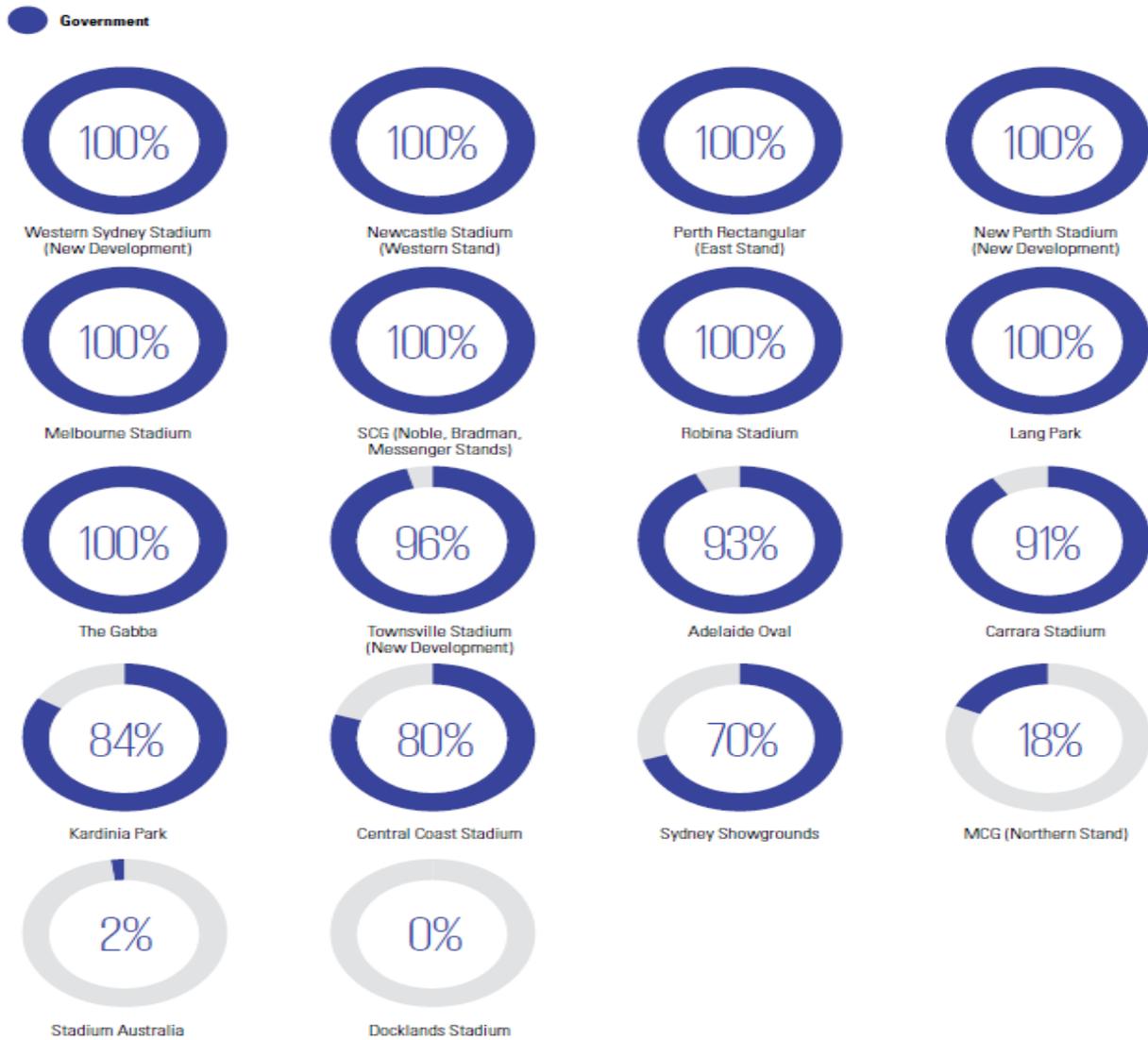
The Australian federal Government invested more than \$600 million in sports infrastructure nationwide in the period 2013-2018. In 2018 it released [Sport 2030](#), Australia’s first national sports plan which represents the Australian Government’s long-term commitment to seeing Australian sports thrive. 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:



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.



4.3 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



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.



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.

[Please contact [FIT Melbourne](#) for the list and contact details of the major industry players]

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:

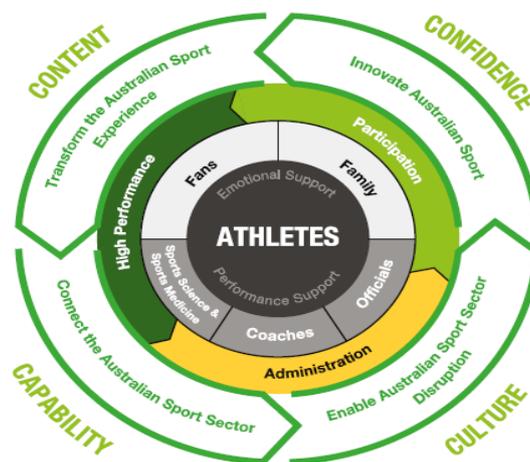
Connecting Digital and Technology with Australia’s Competitive Sport Obsession

Transform the Australian Sport Experience

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

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.



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.

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.



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



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.

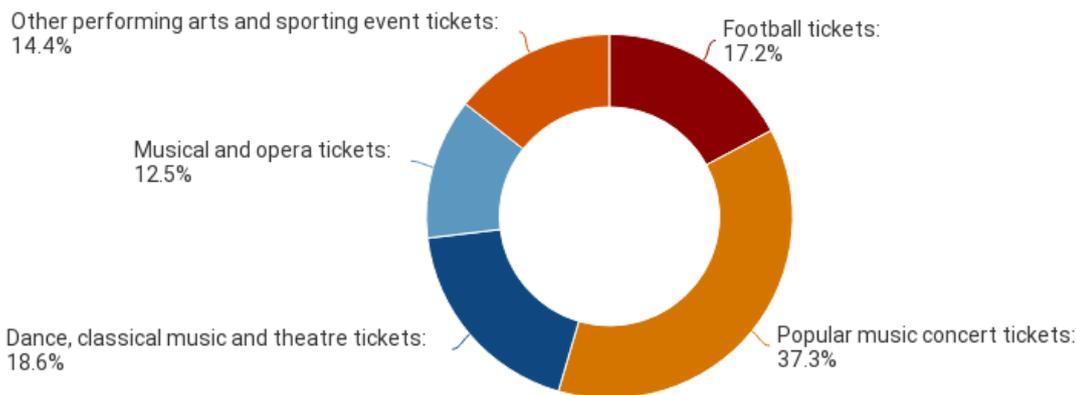


As the online space becomes increasingly saturated, online and mobile ticketing adoption rates are anticipated to have less influence on industry revenue over the next five years. As a result, consumer sentiment and discretionary income are projected to primarily influence the industry’s long-term performance 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.

Industry Products & Services Segmentation

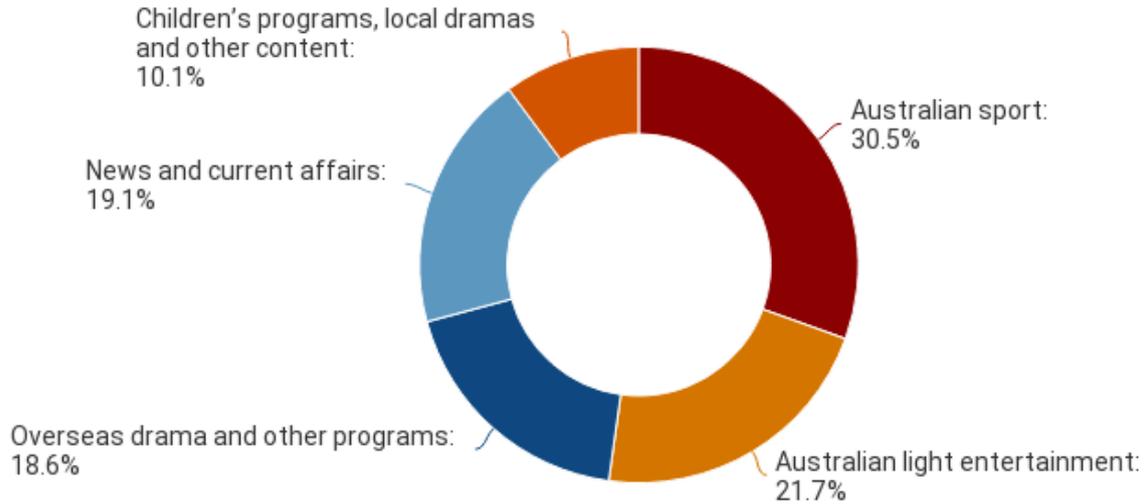


The football tickets segment includes tickets sold online to Australian Rules, Rugby League, Rugby Union and soccer matches. While sporting events are the most popular form of live entertainment in Australia with high attendance rates, tickets are also sold through club memberships and box office locations 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.



6.3.1.2 Products and Services

Industry Products & Services Segmentation



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.

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 services such as Netflix and Stan.

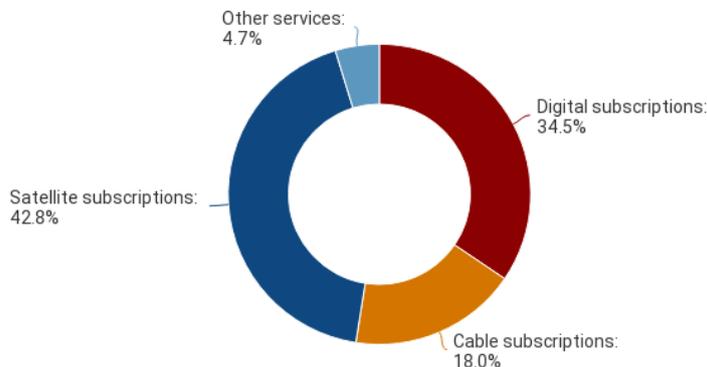
Key Statistics Snapshot



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.

Industry Products & Services Segmentation



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.

Over-The-Top (OTT) media services are 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.

[For a list of the major TV networks, Pay TV and Streaming Channels, please contact [FIT Melbourne](#)]



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- Horse and Dog Racing in Australia (March 2020)
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