

NetballWA

STRATEGIC FACILITIES PLAN 2024 - 2034



PRINCIPAL PARTNER





PRINCIPAL PARTNER



Department of
Local Government, Sport
and Cultural Industries



TABLE OF CONTENTS

EXECUTIVE SUMMARY	5
1. INTRODUCTION	7
1.1 Methodology	7
1.2 Structure of the Strategy	7
2. STRATEGIC FRAMEWORK	8
3. DEMOGRAPHIC AND COMMUNITY PROFILE ANALYSIS	9
3.1 Western Australia	9
3.2 Netball WA Regions	10
4. NETBALL IN WA	15
4.1 Netball WA Competition and Program Structure	15
4.2 Association Hierarchy	16
5. PARTICIPATION AND PLAYER MEMBERSHIP	18
5.1 National Netball Participation	18
5.2 Netball WA Player Membership and Participation	18
6. PLAYER PARTICIPATION TREND ANALYSIS	25
6.1 Woolworths NetSetGO Participation	25
6.2 Junior Participation	26
6.3 Senior Participation	27
7. MARKET SHARE AND FORECAST PLAYER NUMBERS	29
7.1 Market Share	29
7.2 Forecast Player Numbers	30
8. BENEFITS OF NETBALL	32
8.1 Benefit Overview	32
8.2 Measuring Netball WA Activity	34
8.3 Monetising Netball WA Benefits	35
9. KEY FINDINGS	37
9.1 Demographic and Community Profile	37
9.2 Player Membership Analysis	37
9.3 Player Participation Analysis	37



PRINCIPAL PARTNER



Department of
Local Government, Sport
and Cultural Industries



9.4 Market Share	38
9.5 Benefit of Netball in WA	38
9.6 Competition Structure	39
10. EXISTING FACILITIES	40
10.1 Netball Facility Audit	40
10.2 Current Facilities and Challenges	42
10.3 Key Findings	44
11. FUTURE FACILITY REQUIREMENTS	45
12. FACILITY HIERARCHY, RATIONALE AND PRINCIPLES	47
12.1 Facility Hierarchy	47
12.2 Facility Provision Rationale and Principles	48
13. STRATEGIC FACILITY PRIORITIES BY REGION	51
13.1 Great Southern Region	51
13.2 Midwest Gascoyne Region	55
13.3 North West Region	59
13.4 Peel Region	63
13.5 Metropolitan Region	67
13.6 South West Region	71
13.7 Wheatbelt Goldfields Region	75
14. GLOSSARY	78
15. FIGURES	79
16. TABLES	80

FORWARD

From our humble beginnings in 1924, Netball has grown and developed over the past 100 years.

The sport has been propelled forward by dedicated and trailblazing women, passionate volunteers and supportive communities which have helped it to survive and thrive.

In the year that we are celebrating 100 years of Netball in Western Australia, Netball WA has developed a new **Strategic Facilities Plan** which will guide the planning and investment in new developments and redevelopments for the next decade.

Netball is currently the largest participation sport for girls and women in Western Australia and with the expected growth, the need for new and improved facilities will be vital to ensure Netball remains the sport of choice for females in this State.

Our Strategic Facilities Plan has two core focuses:

- The upgrade and maintenance of our current facilities; and
- Where our sport has identified, new facilities need to be built.

We have developed this plan in conjunction with the more than 70 netball associations and 900 clubs who deliver our sport, week-in, week-out. Using the first-hand information provided by our grassroots volunteers combined with a scientific approach, looking at population growth and netball demand, we have been able to develop a detailed analysis of what is required so everyone is able to play and participate in Netball in Western Australia.

This plan provides the framework to assist all levels of government as to where their investment in netball needs to be directed from 2024 to 2034.

It is tremendous to see the interest in Netball continue to grow and we will be working with Local, State and Federal Governments, along with private enterprise, to secure the investment we need to ensure we have the facilities to continue to grow our sport.

The development of this plan goes hand-in-hand with the key strategic objectives outlined in Netball WA's Strategic Plan, as we look to engage all West Australians to Play, Grow and Inspire through the power of Netball.

Netball WA would like to thank the Department of Local Government, Sport and Cultural Industries for its continued support of Netball right across the state, as well as its assistance in the development of this plan.

We would also like to acknowledge and thank our Principal Partner, the Gold Industry Group, and our Major Partners: Heathway, Fortescue and the Insurance Commission of WA, for their unwavering support of Netball in Western Australia.

Netball WA is looking forward to the next decade and working with all stakeholders as we implement this new Strategic Facilities Plan as we continue to Grow, Play and Inspire through the power of Netball.



SIMONE HANSEN

Chief Executive Officer

EXECUTIVE SUMMARY

The Netball WA Strategic Facilities Plan (SFP) provides the strategic direction for the provision of netball facilities, inclusive of on-court and off-court facilities, across the State for the next 10 years.

The SFP provides key information on netball facility development and compliance for associations, clubs and key stakeholders to ensure there is an accurate understanding of on-court and off-court facility requirements, the facility development process, and to ensure existing facilities are adequately maintained, thereby providing a safe environment for players, officials, volunteers and spectators.

The development of the SFP comes at a time when netball participation and membership levels in WA have never been stronger. Nationally, WA accounts for 12.5% of all netball participation, whilst comprising of 11% of the Australian population. Netball WA memberships increased by 2,132 members (4.6%) since 2019, with Peel being the only region to experience a notable decline in membership in 2023, which can be attributed to issues with court access.

The benefit of netball in WA is also significant. The annual value of member activity is estimated to be approximately \$45. million with the annual volunteer replacement cost estimated at \$62.1 million. The total economic output of netball has been estimated at \$38.6 million and the indirect economic output (flow-on contribution) has been estimated at \$25.5 million.

In recent years, increased opportunities for girls and women to participate in organised sports, such as AFL, cricket and football has driven a substantial, positive change in participation and in the profile of women's sport. For netball however, a traditional female sport, the growth in female participation in other codes presents as a rising challenge. To date Netball WA has withstood this challenge and has demonstrated increased membership and participation in most areas. Where declining participation has been recorded, it is directly linked to inadequate or insufficient facilities.

Netball WA is now facing the challenge of securing access to enough suitably located, compliant indoor and outdoor courts and appropriate off-court facilities to meet the needs of this growing sport. Adequate facility provision is fundamental to ensuring that netball is able to defend and grow its market share. It is also critical to ensure that the needs of netball consumers are being met and that facility provision is able to provide the necessary flexibility to meet changing consumer needs and offer appealing netball formats into the future.

In doing so, Netball WA will need to continue its proactive engagement with key stakeholders to achieve the desired facility outcomes. These include State and Local Governments in the planning, funding and operation of netball facilities, other State Sporting Organisations in collaborative accommodation and event hosting situations; and the education sector where netball court provision is the most prolific, albeit frequently substandard and challenging to access.

Importantly, the SFP identifies facility provision which is consistent with the level of netball activity being undertaken and, at a community level, facilities which are multi-use in nature. Fundamental to this provision, Netball WA recognises the need for facility use to be optimised, providing maximum benefit to the community.

The outcomes of the SFP have been developed through:

- Review and analysis of the strategic context within which Netball WA currently operates.
- Analysis of the demographic profile of participants at a state and regional level.
- Analysis of netball participation at a national and state level.
- Analysis of Netball WA's player membership at a state and regional level.

- Analysis of Netball WA's market share of netball participation within the state.
- Key stakeholder engagement to understand current issues, needs and opportunities in respect to current and future facility provision.

The SFP has also considered key trends and influences which impact on facility provision. These include:

- Increased female participation in organised sport and the impact on netball's market share.
- Climate change and the various impacts this will continue to have on netball participation within the different netball regions across the state.
- The emerging netball participation by men and boys and the rise in mixed netball.
- The ongoing evolution of the Gold Industry Group WA Netball League and the competition structure of netball within WA, and its alignment with metropolitan and regional netball participation.

The foundation of the SFP comprises of two distinct components, being a rationale for netball facility provision and the framing of a suite of principles to guide the provision of facilities over the next years to 2034.

Facility Provision Rationale

- Maximise netball participation – all forms of the game, all ages, all genders.

This will require the development of a:

- o Player attraction and retention strategy
- o Volunteer attraction and retention strategy
- o Officials attraction and retention strategy
- Support netball talent identification and development
 - o Develop pathways from NetSetGO to Junior to Senior to Masters and Academy to GIG WANL
 - o Promote players to representative teams (Association, regional and state) and from Fever Reserves to West Coast Fever
- Maximise facility utilisation – extend activities into the off-season to grow participation and secure regular and adequate venue access

Guiding Principles

- Ensuring compliance for both indoor and outdoor courts with Netball Australia's facility standards.
- Facility development to a standard that is consistent with the level of netball activity, as outlined within the SFP hierarchy.
- Off-court facility provision based on the Netball WA Facility Hierarchy and Standards.
- Advocate to key stakeholders for greater indoor court accessibility and targeted court access within the education sector.

The facility provision rationale and guiding principles provide the basis for the development of the strategic facility requirements identified within each of the seven Netball WA regions. The strategic facility requirements of each region have been reported separately based on the key trends and influences, facility issues and requirements specifically identified within the region. To ensure the facility needs of the netball consumer are met over the next 10 years, the SFP identifies facility requirements over a short, medium and long term period.

1. INTRODUCTION

The purpose of the Netball WA Strategic Facilities Plan (SFP) is to provide the strategic direction for the provision of netball facilities, inclusive of on-court and off-court facilities, across the State for the next 10 years.

The SFP provides key information regarding the development and compliance of netball facilities for associations, clubs and key stakeholders. In doing so, the key outcomes being sought are to ensure there is an accurate understanding of on-court and off-court facility requirements, the facility development process, and to ensure that existing facilities are adequately maintained, thereby providing a safe environment for players, officials, volunteers and spectators.

The methodology used in the development of the SFP has sought to ensure a thorough understanding of the strategic and operational context in which Netball WA operates.

Objectives

The objectives of the SFP are to:

- Provide an integrated and strategic approach to the future planning and provision of netball facilities across all metropolitan and country regions over the period 2024–2034;
- Guide key stakeholders in the assessments of key netball facility infrastructure and investment requirements; and
- Provide guidance to key stakeholders through the planning and development process for the provision of new facilities and refurbishment of existing facilities.

1.1 METHODOLOGY

The methodology used in the preparation of the SFP has included the following key stages:

1. Strategic context and literature review
2. Demographic and community profile analysis
3. Netball participation and player membership analysis
4. Facility inventory and mapping
5. Stakeholder engagement
6. Facility hierarchy
7. Facility provision rationale, principles and guidelines
8. Development of region priorities

1.2 STRUCTURE OF THE STRATEGY

The SFP comprises of two parts:

Part 1: Strategic Context and Technical Review

This plan includes the detailed research, data and analysis relevant to each stage of the methodology and reported on an individual region, association or club level. It is intended that this is primarily a reference document for Netball WA staff and secondly, for all netball enthusiasts.

Part 2: Strategic Facilities Plan

This document provides an overview of the key considerations and outcomes with regionally focused strategic facility requirements.

2. STRATEGIC FRAMEWORK

The SFP has been developed within the context of the Netball WA Strategic Plan 2023–2025¹, taking into consideration the following:

- Vision: “To be the best on and beyond the court.”
- Purpose: “To dream, play and achieve through the power of netball.”
- Strategic Pillars
 - o **Play:** Increase junior participation, increase diversity and inclusiveness.
 - o **Grow:** Increased membership base, build a strong revenue and commercial base, diversity revenue and enhance the return on investment of our stakeholders.
 - o **Inspire:** Evolve high performance pathways, prioritise well-being and create a culture that supports, empowers and inspires, and driving positive social outcomes within the community.
- Enablers
 - o Team Excellence
 - o Technology
 - o Governance
 - o Partnership

The SFP also aligns to the Netball Australia National Facilities Policy objectives and principles, as outlined below:

Objectives

- Support participation growth and sustainability
- Provide key stakeholders with guidance in facility planning and development
- Provide a technical manual that can be applied nationally
- Improve the overall consistency, quality and accessibility of netball facilities

Guiding Principles

- Strategic need, facility demand and participation growth opportunities
- Accessibility and inclusion, catering for multiple formats of the sport
- Maximising utilisation and improved programming
- Best practice technical and design standards
- Alignment with the needs of key stakeholders and partners

¹ Netball WA Strategic Plan (2023 - 25) [Governance - Netball WA](#)

3. DEMOGRAPHIC AND COMMUNITY PROFILE ANALYSIS

3.1 WESTERN AUSTRALIA

At the state level, the analysis has been undertaken using the Australian Bureau of Statistics (ABS) 2021 Census of Population and Housing data². While at a regional level, the data has been collated from the ABS and Local Government area data relevant to each region³.

The analysis focuses on the areas of age, cultural background, family structure, mobility – (income levels), SEIFA index (of relative advantage/disadvantage) and housing. These are important factors which influence participation across age and gender cohorts.

Five-Year Age Cohort Analysis

The comparative population per the ABS five-year age cohort between 2016 and 2021 has been illustrated in the figure below⁴.

As can be seen, there has been an increase in population within the five to nine years, the 10 to 14 years (significant increase of over 20,000 people), 15 to 19 years (minor increase of 3,265) and the 35 to 39 years age cohorts. The balance of the cohorts has experienced a reasonable degree of growth, ranging from 2,045 people (45 to 49 years) through to 32,289 people (70 to 74 years). A decrease in population has occurred within the 20 to 24 years and the 25 to 29 years age group.

The steep decline in the number of young people, from the 15 to 19 years cohort through to the 25 to 29 years age cohort, presents a risk to netball within WA as these are key market cohorts. The balance of the cohorts has experienced a reasonable degree of growth, ranging from 330 people (80 to 84 years) through to 772 people (45 to 49 years.)



Figure 1: WA Age Cohorts - Change In Population Number 2016 - 2021

² [2021 Western Australia, Census Community Profiles | Australian Bureau of Statistics \(abs.gov.au\)](https://abs.gov.au)

³ [Stat Data Explorer \(BETA\) • Data by region 2011-2022, by LGA \(ASGS Ed. 3, 2021\) \(abs.gov.au\)](https://abs.gov.au)

⁴ [2021 Western Australia, Census All persons QuickStats | Australian Bureau of Statistics \(abs.gov.au\)](https://abs.gov.au)

Cultural Background

The State’s Aboriginal and Torres Strait Islander population is 3.3% of the total population. 38% of the State’s population being born overseas with the top five countries of birth being the United Kingdom (7.4%), New Zealand (2.8%), India (2.3%), South Africa (1.7%) and the Philippines (1.4%).

Having an understanding of the cultural background of current and potential players is important to ensure that their cultural needs are met.

Income, Housing and Employment

Income, household types and employment are factors which influence participation in sport, in particular junior sport.

In terms of employment type, working full time is the dominant employment status at 57.1%, with part time at 32%, and unemployment is 5.1%.

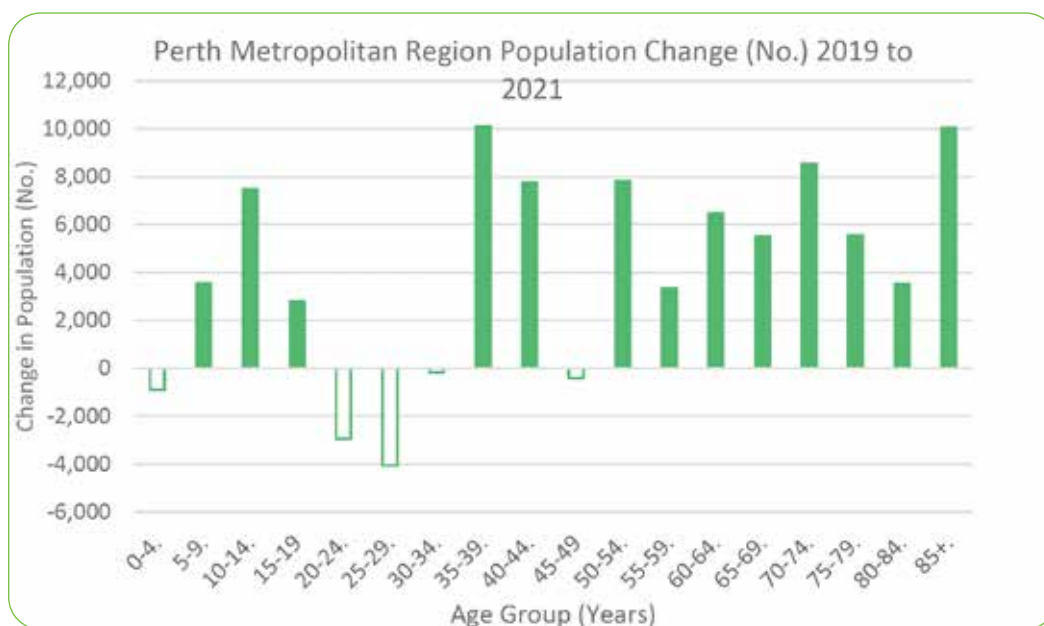
Personal, family and household weekly income levels have all increased over the period 2016 to 2021 (\$848.00, \$2,214.00 and \$1,815.00 respectively), noting that sports participation is routinely considered a discretionary expenditure item when there are cost of living pressures and accordingly, the affordability of netball is a key consideration.

In WA, the household type is predominantly Couples with Children (44.6%), with Couples Without Children being 38.8% of household types, and Single Parent Families being 15.1%. The structure of the family has implications in respect to parents being able to support their children in junior sport participation and also the ability to participate themselves.

3.2 NETBALL WA REGIONS

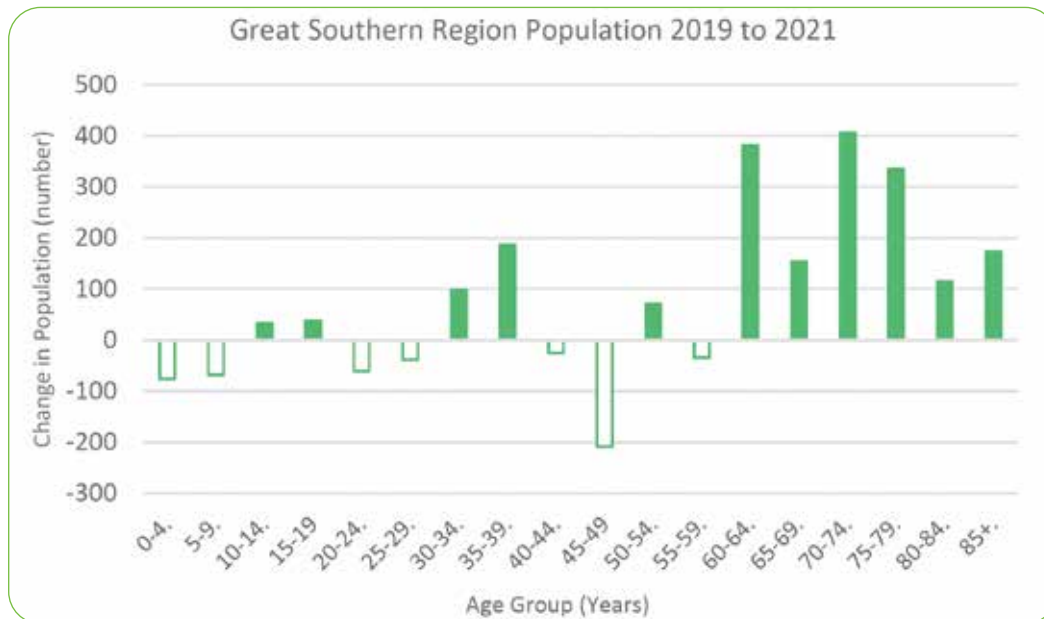
Perth Metropolitan

- The total population for the Perth metropolitan region (noting that Mandurah is excluded from this region) is 2,019,415 people.
- Overall, the population for the region has increased by 73,972, a 3.8% increase. As shown in the graphs below, growth has occurred in the key child age cohorts, with the 10 to 14 year age cohort increasing by 6%. The 5 to 9 years cohort grew by 3% and the 15 to 19 years cohort grew by 2%.



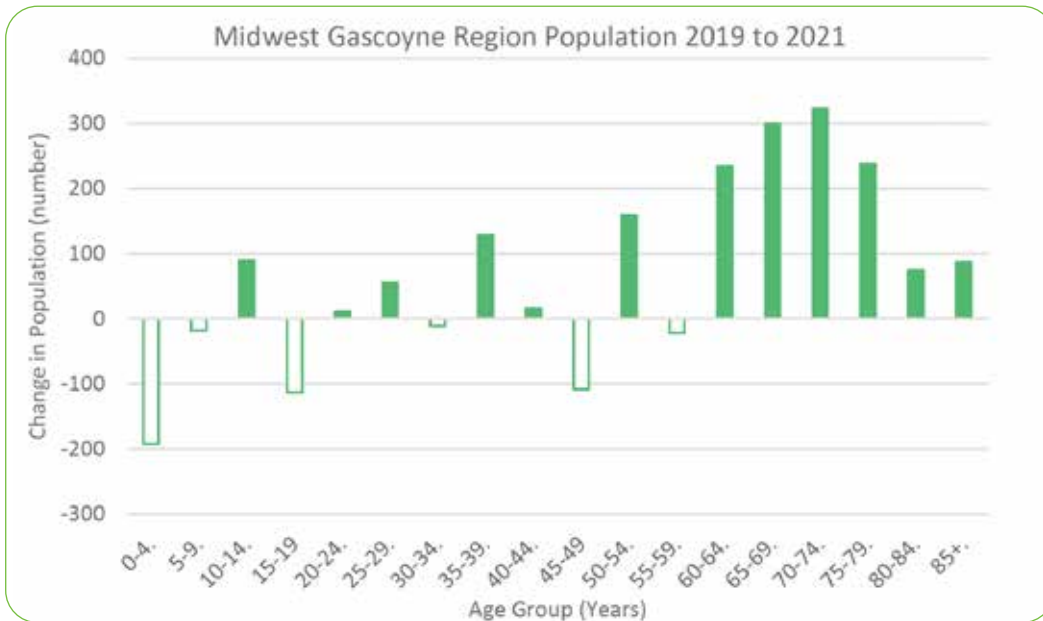
Great Southern

- The total population of this region in 2021 was 75,525 people.
- Albany has the largest population within the region at 40,115 (53%), followed by Esperance with 14,398 (19%). The smallest population centre is Gnowangerup with 1,260 (2%) of the region's population.
- Overall, the population within the region has increased by 1,480 people (2%) from 2019 to 2021. Concerningly for netball, minimal growth occurred in the child age cohorts, with a large decrease in the 0 to 4 and 5 to 9 year cohorts.



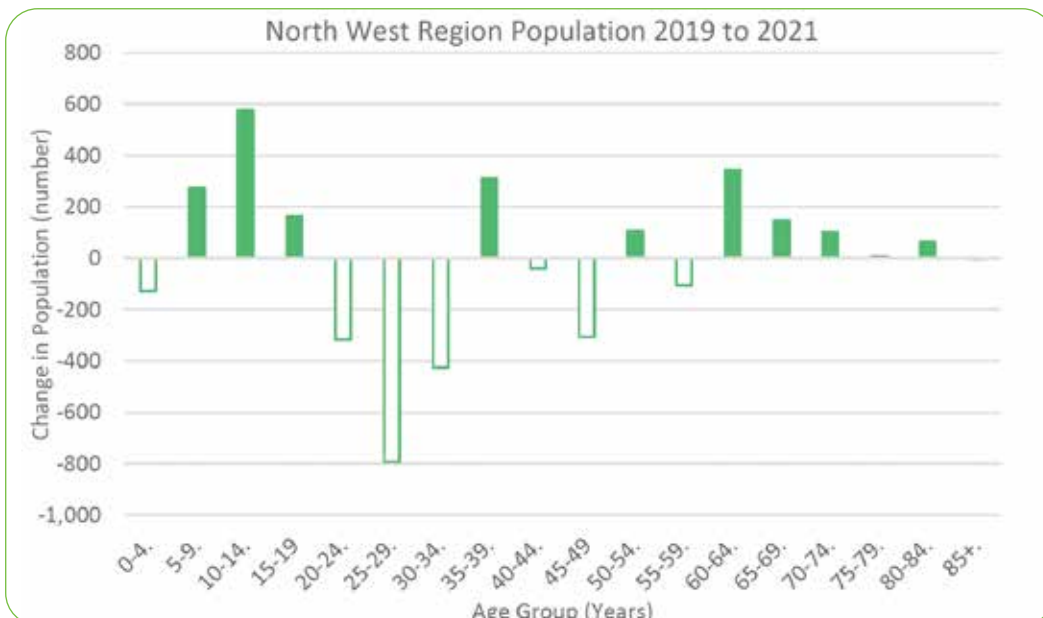
Midwest Gascoyne

- The total population of this region in 2021 was 75,525 people.
- Geraldton accounts for the bulk of the region's population with 41,198 (72%), followed by Carnarvon with 5,526 (10%). The balance of the towns within the region are under 6% of the total population.
- Overall, the population of the region has increased by 1,252 people (2.2%) from 2019 to 2021. It is worthy to note that the majority of the child age cohorts experienced a decline in this period, except for the 10 to 14 years age group (+90 people).



North West

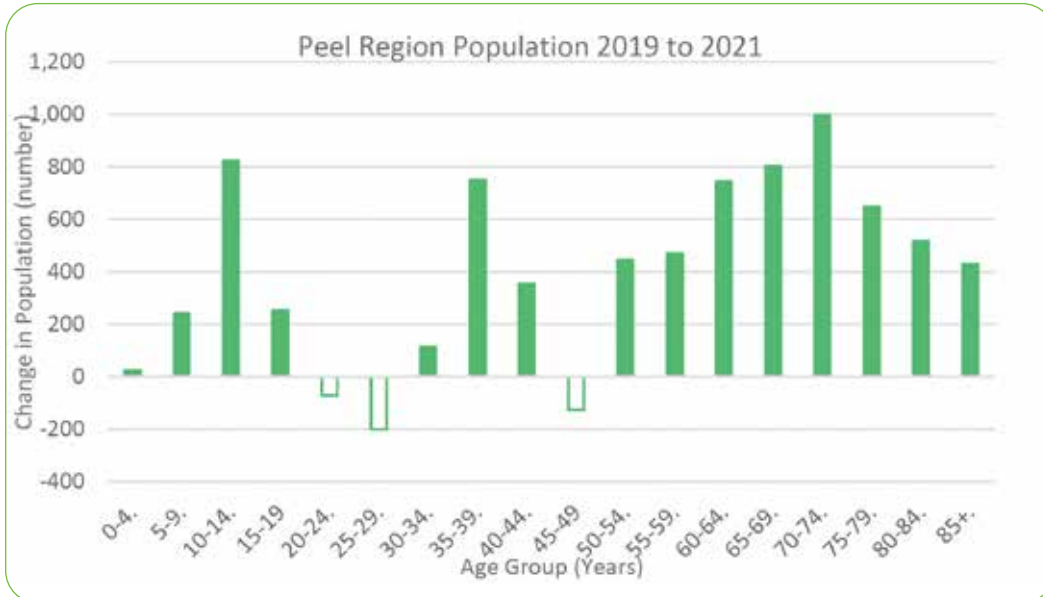
- The total population for the region in 2021 was 92,919 people.
- Karratha, Broome and Port Hedland account for 25%, 20% and 18% of the region’s total population (being 23,421, 18,209 and 16,660 people respectively).
- Overall, the population in the region has remained constant over the period 2019 to 2021, recording a small decrease of 23 people during this period. Unlike the Great Southern and the Midwest Gascoyne, the North West has experienced a growth in the child age cohorts.



Peel

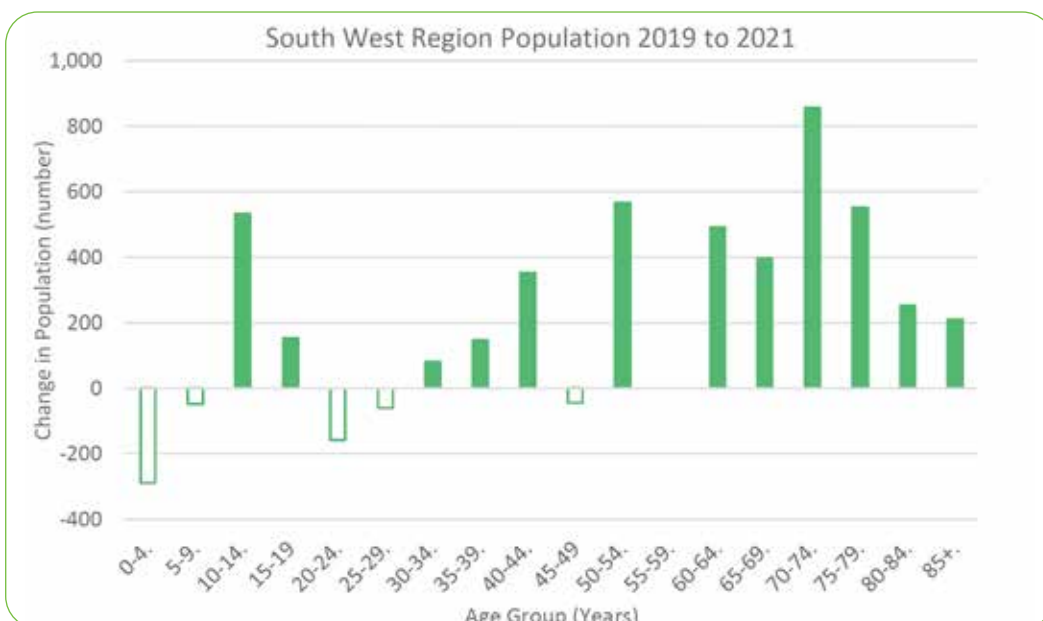
- The total population for the region in 2021 was 151,517 people.
- Mandurah accounts for the bulk of the region’s population with 93,414 people (62%). While Serpentine-Jarrahdale has 33,346 people (22%). Boddington and Waroona are the smallest with 1% and 3% of the region’s population.

- Overall, the population of the region has increased by 7,210 people (4.9%) from 2019 to 2021. It is notable that each of the child age cohorts have increased over this period, with the 10 to 14 year cohort increasing by more than 800 people.



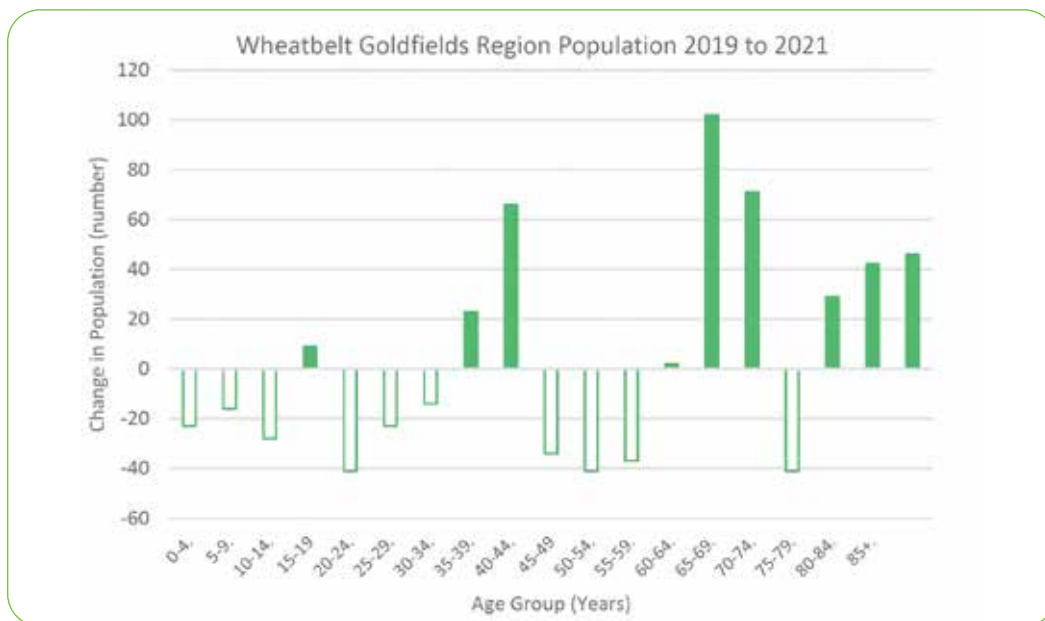
South West

- The total population for the region in 2021 was 154,620 people.
- Busselton and Bunbury account for almost half of the region’s population with 42,006 people (27% of the region’s population) and 34,148 people (22%) respectively. Harvey comprises of 19% of the population with 29,631.
- Overall, the population of the region has increased by 5,652 people (3.8%) from 2019 to 2021. The region has experienced growth in the age cohorts up to 19 years of age, with the 10 to 14 year age cohort increasing by 600 people. Both the 20 to 24 year and 25 to 29 year age cohorts have declined in number by 243 people and 134 people respectively.



Wheatbelt Goldfields

- The total population for the region in 2021 was 66,793 people.
- Kalgoorlie-Boulder and Northam has the bulk of the region’s population with 30,674 people (46% of the region’s population) and 11,810 (18%) respectively. York, Merredin and Dandaragan each have 5% of the region’s population, while Moora has 4%. The remaining 11 LGAs each have less than 1,450 people which equates to 2% or less of the region’s population.
- Overall, the population of the region has increased by 221 people (0.3%) from 2019 to 2021. As shown in the graph below, there has been a decline in almost all age cohorts up to 30 to 34 years, with an increase in all age cohorts from 60 to 64 years onwards.
- This has significant implications for netball, given the junior and senior player catchment has decreased. This is particularly challenging for those LGAs with smaller populations, as these decreases have a proportionally larger impact on player numbers.



4. NETBALL IN WA

4.1 NETBALL WA COMPETITION & PROGRAM STRUCTURE

The current Netball WA competition and program structure has been shown in the figure below. Given the broad range of netball participation, it is important that netball facilities are able to accommodate the different types of netball activities and programs, from the introductory participation programs through to association netball, player development pathways and elite level training and competition.

Netball Victoria⁵ identifies four categories of netball activity, which are relevant to the SFP:

1. Training and Competition;
2. Modified games and programs;
3. Training courses; and
4. Junior participation and skill development.

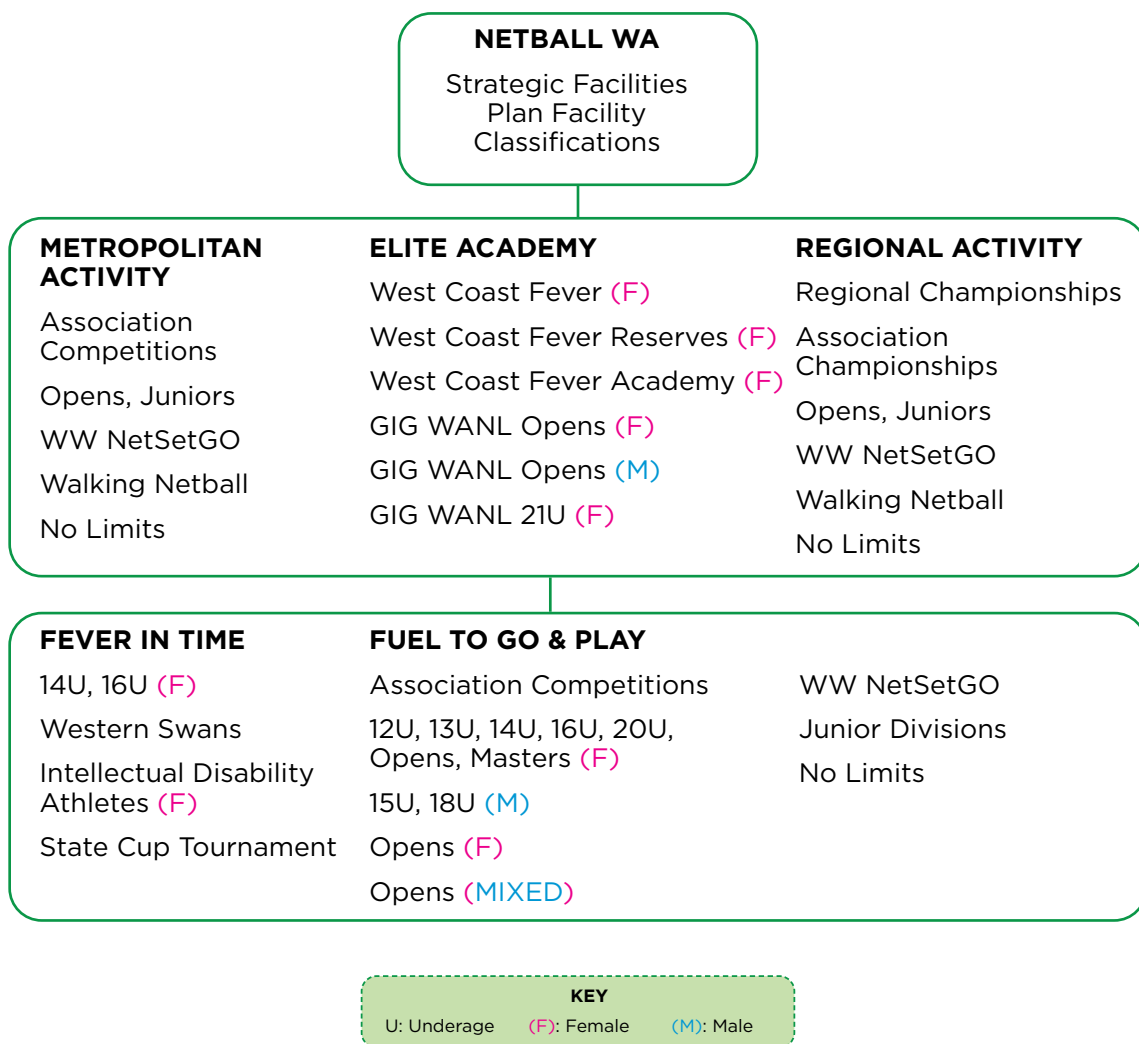


Figure 2: Netball WA Competition And Program Structure

⁵ Netball Victoria Facilities Manual [Facility Development - Netball VIC](#)

4.2 ASSOCIATION HIERARCHY

Netball WA classifies Associations hierarchically into tiers based on governance and development requirements, along with membership numbers and a qualifying suite of competition and program activities. For relevance and the purpose of the Strategic Facilities Plan, we have only outlined the membership and competition structures required for the Tiers.

CRITERIA	TIER 1	TIER 2	TIER 3	TIER 4
Association size	Based on previous year's membership of Primary and Secondary Registrations (of players, coaches and officials only)			
	450+	250-449	1-249	N/A
Minimum Competition Requirements	1x Senior Comp 1x Junior Comp 1x NetSetGO (all Program & Comp Tiers - Net, Set & GO) + 1 other Comp or program	1x Senior Comp 1x Junior Comp 1x NetSetGO (all Program & Comp Tiers - Net, Set & GO)	Minimum 2x Comps from list below: 1x Senior Comp 1x Junior Comp 1x NetSetGO 1x Program	Not Applicable WANL Clubs Independent NetSetGO Centres

Table 1: Association Classification By Tier

The Strategic Facilities Plan is, in the main, predicated on the development of Associations within Tiers 2 and 3, reflecting the current situation in which 98% of Associations currently have 400 players or less. This also acknowledges that the facility requirements to support Tier 1 Associations are significant and increasingly beyond the capacity of Local Governments, who are the main provider of netball facilities.

Over the course of the Strategic Facility Plan's implementation, it is expected that the number of associations affiliated with Netball WA will grow. This will have an effect on Netball WA's competition and program structure and also netball facility provision requirements.

The formation of new Associations can be either led by the community or Netball WA. In either situation, there are a number of key factors which need to be taken into consideration. These include:

- The formation of a new Association will generally be considered within a Tier 3 level to ensure the sustainability of existing Associations.
- The capacity of existing association(s) within the catchment area to meet the identified player demand. This includes:
 - o The capacity of the existing facilities to meet the additional demand;
 - o The ability of the Association's paid and volunteer resources to meet the additional demand; and
 - o The ability to expand existing facility provision.
- If the expansion of an existing Association(s) to accommodate the additional demand is not feasible, then Netball WA will lead the process to form a new Association.
- In doing so, Netball WA consider the rationalisation and /or consolidation of Associations to ensure the ongoing viability of the sport in the region, unless this will have an adverse impact on netball participation opportunities.

Netball WA Regions

Association and club-based netball activity is managed by Netball WA through a framework of seven regions covering the State. These regions are the:

- Great Southern
- Metropolitan
- Midwest Gascoyne
- North West
- Peel
- South West
- Wheatbelt Goldfields



5. PARTICIPATION AND PLAYER MEMBERSHIP

5.1 NATIONAL NETBALL PARTICIPATION

The Australian Sports Commission's current AusPlay data from October 2023⁶ shows that currently 623,900 adults (15 years+) and 315,400 children participate in netball activity nationally each year. This equates to 3.0% of the adult population and 6.5% of the child population nationally.

Points of interest in relation to netball participation at a national level include:

- Participation by gender is dominated by females, with 86% of adult and 97% of junior participation being female.
- Netball participation is highest in Victoria (27.7% of national participation), followed by New South Wales (25.8%), Queensland (20.2%), Western Australia (12.5%) and South Australia (9.2%). Tasmania, ACT and Northern Territory all have share of national participation under 1%.
- By comparison New South Wales has the highest percentage of the 2021 Australian population at 31%, followed by Victoria (25%), Queensland (20%), Western Australia (11%) and South Australia 7%.
- 91.2% of netball participation is organised, with 60.7% being through a sports club or association.
- Club female netball participation is at its highest level in the 12 to 14 year age cohort at 23.4%, declining to 14.6% (15 to 17 years) and 8.3% in the 18 to 24 year age cohorts.

5.2 NETBALL WA PLAYER MEMBERSHIP AND PARTICIPATION

Netball WA's player membership structure allows a player to have a primary and secondary membership (or registration), meaning that a player is able to play for more than one club at any one time. As a consequence, player membership data can be analysed through the lens of primary player memberships, where each player being counted once, or primary and secondary player membership, which captures all player participation.

The analysis supporting the development of the Plan is based on the primary and secondary player membership, which represents the full picture of player participation and therefore demand for netball courts and associated facilities.

Netball WA Membership

As at the end of the 2023 calendar year, Netball WA had a total primary player membership of 48,622, which is an increase of 4.6% from the 2019 number of 46,490. The comparative change in membership across the regions is illustrated in the figure below.

⁶ AusPlay Netball Report [Microsoft Power BI](#)

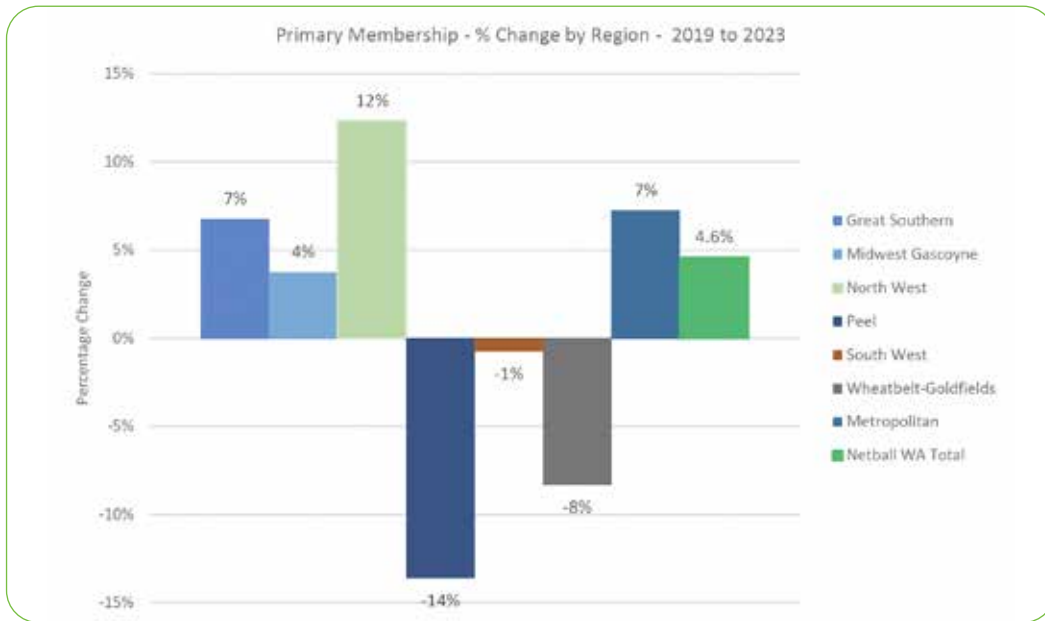


Figure 3: Player Primary Membership - Percentage Change 2019 to 2023

The strongest growth in membership over this period has been in the North West region, with 12%. While the Great Southern and Metropolitan regions have grown by 7% and the Midwest Gascoyne by 4%.

The largest decrease in membership has occurred in the Peel region (-14%), followed by the Wheatbelt-Goldfields (-8%) and the South West (-1%).

A breakdown of the annual percentage change in primary memberships per region is provided in figure 4. This chart reveals that 2020 and 2021 were impacted by the COVID-19 Pandemic, 2021 being the correction from the 2019 and 2020 shutdowns, with 2022 and 2023 indicating a more stable player membership base. The continued decrease within some regions may be due to the lingering effects of the pandemic, however it is more likely due to the increased availability of alternative sport options for females, in particular AFL, football and cricket. Cost of living pressures may also be an underlying cause.

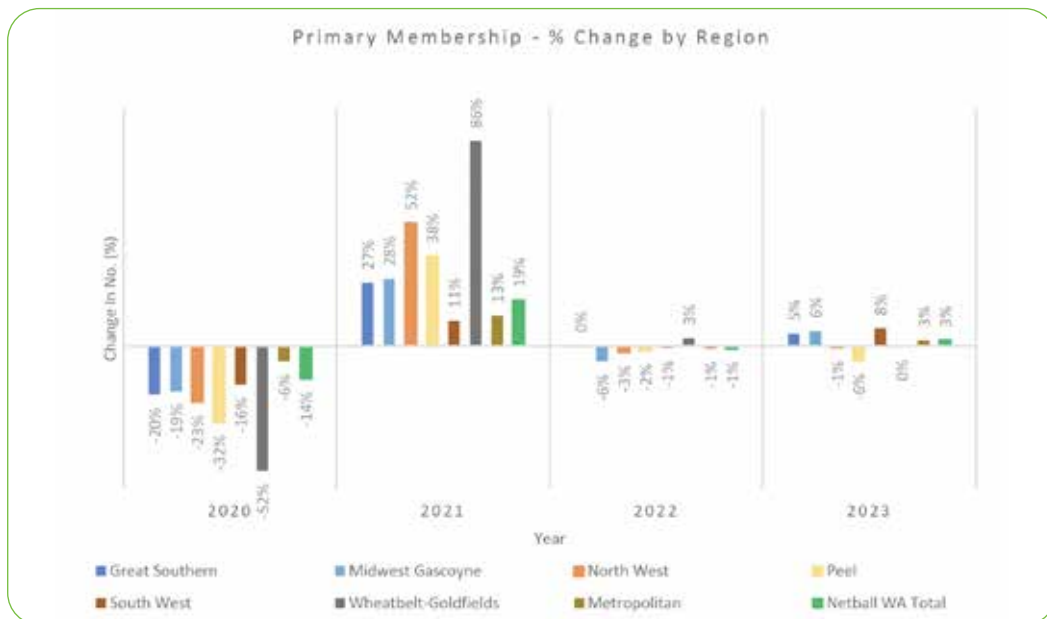


Figure 4: Primary Player Membership - Annual Percentage Change by Region

Metropolitan Region Player Participation

The Perth metropolitan region’s player membership is drawn from 14 Associations extending from Rockingham in the south, to Yanchep in the north and Eastern Hills in the east.

Key considerations arising from the analysis of the region’s player participation data includes:

- The total number of participating players within the metropolitan region is 46,470, comprising of 24,239 (52%) junior players, 7,955 (17%) senior players and 14,276 (30%) NetSetGO players (Figure 5).

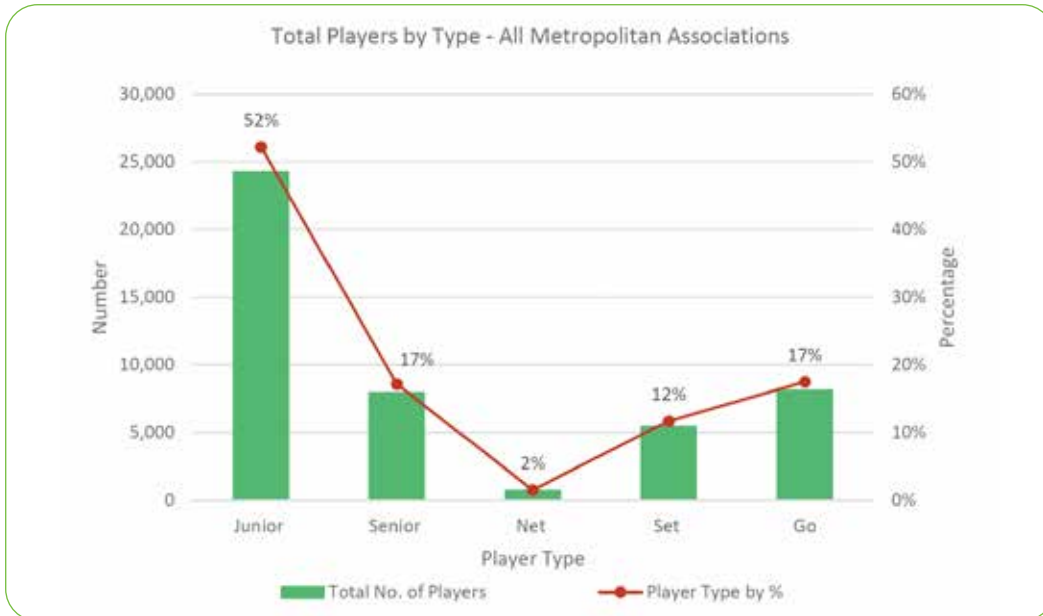


Figure 5: Total Players by Type - All Metropolitan Associations

- The Perth Association has the largest number of participating players with 10,599, followed by Wanneroo Districts (9,511) and Fremantle (5,679).
- The West Coast Men’s and Mixed Association has the least number of players at 74, with the WA Independent Netball Centres having 235 players and the South Midlands Association 202 players (Figure 6).

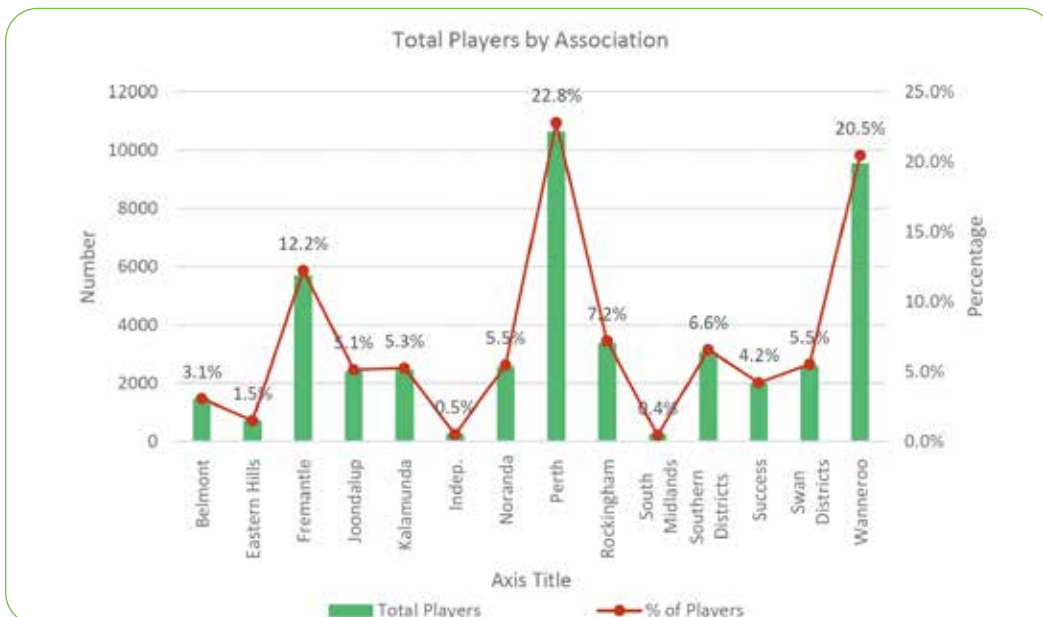


Figure 6: Total Players by Association

- On the basis of player type by Association, the Perth and Wanneroo Associations have the highest level of NetSetGO participants, while Perth has the highest level of junior player participants and Wanneroo has the most senior players.
- Player type as a percentage of total Association players is shown in Figure 7 below.

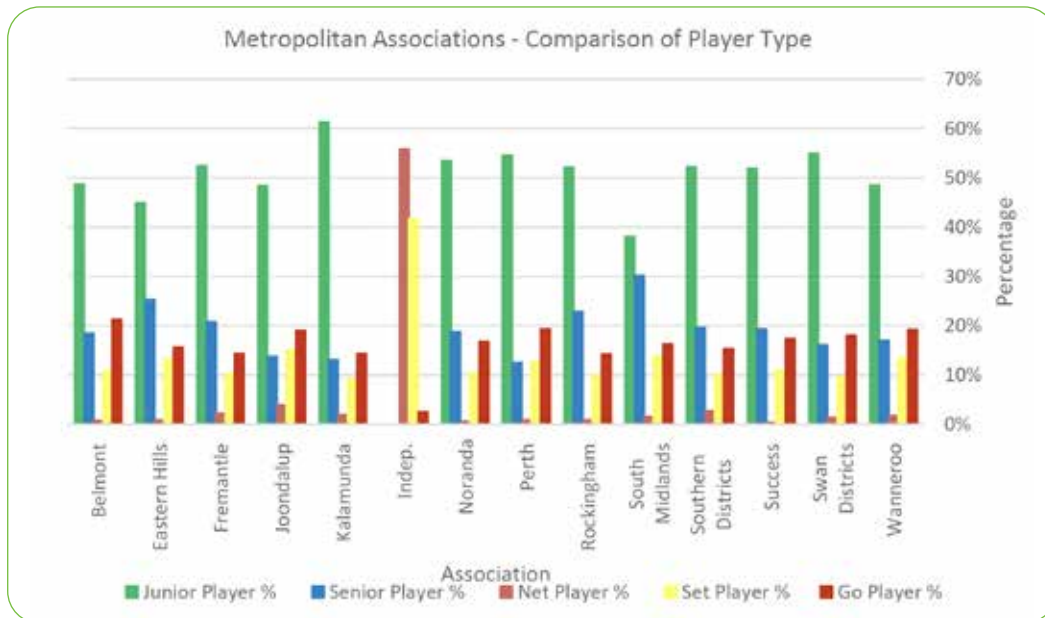


Figure 7: Club Player No. Distribution - Metropolitan Associations 2023

- Overall, 86% of all clubs within metropolitan Associations have less than 200 participating players. 96% of all clubs have less than 300 participating players. Only 4% of all clubs have more than 300 players. The most common club size is up to 50 players, which comprises of 35% or 106 of all metropolitan clubs.
- In general, Associations with larger player participants numbers (Fremantle, Perth and Wanneroo) tend to have a broader distribution of club sizes. Smaller associations tend to have a narrower distribution of club numbers (Figure 8).

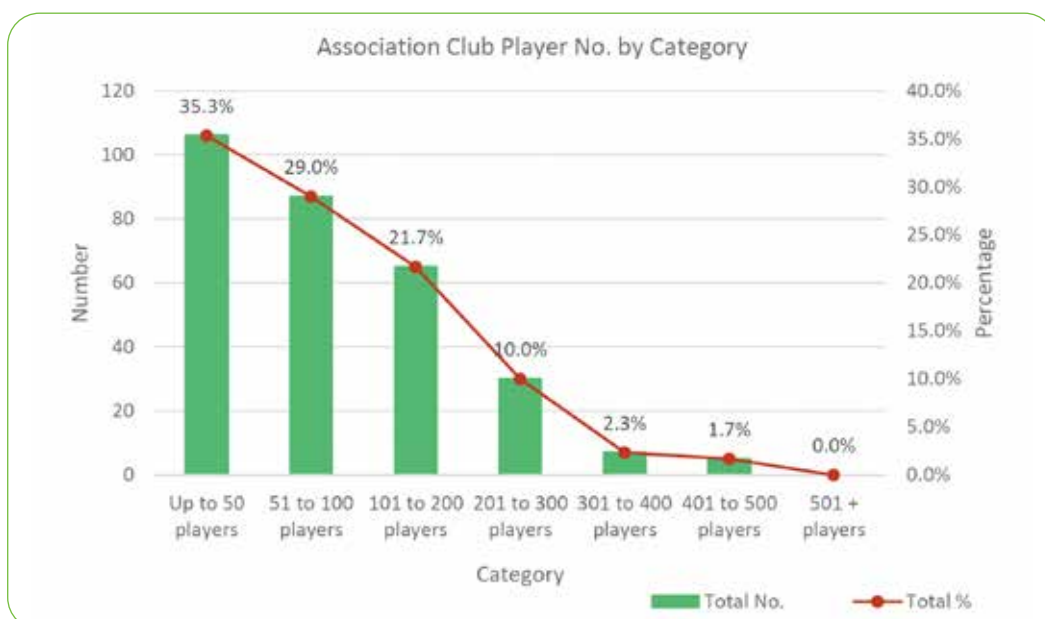


Figure 8: Association Club Player Numbers By Category

Regional Areas Player Participation

The regional player membership is drawn from 54 Associations extending across six regions within WA.

These include the Great Southern, Midwest Gascoyne, North West, Peel, South West and Wheatbelt-Goldfields.

Key considerations arising from the analysis of the region's 2023 player participation data include:

- The total number of participating players across all regions is 19,042 with 8,006 (42%) junior players, 5,955 (31%) senior players and 5,081 (27%) NetSetGO players (Figure 9).

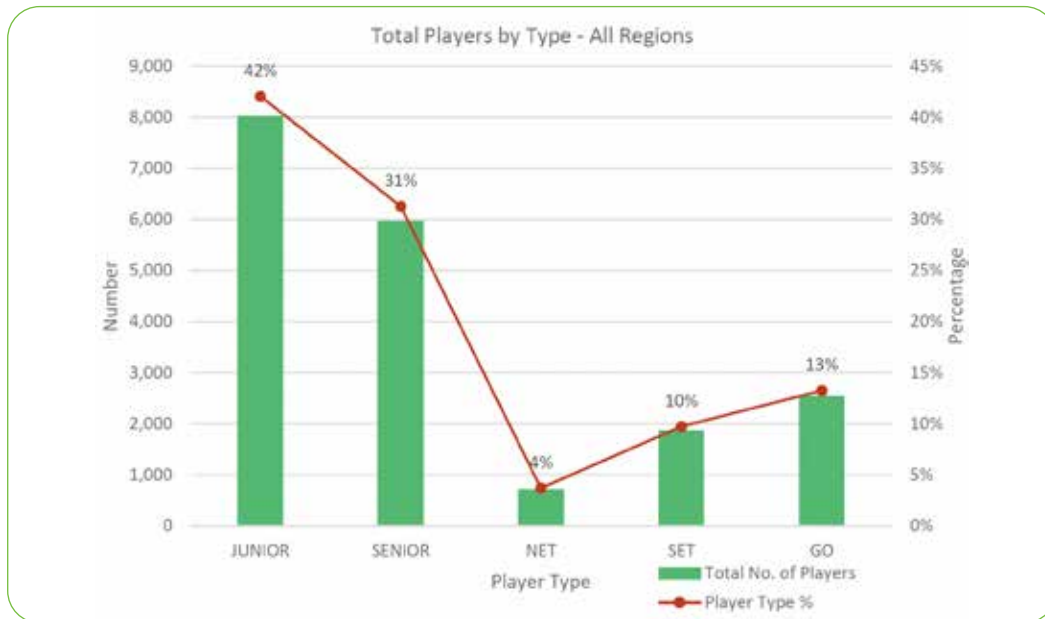


Figure 9: Total Players by Type - All Regions

- The South West region has the most participating players with 4,596, with the Great Southern region having 3,553. The smallest region is Peel with 2,414 players (Figure 10).



Figure 10: Total Players by Region

- On the basis of player type by region, Peel has the highest percentage of NetSetGo participants and the South West has the greatest percentage of junior player participants. The North West region has the highest percentage of senior player participants (Figure 11).

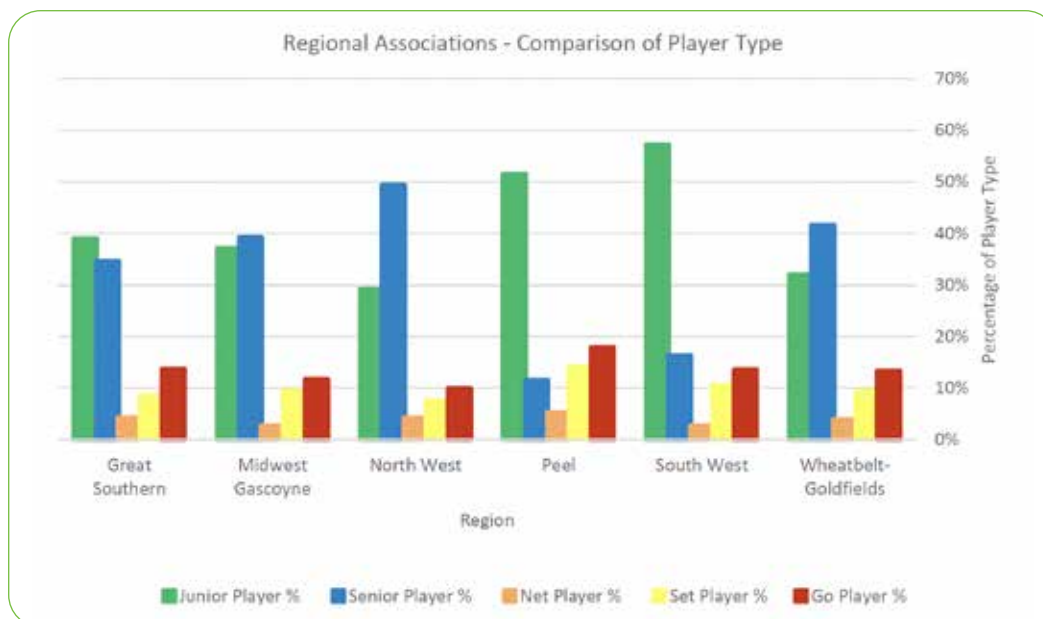


Figure 11: Regions - Comparative Player Type Percentages

Regional Centre Associations Player Participation

A more detailed analysis of player participation has been undertaken for the Associations of the regional centres within WA. These include Albany, Esperance, Geraldton, Karratha, Mandurah, Bunbury, Busselton and Eastern Goldfields (Kalgoorlie).

Key considerations arising from the analysis of the region’s data include:

- The total number of participating players across the eight regional centres is 9,054, which is 48% of the total regional player participation. Of these, 4,404 (48.6%) are junior players, 2,221 (24.5%) are senior players and 2,429 (26.8%) are NetSetGO players.



Figure 12: Regional Centre Associations - Total Players by Type

- At an Association-level, the Geraldton Association has the most participating players with 1,672, while Mandurah has 1,580 and Albany 1,186 participants. The smallest of the regional Associations is Esperance with 722 participating players, followed by Bunbury with 604 and Eastern Goldfields with 767 participants (Figure 13).



Figure 13: Regional Centre Associations - Total Players by Association

- When collectively considering player types, Albany, Mandurah, Bunbury and Busselton Associations have a high percentage of junior player participants, with a low to very low percentage of senior player participation (in the case of Bunbury, no senior players). Esperance has an almost equal split between junior and senior player participants, while Karratha has a greater percentage of senior player participants to juniors - one of the few Associations in which this is the case (Figure 14).

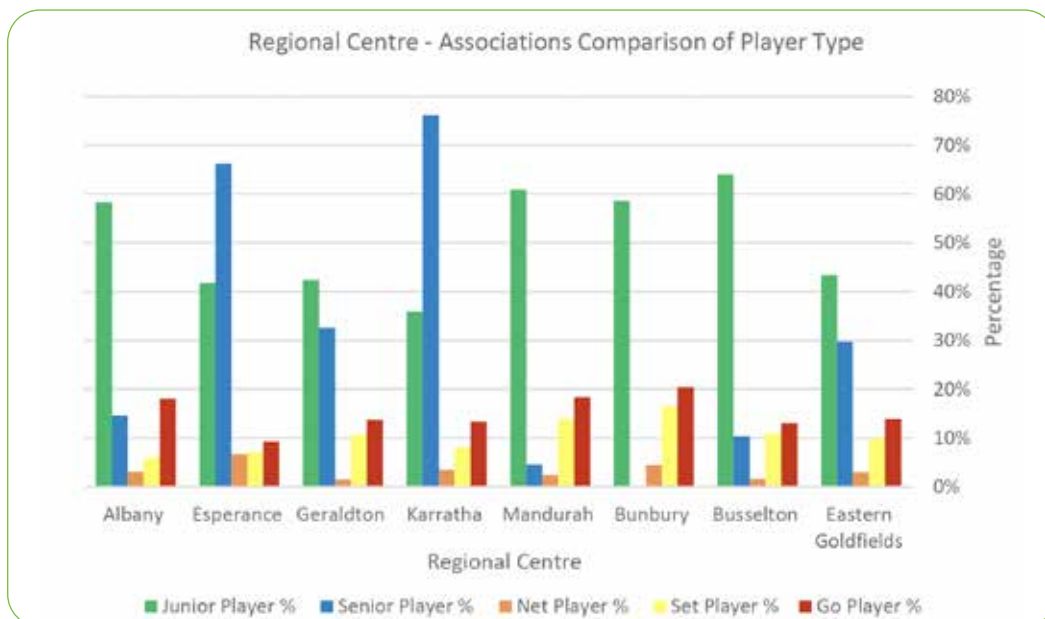


Figure 14: Regional Centre Associations - Comparative Player Type Percentages.

6. PLAYER PARTICIPATION TREND ANALYSIS

6.1 NETSETGO PARTICIPATION

MEASUREMENT	ANALYSIS																																													
<p>% CHANGE 2019 - 2023</p>	<ul style="list-style-type: none"> The number of NetSetGO player participants has increased by 12% from 17,292 to 19,357 participants. The greatest increase has been in the Great Southern with an increase of 50%, followed by the Metropolitan area with +14% and the North West with +12%. Decreases in participation occurred in the South West and the Wheatbelt- Goldfields, each have a 7% reduction. <div data-bbox="560 824 1275 1240" data-label="Figure"> <table border="1"> <caption>Net Set Go - Participation Change by Region 2019 to 2023</caption> <thead> <tr> <th>Region</th> <th>Percentage Change</th> </tr> </thead> <tbody> <tr> <td>Great Southern</td> <td>50%</td> </tr> <tr> <td>Midwest Gascoyne</td> <td>6%</td> </tr> <tr> <td>North West</td> <td>12%</td> </tr> <tr> <td>Peel</td> <td>2.64%</td> </tr> <tr> <td>South West</td> <td>-7%</td> </tr> <tr> <td>Wheatbelt-Goldfields</td> <td>-7%</td> </tr> <tr> <td>Metro Total</td> <td>14%</td> </tr> <tr> <td>Netball WA Total</td> <td>12%</td> </tr> </tbody> </table> </div> <p><i>Table 1: NetSetGO Participation Change By Region 2019 - 2023</i></p>	Region	Percentage Change	Great Southern	50%	Midwest Gascoyne	6%	North West	12%	Peel	2.64%	South West	-7%	Wheatbelt-Goldfields	-7%	Metro Total	14%	Netball WA Total	12%																											
Region	Percentage Change																																													
Great Southern	50%																																													
Midwest Gascoyne	6%																																													
North West	12%																																													
Peel	2.64%																																													
South West	-7%																																													
Wheatbelt-Goldfields	-7%																																													
Metro Total	14%																																													
Netball WA Total	12%																																													
<p>ANNUAL PLAYER % CHANGE BY YEAR</p>	<ul style="list-style-type: none"> When expressed in terms of annual percentage change, the change in player participation numbers becomes more apparent and clearly shows the impact of the COVID-19 pandemic on player numbers in 2020 where the majority of regions experienced a decline in participation numbers. The change in participation over 2022 and 2023 is also evident, with player participation improving over this period, which saw a 51% improvement on the previous year. <div data-bbox="560 1597 1275 2013" data-label="Figure"> <table border="1"> <caption>Net Set Go - Annual Player % Change by Region</caption> <thead> <tr> <th>Year</th> <th>Great Southern</th> <th>Midwest Gascoyne</th> <th>North West</th> <th>Peel</th> <th>South West</th> <th>Wheatbelt-Goldfields</th> <th>Metro Total</th> <th>Netball WA Total</th> </tr> </thead> <tbody> <tr> <td>2020</td> <td>-7%</td> <td>-5%</td> <td>-12%</td> <td>16%</td> <td>-13%</td> <td>0%</td> <td>-4%</td> <td>-4%</td> </tr> <tr> <td>2021</td> <td>22%</td> <td>67%</td> <td>43%</td> <td>8%</td> <td>9%</td> <td>8%</td> <td>8%</td> <td>8%</td> </tr> <tr> <td>2022</td> <td>11%</td> <td>-17%</td> <td>-27%</td> <td>65%</td> <td>-6%</td> <td>-18%</td> <td>-24.34%</td> <td>-4%</td> </tr> <tr> <td>2023</td> <td>19%</td> <td>15%</td> <td>23%</td> <td>71%</td> <td>7%</td> <td>6%</td> <td>41%</td> <td>41%</td> </tr> </tbody> </table> </div> <p><i>Table 2: NetSetGO Player Trend Analysis 2019 - 2023</i></p>	Year	Great Southern	Midwest Gascoyne	North West	Peel	South West	Wheatbelt-Goldfields	Metro Total	Netball WA Total	2020	-7%	-5%	-12%	16%	-13%	0%	-4%	-4%	2021	22%	67%	43%	8%	9%	8%	8%	8%	2022	11%	-17%	-27%	65%	-6%	-18%	-24.34%	-4%	2023	19%	15%	23%	71%	7%	6%	41%	41%
Year	Great Southern	Midwest Gascoyne	North West	Peel	South West	Wheatbelt-Goldfields	Metro Total	Netball WA Total																																						
2020	-7%	-5%	-12%	16%	-13%	0%	-4%	-4%																																						
2021	22%	67%	43%	8%	9%	8%	8%	8%																																						
2022	11%	-17%	-27%	65%	-6%	-18%	-24.34%	-4%																																						
2023	19%	15%	23%	71%	7%	6%	41%	41%																																						

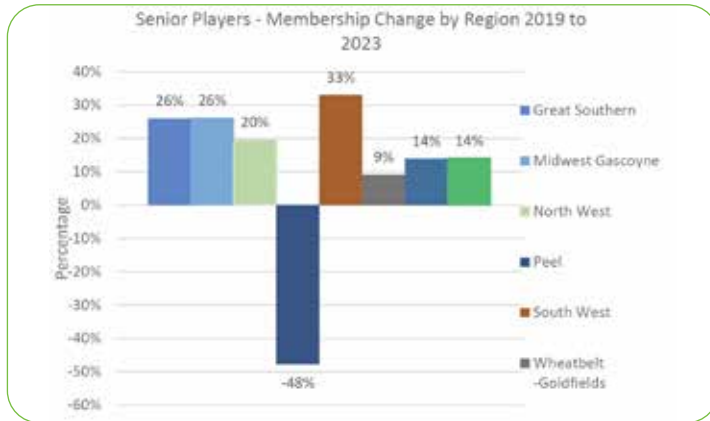
6.2 JUNIOR PARTICIPATION

MEASUREMENT	ANALYSIS																		
<p>% CHANGE 2019 - 2023</p>	<ul style="list-style-type: none"> The number of Junior player participants has increased by 10% from 29,359 in 2019 to 32,237 in 2023. Three of the Regions had an increase in player participation during this period, being the Metropolitan area (+16%), the North West (+7%) and the South West (+8). Four Regions had a decrease in player participation during this period, being the Great Southern (-2%), the Midwest Gascoyne (-4%), Peel (-27%) and the Wheatbelt-Goldfields (-16%). <div data-bbox="560 707 1275 1126" data-label="Figure"> <table border="1"> <caption>Table 2: Junior Players - Membership Change By Region 2019 - 2023</caption> <thead> <tr> <th>Region</th> <th>Percentage Change</th> </tr> </thead> <tbody> <tr> <td>Great Southern</td> <td>-2%</td> </tr> <tr> <td>Metro Total</td> <td>16%</td> </tr> <tr> <td>Midwest Gascoyne</td> <td>-4%</td> </tr> <tr> <td>North West</td> <td>7%</td> </tr> <tr> <td>Peel</td> <td>-27%</td> </tr> <tr> <td>South West</td> <td>8%</td> </tr> <tr> <td>Wheatbelt-Goldfields</td> <td>-16%</td> </tr> <tr> <td>Netball WA Total</td> <td>10%</td> </tr> </tbody> </table> </div> <p><i>Table 2: Junior Players - Membership Change By Region 2019 - 2023</i></p>	Region	Percentage Change	Great Southern	-2%	Metro Total	16%	Midwest Gascoyne	-4%	North West	7%	Peel	-27%	South West	8%	Wheatbelt-Goldfields	-16%	Netball WA Total	10%
Region	Percentage Change																		
Great Southern	-2%																		
Metro Total	16%																		
Midwest Gascoyne	-4%																		
North West	7%																		
Peel	-27%																		
South West	8%																		
Wheatbelt-Goldfields	-16%																		
Netball WA Total	10%																		
<p>ANNUAL PLAYER % CHANGE BY YEAR</p>	<ul style="list-style-type: none"> As with the other player types, when considered in terms of annual percentage change, the change in player participation numbers becomes more apparent. This shows the impact of the COVID-19 pandemic (which started in late 2019) on player numbers in 2020, where all regions experienced a decline in participation numbers. The Wheatbelt Goldfields experienced the largest decrease in player numbers at -52%. 2022 saw player participation numbers stabilise. This trend has continued continuing in 2023 with growth in player participation increasing. There was however, decline in player participation numbers in the Wheatbelt-Goldfields (-2%) and the North West (-8%). The largest decrease was in the Peel region (-27%). The decline in player participation numbers in 2023 may be due to increased opportunities for females to participate in other sports, notable AFL, football and cricket. This is most certainly the case in the Peel region, in addition to the limited number of available compliant courts within the region. Current cost of living pressures may also be an underlying cause in the reduction of the frequency of participation. 																		



6.3 SENIOR PARTICIPATION

MEASUREMENT	ANALYSIS
% CHANGE 2019 - 2023	<ul style="list-style-type: none"> Over the 2019 to 2023 period, the number of Senior player participants increased by 14% from 12,199 in 2019 to 13,910 in 2023. All but one of the regions had an increase in player participation during this period, with the largest increases being in the South West (+33%), and the Great Southern and Midwest Gascoyne (+26%). The Peel region has had a significant decrease in player participation during this period at -48%.



ANNUAL PLAYER % CHANGE BY YEAR

- As with the other player types, when considered in terms of annual percentage change, the change in player participation numbers becomes more apparent. This shows the impact of the COVID-19 pandemic (which started in late 2019) on player numbers in 2020, where all of the regions experienced a decrease in player participation numbers. The smallest decrease was in the South West region (-0.4%), with the largest being in the Peel region (-72%).
- 2022 saw player numbers stabilise, with three regions having a positive annual growth rate, while decreases in player participation rates were limited to a maximum of 12% (Great Southern).
- 2023 has seen continued growth in player participation numbers of between 3% and 25%, with the Peel region being the only region recording a decline in player participation (-37%).
- The decline in player participation numbers in 2023 may be due to increased opportunities for females to participate in other sports, notable AFL, football and cricket. This is most certainly the case in the Peel region, in addition to the limited number of available compliant courts within the region. Current cost of living pressures may also be an underlying cause in the reduction of the frequency of participation.



Table 5: Senior Player Trend Analysis 2019 - 2023

7. MARKET SHARE & FORECAST PLAYER NUMBERS

7.1 MARKET SHARE

The estimation of Netball WA’s market share has been undertaken on a region-by-region basis and seeks to identify the number of potential netball players within each region and across the State. In doing so, the modeling utilises a number of data sources, including:

- Australian Bureau of Statistics (ABS) 2021 population data (5-year age cohorts) by Local Government Areas⁷;
- WA Tomorrow - Medium Term Population Forecasts for Western Australia 2016 to 2031 and Sub-regions 2016 to 2031⁸; and
- Australian Sports Commission AusPlay Netball Report⁹.

Using the available 2021 population data, forecast data and AusPlay participation and frequency data, the model estimates the catchment population for each region and participation rate for netball to forecast the number of potential netball players within each region. When this number is divided by the actual number of Netball WA players within the region, the market share can be calculated and is expressed as a percentage. Netball WA’s Market Share has been estimated based on two participation scenarios, as outlined within the AusPlay Netball Report 25.

In the first scenario, the level of participation is based on 91.2% of adult netball participation being organised, while the second is based on 60.7% of adult netball participation being organised through an Association. In both cases, children participation in netball has been assumed as being 100% organised. The following figure is taken from the AusPlay Netball Report²⁵ and summarises the organisation types which are included within the two scenarios. Scenario one includes all organisation types, except the “non-organised” category. Scenario two includes only the “Sport club or association” category.

For the purposes of this analysis, a rate over 50% is considered to be good, a rate between 50% and 40% is considered to be fair and a rate below 40% is seen to be poor.

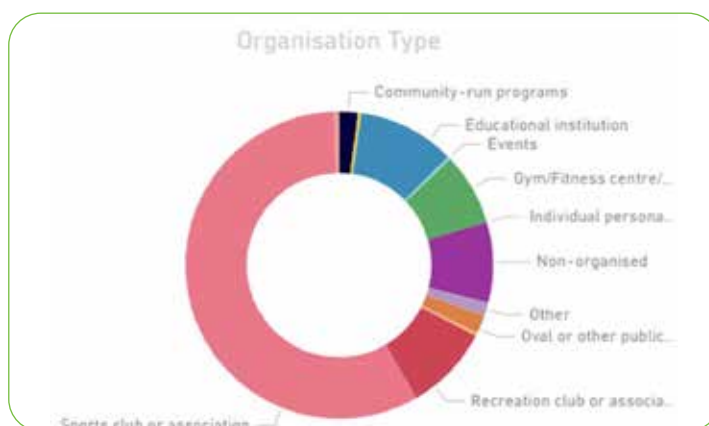


Figure 15: AusPlay Netball Participation by Organisation Type

It is important to note that the outcomes of the modeling provide a point-in-time estimation of the market share using aggregated and forecast data and does not consider specific factors which may influence levels of participation within each of the regions or the State as a whole.

Netball WA’s estimated market share based on an adult participation rate of 91.2% is shown in the Figure 16. As can be seen the extent of market share varies across the regions, with the

⁷ ABS 2021 Local Government Area data [.Stat Data Explorer \(BETA\) • Data by region 2011-2022, by LGA \(ASGS Ed. 3, 2021\) \(abs.gov.au\)](https://www.abs.gov.au/StatData/Explorers/BETA/Data%20by%20region%202011-2022%20by%20LGA%20(ASGS%20Ed.%203.%202021).xlsx)

⁸ WA Tomorrow Population Forecasts [LSD-WAT-2016-2031-sub-State-LGA-forecast-by-age-and-sex.xlsx \(live.com\)](https://www.watoday.com.au/forecast/2016-2031-sub-State-LGA-forecast-by-age-and-sex.xlsx)

⁹ AusPlay Netball Report [Microsoft Power BI](#)

Great Southern, Midwest Gascoyne and Wheatbelt-Goldfields regions achieving a market share of 86.6%, 77.1% and 97.2% respectively. The North West region currently has a market share of 50%, while the Peel, South West and Metropolitan regions have rates of 29%, 33.6% and 42.9% respectively. Overall, Netball WA has a market share of 44.7%.



Figure 16: Market Share By Region - 91.2% Participation Rate

The market share based on an adult participation rate of 60.7% is shown in the Figure 17 below. As with the previous scenario, the market share on a region-by-region basis varies. In this scenario, the Great Southern, Midwest Gascoyne and Wheatbelt-Goldfields regions have improved their market share, achieving results of 106.6%, 95.4% and 120.7% respectively. The North West region has improved its share to a rate of 62.2%, while the Peel, South West and Metropolitan regions have rates of 35.7%, 41.2% and 53.8% respectively. Overall, Netball WA's market share has improved in this scenario, achieving a result of 55.7%.



Figure 17: Market Share By Region - 60.7% Participation Rate

7.2 FORECAST PLAYER NUMBERS

Estimated forecast player numbers have been calculated using the same methodology applied to forecast Netball WA's existing market share. However, in this instance WA Tomorrow 2031 population forecasts (Band C) have been used. The outcome of this analysis has been outlined in the table below.

REGION	2021		2031	
	Catchment Population	Forecast No. of Potential Players	Catchment Population	Forecast No. of Potential Players
Great Southern	48,542	4,325	49,957	4,445
Metropolitan	1,353,253	114,560	1,788,496	151,405
Midwest Gascoyne	40,244	3,472	42,071	3,630
North West	79,344	6,425	85,198	6,899
Peel	99,728	8,768	139,893	12,299
South West	164,267	14,415	202,955	17,810
Wheatbelt Goldfields	37,838	3,149	43,461	3,617
TOTAL	1,823,216	155,114	2,352,032	200,106

Table 6: Netball WA Forecast Player Numbers - 2031

This analysis forecasts that the estimated number of players could rise by 44,992, from 155,114 players in 2021 to 200,116 players in 2031. If the current market share per region was applied to the 2031 forecast player numbers, the forecast total number of players in scenario one (91.2% of adult netball being organised) would be 62,055 and 53,360 for scenario 2 (60.7% association organised). This would be an increase of approximately 12,880 and 4,185, respectively, on the current Netball WA membership.



8. BENEFITS OF NETBALL

8.1 BENEFIT OVERVIEW

There are a number of benefits associated with the provision and utilisation of community sport and recreation facilities. Typically, these are categorised as being social benefits, health benefits and economic benefits. The Australian Sport's Commission report: *The Value of Community Sport and Infrastructure (2018)*¹⁰ further defined these benefits, with those relevant to this study outlined within the table below.



¹⁰ The Australian Sports Commission [Social value of sport \(kpmg.com\)](https://www.kpmg.com/au/issues-and-insights/articles-and-publications/2018/09/social-value-of-sport)

SOCIAL BENEFITS	
Human Capital Uplift	Increased cognition and the development of skills which improve employment and education outcomes.
Social Inclusion	Improves the connection between different sectors and groups within the community.
Community Pride	Pride in the success of a community's team as well as events hosted by the community.
Increase level of trust	Research shows that involvement in community sport can increase the general level of trust within the community.
Positive role modeling	Opportunity for young people to develop positive role models outside of the family unit.
Reduction in crime and antisocial behaviour	Academic and anecdotal evidence which identifies a link between community sport and a reduction in crime and antisocial behaviour.
HEALTH BENEFITS	
Personal health benefits	<p>Reduced risk of developing chronic disease and a reduction in the severity of mental illness as a result of an individual's participation and being physically active.</p> <p>An Australian study has identified that each hour that an individual engages in moderate physical activity brings \$3.02 (in \$2010) per hour of health benefits, which will accrue as each additional person utilises the facility. The benefit derived from increase participation provides a potential reduction in health care costs¹¹.</p>
Health system benefits	Savings to the health system as a result of the improved health of the individual and community.
Reduced risk of accidents	Being physically active can reduce the risk of fall related accidents, in particular within older age groups.
ECONOMIC BENEFITS	
Increased economic activity	The value that expenditure on community sport infrastructure adds to the local economy.
Increased productivity	The value of the additional productivity of active people to the local economy.
Employment	The number of people employed through community sport infrastructure provision.
Contribution of volunteers	The value of volunteers and their contribution to community sport
Induced visitation	The benefit of visitation (tourism) generated by events held at community sport facilities.

Table 7: Overview Of Social, Health And Economical Benefits Of Sport

¹⁰ The Australian Sports Commission [Social value of sport \(kpmg.com\)](https://www.kpmg.com/au/issuesandinsights/articlespublications/2016/09/social-value-of-sport)

8.2 MEASURING NETBALL WA ACTIVITY

The measurement of netball activity within WA has been calculated based on 2023 membership data and captures the level of activity of NetSetGo players, junior players, senior players, coaches, umpires, team managers and general volunteers.

A number of assumptions have been made to inform the methodology which has been used. These assumptions are as follows:

- Total annual season duration has been calculated at 28 weeks, being 18 weeks for the winter season and 10 weeks for the Spring season.
- Winter season participation for players, coaches, umpires, team managers and volunteers has been estimated at 98% of the respective category total members, to account for absences.
- Spring season participation has been estimated at 50% of the winter season participation levels.
- Woolworths NetSetGo players participate for one hour per week over a 10-week period.
- Junior and senior players participate for a maximum of two hours per week (one hour training and one hour for a game).
- Coaching participation has been estimated at two hours per week (one hour training and one hour for a game), at a 95% participation rate to allow for absences.
- Umpire, team manager and general volunteer participation has been estimated at one hour per week for the duration of the total annual season.

The table below provides summarises the outcome of the methodology:

	TOTAL HOURS/ WEEK	SEASON/WEEKS	TOTAL HOURS/ SEASON
PLAYERS			
<i>Woolworths NetSetGO</i>	14,494	10	144,940
<i>Junior</i>			
Winter Season	46,195	18	831,514
Spring/Summer Season	23,569	10	235,690
SUBTOTAL	69,764	28	1,067,204
<i>Senior</i>		26	
Winter Season	22,569	18	406,249
Spring/Summer Season	11,515	10	115,150
SUBTOTAL	34,084	28	521,399
TOTAL ANNUAL PLAYER HOURS			1,733,544

COACHES			
Winter Season	5,116	18	11,290
Spring/Summer Season	2,610	10	26,100
SUBTOTAL	7,726	28	118,181

UMPIRES			
Winter Season	627	18	11,290
Spring/Summer Season	320	10	3,200
SUBTOTAL		28	14,490

TEAM MANAGERS			
Winter Season	1,798	18	32,369
Spring/Summer Season	918	10	9,175
SUBTOTAL		28	41,544
VOLUNTEERS			
SUBTOTAL	429	28	12,019
NETBALL WA TOTAL ANNUAL HOURS OF ACTIVITY	112,003	178	1,919,777

Table 8: Netball WA Annual Netball Activity (Hours) By Member Category

The total annual netball activity across all Netball WA membership categories has been estimated at just above 1.92 million hours (or 112,000 hours per week). Of this, 1.73 million hours are attributable to netball players, 118,180 hours to coaches, 14,490 hours to umpires, 41,544 hours to team managers and 12,020 hours to general volunteers.

8.3 MONETISING NETBALL WA BENEFITS

The Value of Participation

The South Australian Centre for Economic Studies¹² in a 2015 report, placed the value of participation in organised sport at \$17.50 per hour (in \$2011). In today's terms this equates to \$23.86. When this figure is multiplied with the total annual hours of activity, the annual value of Netball WA member activity is estimated to be approximately \$45.8 million.

Physical and Mental Health Benefits

A study undertaken in Australia in 2010 found that for each hour an individual undertakes moderate physical exercise, there are corresponding health benefits to the value of \$3.02 per hour¹³. In 2024, this is estimated to be in the order of \$4.25 per hour. On this basis, the health value of player participation annually can be valued at approximately \$7.37 million.

Volunteers

Volunteers form an important part of any community organisation. Without volunteers many of these organisation would not exist and the programs, services and expertise they provide would be lost to the community¹⁴. Netball is no different in this regard, as without volunteers to undertake the roles of coaching, officiating, team managers, committee members or providing general assistance, the level of netball activity would be significantly diminished.

Volunteering WA has estimated that the monetary value of volunteering on an hourly rate is approximately \$48.01 per hour. When applied to the total annual estimated hours for coaches, umpires, team managers (assuming these are unpaid roles) and general volunteers, the annual volunteer replacement cost is \$62.1 million. The itemised annual volunteer replacement cost is as follows:

- Coaches - \$5.67 million
- Umpires - \$695,650
- Team Managers - \$1.99 million
- General Volunteers - \$577,019

¹² SA Centre for Economics Studies (2015). Cost Benefit Analysis of the Proposed Port Pirie Sports Precinct. Pg. 22 - 23

¹³ Trubka et al. 2010. The Costs of Urban Sprawl – Physical Activity Links to Healthcare Costs and Productivity. pg. 3

Economic and Employment Benefits

The economic and employment benefits have been calculated using modeling provided by Pracsys¹⁵. The model assumes the absence of supply and demand constraints, approximates the actual patterns of linkages between industries in the economy and assumes the industrial structure within the economy is fixed.

For the 2022 financial year, Netball WA's direct economic output (direct contribution) was \$13.1 million, its total economic output (total contribution) was \$38.6 million and its indirect economic output (flow-on contribution) was \$25.5 million.

In respect to employment, Netball WA's directly accounted for 65 FTE (full time equivalent) jobs in the 2023 financial year and indirectly generated a further 83 FTE within the WA economy. Overall, Netball WA activity accounted for 148 FTE within the economy.



¹⁴ [Volunteering WA, 2015, The Economic, Social and Cultural Value of Volunteering to Western Australia, pg. 108.](#)

¹⁵ [Pracsys \(2021\), Employment and Output Calculation Model.](#)

9. KEY FINDINGS

9.1 DEMOGRAPHIC AND COMMUNITY PROFILE

- At a state level, while there is an increase in key age cohorts relating to junior netball participation (5 to 9 years and 10 to 14 years), there is a sharp decline in the number of people within the 15 to 19 years through to the 25 to 29 years cohorts, which currently underpin adult netball participation.
- The State continues to have a large First Nations and Multicultural communities, showing a continuing need for programs, facilities and services which are appropriate to cultural needs.
- Across the regions, there has been minimal growth in key child age cohorts, which support Woolworths NetSetGO and Junior netball and therefore poses a risk to the future development of the sport and increased membership and participation numbers. This trend is most prominent in the Wheatbelt Goldfields, Midwest Gascoyne and to a lesser extent the Great Southern. Not surprisingly, population growth within the Perth metropolitan area, Peel and the South West has been positive.
- While household income has grown, cost of living pressures and higher unemployment in regional areas will impact on a household's discretionary income and therefore capacity to pay for activities such as netball. Unemployment is highest in the Peel region (Mandurah 7.0%) and South West (Collie 7.9%). Unemployment is above 5% in the areas of Katanning, Narrogin, Geraldton, Murray, and Bunbury, noting that a number of these are key regional centres.
- Population growth areas include the Perth metropolitan and Peel regions. Within the metropolitan region, current growth corridors include the outer metropolitan Local Governments and specifically the north west coastal growth corridor (City of Wanneroo, Butler to Yanchep), the south east growth corridor (City of Armadale) and the south west growth corridor (City of Rockingham).

9.2 PLAYER MEMBERSHIP ANALYSIS

- Player membership data has been analysed through the lens of primary player memberships, where each player being counted once.
- Netball WA's primary player membership is currently 48,622 and has increase by 4.6% (2,132) over the period from 2019 to 2023.
- The strongest growth in membership over this period has been in the North West region, which has had a 12% increase in membership, while the Great Southern and Metropolitan regions have grown by 7% and the Midwest Gascoyne by 4%.
- The largest decrease in membership has occurred in the Peel region (-14%), followed by the Wheatbelt Goldfields (-8%) and the South West (-1%).

9.3 PLAYER PARTICIPATION ANALYSIS

- Player participation data has been analysed through the lens of the primary and secondary player membership data.
- NetSetGO player participation has increased by 12% for the period 2019 to 2023, with the greatest increase being in the Great Southern (+50%). Decreases in participation occurred in the South West and the Wheatbelt Goldfields both -7%.
- Junior player participation has increased by 10% for the period 2019 to 2023, with the greatest increase being in the Metropolitan region (+16%). The largest decrease occurred in the Peel region (-27%).
- Senior player participation has increased by 14% for the period 2019 to 2023, with the largest increases being in the South West (+33%). The largest decrease was in the Peel region (-48%).

- Across all player categories, player participation has typically stabilised in 2022 after the impact of the pandemic in 2019, 2020 and 2021, with participation numbers generally growing in 2023.
- Where there has been a decrease in player participation, contributing factors include the lack of compliant court space, the increased availability of alternative organised sport options for girls and women, in particular AFL, football and cricket, and general cost of living pressures may also be a contributing factor.
- Factors such as the number of players within a club and the percentage of junior and senior players fundamentally influence the number of courts required for training and games, as well as the extent of off-court facility provision (For example floodlighting, toilets, changerooms, social facilities, use of indoor or outdoor courts).
- The analysis undertaken across metropolitan and regional Associations, shows that player type and Association/club size in the metropolitan and regional centres is different to that of the balance of regional areas. This is key outcome which will need to be addressed when developing the strategic facility requirements for each region.
- The growth in player membership and participation is a positive sign for Netball WA however, the analysis has identified the Peel region and, to a lesser extent the Wheatbelt Goldfields regions as areas of concern. The Peel region's decline in junior and senior player participation numbers has been substantial over the period 2019 to 2023 and is an area of significant concern to Netball WA. The lack of adequate compliant court provision, coupled with strong growth in female sport options are the primary drivers of this decline. Consequently, addressing the lack of available compliant courts is a key priority for Netball WA in the implementation of the Plan.

9.4 MARKET SHARE

- Within this analysis, market share has been calculated based on an adult participation rate of 91.2% and 60.7%, being organised netball participation and association netball participation, respectively (based on current AusPlay Netball data).
- This analysis clearly shows that netball participation remains strong in the more distant regional areas (above 50% in both scenarios). While the Metropolitan region's market share remains sound (between 44.7% and 55.7%). In the adjacent Peel and South West region, the market share of netball remains poor (under 42% of the available market).
- This suggest that factors such as the increased accessibility of alternative sports for females (i.e., AFL, soccer and cricket), growth of sports which are a close competitor to netball (basketball) and the quality of existing facilities (court condition and compliant court availability in Mandurah) continue to have an impact on netball participation.

9.5 BENEFIT OF NETBALL IN WA

- The total annual netball activity across all Netball WA membership categories has been estimated at just above 1.92 million hours (or 112,000 hours per week).
- The annual value of member activity is estimated to be approximately \$45. million.
- The health value of player participation annually can be valued at approximately \$7.37 million.
- The annual volunteer replacement cost is \$62.1 million.
- 2022 direct economic output (direct contribution) was \$13.1 million, the total economic output (total contribution) was \$38.6 million and indirect economic output (flow-on contribution) was \$25.5 million.
- In 2023, Netball WA directly accounted for 65 FTE (full time equivalent) jobs, indirectly generated a further 83 FTE. Overall, Netball WA activity accounted for 148 FTE within the economy.

9.6 COMPETITION STRUCTURE

- The current Netball WA competition structure is based on the formality of affiliated metropolitan and regional Associations, noting that this comprises of approximately 60% of netball activity. The remaining 40% occurs in the main within school-based activities and competitions run in Local Government recreation facilities.
- This fact alone, suggests that Netball WA needs to consider how it can develop an ongoing connection with the non-association based netball activity, in particular the recreation centre based competitions, to capture more of the netball market, increase the level of player membership and participation. The assessment of the market share, suggest that this needs to be identified as a priority in the Perth metropolitan, Peel and South West regions.
- Recreation centres, Local Government facilities in particular, run these competitions for reasons related to service delivery and financial management. To effectively engage with these centres, Netball WA needs to consider the “value proposition” that they present and that it provides a clear “win – win” scenario for both parties. Such a proposition does not need to be an allocation of Netball WA resources, but would take the form of strategic partnerships focusing on training and accreditation of coaches, umpires and officials.
- Consideration should also be given to the implementation of a more geographically-based development model for netball competition, one which provides for stronger alignment between geographical regions, Association-level competition and elite level activity (GIG WANL). A stronger geographical identity and improved alignment of regions with State Government development regions and Local Government areas will serve to strengthen key stakeholder relationships, in particular in respect to facility provision.



10. EXISTING FACILITIES

10.1 NETBALL FACILITY AUDIT

Courts

A comprehensive mapping exercise to identify the full suite of netball courts available in Western Australia using aerial imagery from Google Earth and facility data provided by Netball WA.

The mapping is available for viewing using the following link in the Google Earth program.

https://1drv.ms/u/s!AocUlnxkpoBKHzgzFO_ZQE2rNLJaBA?e=muEx7C

The table below identifies the total number of netball courts available in WA and the distribution by organisation or institution.

COURT TYPE	INDOOR		OUTDOOR		TOTAL COURTS
	Number	%	Number	%	
	269	11.5%	2,078	88.5%	23,47
COURT DISTRIBUTION BY ORGANISATION/INSTITUTION					
Primary	High	College	Park	Rec Centre	Tertiary
845	263	374	595	255	13
36.0%	11.2%	16.0%	25.4	10.9%	0.6%

Table 9: Netball Court Provision By Type And Institution

Table 10 identifies the number of netball courts actually used by Associations, based on Netball WA data.

	CURRENT COURT USAGE			
	Outdoor	Indoor	Total	% Indoor
Great Southern	27	23	50	46%
Metropolitan	263	13	276	5%
Midwest Gascoyne	29	3	32	9%
North West	70	33	103	0%
Peel	23	21	44	48%
South West	30	27	57	47%
Wheatbelt-Goldfields	60	35	95	37%
TOTAL	432	122	554	22%

Table 10: Current Netball Court Usage - By Region

Table 11 shows the percentage of indoor courts in each region, noting that there is a significant bias towards indoor provision in the country regions, which have access to multiple indoor venues. Kalamunda and Success are the only Associations in the metropolitan area with more than 10% of the court provision being indoors, noting that these Associations have access to major indoor stadiums including Ray Owen in Kalamunda.

REGION/ASSOCIATION	% INDOOR COURTS	REGION/ASSOCIATION	% INDOOR COURTS
South Midlands	44.4%	Serpentine Jarrahdale	7.4%
Great Southern	41.7%	Joondalup	7.4%
North West	32.0%	Rockingham Catchment	6.7%
South West	19.9%	Swan Districts	6.7%
Kalamunda Districts	17.3%	Noranda	6.3%
Eastern Hills	14.8%	Mid-West Gascoyne	4.9%
Peel	13.9%	Fremantle	4.8%
Wheatbelt Goldfields	13.5%	Wanneroo Districts Catchment	4.1%
Success	10.4%	Southern Districts Catchment	1.2%
Perth	10.1%	Belmont	0.0%
		South Midlands	0.0%

Table 11: Percentage Of Indoor Courts By Region

Lighting

Floodlighting on outdoor courts is an important factor determining the functionality and capacity of those courts. Outdoor courts with no lighting or lighting which is not to the required standard limits the use of the courts and therefore capacity for growth within the club or Association.

Table 12 provides a summary of lighting provision on existing outdoor courts, indicated by the Associations through the stakeholder engagement process. Overall, 281 of the 432 outdoor courts (65%) currently used are lit. Of the courts which are lit, 59 (21%) are LED installations while 222 (79%) are Metal Halide installations.

	NO. OF OUTDOOR COURTS	OUTDOOR COURT LIGHTING			TYPE OF FLOODLIGHTING			
		Floodlit	Not Floodlit	% Not Floodlit	LED (No.)	LED (%)	Metal Halide (No.)	Metal Halide (%)
Great Southern	27	8	19	70%	6	75%	2	25%
Metropolitan	263	197	66	25%	49	25%	148	75%
Midwest Gascoyne	29	19	10	34%	0	0%	19	100%
North West	70	45	25	64%	0	0%	45	100%
Peel	23	15	8	35%	0	0%	15	100%
South West	30	21	9	30%	0	0%	21	100%
Wheatbelt-Goldfields	60	21	39	65%	4	19%	17	81%
TOTAL	432	281	151	35%	59	21%	222	79%

Table 12: Existing Outdoor Courts - Extent And Type Of Floodlighting

10.2 CURRENT FACILITIES AND CHALLENGES

A series of workshops (supported by a follow up survey) were conducted with Association Presidents and Netball WA staff to consider a range of topics relevant to current and future netball facility provision. The outcomes of this process has been summarised as follows:

- Netball WA's priority strategic focus on the development of outdoor courts was strongly supported however, it is noted that challenging climatic conditions in the regions saw support for indoor facility provision as well. As one respondent noted,; "all Associations should have access to at least one indoor court". Many Associations, in particular in the Great Southern and South West regions, are finding that it is increasingly difficult to access indoor courts for training and competition, due to the facility operators focusing on more profitable court programming options (i.e. facility-run indoor sporting competitions).
- The workshop participants have also found that it is increasingly difficult to access Department of Education courts (indoor and outdoor), with Netball WA experiencing at least one situation in which previously agreed court access has been withdrawn.
- The existing Parks Leisure Australia WA industry guidelines indicate that netball court provision should be on a ratio of approximately one court per 5,000 to 8,000 people. Stakeholders felt that one court per 8,000 people in a community was too low as a general measure, however 10-12 courts for a district scale facility were deemed reasonable. This would apply to many regional Associations where a 12-court venue would be ideal.
- Referencing Netball Victoria's Strategic Facilities Plan, stakeholders rated junior participation and skills development as the highest priority areas with respect to facility provision, surpassing all other activities. Modified games and programs were the least important but still garnered 65% support.
- With respect to current facility provision, 65% of stakeholder respondents disagreed that there were adequate outdoor courts and 100% disagreed that there were adequate indoor courts.
- With respect to the current condition of existing on-court and off-court facilities, respondents were asked to rate the adequacy and condition of their competition and training venues on a scale of 1 (poor) to 7 (excellent). The answers for competition and training venues show almost identical average scores and they have been reported as one and are shown in Figure 18.

With a rating of 4 indicating facilities are OK, those scoring less than 4 have been deemed less than satisfactory and needing attention. This relates to canteen/kiosk facilities, public toilets, storage, umpires facilities and first aid rooms. In many instances these facilities do not even exist.

Those elements rated above 4 include instances, where the court surface and lighting rate very poorly and indicate a need for targeted action, however on average these elements are rated most highly (Figure 18).

- As netball Associations do not own the venues they play and train at, the relationship with the facility owner and/or manager is important. Respondents indicated using a 7 point scale that the relationship was strongest with the schools (6) they use and least favourable with appointed facility managers (3). Local Government score was 4.80.

Commentary regarding the relationship with facility managers indicated that because of competing demands for space and that netball is seasonal, the manager must contend with a gap in the venue use. Many managers are charged with maximising utilisation and participation of their venues and at times default to a position that 'it easier to run it yourself', effectively shutting netball out.



Figure 18: Average Condition Of Netball Facilities

- In relation to new and additional facility requirements over the next decade, it was found that court resurfacing was the highest priority in terms of renewal. Additional courts and lights on existing courts were rated highly, with amenities such as changerooms for players and umpires and storage were considered the next important (Figure 19 and 20).



Figure 19: New Facility Requirements

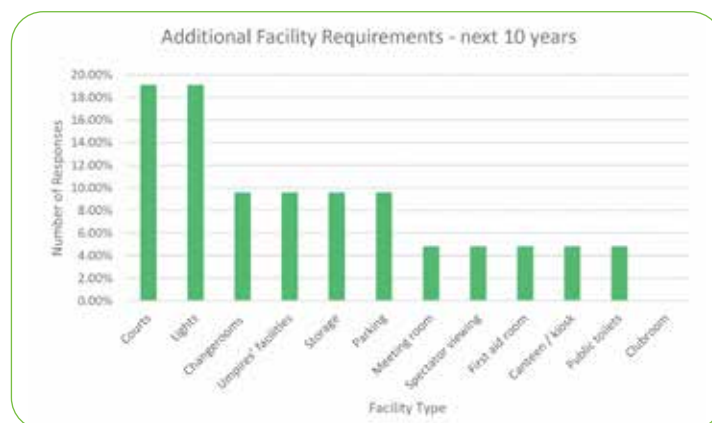


Figure 20: Additional Facility Requirements

10.3 KEY FINDINGS

Key findings resulting from the audit include:

- The inventory and mapping process undertaken has found that there is a total of 2,347 netball courts within the State, of which 269 (11.5%) are indoor and 2,078 (88.5%) are outdoor.
- The large majority of the courts are provided at Primary Schools (36.0%) and on Local Government public open space (25.4%).
- Collectively the Associations use 433 outdoor courts and 122 indoor courts to host their activities. The survey returns indicate the need to resurface 398 courts in the next decade and the desire to establish a further 75 new courts, of which 33 (44%) are flagged as indoor courts.
- Regional survey responses found that (70%) 304 of the 432 outdoor courts used are lit with only 33% using LED lamps. This provides an opportunity to upgrade light life and quality while reducing cost across 233 existing courts.
- Associations in the metropolitan area identified a total of 265 courts of which 207 are lit. Metal halide is the dominant style of lamp accounting for 158 or 76% of all court installations. A progressive conversion of existing installations from metal halide to LED lighting is recommended with all new installations being LED.
- In this respect, it is evident that the resurfacing of courts, court compliance and lighting of outdoor courts are priority areas in respect to future facility requirements. The analysis also found parking to be an issue within the metropolitan region, while the provision of off-court facilities and need for future facilities varied widely across the regions. Provision of toilets, storage and competition offices were considered to be priority needs, and as such have been reflected within the Facility Hierarchy as shown in Figure 21 and the facility guidelines in Section 12.2.



11. FUTURE FACILITY REQUIREMENTS

Future netball facility requirements have been categorised as follows:

- Outdoor court resurfacing – resurfacing of existing outdoor courts to provide compliant courts in respect to the court dimensions and with contrasting colours.
- New outdoor court – provision of a new and compliant contrasting colour outdoor courts with lighting and fencing.
- Installation of court floodlighting – to the current Australian Standard (AS 2560.2:2021) for netball activity, utilising LED luminaries.
- Upgrade of existing court lighting – replacing existing metal halide lighting with LED lighting to meet the current Australian Standard. Halide is the dominant style of lamp accounting for 158 or 76% of all court installations. A progressive conversion of existing installations from metal halide to LED lighting is recommended with all new installations being LED.

ITEM	TOTAL NO.	COST PER ITEM (\$)	TOTAL COST (\$)
Court resurfacing	398		
Subsurface is sound		82,234	33,127,140
Subsurface requires remediation		99,881	39,752,568
New Outdoor court (single)	75	186,298	13,972,380
Installation of court floodlighting	128	41,383	5,297,080
Upgrade of existing court lighting	233		
Existing poles compliant		3,880	903,970
Poles require replacement - base sound		8,406	1,958,601

Table 13: Future Facility Requirement Priorities - Order Of Magnitude Cost Estimates

- Provision of off-court facilities – to support netball activity, as shown in the netball Facility Hierarchy included within Section 12.

The specific future facility requirements have been identified on a regional basis within Section 13 and identified on a short, medium and long term basis. The total future facility requirements are summarised as follows, noting the costs represented are based on Perth metropolitan rates.

Depending on the existing condition of the infrastructure being upgraded (i.e. court resurfacing or lighting upgrades), the total estimated cost of the identified future facility requirements is in the order of **\$70.5 million to \$78.2 million**.

It is important to note that these costs are very generalised and actual costs may vary significantly dependent upon the selected site, ground conditions, availability of utilities and services, the layout of the courts and positioning of the associated off-court facilities. These cost estimates enable some preliminary order of magnitude to be established. There are economies of scale to be had with careful attention to court layout and orientation and the resultant impact on fencing, lighting, site access roads and parking.

The Table 14 provides a summary of estimated costs for the off-court facilities which have been identified as a result of the methodology undertaken.

	NO.	UNIT	UNIT COST	CONSTRUCTION COST	PROJECT DELIVERY	TOTAL UNIT COST
PLAYER CHANGEROOM FACILITIES						
2x Change Areas	40	m ²	dry areas	2,750	1.49	163,394
2x Amenities (3x toilets & 3x showers)	40	m ²	wet areas	4,000	1.49	237,664
TOTAL	80	m²				401,057
UMPIRE CHANGEROOM FACILITIES						
1x Change Area	10	m ²	dry areas	2,750	1.49	40,848
1x Amenities (1x toilet & 1x showers)	7	m ²	wet areas	4,000	1.49	41,591
TOTAL	17	m²				82,440
First Aid Room - 10m ²	10	m ²	4,000	40,000	1.33	53,027
Kiosk/Canteen - 20m ²	20	m ²	4,000	80,000	1.33	106,415
Admin Office - 15m ²	12	m ²	2,700	32,400	1.33	43,098
Tournament Office - 15m ²	15	m ²	2,700	40,500	1.33	53,087
Meeting Room - 40m ²	40	m ²	2,700	108,000	1.33	143,660
Equipment Store 20m ²	20	m ²	2,200	44,000	1.33	58,528
Merchandise Store - 10m ²	10	m ²	2,200	22,000	1.33	29,264
Public Toilets - M - F -UA - 24m ²	24	m ²	4,000	96,000	1.33	127,697
Covered Spectator Viewing Area - 50m ²	50	m ²	450	22,500	1.33	29,929
Parking - 20% - 30m ² Per Bay	160	Bays	2,550	408,000	1.33	542,714
Access Road - 100mm X 6m	160	m ²	510	81,600	1.33	108,543
Indoor Sports Stadium - 2 Courts	1,530	m ²	2250	3,442,230	1.75	6,029,131
2 Covered Acrylic Courts - roof, lights, no walls	1,530	m ²	1,300	1,988,844	1.49	2,954,224
Indoor Sports Stadium - 4 Courts	2,967	m ²	2,250	6,675,840	1.45	11,692,861
4 Covered Acrylic Courts - roof, lights, no walls	2,967	m ²	1,300	3,857,152	1.49	5,729,403
¹Generic estimate - non cyclone rated area						

Table 14: Off-Court Facility Requirements - Order Of Magnitude Cost Estimates

12. FACILITY HIERARCHY, RATIONALE AND PRINCIPLES

12.1 FACILITY HIERARCHY



Figure 21: WA Netball Facility Hierarchy

Facility provision, regardless the sporting code tends to follow a hierarchy of need. Similar to Maslow's Hierarchy of Need¹⁶, once a particular level of the hierarchy is met, there tends to be a push for the next level of amenity to be provided. In this instance, and in line with Netball WA's strategic focus to prioritise the establishment of outdoor courts to maximise participation opportunities, the hierarchy focuses on outdoor facilities first, then indoor facilities and then the specific requirements of elite competition.

This reflects the fundamental community basis of the sport, with a strong participation culture at the grassroots. The incremental facility development outlined by the hierarchy seeks to match facility provision with the participation needs of the netball community. As the participation needs increase, so too does the standard of facility provision requirements, while the number of specialised facilities decreases as the hierarchy level increases.

Importantly, if a lower order of need subsequently fails (for example the netball court surface is damaged), the priority immediately returns to that level.

Figure 21 shows a hierarchy which has seven levels which has been developed as a guide as to where the focus on facility provision rests at any point. If a level is met, move up the hierarchy. If a level previously met fails, return to the lower level until it is once again satisfied and then proceed up the hierarchy.

It is important to note that the playing surface is on the first level and will always remain the highest priority. There is a dual focus here, on the ability to play and player safety.

Given the geographical size and diversity of the State, the implementation of the hierarchy will also need to consider differing factors within each region. One of the key factors will be climatic conditions and the impact of climate on participation. This means that in regions where winter brings cold and wet weather, the need for indoor and/or covered courts will be higher than regions with a more temperate climate. In regions where there are extremes in summer heat and humidity, the need for covered outdoor courts will be higher. This is not withstanding

¹⁶ [Maslow's Hierarchy of Needs \(simplypsychology.org\)](https://www.simplypsychology.org/maslow/)

that climate change is driving increases in average temperatures and UV levels, which will see an increase in the demand for covered outdoor courts and, to a lesser degree indoor court provision.

In Section 13, Strategic Facility Priorities provides consideration of environmental factors has resulted in a particular focus on the provision of indoor courts within the Great Southern region, and to a lesser extent in the South West region. While there has been a focus on covered outdoor court provisions in the North West region, and to a lesser extent in the Midwest Gascoyne region.

In this context, it should be noted that all facility provisions identified within this Plan must be subject to a separate and thorough strategic facility planning process, which identifies and confirms the need and feasibility of the proposed facility.

12.2 FACILITY PROVISION RATIONALE AND PRINCIPLES

Rationale

The Netball WA Team identified the following rationale to guide facility provision.

- Maximise netball participation – all forms of the game, all ages, all genders. This will require the development of a:
 - o Player attraction and retention strategy;
 - o Volunteer attraction and retention strategy; and
 - o Officials attraction and retention strategy.
- Support netball talent identification and development
 - o Develop pathways from Woolworths NetSetGO to Junior to Senior to Masters and Academy to WANL
 - o Promote players to representative (district, regional and state) teams and from Fever Reserves to West Coast Fever.
- Maximise facility utilisation – extend activities into the off-season to grow participation and secure venue access

Principles

Netball Australia's National Facilities Plan outlines a set of high level guiding principles that must be considered in the West Australian context. They require facilities to be planned and developed with consideration of:

1. Strategic need, facility demand and participation growth opportunities
2. Accessibility and inclusion, catering for multiple formats of the sport
3. Maximising utilisation and improved programming
4. Best practice technical and design standards
5. Alignment with the needs of key stakeholders and partners.

Other guidelines to be considered specifically in WA include:

On Court Compliance

- Establish court compliance and quality measures as detailed in the Netball Australia Technical Manual for the Design Construction and Maintenance of Netball Facilities (July 2015) including:
 - o Court dimensions (including unobstructed runoffs)
 - o Site investigations and selection

- o Design including court orientation
- o Court sub surface, surface and line marking Note: Court surfaces should have a minimum P4 rating as determined by the wet pendulum test method as detailed in the Australian Standard for Slip Resistance (AS 4586 and AS4663).
- o Goal posts and padding
- o Court lighting type and lux levels – a minimum 200 lux for outdoor competition court installations
- o Adopt LED lighting for all new installations
- o Develop a floodlighting replacement program to transition to LED lamps in all locations and ensure installations meet required lux levels
- o Fencing and landscaping
- o Inclusivity, accessibility and signage
- o Off-court facilities (shelter, storage seating)
- o Construction and Project Management
- o Consistency of gradient and drainage on outdoor courts (prevent pooling)
- Support and advocate for lighting installations to existing unlit courts to extend hours of use
- Adopt contrasting colour acrylic court surfaces and surrounds as the preferred outdoor court surface
- Audit all courts on a three-year cycle to address facility conditions that provide guidance for resurfacing requirements to improve overall consistency, quality and accessibility of netball facilities

Facility Hierarchy

- Develop compliant off-court facilities in line with the adopted hierarchy including consideration of gender neutral disability access requirements
- Pursue access to indoor and / or covered facilities to reduce the impact of climate challenges (both hot/humid and wet/cold conditions).
- Encourage both outdoor and indoor court provision at association headquarters in line with the facility hierarchy
- Prioritise outdoor court provision for mass participation (NetSetGO and junior netball), modified programs (No limits, Walking Netball) activities and broader sport participation development.
- Prioritise indoor court access for seniors / inclusion participation and talent development pathways / elite level competitions and training.
- Indoor court provision can be new or existing, and provided by local government, education facilities or by the private sector.

Facility Provision Models

- Adopt a generic facility model for metropolitan Associations comprising of
 - o District – 8 to 20 outdoor courts and an associated/adjacent stadium providing 2 indoor courts.
 - o Regional - 20 to 30 outdoor courts and an associated / adjacent stadium of at least 4 indoor courts, one of which serves as a show court with a seating capacity (permanent or temporary) for at least 300 spectators, when in the show court configuration.

- Adopt a generic facility model for regional Associations comprising of:
 - o District – 2 to 8 outdoor courts.
 - o Regional – 8 to 20 outdoor courts and an associated / adjacent stadium of at least 2 indoor courts, one of which serves as a show court with a seating capacity (permanent or temporary) for at least 150 spectators when in the show court configuration.
- Support the development of multi-use indoor sports court facilities with both regular season and off-season access
- Support the provision of multi-use off court facilities, including pavilions, social rooms etc.

Geographical Development Focus

- Development of the sport with a geographical focus, one which provides for stronger alignment between geographical regions, Association-level competition and elite level activity (i.e. GIG WANL).
- Improved alignment of regions with State Government development regions and Local Government areas.

Advocacy

- Seek input into the design of multi-use indoor stadiums to ensure compliant court layouts and dimensions, provision of and access to a competition office, meeting room, permanent storage and social facilities in line with the Netball WA Facilities Guidelines
- Access to covered outdoor courts as an alternative to indoor court provision.
- Targeted advocacy for access to school facilities, based on localised association / club need. Target on participation programs and training activity.
- Develop a stronger geographical identity and improved alignment of regions with State Government development regions and Local Government areas to strengthen key stakeholder relationships with respect to facility provision.



PRINCIPAL PARTNER



13. STRATEGIC FACILITY PRIORITIES BY REGION

OVERVIEW OF STRUCTURE

The strategic facility requirements and priorities have been developed for each region and are based on the outcomes of the strategic and technical review, player participation analysis, stakeholder engagement process and the facility provision rationale, guiding principles and hierarchy developed as a part of the study process.

The Netball WA regions are as follows: Great Southern, Metropolitan, Midwest Gascoyne, North West, Peel, South West and Wheatbelt Goldfields.

The priorities have been listed in order (One being the most important) and with an indicative timeframe of either short term (zero to five years), medium term (five to 10 years) or long term (10+ years) being allocated. Key stakeholders have also been identified for each item.

The market share percentage quoted for each region is based on the methodology outlined within Section 6.1 and as summarised below:

- Based on available 2021 ABS Census data, WA Tomorrow population forecast data, and AusPlay participation and frequency data, the number of potential netball players has been calculated for each region.
- This calculation is based on 60.7% of adult and 100% of child netball participation being organised through an Association.
- The number of potential players for the region is divided by the current player participation number for the region. This number is expressed as a percentage and represents the current estimated market share.
- Where the market share of a region is greater than 100%, this means that the total number of actual netball players within the region exceeds the estimated number of potential players within the market. Where the market share is less than 100%, this means that the total number of actual netball players is less than the estimated number of potential players within the market.

13.1 GREAT SOUTHERN REGION

Overview

The Great Southern region comprises of eight Associations including Albany, Denmark, Esperance, Katanning, Kojonup, Narrogin, Ongerup and Ravensthorpe. The combined 2023 total player membership is 3,553 with a current market share of 106.6%.



PRINCIPAL PARTNER



Participation

In 2031, the region is forecast to have a potential playing population of 4,737 players, which based on current market share, equates to 3,358 players. This is an increase of 98 players or approximately 14 teams from 2021.

Junior players are the dominant player type at 42% of all players, with senior players being 31% of the playing population and NetSetGO players 27% of the playing population. Over the period 2019 to 2023, the region has experienced a 50% increase in NetSetGO players and a 26% increase in Senior players, while Junior player numbers have declined by 2%.

Court Provision

Netball currently uses 50 of the 60 available netball courts within the region: an overall utilisation rate of 83%. Of the courts used, 23 (46%) are indoor. 8 of the 27 outdoor courts used, are lit with 75% of these being LED installations.

Future Provision – Key Drivers

Albany

- Current indoor court access at the Albany Leisure Centre has been reduced to competition requirements only. As a consequence, the Association will require access to up to 8 additional courts (minimum of 2 indoor courts) to accommodate club and Association training.

Denmark

- Additional court access is required for the Association to accommodate current competition and training requirements. Given the scarcity of indoor court provision within the town, it is important for the Association to work with the Shire of Denmark or Department of Education to gain additional court access at the Denmark Recreation Centre or Denmark High School during the winter season.
- If additional court access is not able to be achieved, consideration will need to be given to the development of additional indoor court provision, ideally at the Denmark Recreation Centre.

Esperance

- The current Association facility needs are being met through a recently developed 4 court outdoor and 4 court indoor facility, along with the existing aging indoor 3 court facility. However, it should be noted that the aging facility court condition and access will need to be monitored due to the age of the facility.

Narrogin

- Current facility provision is sufficient for the Association, with future court provision being through the upgrade of existing Local Government or Department of Education courts.

NETBALL WA STRATEGIC FACILITIES PLAN PAGE 52

FACILITY REQUIREMENTS & ACTIONS	SHORT TERM (0 - 5 YEARS)	MEDIUM TERM (5 -10 YEARS)	LONG TERM (10 YEARS +)	STAKE-HOLDERS
<p>1. Outdoor Court Re-surfacing Program:</p> <p>Ongerup (2), Boxwood Hill (4), Lake King (3), Lake Grace (2), Narrogin (2), Pingelly (2)</p> <p>Esperance (4), Borden (2), Denmark (1) and Kojonup (4)</p> <p>Actions:</p> <ul style="list-style-type: none"> NWA to monitor court condition and compliance with Local Governments and regional Associations. 				<p>LGA, State Govt & NWA Region</p>
<p>2. New Court Provision</p> <p>Denmark (1 x indoor) (Denmark Leisure Centre), Albany (8 courts, with a minimum 2 x indoor)</p> <p>Actions:</p> <ul style="list-style-type: none"> NWA to engage with the relevant Local Governments to secure additional access to existing indoor court facilities. Should additional indoor court access not be secured, engage with the with the relevant Local Governments to progress planning for new facility provision. 				<p>LGA, State Govt & NWA Region</p>
<p>3. Court Lighting Upgrade</p> <p>Change of Metal Halide lamps to LED (CSRFF grant)</p> <p>Hopetoun (2 courts)</p> <p>Actions:</p> <ul style="list-style-type: none"> NWA to engage with Local Governments and regional Associations to determine court lighting requirements and to develop a court lighting upgrade program to support potential CSRFF grant funding. 				<p>LGA, State Govt & NWA Region</p>



PRINCIPAL PARTNER



4. Advocacy - Court Access

Actions:

- NWA to review the availability of all identified unused netball courts within the region for potential training and competition purposes.
- Determine barriers to court access and for available courts, determine operational and infrastructure requirements (current and future) with the court owners.



NWA & State Govt (Dept. of Education)

5. Future Facility Requirements

- Provision of an Association HQ facility (dedicated office and secure equipment storage) for the Albany and Kojonup Associations.
- Development of a prioritised and needs based program for the provision of Level 2 facility requirements across the region.

Actions:

- NWA to engage with the relevant Local Governments to secure identified Association HQ facilities.
- NWA to engage with the relevant Local Governments and Associations to develop a prioritised and needs based program for the provision of Level 2 facilities across the region.



NWA & Local Govt



PRINCIPAL PARTNER



13.2 MIDWEST GASCOYNE REGION

Overview

The Midwest Gascoyne region comprises seven Associations including Carnarvon, Exmouth, Geraldton, Kalbarri, North Midlands, Northampton and Turquoise Coast. The combined 2023 total player membership is 2,538 with a current market share of 95%.

Participation

In 2031, the region is forecast to have a potential playing population of 3,630 players, which based on current market share, equates to 2,653 players, an increase of 115 players or approximately 16 teams from 2021. Junior and Senior player numbers are equal at 37% and 39%. NetSetGO players make up the remaining 24% of the playing population. Over the period 2019 to 2023, the region has experienced a 6% increase in NetSetGO player numbers and a 26% increase in Senior player numbers. Junior player numbers have decreased by 4% in this period.

Court Provision

Netball currently uses 32 of the 82 available netball courts within the region: an overall utilisation rate of 39%. Of the courts used, 3 (9%) are indoor. 19 of the 29 outdoor courts used are lit with none of these being LED installations.

Future Provision - Key Drivers



Geraldton

- Current indoor provision is limited to a single court, with the Association not able to access to the adjacent indoor basketball centre. Growth in membership and the prevalence of changing climatic conditions, necessitates the need for greater indoor court access.



PRINCIPAL PARTNER



FACILITY REQUIREMENTS & ACTIONS	SHORT TERM (0 - 5 YEARS)	MEDIUM TERM (5 -10 YEARS)	LONG TERM (10 YEARS +)	STAKE-HOLDERS
<p>1. Outdoor Court Re-surfacing Program</p> <p>Carnarvon (4), Exmouth (2), Geraldton (10), Turquoise Coast (2), Northampton (4), Kalbarri (2).</p> <p>Actions:</p> <ul style="list-style-type: none"> • NWA to monitor court condition and compliance with Local Governments and regional Associations. 				<p>LGA, State Govt. Region</p>
<p>2. New Court Provision</p> <p>Geraldton (1 x indoor) (Geraldton Netball Association)</p> <p>Actions:</p> <ul style="list-style-type: none"> • NWA to engage with the relevant Local Government to secure additional access to existing indoor court facilities. • Should additional indoor court access not be secured, engage with the with the relevant Local Governments to progress planning for new facility provision. 				<p>LGA, State Govt & NWA Region</p>



PRINCIPAL PARTNER



3. Court Lighting

Change Metal Halide lamps to LED

Kalbarri (2)

Geraldton (9), Northampton (4), Exmouth (2)

Actions:

- NWA to engage with Local Governments and regional Associations to determine court lighting requirements and to develop a court lighting upgrade program to support potential CSRFF grant funding.



LGA, State Govt & NWA Region

4. Advocacy - Court Access

Actions:

- NWA to review the availability of all identified unused netball courts within the region for potential training and competition purposes.
- Determine barriers to court access and for available courts, determine operational and infrastructure requirements (current and future) with the court owners.



NWA & State Govt (Dept. of Education)



PRINCIPAL PARTNER



5. Future Facility Requirements

- Provision of additional public amenities and secure equipment storage for the Geraldton Association.
- Development of a prioritised and needs based program for the provision of Level 2 facility requirements across the region.

Actions:

- NWA to engage with the relevant Local Government to secure identified Association HQ facilities.
- NWA to engage with the relevant Local Governments and Associations to develop a prioritised and needs based program for the provision of Level 2 facilities across the region.



NWA Local Government





PRINCIPAL PARTNER



13.3 NORTH WEST REGION

Overview

The North West region comprises of nine Associations including Broome, Derby, Karratha, Kununurra, Newman, Paraburdoo, Port Hedland, Tom Price and Wickham. The combined 2023 total player membership is 3,044 with a current market share of 62.2%.

Participation

In 2031, the region is forecast to have a potential playing population of 6,899 players, which based on current market share, equates to 3,269 players. This is an increase of 225 players or approximately 32 teams from 2021.

Senior players are the dominant player type at 49% of all players, with junior players being 29% of the playing population and NetSetGO players 22% of the playing population. Over the period 2019 to 2023, the region has experienced a 12% increase in NetSetGO players, a 7% increase in Junior players and a 20% increase in Senior player numbers.

Court Provision

Netball currently uses 51 of the 103 available netball courts within the region: an overall utilisation rate of 49.5%. Of the courts used, 33 (64%) are either covered outdoor courts or indoor courts.

Future Provision – Key Drivers

Karratha

- Additional court access is required for the Association to accommodate current competition and training requirements, noting the importance of indoor and covered outdoor courts in the North West region. If additional court access is not able to be achieved, consideration will need to be given to the development of additional indoor court provision, ideally at the Karratha Leisureplex.

Broome

- Additional court access is required for the Association to accommodate current competition and training requirements, noting the importance of indoor and covered outdoor courts in the North West region. If additional court access is not able to be achieved, consideration will need to be given to the development of additional indoor court provision, ideally at the Broome Recreation and Aquatic Centre.

Port Hedland

- Additional court access i




General Provision

- A key focus of Netball WA in this region is the provision of covered outdoor courts and compliant floodlighting.



PRINCIPAL PARTNER



FACILITY REQUIREMENTS & ACTIONS	SHORT TERM (0 - 5 YEARS)	MEDIUM TERM (5 -10 YEARS)	LONG TERM (10 YEARS +)	STAKE-HOLDERS
<p>1. Outdoor Court Re-surfacing Program</p> <p>Port Hedland (6) Derby (4), Kununurra (6), Broome (4) Newman (6) Paraburdoo (3) Wickham (2), Karratha (6), Tom Price (3)</p> <p>Actions:</p> <ul style="list-style-type: none"> • NWA to monitor court condition and compliance with Local Governments and regional Associations. 				<p>LGA, State Govt. NWA Region</p>
<p>2. New Court Provision</p> <p>Broome (4 x covered outdoor) Karratha (8x covered outdoor)</p> <p>Actions:</p> <ul style="list-style-type: none"> • NWA to engage with the relevant Local Governments to secure additional access to existing courts. • Should additional court access not be secured, engage with the with the relevant Local Governments to progress planning for new facility provision. 				<p>LGA, State Govt & NWA Region</p>



PRINCIPAL PARTNER



3. Court Lighting Upgrade

Change of Metal Halide lamps to LED (CSRFF grant):

- Port Hedland (6), Derby (4), Wickham (2 courts), Kununurra (6 courts)
- Broome (4)

New lighting installation (CSRFF grant):

- Newman (6 courts) lighting install

Actions:

- NWA to engage with Local Governments and regional Associations to determine court lighting requirements and to develop a court lighting upgrade program to support potential CSRFF grant funding.



LGA, State Govt & NWA Region

4. Advocacy - court access

Actions:

- NWA to review the availability of all identified unused netball courts within the region for potential training and competition purposes.
- Determine barriers to court access and for available courts, determine operational and infrastructure requirements (current and future) with the court owners.



NWA & State Govt (Dept. of Education)



PRINCIPAL PARTNER



5. Future Facility Requirements

- Provision of an Association HQ facility (dedicated office and secure equipment storage) for the Newman, Wickham, Paraburdoo, Kununurra and Broome Associations.
- Provision of Covered Courts for Wickham (2), Port Hedland (6), Kununurra (6) and Newman (6).
- Provision of public toilets at the courts used by Wickham.
- Develop a prioritised and needs based program for the provision of Level 2 facility requirements across the region.

Actions:

- NWA to engage with the relevant Local Governments to secure identified Association HQ facilities, Covered Courts and Public Toilets.
- NWA to engage with the relevant Local Governments and Associations to develop a prioritised and needs based program for the provision of Level 2 facilities across the region.



NWA, Local Government



PRINCIPAL PARTNER



13.4 PEEL REGION

Overview

The Peel region comprises of five Associations including Mandurah, Peel Football and Netball League (Peel FNL), Pinjarra, Serpentine-Jarrahdale and Waroona and Districts. The combined 2023 total player membership is 2,414 with a current market share of 35.7%.

Participation

In 2031, the region is forecast to have a potential playing population of 12,299 players, which based on current market share, equates to 3,386 players. This is an increase of 972 players or approximately 139 teams from 2021.

Junior players are the dominant player type at 51% of all players, with NetSetGO players being 37% of the playing population and Senior players 12% of total players. Over the period 2019 to 2023, the number of NetSetGO players has increased by 2.64%, while the number of Junior players has decreased by 27% and Senior players by 48%.

Court Provision

Netball currently uses 44 of the 171 available netball courts within the region: an overall utilisation rate of 26%. Of the courts used, 44 (48%) are indoor. 15 of the 23 outdoor courts used are lit with none of these being LED installations.

Future Provision – Key Drivers

Mandurah

- The provision of new and upgraded netball courts in Mandurah has been a focus of both the local netball community and the City of Mandurah for some time. Despite a willingness to address the lack of adequacy of the courts at Rushton Park (Thomson Street) in Mandurah, the site is significantly constrained and unable to accommodate an expanded netball complex.
- Investigations to identify an alternative site for the development of a new netball complex in Mandurah have to date been fruitless. It may be necessary to accept a longer term view for facility provision in this region and consider the development of a Peel regional netball complex on the regional open space located near the intersection of the Kwinana Freeway and Pinjarra Road.
- There is sufficient room at this site to establish a major multi-sport facility with netball being one of the foundation sports. Early planning for this site, as far back as 2002, nominated netball as one of the sports to be included.




PRINCIPAL PARTNER



- The proposal then, was for senior netball to be played in a 3 court indoor stadium while junior netball was proposed to remain at Rushton Park. These options are no longer a viable proposition. Advocacy for the development of the Peel regional open space should now be pursued in line with the metropolitan Association model of up to 20 lit outdoor hard courts and access to an adjacent four court indoor stadium. This venue should be home to the Peel region GIG WANL representative team, the Peel Lightning.



Figure 22: Peel Regional Open Space Masterplan 2002

FACILITY REQUIREMENTS & ACTIONS	SHORT TERM (0 - 5 YEARS)	MEDIUM TERM (5 -10 YEARS)	LONG TERM (10 YEARS +)	STAKE-HOLDERS
<p>1. Outdoor Court Re-surfacing Program Mandurah (10), Mundijong (4), Halls Head (8), Falcon (1) Actions:</p> <ul style="list-style-type: none"> NWA to monitor court condition and compliance with Local Governments and regional Associations. 				LGA, State Govt. Region



PRINCIPAL PARTNER



2. New Court Provision

Mandurah (15 x outdoor if based at Rushton Park – 25 if new location), Mandurah RAC (2 x indoor)

Actions:

- NWA to engage with the relevant Local Governments to secure additional access to existing indoor and outdoor court facilities.
- Should additional court access not be secured, engage with the with the relevant Local Governments to progress planning for new facility provision.



LGA, State Govt. & NWA Region

3. Court Lighting

Change of Metal Halide lamps to LED (CSRFF grant)

Actions:

- NWA to engage with Local Governments and regional Associations to determine court lighting requirements and to develop a court lighting upgrade program to support potential CSRFF grant funding.



LGA, State Govt. & NWA Region

4. Parking

Provision of additional parking capacity at Mandurah (100 bays).

Actions:

- NWA to engage with the relevant Local Governments to secure additional parking facilities.



LGA, NWA



PRINCIPAL PARTNER



5. Advocacy - Court Access

Actions:

- NWA to review the availability of all identified unused netball courts within the region for potential training and competition purposes.
- NWA investigate court access for the Peel Lightning GIG WANL team for training and competition purposes.
- Determine barriers to court access and for available courts, determine operational and infrastructure requirements (current and future) with the court owners.



NWA & State Govt. (Dept. of Education)

6. Future Facility Requirements

- Development of compliant and adequate court provision to meet the future needs of the Mandurah Association.
- Development of a prioritised and needs based program for the provision of Level 2 facility requirements across the region.

Actions:

- NWA to engage with the relevant Local Governments to secure identified additional court provision within Mandurah.
- NWA to engage with the relevant Local Governments and Associations to develop a prioritised and needs based program for the provision of Level 2 facilities across the region.



NWA & Local Govt.



PRINCIPAL PARTNER



13.5 METROPOLITAN REGION

Overview

The Metropolitan region comprises of 14 Associations and affiliated centres extending from Rockingham in the south, to Yanchep in the north and Eastern Hills in the east. The combined 2023 total player membership is 46,470 with a current market share of 53.8%.

Participation

In 2031, the region is forecast to have a potential playing population of 151,405 players, which based on current market share, equates to 61,416 players. This is an increase of 14,946 players or approximately 2,135 teams from 2021.

Junior players are the dominant player type at 52% of all players, with NetSetGO players being 31% of the playing population and Senior players 17% of total players. Over the period 2019 to 2023 the number of NetSetGO players has increased by 14%, Junior players by 16% and Senior players by 14%.

Court Provision

Netball currently uses 276 of the 1,477 available netball courts within the region: an overall utilisation rate of 19%. Of the courts used, 13 (5%) are indoor. 197 of the 263 outdoor courts used are lit with 49 (25%) of these being LED installations.

Future Provision – Key Drivers

Gold Netball Centre

- Currently the Gold Netball Centre is near capacity in respect to competition and training requirements for the West Coast Fever, GIG WANL clubs and general club and community use. An increase in court capacity will need to be considered to enable the centre to meet the needs of the WA netball community.

Growth Corridors

- Population growth within the Cities of Armadale and Wanneroo is increasing netball participation and demand for court access, which is evidenced by the growth in Association membership numbers within each of these areas.
- To meet these future needs, the Cities of Armadale and Wanneroo are planning for the provision of new facilities at the Armadale Regional Recreation Reserve and Alkimos Regional Open Space. It is important for Netball WA to continue to work with these Local Governments to ensure adequate and compliant netball provision is included within these two developments.
- Demand for indoor court space in Rockingham is ever increasing, as a result of population growth and increased participation. It is important for the Association to work with the City of Rockingham to improve indoor court accessibility to meet current needs.






NETBALL WA STRATEGIC FACILITIES PLAN PAGE 67





PRINCIPAL PARTNER



FACILITY REQUIREMENTS & ACTIONS	SHORT TERM (0 - 5 YEARS)	MEDIUM TERM (5 -10 YEARS)	LONG TERM (10 YEARS +)	STAKE-HOLDERS
<p>1. Outdoor Court Re-surfacing Program:</p> <p>Rockingham (10), Wanneroo (27), Kalamunda (2), Success (20), Fremantle (3), Southern Districts (22), Wanneroo (30), Gingin (8) Perth (13), Fremantle (6), Swan Districts (13)</p> <p>Perth (15), Fremantle (6), Southern Districts (10), Fremantle (3), Joondalup (12), Belmont (12)</p> <p>Actions:</p> <ul style="list-style-type: none"> NWA to monitor court condition and compliance with Local Governments and regional Associations. 				<p>LGA, State Govt. Region</p>
<p>2. New Court Provision</p> <p>Gold Netball Centre (2 x indoor), Kalamunda (2 x outdoor), Southern Districts (4 x indoor), Baldivis (4 x indoor)</p> <p>Swan Districts (7 x outdoor), Kalamunda / High Wycombe CC (4 x indoor), Rockingham (5 x outdoor), Joondalup (8 x outdoor)</p> <p>Armadale (4 x indoor, 20 x outdoor) and Alkimos (20 x outdoor)</p> <p>Actions:</p> <ul style="list-style-type: none"> Work in partnership with Venues West in undertaking a Needs and feasibility study of the Gold Netball Centre. Needs and Feasibility Study to be undertaken in 2024. NWA to engage with the relevant Local Governments to secure additional access to existing indoor and outdoor court facilities. Should additional indoor court access not be secured, engage with the with the relevant Local Governments to progress planning for new facility provision. 				<p>LGA, State Govt. & NWA Region</p>



PRINCIPAL PARTNER



3. Court Lighting

Change Metal Halide lamps to LED (CSRFF grant) Wanneroo (57), Rockingham (10), Swan Districts (6), Joondalup (12), Perth (18), Success (20), Belmont (12), Fremantle (25).

Actions:

- NWA to engage with Local Governments and regional Associations to determine court lighting requirements and to develop a court lighting upgrade program to support potential CSRFF grant funding.



LGA, State Govt. & NWA Region

4. Parking

Provision of additional parking capacity:

Swan Districts (100), Southern Districts (200), Success (100), Joondalup (100), Kalamunda (250)

Belmont (100)

Actions:

- NWA to engage with the relevant Local Governments to secure additional parking facilities.



LGA, NWA

5. Advocacy - Court Access

Actions:

- NWA to review the availability of all identified unused netball courts within the region for potential training and competition purposes.
- Determine barriers to court access and for available courts, determine operational and infrastructure requirements (current and future) with the court owners.



NWA & State Govt. (Dept. of Education)



PRINCIPAL PARTNER



6. Future Facility Requirements

Work in partnership with VenuesWest in undertaking a Needs and Feasibility study of the Gold Netball Centre in 2024.

Work with the City of Armadale on the development of the Armadale Regional Recreation Reserve, ensuring adequate and compliant court provision in a timely manner. Work with the City of Wanneroo on the development of the Alkimos Regional Open Space, ensuring adequate and compliant court provision in a timely manner.

Develop a prioritised and needs based program for the provision of Level 2 facility requirements across the region.

Actions:

- NWA to engage with the relevant Local Governments to secure identified Association HQ facilities.
- NWA to engage with the relevant Local Governments and Associations to develop a prioritised and needs based program for the provision of Level 2 facilities across the region.



NWA



PRINCIPAL PARTNER



13.6 SOUTH WEST REGION

Overview

The South West region comprises of 11 Associations including Bridgetown, Bunbury, Busselton, Collie, Donnybrook, Eaton, Harvey, Leschenault, Manjimup, Margaret River and the South West Football Netball League (South West FNL). The combined 2023 total player membership is 4,596 with a current market share of 41.2%.

Participation

In 2031 the region is forecast to have a potential playing population of 17,810 players, which based on current market share, equates to 5,678 players. This is an increase of 1,082 players or approximately 155 teams from 2021.

Junior players are the dominant player type at 57% of all players, with Senior players being 16% of the playing population and NetSetGO players 27% of total players. Over the period 2019 to 2023, the number of NetSetGO players has declined by 7%, Juniors player numbers have increased by 8% and Senior players have increased by 33%.

Court Provision

Netball currently uses 57 of the 186 available netball courts within the region: an overall utilisation rate of 31%. Of the courts used, 27 (47%) are indoor. 21 of the 30 outdoor courts used are lit with none of these being LED installations.





Future Provision – Key Drivers

- Court provision requirements are being driven by the growth being experienced by the Associations and limited access to existing facilities, which in turn is restricting competition growth in the region.
- Provision of floodlighting for existing courts, and upgrade of existing lighting, is required to increase the capacity of existing courts to meet competition and training demand This is particularly evident at Busselton, where currently only three of the 12 existing courts are lit, limiting the Association's ability to meet demand in a high growth region.
- While new court provision has been identified, the primary focus of the Associations will be to work with the relevant Local Governments and Department of Education to increase the availability of existing courts.



PRINCIPAL PARTNER



FACILITY REQUIREMENTS & ACTIONS	SHORT TERM (0 - 5 YEARS)	MEDIUM TERM (5 -10 YEARS)	LONG TERM (10 YEARS +)	STAKE-HOLDERS
<p>1. Outdoor Court Re-surfacing Program</p> <p>Busselton (12) Naturaliste CC (4) Bunbury (12)</p> <p>Actions:</p> <ul style="list-style-type: none"> NWA to monitor court condition and compliance with Local Governments and regional Associations. 				<p>LGA, State Govt. & NWA Region</p>
<p>2. New Court Provision</p> <p>Collie RC (4 courts with 2 x indoor), Donnybrook (1 x indoor), Eaton (6 courts with 2 x indoor) Leschenault LC (2 x indoor), Naturaliste CC (6 courts, 2x indoor)</p> <p>Actions:</p> <ul style="list-style-type: none"> NWA to engage with the relevant Local Governments to secure additional access to existing indoor court facilities. Should additional indoor court access not be secured, engage with the with the relevant Local Governments to progress planning for new facility provision. 				<p>LGA, State Govt. & NWA Region</p>



PRINCIPAL PARTNER



3. Court Lighting

Change Metal Halide lamps to LED (CSRFF grant)

Bunbury (12), and Naturaliste CC (4)

New lighting installation (CSRFF grant):

Busselton (12) lighting install, including upgrade of existing lighting (3 courts) from Metal Hallide to LED.

Actions:

- NWA to engage with Local Governments and regional Associations to determine court lighting requirements and to develop a court lighting upgrade program to support potential CSRFF grant funding.



LGA, State Govt. & NWA Region

4. Parking

Provision of additional parking capacity:

Margaret River (100 bays)

Actions:

- NWA to engage with the relevant Local Governments to secure additional parking facilities.



LGA, NWA

5. Advocacy - Court Access

Actions:

- NWA to review the availability of all identified unused netball courts within the region for potential training and competition purposes.
- Determine barriers to court access and for available courts, determine operational and infrastructure requirements (current and future) with the court owners.



LGA & State Govt. (Dept. of Education)



PRINCIPAL PARTNER



6. Future Facility Requirements

- Provision of an Association HQ facility (dedicated office and secure equipment storage) for the Eaton Association.
- Development of a prioritised and needs based program for the provision of Level 2 facility requirements across the region.

Actions:

- NWA to engage with the relevant Local Governments to secure identified Association HQ facilities.
- NWA to engage with the relevant Local Governments and Associations to develop a prioritised and needs based program for the provision of Level 2 facilities across the region.



NWA





PRINCIPAL PARTNER



13.7 WHEATBELT GOLDFIELDS REGION

Overview

The Wheatbelt Goldfields region comprises of 15 Associations including Avon, Central Midlands Coastal, Central Midlands, Central Wheatbelt, Corrigin & Districts, Cunderdin Nippers, Dalwallinu, Eastern Goldfields, Kellerberrin Ladies, Merredin, Mortlock, Northam, Quairading, Wongan Hills, and Yilgarn. The combined 2023 total player membership is 2,897 with a current market share of 120.7%.

Participation

In 2031 the region is forecast to have a potential playing population of 3,617 players, which based on current market share, equates to 3,328 players. This is an increase of 431 players or approximately 62 teams from 2021. Senior players are the dominant player type at 42% of players, with Junior players being 32% of the playing population and NetSetGO players 27% of total players. Over the period 2019 to 2023, the number of NetSetGO players has declined by 7%, Juniors player numbers have declined by 16% and Senior player numbers have increased by 9%.

Court Provision

Netball currently uses 95 of the 260 available netball courts within the region: an overall utilisation rate of 37%. Of the courts used, 35 (37%) are indoor. 21 of the 60 outdoor courts used are lit with 4 (19%) of these being LED installations.

Future Provision – Key Drivers

The key focus of Netball WA in this region is the provision of compliant courts and floodlighting to support current use and to negotiate access to existing Local Government and Department of Education courts to meet future demand.



PRINCIPAL PARTNER



FACILITY REQUIREMENTS & ACTIONS	SHORT TERM (0 - 5 YEARS)	MEDIUM TERM (5 -10 YEARS)	LONG TERM (10 YEARS +)	STAKE-HOLDERS
<p>1. Outdoor Court Re-surfacing Program Merredin (4), Northam (4), Cunderdin (2), Beacon (3) Kalgoorlie (9), Koorda (1), Kalannie (1)</p> <p>Actions:</p> <ul style="list-style-type: none"> • NWA to monitor court condition and compliance with Local Governments and regional Associations. • NWA to engage with Local Governments to ensure re-surfaced courts are also made compliant. 				LGA, State Govt. & NWA Region
<p>2. Court Lighting Change Metal Halide lamps to LED (CSRFF grant) Northam (4), Merredin (4), Kalgoorlie (9), Beacon (3)</p> <p>Actions:</p> <ul style="list-style-type: none"> • NWA to engage with Local Governments and regional Associations to determine court lighting requirements and to develop a court lighting upgrade program to support potential CSRFF grant funding. 				LGA, State Govt. & NWA Region



PRINCIPAL PARTNER



3. Advocacy – Court Access

Actions:

- NWA to review the availability of all identified unused netball courts within the region for potential training and competition purposes.
- Determine barriers to court access and for available courts, determine operational and infrastructure requirements (current and future) with the court owners.



NWA & State Govt (Dept. of Education)

4. Future Facility Requirements

- Provision of an Association HQ facility (dedicated office and secure equipment storage) and public toilets for the Kalgoorlie Association.
- Provision of covered outdoor courts for Narembeen (4 courts)
- Development of a prioritised and needs based program for the provision of Level 2 facility requirements across the region.

Actions:

- NWA to engage with the relevant Local Governments to secure identified Association HQ and public toilet facilities for the Kalgoorlie Association and covered courts for the Narembeen Association.
- To support the facility planning process of LGA’s in the region for uncompliant courts to be made compliant and to meet netball requirements.
- NWA to engage with the relevant Local Governments and Associations to develop a prioritised and needs based program for the provision of Level 2 facilities across the region.



NWA, Local Govt

GLOSSARY AND ABBREVIATIONS

ABS	Australian Bureau of Statistics
AFL	Australian Football League
AS	Australian Standard
DLGSC	Department of Local Government Sport and Cultural Industries (WA)
LED	Light-emitting diode
LUX	A unit of illumination
NWA	Netball WA
PLA WA	Parks and Leisure Australia - Western Australia
SFP	Strategic Facilities Plan
SSN	Suncorp Super Netball
WA	Western Australia
GIG WANL	Gold Industry Group Western Australian Netball League



PRINCIPAL PARTNER



Department of
Local Government, Sport
and Cultural Industries



FIGURES

Figure 1: WA Age Cohorts - Change In Population Number 2016 - 2021	9
Figure 2: Netball WA Competition And Program Structure	15
Figure 3: Player Primary Membership - Percentage Change 2019 to 2023	19
Figure 4: Primary Player Membership - Annual Percentage Change by Region	19
Figure 5: Total Players by Type - All Metropolitan Associations	20
Figure 6: Total Players by Association	20
Figure 7: Club Player No distribution - Metropolitan Associations 2023	21
Figure 8: Association Club Player Numbers By Category	21
Figure 9: Total Players By Type - All Regions	22
Figure 10: Total Players By Region	22
Figure 11: Regions - Comparative Player Type Percentages	23
Figure 12: Regional Centre Associations - Total Players By Type	23
Figure 13: Regional Centre Associations - Total Players By Association	24
Figure 14: Regional Centre Associations - Comparative Player Type Percentages	24
Figure 15: AusPlay Netball Participation By Organisation Type	29
Figure 16: Market Share By Region - 91.2% Participation Rate	30
Figure 17: Market Share By Region - 60.7% Participation Rate	30
Figure 18: Average Condition Of Netball Facilities	43
Figure 19: New Facility Requirements	43
Figure 20: Additional Facility Requirements	43
Figure 21: WA Netball Facility Hierarchy	47
Figure 22: Peel Regional Open Space Masterplan 2002	64



PRINCIPAL PARTNER



Department of
Local Government, Sport
and Cultural Industries



TABLES

Table 1: Association Classification By Tier	25
Table 2: Junior Players - Membership Change By Region 2019 - 2023	26
Table 3: Junior Player Trend Analysis 2018 - 2023	27
Table 4: Senior Players - Membership Change By Region 2019 - 2023	27
Table 5: Senior Player Trend Analysis 2019 - 2023	28
Table 6: Netball WA Forecast Player Numbers - 2031	31
Table 7: Overview Of Social, Health And Economical Benefits Of Sport	33
Table 8: Netball WA Annual Netball Activity (Hours) By Member Category	35
Table 9: Netball Court Provision By Type And Institution	40
Table 10: Current Netball Court Usage - By Region	40
Table 11: Percentage Of Indoor Courts By Region	41
Table 12: Existing Outdoor Courts - Extent And Type Of Floodlighting	41
Table 13: Future Facility Requirement Priorities - Order Of Magnitude Cost Estimates	45
Table 14: Off-Court Facility Requirements - Order Of Magnitude Cost Estimates	46





PRINCIPAL PARTNER



GOLD
INDUSTRY
GROUP



ShootingStars



Department of
Local Government, Sport
and Cultural Industries

