



OFFICE FOR
RECREATION & SPORT



GAME PLAN



a report on the
economic significance
and management
practices of 10 sports
in south australia



Government
of South Australia



Minister's Message

Sport and Recreation is an integral part of South Australia's lifestyle and culture. For a State with just under 1.5 million people our sporting achievements, both domestically and internationally, are a source of considerable State pride.

Approximately 57% of adult South Australians participate in sport and recreation each year, while over 52% attend sporting or recreational events. There is little doubt that sport and recreation is one of our State's favoured pastimes.

The recreation and sport participants and spectators are, however, being increasingly offered a range of alternative activities. It is imperative that sport and recreation organisations are able to strategically plan to keep current participants and spectators in addition to attracting new ones in the face of increasing demand on people's time and the 'technological revolution'.

This report Game Plan - a report on the economic significance and management practices of 10 sports in South Australia has been produced to highlight the approaches used by various sports in South Australia to adapt to the changing environment. It is the first time that information from such a wide variety of organisations has been pulled together and will serve the recreation and sport industry as a tool to assist in its planning for the future.

The consultation process was indeed a time-consuming task and I would like to take this opportunity to commend the organisations involved, without their cooperation and invaluable assistance the report would not have been possible. Information sharing is crucial to the continued development of the recreation and sport industry, an industry that remains as one of the fastest growing sectors in the South Australian economy.

It is hoped that the perspectives provided by the ten organisations studied can be adapted to assist the recreation and sport industry and organisations which were not involved in this study, as well as those who were.

The South Australian Office for Recreation and Sport continues to produce innovative and useful research for the benefit of the recreation and sport industry and interested stakeholders. I sincerely hope that you or your organisation find this report of assistance in planning to meet the challenges ahead.

A handwritten signature in blue ink, appearing to read 'Iain Evans'. The signature is fluid and cursive, with a large initial 'I'.

*Hon Iain Evans, MP
Minister for Recreation, Sport & Racing*

G A M E P L A N

*a report on the economic significance
and management practices of 10
sports in south australia*

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DISCLAIMER

The information relating to the ten sports contained in this report has been provided by the sports themselves

It has been done in the spirit of co-operation and information sharing.

While the Office for Recreation and Sport welcomes the contributions of each sport, the views expressed herein are those of the sports and not necessarily those of the South Australian Government.

GAME PLAN

a report on the economic significance and management practices of 10 sports in south australia

Introduction

The South Australian recreation and sport industry is one of the fastest growing sectors in the South Australian economy. It contributes over 2.2% of Gross State Product and employs over 20,000 people. However, it is facing considerable challenges from a variety of sources threatening to slow its continued development.

The State and regional sporting and recreation organisations and the many thousands of clubs they represent are under increasing pressure to attract participants, sponsors and spectators to their sport. The ability to generate revenue has never been more important. Even the most ardent industry supporters recognise that consumers have never before had such a diverse range of options on which to spend their leisure dollar.

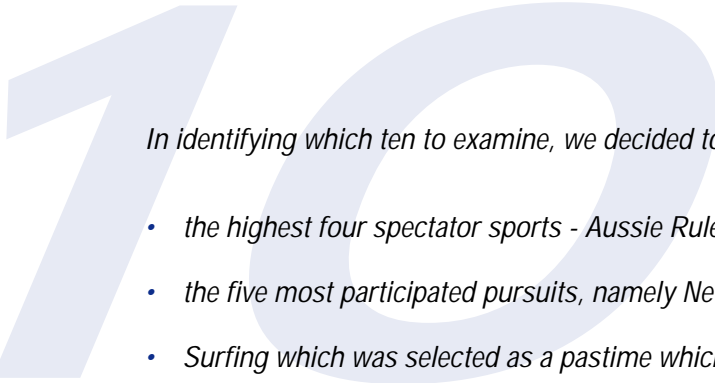
The move towards unstructured sports and recreational activities has been pronounced in the past decade. Many participants do not wish to join a club or peak body preferring the 'pay to play' option available at recreation and community centres. Whilst numbers participating in physically active pursuits may not be decreasing, organisations within the traditional sport and recreation structure must develop innovative ways to capture this growing market segment.

There is also an increasing trend toward involvement in outdoor recreation activities such as trail walking and coastal-based activities. The very nature of such pursuits does not necessitate the need for involvement in the traditional organised sporting structure.

As a result of shifting consumer trends towards unstructured sport and recreational activities, the traditional State associations have had to become more innovative and efficient in their own practices. This report highlights some of the management practices that sport and recreation associations are currently utilising in this regard.

Study Rationale

The Office for Recreation and Sport is committed to increasing the awareness of recreation and sport through the provision of data impacting on all segments of the industry. This report highlights the structure, economic significance and management practices of ten sport and recreation organisations in South Australia.



In identifying which ten to examine, we decided to select -

- *the highest four spectator sports - Aussie Rules Football, Cricket, Soccer and Basketball;*
- *the five most participated pursuits, namely Netball, Lawn Bowls, Tennis, Golf and Aerobics; and*
- *Surfing which was selected as a pastime which is growing and almost solely participated in outside the traditional club structure.*

From the project's inception, it was decided that the study was not meant to be judgemental. It was not the intention of the ORS to analyse the management practices and group them into 'efficient and inefficient'. Moreover we were concerned with identifying which management techniques were being utilised and allowing recreation and sport organisations to select those they could adopt to their individual organisations to improve their own performance.

The end result is hoped to be a tool which recreation and sport organisations can use to discover practices which may be appropriate for them to adapt to suit their own circumstances.

The recreation and sport industry acknowledges that information sharing is one way forward to further develop this sector and assist it in reaching its obvious potential. This study provides a forum for information sharing as the industry strives to continually improve and meet the future challenges which it faces.

Whilst the management practices used by sport and recreation organisations are a feature of this study, considerable effort has also gone into identifying some of the key economic and statistical data on the ten sport and recreation organisations examined as part of the study. Furthermore, the report highlights the significant impact each of the ten has on the South Australian economy.

Report Outline


Each organisation consulted for the research of this study operates in a unique environment, and whilst it is acknowledged that all operate under the umbrella of the recreation and sport industry, each had a different story to tell. What forms the 'story' of each sport is the relationship each has with its participants, sponsors, suppliers and the media.

Each sport and recreation examined makes a significant contribution to the State's economy through the value of its infrastructure, the people it employs and the expenditures made by the participants, spectators and sponsors.

What became evident from the outset was the different administration structures the organisations operated under. They varied considerably from having a large board of management, with many paid positions which oversaw the running of the sport or recreation - to smaller structures which employed, in the most extreme case, only one part-time administrator.

The management practices of the ten sport and recreation organisations included in this study were segmented into the following categories:

- *Leadership*
- *Customer Focus*
- *People*

- 
- *Strategy and Planning*
 - *Suppliers*
 - *Processes for Innovation and Quality Improvement*
 - *Organisation and Performance*

These categories are based on the Business Excellence model developed as part of the Business Vision 2010 project and are also largely consistent with the key performance areas used in the Active Australia provider framework.

The ten organisations in this study all provide examples of innovative and effective sports management practices. There is much that can be learnt from such organisations; below are a few examples:

Leadership - the development of leaders with vision was highly sought after and many organisations are currently in the process of developing such leadership in their organisations.

Customer Focus - many organisations have targeted their customers and participants and have developed specific products to cater for their needs. Many sports have adapted the concept of family packages, whereas the focus of other sports is on facility development and the needs of participants.

People - the consultative process highlighted the need to have passionate and committed people around sporting and recreation organisations. The volunteer effort should not be underestimated and a key issue was the need to retain and properly train volunteers to assist in the efficient running of such organisations.

Strategy and Planning - the sports in this study recognised the need to plan strategically for the future as a tool to meet increasing challenges. Some of the plans are built around increasing participation, managing media and sponsors and developing emerging talent.

Suppliers - the study highlights the relationship the organisations have with the suppliers to their sport. These relationships are vital to the broader development of the sport or recreational activity. This could be in the form of sponsorship, facility provision or the supply of products and services.

Processes for Innovation and Quality - there was an increasing role for ingenuity and adaptation of new methods to cater for participants, spectators, sponsors and media. These range from modified rule games for juniors, providing a wider scope of times to participate in sports and new ways to promote the sport both to the media and potential participants.

Organisation and Performance - this category gave the ten organisations the chance to briefly assess their strengths, weaknesses, opportunities and threats in relation to their own management practices and future development.

We trust you find this study interesting and a useful tool in managing your sport or recreation organisation. We hope that some of the perspectives that follow can be adapted to assist your organisation to continuously improve and help to meet the challenges that face the recreation and sport industry in the future.

AEROBICS

The growth of the fitness/aerobics industry over the last decade has been phenomenal. With a participation rate in South Australia of 4.5% it is South Australia's most popular physical activity.

Aerobics has evolved from highly choreographed routines in the early 1990s to Step Reebok, aquarobics, body pump and more recently to the use of computer controlled training equipment.

Current Structure/Overview

Participation Levels

There were just under 140,000 participants involved in aerobics over 1998/99 with the majority of participants attending an aerobics class at least once every fortnight.

Most participants take half hour classes at fitness centres and do not usually enter competitions. Those who do participate competitively are generally instructors.



Aerobics participation is almost exclusively undertaken in commercial fitness centres.

Administration Structure

Two international Federations provide competition in aerobics, using different rules:

- *The International Gymnastics Federation, and*
- *Federation Internationale des Sports Aerobics et Fitness*

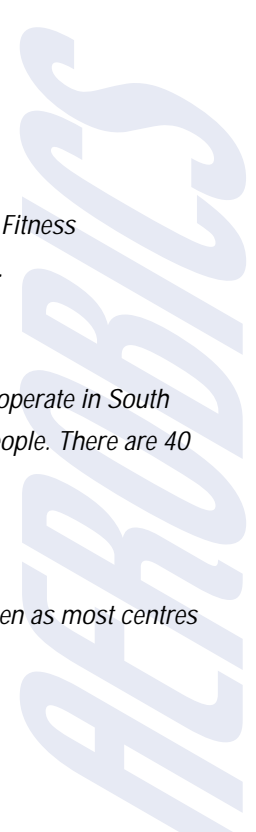
Fitness SA is the peak industry body in South Australia. It is affiliated with Fitness Australia and the Australian Fitness Accreditation Council, who are both affiliated with the Federation Internationale des Sports Aerobics et Fitness.

Employment

Aerobics takes place in fitness centres, community recreation centres and schools. About 160 fitness centres operate in South Australia. The largest centres employ up to 40 people. In total, all centres would employ in the order of 800 people. There are 40 personal trainers registered in South Australia.

Financials

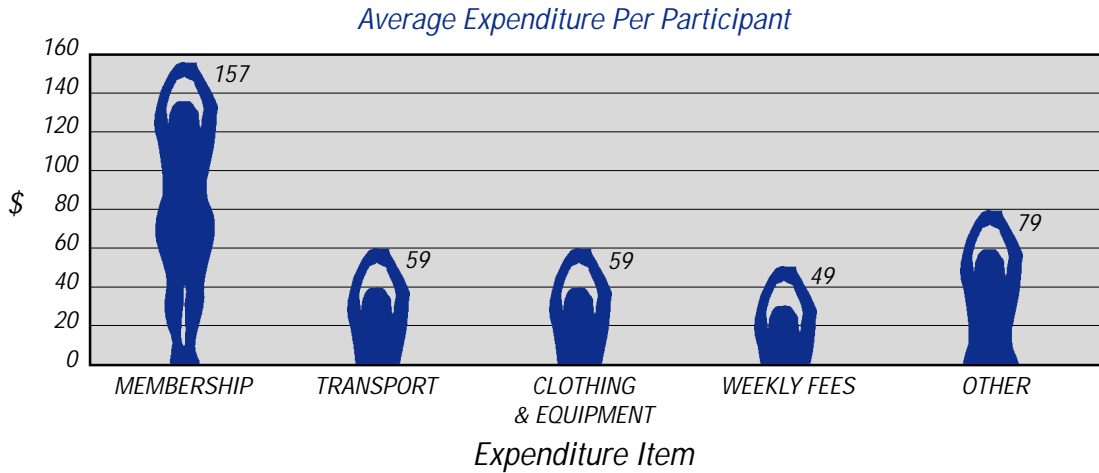
Due to the commercial nature of the aerobics industry, the gathering of financial information was not undertaken as most centres are private providers.



Economic Significance

Expenditure

Aggregate spending by aerobics participants in South Australia was reported to be \$17 million. Average yearly spending by participants was \$334 each.



Source: ABS Cat. No. 4177.0

Exports

While there are several companies in South Australia who export fitness equipment to overseas markets including North America, Europe and Asia, the export of specific aerobics-related equipment is negligible.

Spectators

Aerobics is generally not considered to be a spectator sport. However it does attract crowds to World Championship and National titles. Numbers of attendance are generally not collected.

Merchandising

Commercial products and brands associated with aerobics include books and equipment, commercial expositions and competitions, shoes, clothing, branded exercises and packaged music.

The sale of such items does not result in any gain to the peak body. The majority of such equipment is sold through retail sport stores or at commercial fitness centres.

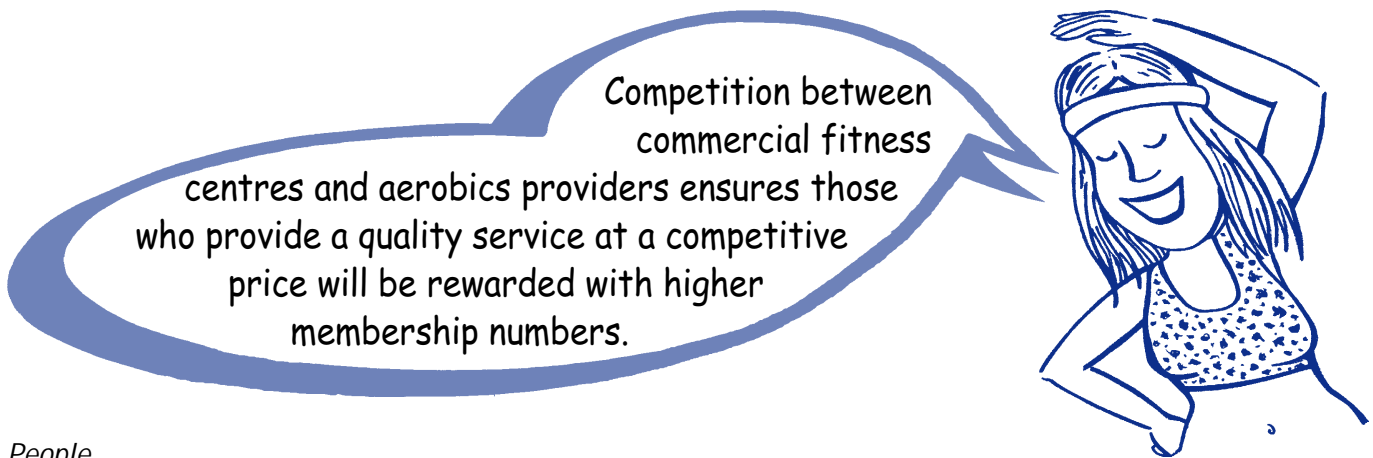
Management Practices

Leadership

Aerobics has decentralised, commercial leadership. These leaders have a vision of growth and the sport is regularly developing willing new leaders. Response to change has been continuous and adaptive.

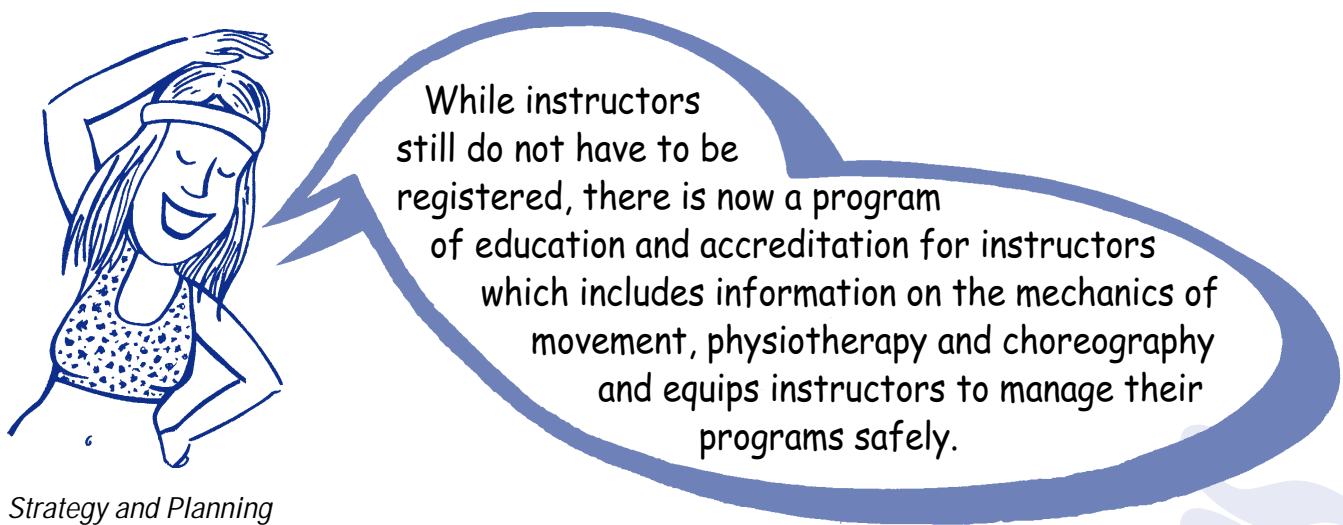
Customer Focus

The high levels of participation and the continuous innovation and research in aerobics, reflects a strong focus on participants as customers. There is no strong program of junior development, perhaps because the sport focuses on participation rather than elite performance. Operators who provide quality service are rewarded with high membership numbers.



People

While instructors still do not have to be registered, there is now a program of education and accreditation for instructors which includes information on the mechanics of movement, physiotherapy and choreography and equips instructors to manage their programs safely. Volunteers are not widely involved in aerobics due to the commercial nature of the industry.



Strategy and Planning

The strategy of quality assurance, accreditation and service improvement is well accepted but a common strategy for all centres is difficult to sustain. Aerobics is progressing towards quality assurance for centres and accreditation of all instructors.

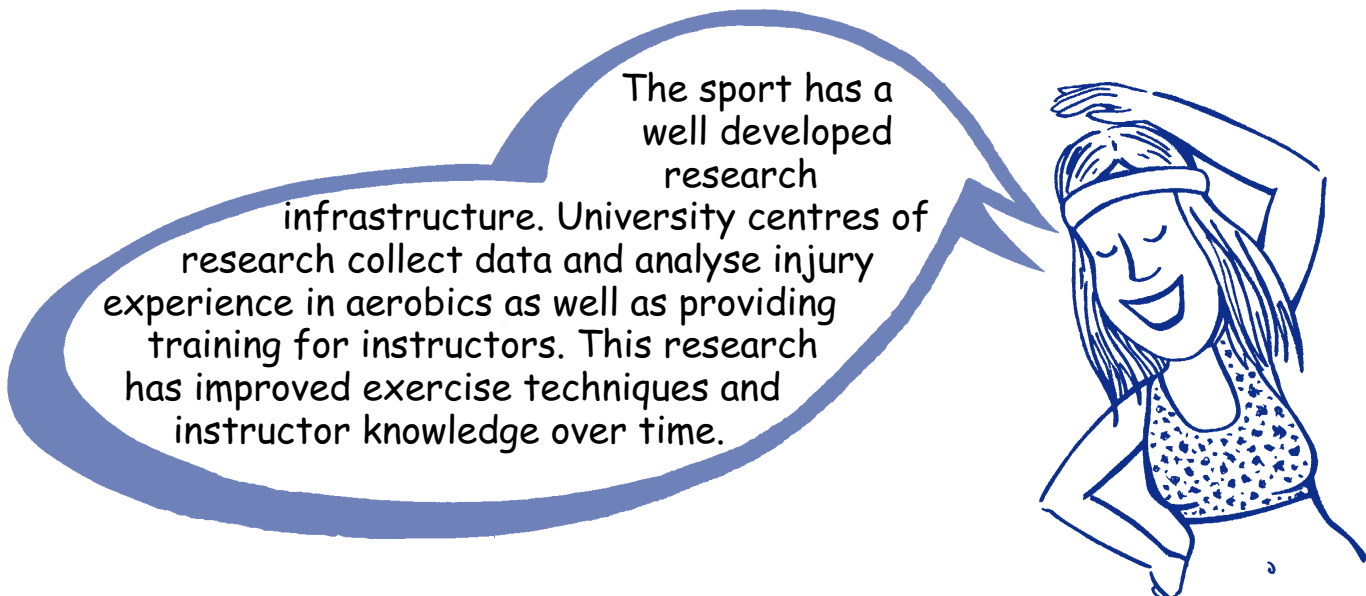
Suppliers

Because of its participation base, aerobics is an attractive retail tenant and developers continuously deliver new locations for centres. In order to encourage participation in aerobics, investors are establishing fitness centres in shopping centres and highly populated areas.

Processes - Innovation and Quality Improvement

The routines included in aerobics are designed and marketed by fitness specialists. A South Australian example is Monica Linford's Chi Ball Method.

New exercise programs emerge continuously, often in response to participants needs and research. Innovation and development in the sport is driven by a mix of commercial opportunity, licensing and training in new techniques which attract participants, and by research. Some organisations specialise in fitness routines: eg Network for Fitness Professionals.



Organisation Performance: Information and Analysis

Key strengths of aerobics are the high levels of participation and a robust, commercial organisation. A decentralised and divided structure is a weakness, but this is offset by the limited reliance on volunteers.

Threats emerge when the margins available to centre operators fall and customers are affected by insolvencies. The key competitive influences on aerobics are sedentary weight loss programs and the continued interest in fitness and exercise.



AUSTRALIAN RULES FOOTBALL

South Australians have been playing Australian Rules Football for over 130 years. With a long and proud footballing history, South Australia has produced some of the games greatest players.

For over 120 years, a strong and vibrant SANFL competition has developed the game and captured the imagination of football followers in this State. The more recent success of the Adelaide Crows (AFL Premiers in 1997 and 1998), and the emergence of Port Power has strengthened the position that football has as South Australia's largest spectator sport.

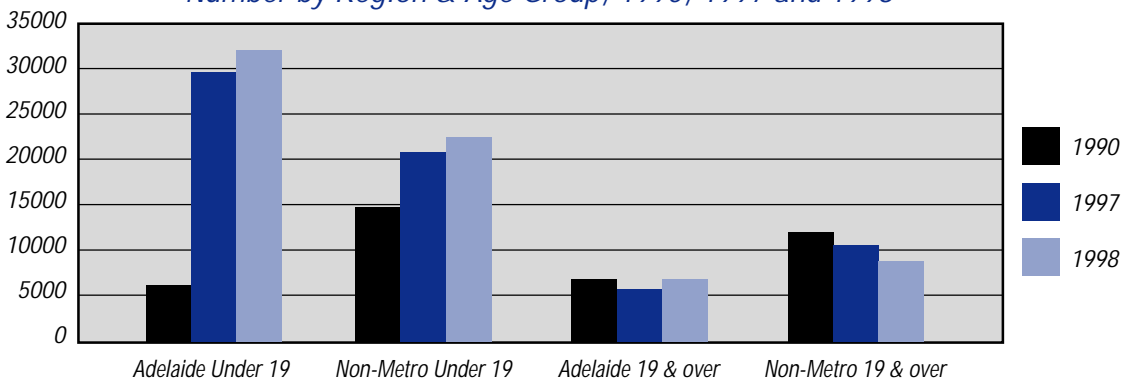
Current Structure/Overview

Participation Levels

According to the South Australian National Football League - the peak body for football in South Australia - there were over 69,000 players in 1998, with 54,000 of these players being aged 18 years or younger.

This group of participants has been growing rapidly, having more than doubled since 1990. The rapid fall off in participation with age and the great success in recruiting young participants into the metropolitan area in the years from 1990 to 1998, is illustrated in the SANFL data.

Australian Rules Football Players in South Australia
Number by Region & Age Group, 1990, 1997 and 1998



Source: SANFL data.



The SANFL spends considerable resources on junior development resulting in a 7.7% growth between 1997 and 1998. This growth is expected to continue as the SANFL continues to place emphasis on the development of juniors.

The SANFL spends considerable resources on developing the game at a junior level evidenced by participation which grew 7.7% from 1997 to 1998. The SANFL football development program in 1998 included:

- Auskick, a skills program for children aged 5 to 8 years which reached 9,362 participants in 139 centres in 1998.
- Development Officers visiting over 500 primary schools involving over 100,000 children in 1998.
- A Kick to Kick competition conducted for years 4, 5, 6 and 7 in 75 primary schools for over 10,000 children.

AUSTRALIAN RULES FOOTBALL



- *Nine-a-side carnivals for school children in years 8, 9 and 10 involving over 500 teams and 6,348 players.*
- *School holiday coaching clinics involving 750 children at 5 clubs and at Football Park.*
- *Mini-league half-time games at SANFL League Games involving over 4,000 senior primary footballers.*
- *Little League at AFL games at Football Park involving 800 senior primary footballers.*
- *Talent Development Squads supported by League Clubs competing in Under 13, 14, 15, 17 and 19 competitions.*

Administration Structure

The Australian Football League (AFL) is the national body to which the South Australian National Football League (SANFL) is affiliated. The AFL is responsible for maintaining and developing the Australian Rules Football code. There are 16 clubs licensed to play in the AFL and two of those licences are held by SANFL.

SA National Football League is an incorporated body with its own board and management. The nine league clubs in the SANFL are shareholders in SANFL, and with the affiliated leagues, each contribute a Director. Directors are usually a Club Chairman, President or Chief Executive Officer.

The South Australian Football Commission consists of seven League Commissioners and the Executive Commissioner, who is Chief Executive Officer of the SA National Football League. The Commission is independent and oversees the operation of the SANFL and the two AFL licences.

This structure provides independence for management of the commercial aspects of the game while players and clubs retain representation to deal with the values of the game.

There are 29 country and metropolitan football leagues affiliated with the SA National Football League. The only district league not affiliated is the South Australian Amateur League, which encompasses all the inner metropolitan area leagues. Discussions on mutually beneficial arrangements that may lead to affiliation are continuing.

Employment

A Street Ryan survey estimated that Australian Football leagues and clubs in South Australia employed 834 people in 1998. The estimated full time equivalent employment was 312 persons.



South Australian football volunteers were estimated to have donated 941,000 hours of time during 1998, with an estimated economic value of \$11.5 million. SANFL reports the involvement of 45,000 volunteers.

Financials

Football operations involve the management of large expenditures. Street Ryan note in their report \$45.3 million of expenditure by peak bodies and leagues in South Australia in 1998, and \$66.6 million expenditure by the clubs. An analysis of league expenditures in South Australia is not available.



In the year ended 31 October 1998, SANFL reported revenues from football operations of \$47.6 million and total operating revenue of \$48.0 million. An operating surplus of \$6.2 million was derived in 1998.

In 1998 abnormal items included a State Government Grant and a special distribution from AFL which added \$3.5 million and produced a surplus on operations of \$9.7 million.

SANFL financial reports consolidate the nine League clubs and two AFL clubs. They do not include the results of 228 other football clubs in South Australia.

SANFL reported current assets of \$7.6 million and current liabilities of \$10.5 million.

Like all sports Australian Football, as represented by SANFL and its member clubs, is not highly liquid and must manage its finances carefully.

Economic Significance

While football is fortunate to own its own headquarters, Football Park requires annual maintenance of \$400,000.



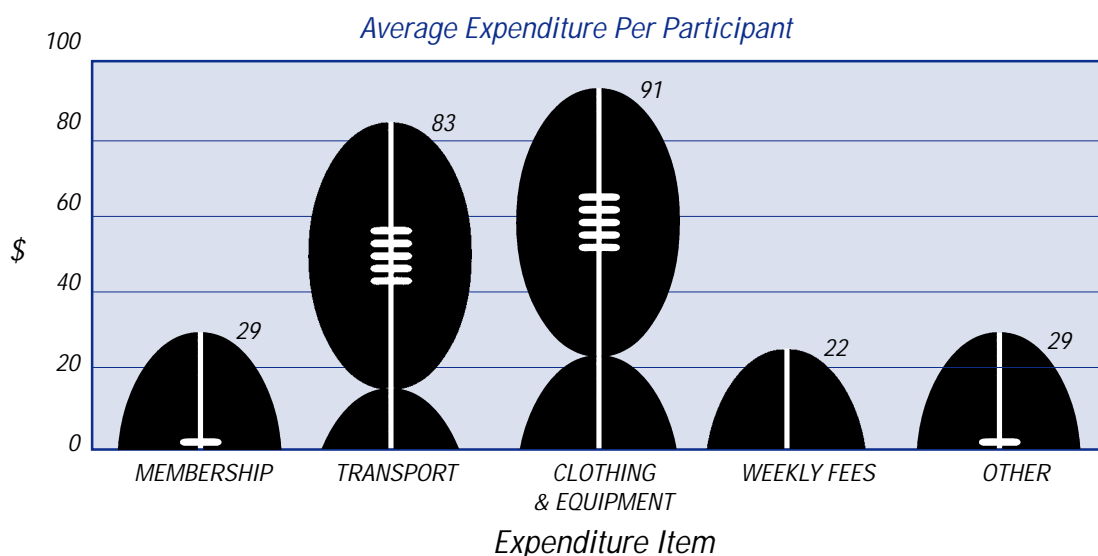
Football uses substantial infrastructure in the form of ovals, change rooms and structures. Football Park is owned by SANFL, has a replacement value of \$70 million and requires about \$400,000 per year to maintain.

Most facilities are used by other sports, especially cricket. These facilities include nine suburban ovals (\$60 million to replace) and about 300 club ovals (\$30 million to replace).

Total infrastructure in use by football, and other sports, has a replacement cost in the order of \$160 million excluding land.

Expenditures

ABS surveys show participant expenditures in organised football were \$7.0 million per year in 1996-97. Average yearly spend per participant was \$253.00



Source: ABS Cat. No. 4177.0



Australian Football is the most popular spectator sport in South Australia.

Spectators

In the year ended April 1999, the ABS survey reported that 402,600 persons aged 15 years and over attended at least one football match in South Australia.

Reported attendance at AFL games held in South Australia in 1998 totalled 819,985 while attendances at SANFL games in 1998 was 414,816 persons. Taken together, the AFL and SANFL codes attracted over 1.2 million attendances in 1998.

Football spectator expenditures in South Australia have been estimated as \$34.2 million. This amounts to about \$28.50 per attendance for 1.2 million attendances at AFL or SANFL matches in South Australia.

Merchandising

SANFL club merchandise activities have declined in recent years to about 25% of its level before the AFL expansion. There is now very little retail support for SANFL club merchandise. However, AFL merchandise is growing rapidly.

Sponsors/Media

The emergence of AFL football in South Australia, first the Adelaide and then the Port Adelaide franchises, created a very significant reduction in attendance at SANFL matches. This loss of patronage caused sponsors of SANFL clubs to move their support to AFL teams. SANFL addressed this threat by careful marketing to spectators, by researching and responding to the views of the community about football and by improving the quality of the competition and the on-ground experience provided.

The estimated business expenditure on football in South Australia is \$49.7 million per annum. Over five years the television rights for broadcasting games of the two AFL licences in South Australia are valued at \$40 million.

As a spectator sport, the media is vital in generating interest in Aussie Rules and providing additional benefit for sponsors.



Media relations are vital to Australian football because of the wide public interest in the sport and the need to sustain that interest. Media interest is intense and servicing the media is demanding. Local interest is sustained through television, newspaper and radio stations, all of which demand and get daily contact, regular press releases, hospitality, access to personalities and responses to questions.



Management Practices

Leadership

Football has the leaders and vision needed to respond to challenges and to prosper. The leagues have recruited professional managers and leaders and adopted visionary plans. The clubs rely much more heavily on volunteers, but are addressing some of the problems of recruitment, training and entrenched leadership which this can bring.

Volunteers have traditionally been past players and members and supporters of the club who have filled positions in the football club and canteen. Football administrators are encouraging clubs to create new roles which recently joined, younger playing and non-playing volunteers can fill.

The South Australian Sports Institute, the AFL Academy and the Australian Institute of Sport are all linked to football, and sports sciences for the benefit of the elite players. The Australian Sport Drugs Agency and the medical officers in each club cooperate to implement controls over drug use in sport.

Customer Focus

Football markets season tickets and non-playing membership to spectators seeking value for money entertainment and social activity. SANFL targets family entertainment offering free entry for those under 18 years of age.



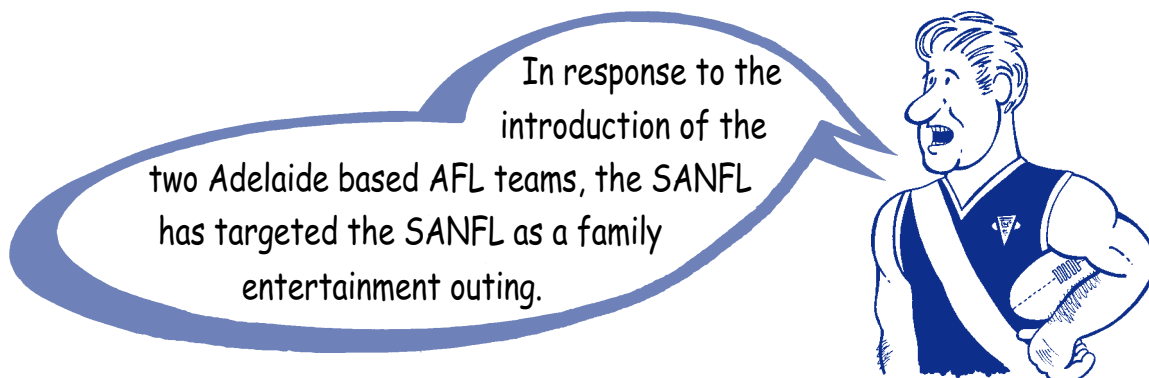
AFL targets high value corporate customers and sponsors for premium service corporate boxes. Public perceptions of the game are surveyed to determine how value can be produced for spectators, players and sponsors.

People

Football has the professional people it needs but is facing difficulty developing volunteers to support growth. Training and accreditation programs have been established at all levels and there is a strong emphasis on recognising contribution.

Strategy and Planning

Football has well-developed strategies and plans to grow and progress in future. There are business plans for the two AFL Clubs, the nine league teams and for the Football Park stadium.



AUSTRALIAN FOOTBALL



Apart from market segmentation, SANFL has put significant effort into the development of juniors and the presentation and skills of the SANFL product, providing quality entertainment and maintaining a public image of a safe contact sport. SANFL also provides sports medicine and trainer courses and conducts an Umpiring Academy with 58 students of whom 22 have been invited to trial with the SANFL umpiring panel.

SANFL is involved in a unique sport and has a leading position within that sport in Australia. Benchmarking is conducted through the SANFL Business Plan and the AFL National Development Plan. These provide for benchmarking of practices, club to club and league to league.

Suppliers

Football is well supplied and has excellent relations with key suppliers including local government and equipment suppliers.

Processes for Innovation and Quality

Football has excellent processes and services to ensure continuous improvement. A consistent standard of service is extended across football. Most development effort goes into junior development, which produces talent and spectators for the senior game.

SANFL has introduced nine-a-side football as a code change allowing smaller, mixed teams to participate in the sport as recreation.

SANFL is concerned about the drop off of senior players, especially in country areas. There are also rules modifications in place to protect older players while allowing younger players to compete in senior grades.

A key feature of development is to have qualified coaching so that the skills of the sport are widely understood. The Football Development Foundation also conducts coach accreditation courses.

The growth in junior players reflects results from a vigorous development effort which SANFL and its nine clubs have been pursuing through the SANFL Football Development Foundation. Sport development spending has been about \$1.7 million per annum with significant sponsor support.

The introduction of AFL licences into South Australia appears to have lifted interest in football in the schools. The development program has reinforced this. School football teams receive free coaching, umpires and guernseys.

Organisation and Performance

Football is well served by organisation at all levels. Structures provide for management and club representation. Football administrators collect timely and accurate data for effective decision making and analyse key indicators to achieve goals.

Football has strengths as a spectator sport that is professionally managed and has a strong junior program. There are threats from unstructured activities, where club membership is not required, and due to the financial vulnerability of some clubs. The economic impact of football in South Australia is significant: in the order of \$95 million per year, primarily driven by the spending of spectators.



BASKETBALL

The success of South Australia's two national basketball league teams has been nothing short of sensational. The Adelaide 36ers are recent NBL champions after two stellar seasons which led to back-to-back titles, while the Adelaide Lightning have been equally as dominant in the Women's National Basketball League having won four championships.

Current Structure/Overview

Participation Levels

In 1998-99 over 25,000 South Australian participants over the age of 18 years played basketball. Australia-wide, over half the participants in the sport were aged 18 to 24 years of age.

The junior program in basketball attracts more participants than the 18 and over group. Including juniors, about 30,000 players are associated with the Basketball Association of South Australia (BASA), the peak body for basketball in this State.

Administration Structure

As the national peak body, the Australian Basketball Federation (Basketball Australia) oversees the National Basketball League and the Women's National Basketball League competitions in Australia.

BASA and the Country Basketball Association are affiliated with Basketball Australia.

BASA owns and operates the Adelaide 36ers NBL team and the Adelaide Lightning WNBL team.

The ten district basketball clubs in South Australia own BASA. The Board, which numbers seven, is structured as a management group with a State-wide management role. BASA owns and operates Sports Facilities Management of SA (SFMSA) which owns Clipsal Stadium and manages seven other stadiums for local government owners or for tenants.

Clubs pay stadium fees to SFMSA, run their own affairs and program, and nominate teams.

Employment

BASA employs 50 people including professional athletes and a further 30 to 40 casuals at each professional game. Volunteers contribute the equivalent of a further 10 full time staff to BASA. In addition the clubs have about 100 part time volunteers and six full time paid employees.

Financials

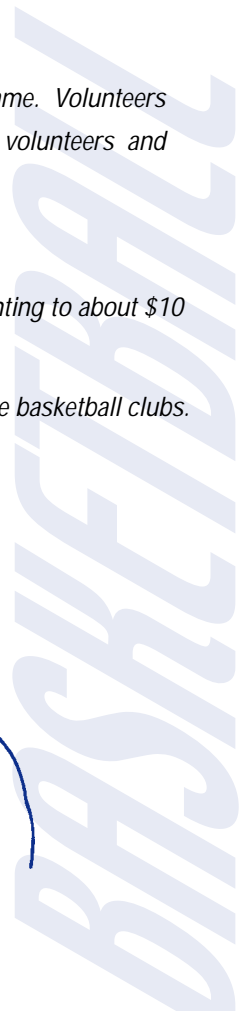
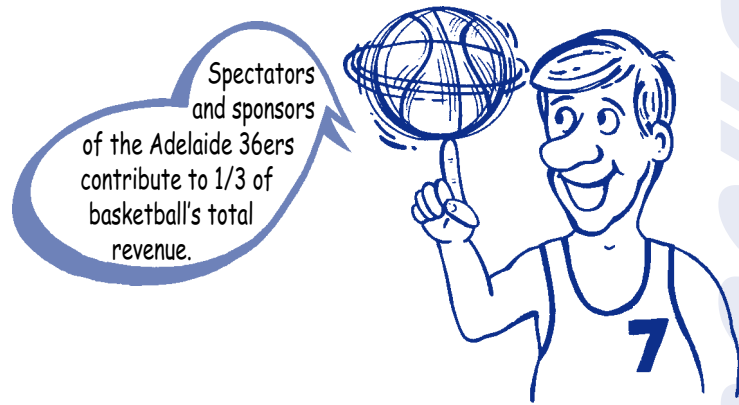
BASA reports total turnover of \$9 million and the ten clubs have turnover in the order of \$200,000 each amounting to about \$10 million per annum. Spectator funds from the Adelaide 36ers have been the key source of revenue growth.

Business sponsors and paying spectators account for about one third of the combined income of BASA and the basketball clubs.

This is represented by:

36ers sponsors	\$2m
36ers Season Tickets	\$1m
36ers Casual Tickets	\$0.5m

BASA has improved its commercial performance in recent years and returned an operating profit in 1998-99. This has been achieved by containing expenditures and growing incomes from spectators.



Economic Significance

Infrastructure

The replacement cost of a basketball stadium is approximately \$1.5 to \$2.0 million. Local government is developing integrated indoor recreation facilities, which cater to an even wider range of sports and have a replacement cost of \$7 to \$8 million.

About 20 indoor basketball facilities are in use in the Adelaide metropolitan area with an aggregate replacement cost of about \$80 million.

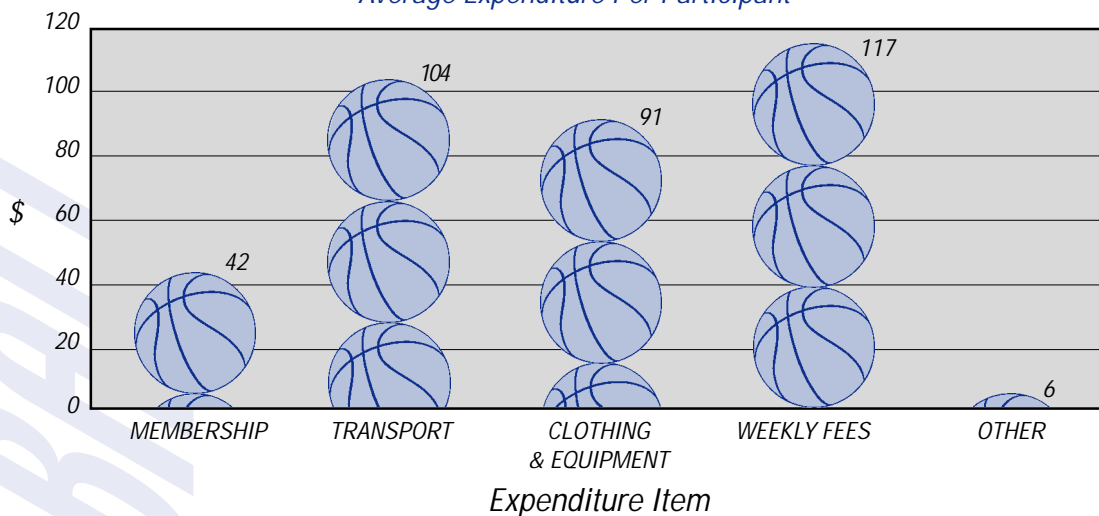
Expenditure

Aggregate participant expenditure in basketball in South Australia in 1996-97 was \$12.5 million, with the average yearly spending by a basketball participant being \$408.



Basketball uses indoor venues and the charge for access to venues possibly accounts for the high levels of weekly fees in the sport.

Average Expenditure Per Participant



Source: ABS Cat. No. 4177.0

Spectators

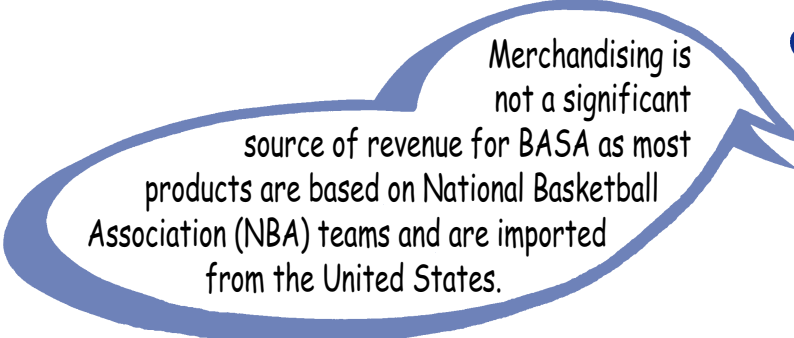
Over 85,000 South Australians attended a basketball game in 1999/00. The sport has a large spectator following, with the 36ers and Lightning attracting the majority of patrons. The decline in spectators, despite competitive success, has been a major concern in recent times and has been addressed at a national level by a change to a summer season a couple of years ago, in the hope that attendances could be more easily retained.



Merchandising

Merchandising and major participation events have not been developed effectively within basketball. Most basketball merchandise is imported from the United States National Basketball Association (NBA).

The NBL is building a range but this will remain a relatively small source of income for BASA.



Merchandising is not a significant source of revenue for BASA as most products are based on National Basketball Association (NBA) teams and are imported from the United States.



Sponsors and Media

Sponsorship efforts are focused around the media exposure generated by the Adelaide 36ers team. Management works closely with sponsors of the team. The media are given constant support, consistent with attempts to generate exposure for sponsors.

Management Practices

Leadership

Leadership in basketball is centralised in BASA. In the clubs, where there is a reliance on voluntary effort, it is difficult to recruit new leaders to create a future. Basketball is in a position to develop a compelling vision which its leaders can communicate and use to empower the energies of others and to recruit new leaders.

Customer Focus

Customer focus has been on spectators, and the facility requirements of participants. Basketball markets spectator services to premium customers in corporate boxes and season tickets to value for money spectators who are generally adults.



Management focus is on developing facilities for participants and operating them as commercially viable enterprises.

Management focus is on developing facilities for participants and operating them as commercially viable enterprises. This allows collaboration with other sports and operators to help drive down participation costs and to develop and fund facilities which can be used jointly.

BASA provides services to netball, volleyball and indoor cricket among other sports, in facilities that it runs. It also runs basketball programs in facilities managed by others.





People

People working in basketball have a safe, ethical and rewarding environment and recognition for their achievements. For participation in basketball to grow, the sport must continue to develop coaches and umpires for competitions.

Strategy and Planning

Strategy and planning in basketball is centralised and reflected in efforts to reposition as a summer spectator sport and to stimulate development of venues. The National Basketball League has been shifting to a summer season to protect the spectator base from competition with football. The structure focuses on sourcing the venues needed for participation to grow. Processes for developing strategy and for reviewing objectives and plans to deliver outcomes for participants, are not as clearly visible.

Suppliers

Suppliers of facilities are a key focus of basketball. The sport has effective strategies for the management of facilities and has developed collaborative approaches to the development of new facilities with local government and schools.

Processes for Innovation and Quality

Processes for innovation and quality improvement in basketball are variable and present an opportunity to improve participant experience of the game, so as to retain players into senior years. Basketball can establish a consistent framework for continuous improvement in order to deliver consistent quality to its customers, both spectator and participant.

Organisation and Performance

Basketball is a spectacular game with strong junior participant interest, Olympic and international exposure, successful national league teams and quality facilities. The sport relies on indoor facilities and has devoted considerable effort to ensuring access to quality playing facilities by collaborating with local government.

Issues that have the potential to constrain development include the availability of coaches and umpires, while there are also threats from declining spectator numbers, limited television coverage and difficulties retaining senior players at a competitive level although they may be still playing socially.



The organisation structure is simple and readily understood, providing for clear control. Basketball manages facilities and monitors financial performance well. Monitoring of other key indicators of performance could be improved. Basketball can strengthen accountability for the quality of experience gained by participants, particularly in coaching and umpiring.



CRICKET

A game rich in tradition and embedded in Australia's sporting culture, cricket has produced many of Australia's sporting heroes.

The state of cricket in Australia has never been healthier. Australia is clearly the most dominant nation in world cricket at the moment having defeated all comers in recent years and there is no evidence which suggests Australia's dominance will not continue for many years, with an expanding pool of young talent.

Current Structure/Overview

Participation Levels

Cricket has long been one of South Australia's most popular sports, both in terms of participation and attendance.

In 1998/99 there were over 30,000 adult South Australians participating in the sport, and coupled with about 40,000 youngsters involved at a junior level or in coaching clinics, participation in cricket is clearly strong.



The importance of juniors programs to the South Australian Cricket Association will ensure juniors remain involved in the sport in years to come, either as a player, official or spectator.

Organisational Structure

At the international level cricket is governed by the International Cricket Council and its national affiliates of which the Australian Cricket Board (ACB) is a member. The South Australian Cricket Association (SACA) is a part 'owner' of the ACB with the other State cricket associations in Australia.

The SACA is governed by a Board of Management consisting of 12 persons. The Cricket Committee is made up of representatives from the 13 metropolitan grade clubs, the umpires, country cricket, the Cricket Union of South Australia and the Board of Management.

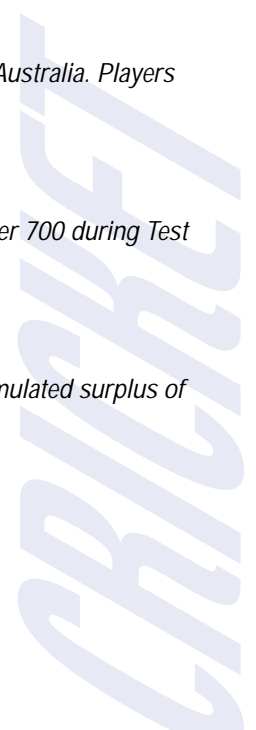
Cricket in South Australia is conducted by 44 associations within the metropolitan and regional areas of South Australia. Players are registered by their clubs, each of which is a member of an association.

Employment

The Chief Executive heads a management team of six and SACA employs in excess of 50 full-time staff and over 700 during Test Matches.

Financials

With total assets approaching \$20m and a record gross revenue in 1998/99 of \$14.6m, coupled with an accumulated surplus of close to \$5m, cricket is quite obviously one of South Australia's most financially secure sports.



Economic Significance

Infrastructure

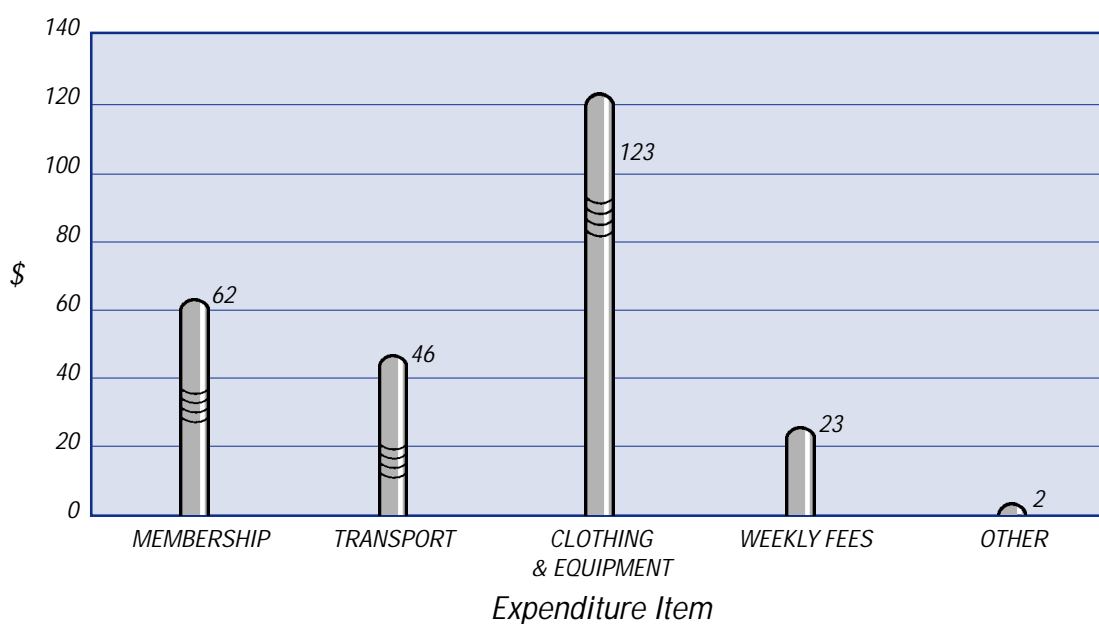
It is estimated that the replacement value of cricket facilities in South Australia is \$90m, \$30m of which is shared with football. The Adelaide Oval, considered by much of the cricket fraternity world-wide to be cricket's most beautiful ground, is the key asset of SACA with an estimated replacement value of \$100m.

The Commonwealth Bank Cricket Academy is funded by the Australian Cricket Board and the Australian Institute of Sport, and sponsored by the Commonwealth Bank. The majority of Australia's current players have been involved with the Academy, which has become a breeding ground for elite cricketers in this country, much to the envy of other cricket playing nations world-wide.

Expenditure

The average yearly expenditure per cricketing participant was \$298.00, with the total aggregate spending amounting to \$3.3 million.

Average Expenditure Per Participant



Source: ABS Cat. No. 4177.0

Exports

Whilst much of the cricket equipment used in Australia is imported, there is scope for South Australia in particular to export its expertise in soil and turf management and ground maintenance.

The Cricket Academy also caters for in-bound cricketers who come to Adelaide to utilise the Academy as part of international training groups.

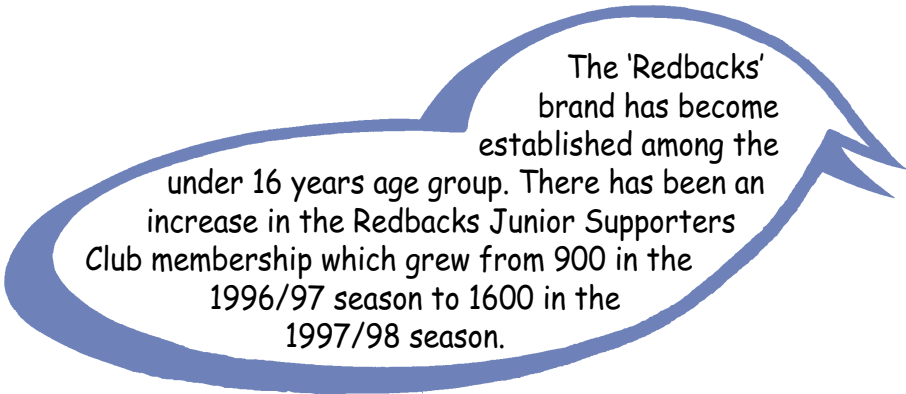
Attendance/Spectator Spend

Over 86,000 people attended a cricket match (in which they paid for entry) during 1998/99. It is estimated that cricket matches at the Adelaide Oval attract approximately 180,000 patrons with the annual Test Match attracting approximately 65,000 spectators over the five days. A study of the 3rd Ashes Test Match in 1998 conducted by the Office for Recreation and Sport in conjunction with the SACA, highlighted that over 2,000 interstate and overseas visitors were in Adelaide for the Test Match introducing over \$4 million worth of new money to the State (the equivalent of 67 jobs to the South Australian economy).



Merchandising

Cricket merchandise depends upon effective branding programs to sell product.



The 'Redbacks' brand has become established among the under 16 years age group. There has been an increase in the Redbacks Junior Supporters Club membership which grew from 900 in the 1996/97 season to 1600 in the 1997/98 season.



Sponsors and Media

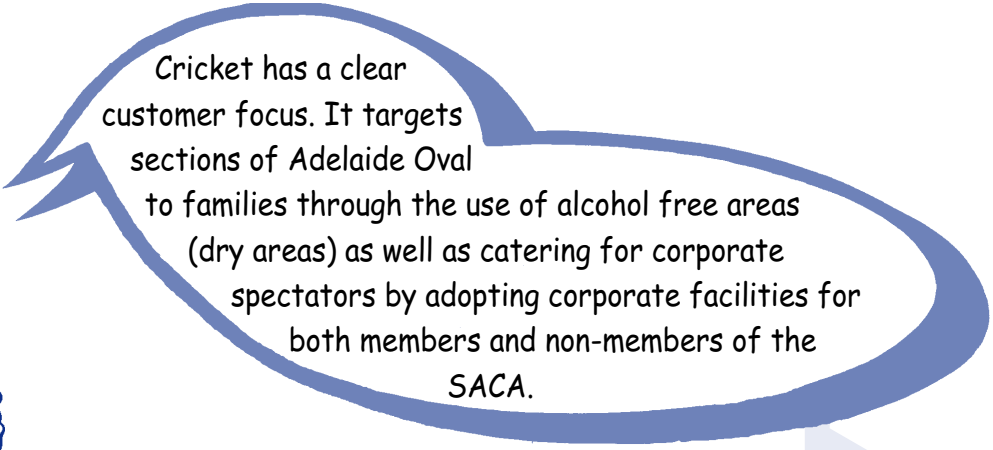
Cricket is covered by all forms of the media exceptionally well and sponsors are attracted to the media exposure given to cricket. As a major spectator sport, cricket relies upon sponsors seeking exposure for their brands. For their sponsorship dollar, sponsors benefit from signs in the venue, which offer international exposure at international competitions as well as naming rights for junior cricket programs.

Management Practices

Leadership

While cricket has leaders who look to the future and embrace change at State level, the local clubs rely on a diminishing number of ageing volunteers, many of whom have difficulty finding or accepting replacements.

Customer Focus


Cricket has a clear customer focus. It targets sections of Adelaide Oval to families through the use of alcohol free areas (dry areas) as well as catering for corporate spectators by adopting corporate facilities for both members and non-members of the SACA.

Cricket has a clear customer focus. It targets sections of Adelaide Oval to families through the use of alcohol free areas (dry areas) as well as catering for corporate spectators by adopting corporate facilities for both members and non-members of the SACA. In addition there are 34 corporate boxes leased year round.

People

Increasing recognition, training and development of people, especially volunteers remain a priority. A critical need for the future is to develop and recruit people to run clubs and recreational cricket.





SACA and the cricket associations are developing strategies to address key challenges that face the sport at all levels.

SACA and the cricket associations are developing strategies and plans to address key challenges surrounding the strength of the local competition and the reliance on volunteer efforts. For example the Grade Clubs and metropolitan associations are considering a rationalisation which would deliver a stronger future competition and less reliance on volunteer resources. New forms of cricket are being established to provide participants with more time efficient options. Summer sport competition from soccer, basketball and indoor centres will create future challenges.

Suppliers

Cricket has the suppliers and service providers needed to grow in future, including a large base of facilities, excellent coaching and support in the schools. The continued development of skilled volunteers will be a difficulty.

Processes for Innovation and Quality Improvement

Cricket has established the quality processes and innovation needed to progress, especially at representative competitive level. The SACA is constantly researching facility improvements for spectators and cricket on a world scale and regularly investigates processes that may improve quality, ie - visibility of cricket balls. The use of video for some umpiring decisions (the third umpire) has also improved the standard of the game.



Cricket has introduced innovative game formats such as Kanga Cricket and Have-a-Go for juniors, and the two hour Super-8 format for teenagers, in an effort to attract young participants.

Cricket has been introducing innovative game formats such as Kanga Cricket and Have-a-Go for juniors, and the two hour Super-8 format for teenagers, which are aimed at attracting young participants. The quality of competition has been improved using computer assisted, video coaching based on game tapes to analyse the batting and bowling of individual players.

Organisation Performance, Information and Analysis

Through talent development programs, the organisation of the competitive and representation levels of cricket and the success of the international teams, positive growth and progress is expected for cricket in Australia.

GOLF

While some sports struggle to attract participants, golf continues to grow in popularity. The international successes of Australia's male and female golfers, high levels of television coverage and the abundance of golf courses makes golf a very attractive sport for people of all ages.

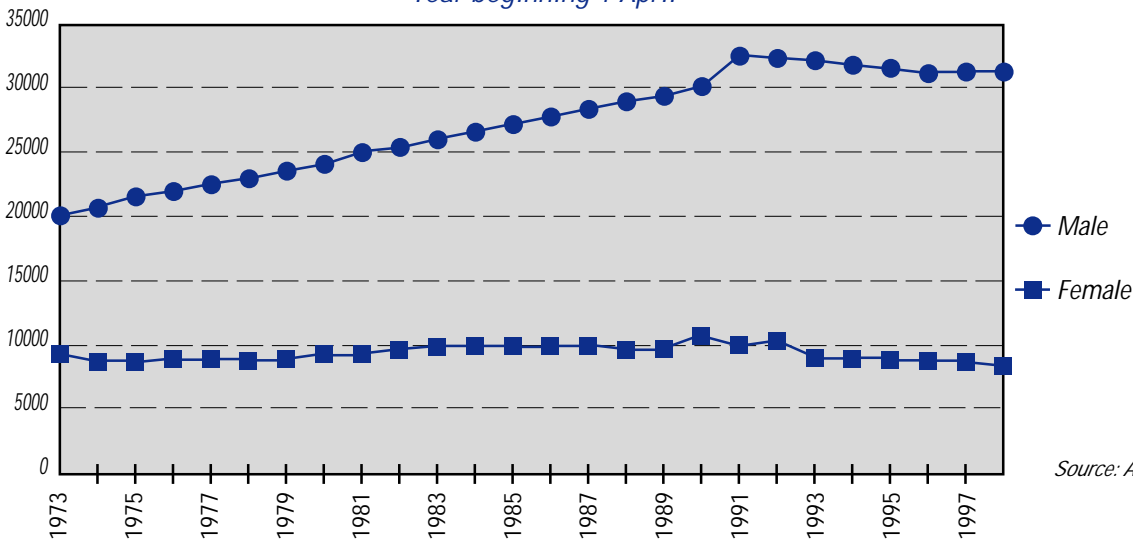
Current Structure/Overview

Participation Levels

There are just under 97,000 golf participants over the age of 18 years in South Australia. However, only 44% of golfers are members of clubs which demonstrates the high rate of 'social golf' being played.



Members of Affiliated South Australian Golf Clubs
Year beginning 1 April



Source: ABS Cat. No. 4177.0

The South Australian Golf Association (SAGA) had 257 affiliated clubs in the year ended 31 March 1999. Affiliated membership is roughly equal between metropolitan and country clubs, however, there is some growth of affiliated membership in country clubs.

Australia wide, about 35% of golf participants reported playing 26 times or more during the year, about the same as in the previous year.

On a rotational basis, a number of amateur national championships are conducted in South Australia. These include the Australian Junior Championship, the Australian Amateur Championship and interstate team matches.

The major event conducted by SAGA is the Ford Open Golf Championship which is the South Australian Open. Country Golf Week which includes the SA Country Championship attracts significant numbers of country players to metropolitan courses. Women's Golf SA (WGSA) conducts the annual country tour week which attracts 500 to 600 players and uses four venues in regional centres. Country Week, which includes Country Championship, attracts country players to metropolitan courses.

Administration Structure

The Australian Golf Union is the controlling body of golf in Australia and administers men's golf. Women's Golf Australia administers women's golf in consultation with the State Associations in Australia. The Professional Golfers Association of Australia provides for the professionals working in golf clubs, rather than the professional tournament players.

The Australian Golf Union comprises 13 Councillors representing all State associations with an Executive Director. The three larger states have three councillors each. Women's Golf Australia has a National Board of 6 representing each State Association and a Chief Executive Officer.

The SA Golf Association has an Executive of 7 elected by 22 Councillors. There are 9 SA Country groups, including Northern Territory and Broken Hill, 4 metropolitan groups and 257 clubs.

Women's Golf South Australia has a State Council of 13, four key committees for handicapping, course rating, match and junior advancement. WGSA has 4 metropolitan zones and four country zones and Northern Territory. There are 2 District Standing Committees in each country zone.

The Associations, SAGA and WGSA, each have significant affiliated player representation in their structures. Since affiliated players are also members of clubs this structure provides, perhaps informally, for club representation in Association decisions. The clubs are independent business entities and the Associations have little influence over club operations, except to ensure compliance with the Rules of Golf.

This management structure leaves Association management very little autonomy. For major competitions or for junior development the Associations rely on the clubs for access to playing space and volunteers. Clubs can focus on their commercial viability.

Employment

South Australia has 170 affiliated clubs. The 14 private metropolitan clubs, the 9 public metropolitan courses and the larger country clubs employ approximately 260 people. In addition, SAGA employ 3 people full time, and WGSA employ 1 full time and 1 part time.

Financials

Both the SAGA and WGSA receive funding from the Office for Recreation and Sport and other sources (including sponsors). The income of the two bodies totals approximately \$650,000 per year and each Association achieves an operating surplus.

Economic Significance

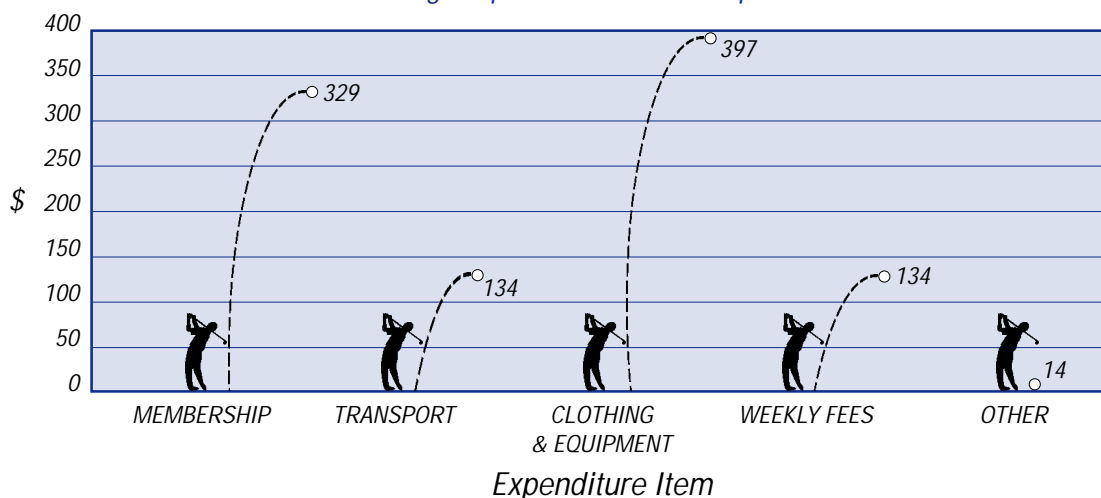
Infrastructure

The course infrastructure for golf in South Australia has a replacement value in the order of \$250 million.

The value of existing golf course developments in South Australia has not been recorded and the above is an estimate based on the number of courses and their standard of development. An 18 hole Group 2 golf course costs between \$6 million and \$8 million to develop, excluding land and clubhouse. A Group 1 course would cost \$15 million to replace, excluding land, and a Group 3 course about \$3 million. Clubhouses depend on standard but can cost from \$300,000 to \$3 million.



Average Expenditure Per Participant



Source: ABS Cat. No. 4177.0

Expenditures

Estimated total annual expenditure on golf activities by participants in South Australia in 1996-97 was \$26.8 million. Average yearly expenditure per participant was \$966.

Exports

In recent years, Australia's exports of golf related equipment have been experiencing significant growth. South Australia has been exporting both product and service (ie golf course architecture and design) for several years to overseas markets such as Japan, England, Europe, China, India and Thailand.

In addition, golf has been used as a tool for in-bound tour operators with a 1996 South Australian Tourism Commission survey highlighting that 24% of visitors to Adelaide were golfers. Of this figure, over half also played golf whilst travelling.

Spectators

Golf attracts few spectators except at professional tournaments. The South Australian Open attracted 38,000 spectators over four days.

Merchandising

Whilst there is little golf merchandise produced in South Australia, golf retailers sell large volumes of products endorsed by leading players. Golf related clothing is also very popular amongst players and non-players alike. Profits from merchandising do not accrue to the peak bodies.



Sponsors/Media

Despite the large expenditures of golf participants, suppliers of clothing and equipment are not the dominant sponsors of the sport; motor car companies appear more prominent. Clubs have most success with promotions which sell the goods and services of the sponsor. This is consistent with the marketing strength of a participant sport.



Golf is a participant sport, and as a result sponsors have the opportunity to sell product to club members.

Golf uses media to report competition results and coincidentally to publicise naming sponsors.

Management Practices

Leadership

Golf associations have leaders with the vision needed to grow and develop the sport in future and there is no shortage of willing new leaders.

Customer Focus

Golf associations and clubs report that the sport is anticipating and responding to participant needs and developing ways to provide customers with exceptional service. However the clubs do not cater to unaffiliated players.

An Australian Golf Union survey reported in 1995 that 50 per cent of metropolitan clubs and 5.7 per cent of country clubs in South Australia had waiting lists for full membership in 1993. When clubs no longer have playing spaces available to offer a seven day membership they will establish a waiting list and offer applicants a membership with less than seven days a week access. When these options are exhausted some clubs may stop admitting junior members until space becomes available.

Golf has developed innovative approaches in order to satisfy increasing membership demand, through the introduction of 5 and 6 day membership and playing rights.



Golf marketing targets club members who use club facilities frequently. The clubs are the commercial structures of golf. Their marketing focuses on club turnover and utilisation, particularly in off peak periods.



People

Golf has the people in its organisations which it needs to grow and progress.

SAGA reports no difficulty obtaining volunteers to work at tournaments although some clubs have difficulty getting volunteers to act as secretaries or to stand for Council.

Strategy and Planning

Women's Golf SA has a plan documented and agreed with the Office for Recreation and Sport. SA Golf Association also has a plan, although it is not documented. The Associations believe that the sport has a clear vision and a well understood plan describing how objectives will be realised.

Suppliers

Golf has the professionals, coaching and golf shops needed to grow and prosper. Local governments provide adequate space for golf courses in non-metropolitan areas, but there are constraints on space for additional courses in the metropolitan area.

Processes for Innovation and Quality

Golf has the processes and services needed to grow and progress, and to provide consistent quality for affiliated players.

The Australian Golf Union (AGU) has made junior development a priority. In 1992 the AGU introduced Wilson Go-Go Golf and this has exposed about 350,000 children in Australian schools to qualified golf instructors in recent years. The program is very strong outside the metropolitan area. Girls Golf Club has been introduced in women's golf and provides for girls aged 8 to 18 years. The Junior Boys Golf Club is about to be launched in men's golf. Go-Go Golf and Girls Golf Club have helped new elite competitors and have been credited with the beginning of an increase in junior players.

The Australian Golf Union funds research on turf management and on environmental strategies for Australian golf courses. This research is managed through the Horticulture Research and Development Corporation and the Australian Turf Grass Research Institute.

Innovation in golf equipment is driven by suppliers seeking commercial advantage in sales to players. In turn golf course architecture responds to changes in player capabilities and improved equipment.



There are several forms of competition. An important innovation in South Australia in the 1950's, has been the introduction of social clubs which allow players to have a handicap.

GOLF

Organisation and Performance

Golf has a very large participation, although a significant share of its players are not affiliated with clubs. The clubs have strong volunteer programs. At least in metropolitan areas the sport has had difficulty expanding playing space, while country clubs have had difficulty funding their facilities.

Irrigation practices and herbicide use on golf courses raise some environmental concerns in the community and there is a perception of exclusivity, both of which may be limiting the availability of public land for course development.

The organisations of golf perform at a high level and have good information about key performance indicators and systems in place to analyse performance.





LAWN BOWLS

Lawn bowls has traditionally been considered a genteel sport for the over 50's - however this is far from the truth. With an upsurgeance in popularity on the back of increasing television coverage, Commonwealth Games exposure and changes in uniform requirements, lawn bowls is attracting increasing numbers of younger players more than ever before.

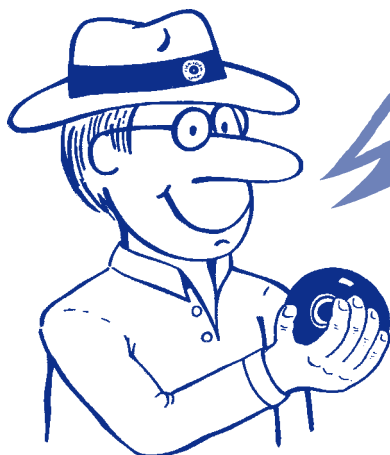
Current Structure/Overview

Participation Levels

According to the ABS, approximately 32,000 South Australians participated in bowls in 1998-99, with over 60 per cent playing more than 26 times per year.

There were 236 lawn bowls clubs in South Australia in 1999. These clubs had almost 18,000 male members and 7,500 female members.

It is interesting to note that records show 17,723 male members and ABS reports 16,200 male participants. However, the SA Women's Bowling Association reports 7,500 members compared with 15,600 women participants reported by ABS. This indicates there may be a substantial number of women players who are not members of clubs.



Bowls has a very strong regional participation with almost 60% more members in country areas than in the metropolitan areas.

Bowls has a very strong regional participation with almost 60% more members in country areas than in the metropolitan area. There are almost three times more country clubs than metropolitan clubs.

Administration Structure

Lawn bowls has separate organisations for men's and women's participation at international, national and state level. In Australia the two national bodies have agreed to merge from July 2001. At State level, Bowls SA is an umbrella body serving both Associations in South Australia.

International Bodies	World Bowls Council (Men)
	World Bowls Council (Women)
National Affiliates	Bowls Australia (Men)
	Australian Women's Bowling Council
State Affiliates	Royal SA Bowling Association (Men)
	SA Women's Bowling Association





The men's association (RSABA) is managed by an Executive Officer and staff who are accountable to an Executive Council. The Executive Council is comprised of the Chairmen of 8 Metropolitan Zones and 8 Country Divisions. In addition there are 22 country Associations which provide a regional structure for clubs.

The SA Women's Bowling Association is managed by an Executive Officer who is a member of an Executive of 17 persons. The country areas are divided into six Divisions which are divided into 25 Associations with a President and Secretary for each. All clubs belong to an Association.

Overall the heavily representative organisation structure of bowling reduces the flexibility with which the sport can respond to external opportunities and restricts the scope for strategic management initiatives.

Employment

Government funded employment in bowling increased from one to one and a half full time staff in 1998-99. The RSABA employs 4 people. In South Australia there are about 90 full time and 120 part time employees involved directly in bowling clubs or administration.

Bowls clubs employ managers, hospitality staff and greenkeepers.

Financials

In the three years ended 31 May 1998 RSABA suffered a decline in member registration fees of \$41,000 which it more than offset through an increase of \$70,000 in sponsorship revenues. In that year operating revenues of just over \$590,000 were exceeded by expenditures and a deficit of \$23,000 resulted. By selling some fixed assets the Association improved liquidity and finished with net assets of over \$750,000.

Declining membership is placing very great financial and operating pressures on clubs. Across Australia this decline has resulted in a slow rationalisation of clubs, as they struggle for financial viability. Clubs need 150 to 200 members to remain viable, and many clubs have fallen below these levels.

Organisation and Performance

Bowls will need to improve the efficiency of its organisation structure to deliver its strategic goals. The systems of key performance indicators, goal setting and assessment are being established. These will address the challenge to develop club level leadership and skills, to adopt continuous improvement in processes and to strengthen reporting of key performance indicators.

Bowls is an international sport, with good playing facilities, strong regional participation and stable, ageing membership who participate frequently. There are financial and operating pressures on clubs and the management structure is rather unwieldy. Bowls has opportunities in modified rules games, improved customer service and inbound bowls tourism attracting players from overseas to play in Australia.

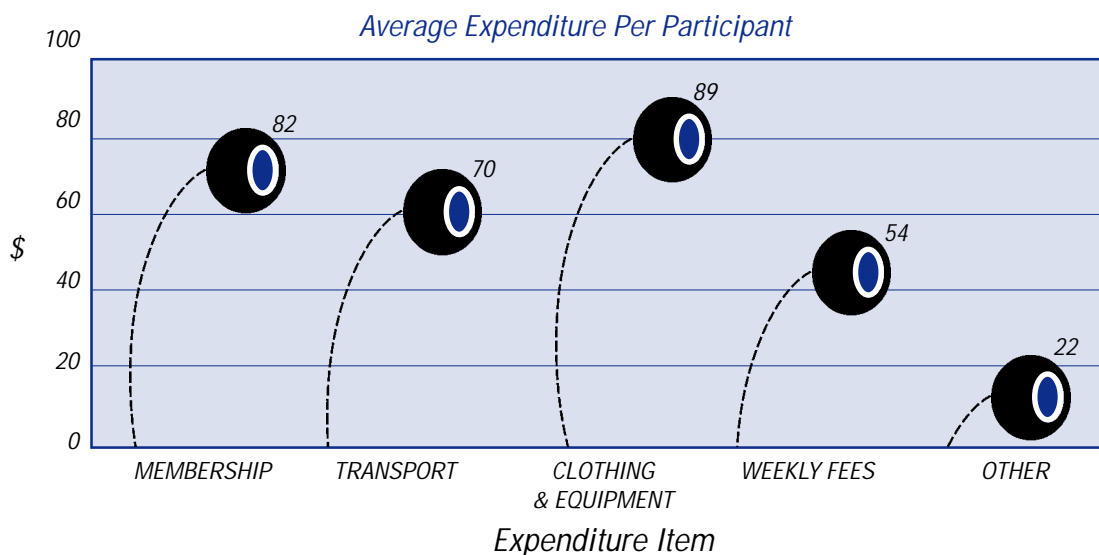
Economic Significance

Infrastructure

The replacement cost of approximately 500 greens, 65,000 square metres of club facilities and 4,000 car parks in use at bowls clubs in South Australia is approximately \$170 million.

Expenditures

Total participant spending on lawn bowls in South Australia amounted to \$9.9 million with the average yearly spending of a bowls participant being \$314.



Source: ABS Cat. No. 4177.0

Spectators

Bowls is generally considered a participative sport and attracts very few spectators other than at major championships. There are no recorded figures of attendance.

Merchandising

Merchandising of bowls discs, scorecards, cleaning cloths and badges is restricted to participants only. Bowls Australia has a national merchandising scheme and a list of licensed manufacturers. The state's men's associations are bound into the merchandise agreement and the national bowls logo is now required to be displayed on tournament clothing.

Sponsors/Media

Sponsors are offered three year deals including point of sale signs, advertising in the competition book, score cards and magazine space.

The Royal SA Bowls Association have appointed a part time marketing manager who has been building the relationship with the media, by providing story lines and build ups to events. The aim is to shift perceptions of the game to attract more youthful participants.



Major championships attract media coverage such as television broadcasting of the Jack High series which has tapped a spectator market.

Management Practices

Leadership

At regional level the sport has leaders with vision and energy who are communicating their vision of improved customer service and new forms of competition such as Night Owls. However many clubs are finding existing leaders hard to replace.





Customer Focus



New participants are targeted through "come and try" events such as corporate bowls nights, and through modified rules games.

Bowls is conducting research into participants' needs and community perceptions and is innovating its services to participants and sponsors.

People

Bowls relies on volunteer effort in clubs, coaching, scoring and in some cases green keeping and catering. Some clubs have closed because volunteer services were no longer available to keep them viable. In some clubs, falling membership has placed volunteers in roles for which they are not trained, recognised or rewarded.

Recent innovations have posed significant challenges for clubs because new members seek different operating procedures and a growing few resist joining clubs and taking on the responsibilities involved.

Strategy and Planning

Bowls has developed a five year strategic plan directed at building participation and market share through improved recruitment, programs and service, changed perceptions and open access.



There are plans to improve management and volunteer training at regional and club levels, to strengthen coaching and talent identification and to widen the range of competitions available.

Suppliers

Lawn bowls does involve its suppliers in plans and encourages innovation and long term relations. Suppliers are prominent in sponsorship and appear active partners in developing the sport. The sport has outdoor and club facilities and has an opportunity to develop collaborative relationships with suppliers of indoor facilities and commercial rinks who will compete for participants.

Processes for Innovation and Quality



The modified rules game Night Owls has been very effective at attracting new participants to the game. Night Owls is promoted as: "Too wild for the daytime." These events raise interest in the game in a market segment of people who may not wish to join a club but who are willing to pay to play.

Future innovation will use indoor arenas in which to expand night and all weather competition, and to offer new opportunities to participants to rent a rink at any time and to play in multi-use indoor sports facilities with hard floors, such as those used for basketball and indoor cricket.

RSABA is conducting market research among members to assess factors affecting participation. The research considers alternative competition days and times, and changes to competition formats. RSABA is building a base of information about member preferences for features of bowling competitions which are attractive and innovative.



NETBALL

Introduction

Australia has a proud international record in netball. Australia retained its crown as world champion in 1999 with a heart-stopping victory against New Zealand. In addition, Australia won the inaugural gold medal for netball at the Commonwealth Games in 1998.

South Australia can also lay claim to being the premier netball State. This is supported by the championship-winning successes of the Adelaide Thunderbirds in the National League and the continual winning of national age group titles.

Current Structure/Overview

Participation Levels

During 1998-99 there were over 46,000 netball participants in South Australia over the age of 18 years.

Netball competitions provide for ages 11 to Masters. There are in the order of 80,000 to 90,000 school players and rapid growth in Masters competition. Mixed social netball is holding players beyond late teenage years. Altogether there could be 120,000 netball players in South Australia, including players in schools, affiliated and unaffiliated competitions and indoor centres.

Administration Structure



The development of both Masters and mixed social netball competitions has been successful in retaining participants.

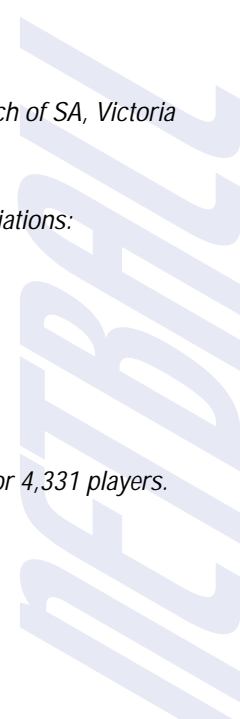
The peak body for netball in Australia is the All Australian Netball Association (AANA) which affiliates all six States and two Territories. Each State / Territory has 2 delegates on the AANA Board. AANA conducts:

- Annual National Championships for Open and 21 & under teams;
- Annual carnival and training programs for 19 and under and 17 and under players;
- The National Netball League competition for the top 8 teams in Australia in which 2 teams compete from each of SA, Victoria and NSW, and 1 team competes from each of Queensland and Western Australia.

The SA Netball Association (SANA) is the peak body for netball in South Australia and has three grades of affiliations:

- Divisions of large competitions of individually registered players,
- Member Associations of smaller competitions of individually registered players, and
- Honorary Associate Associations of school competitions paying no fees.

SANA has 32 Member Associations or Divisions accounting for 18,658 players and 7 Associates accounting for 4,331 players.





SANA has retained ownership of the franchises of two National League teams and has established management boards for each. The 8 team State league has been divided into two agreed pools, each linked to one of the National league teams.

The United Church Netball Association and the North Eastern Netball Association are not affiliated with SANA.

Players in the netball competitions conducted by indoor recreation centres are not registered with SANA. SANA has established a registration classification for indoor recreation centre competitions which will create a link with SANA services without registering players individually.

International Netball is organised in 45 countries affiliated with the International Netball Federation (IFNA). IFNA conducts a world tournament every four years to determine the world champions.

Employment

An increasing number of employed staff are being appointed by netball.

SANA employs 4.5 people full time, some of which are funded by the Office for Recreation and Sport. In addition ETSA Park employs 3.5 for management, caretaking and clerical services and a further 15 casual employees for catering services. AANA part fund a Coaching Director.

Financials

Total income and expenditure of the South Australian Netball Association in recent years has been in the order of \$1 million. Annual expenses include about \$250,000 for representative and national teams and \$300,000 for salaries.

Player registration and affiliation fees received by SANA have increased rapidly from \$221,639 in 1995/96, to \$220,755 in 1996/97, and \$346,872 in 1997/98. This growth in revenue reflects increased fees and increased participation.

An operating deficit of almost \$80,000 was incurred in 1997/98. The years 1996-97 and 1997-98 are the only years in which SANA has produced a deficit. These years had extraordinary factors associated with the opening of ETSA Park and the hosting of several major tournaments.

In 1997/98 ETSA Park netball stadium opened and SANA undertook a long term debt of just over \$3.6 million. A Board of Management, set up under the funding deed and including representatives of the State government and SA Netball Association, manages ETSA Park. In 1997/98 the State Government contibuted substantial funding towards ETSA Park stadium, provided sponsorship under the State Government's Management and Development Program and funded part of the salary of a Project Manager in the Umpire Project.

Economic Significance

Infrastructure

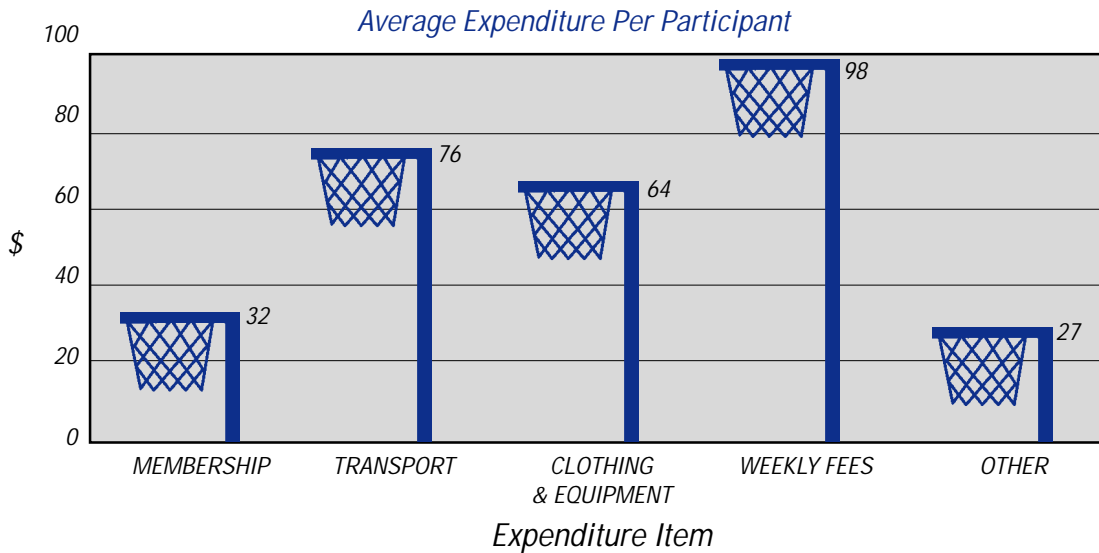
The estimated replacement costs of netball courts in South Australia is \$55 million. The majority of netball courts are built on local government or school land and all metropolitan recreation centres have netball courts.

Expenditure

Netballers' expenditure amounts to \$13.1 million per year with the average spend per participant being \$301 per year.



SANA registers indoor centres for \$500 and conducts netball clinics for the players. The players contribute to a \$35 per game per team payment to the centre for 10 to 20 games per year, providing umpiring and recording. Indoor recreation centres have not been prepared to pay player affiliation fees to SANA although revenue from social netball competitions is very important to the centres.



Source: ABS Cat. No. 4177.0

Spectators

Netball is a significant spectator sport with an estimated 37,800 South Australians attending a netball match in 1998/99. SANA estimates total attendances at ETSA Park in 1997/98 of 66,000, the majority being for National Netball League games.

Merchandising

There has not been any great development of premium netball merchandise around the international and national successes of netball.

Sponsors/Media

Access to sponsorship is affected by the lack of media attention in women's sport leading to a heavier reliance on public sponsors. Commercial sponsors include food and beverage suppliers, motor car suppliers and ETSA. Sponsorship revenues have fluctuated in recent years and reached \$426,550 in 1997/98.

The National League is centrally managed by the All Australian Netball Association who control sponsorship, signs and merchandising, and fund National League uniforms, transport, accommodation and some training expenses.

The introduction of the National League has resulted in a shift of television coverage from State League, further reducing media coverage of women's sport. While public television coverage is welcomed and appreciated, commercial sponsors need commercial television coverage.





The competitive strength of netball in South Australia puts the State in a good position to attract and host a world tournament, attracting international spectators and players to the State. SANA is interested in hosting a world tournament. However financing such events requires funding the costs of travel to Australia and this requires an acceptable agreement with IFNA on sharing of marketing and media revenues.



Sponsor development efforts in netball have benefited from management work developing an inventory of sponsor benefits and a legal framework for professional agreements with sponsors.

Management Practices

Leadership

Netball has leaders of integrity who inspire others to devote their energies to the sport. However those leaders tend to stay in these positions longer than they would like because their volunteer replacements are not being developed quickly enough to provide for an orderly succession.

Customer Focus

Netball has focussed well on the needs of participants and is quickly addressing the needs of spectators. The State and National League structures, the efforts to register and support unaffiliated players and the marketing of the ETSA Park facilities is evidence of continuing improvement.

ETSA Park targets family seating and premium corporate box services. Member and family passes are used to encourage use of the catering services provided at ETSA Park.



People

The sport has successfully developed elite players and sufficient volunteers and administrators to grow and prosper. People are available and are being recognised and valued in the workplace. However the need for skilled people is growing rapidly.

Netball relies heavily on several thousand volunteers working across the State. Most work in clubs where each team needs a manager, coach, scorer and timekeeper. Some teams also have trainers.



The tasks of training, recognising and recruiting the volunteers needed to run the sport are becoming a serious challenge as the technology and systems involved in running the sport grow.

In future SANA intends to extend the use of the internet to support record keeping for the Associations and to increase the training provided to volunteers and staff.

Strategy and Planning

Members of SANA have embraced the need for strategy and planning and are pushing leaders to address longer term issues within tight time constraints. Existing written plans for the current two year period are comprehensive and are being used to drive priorities across all levels of the game, from elite competition to unaffiliated players.

SANA has recognised the importance of strategic planning to drive the future development of the game.



Suppliers

Netball relies on volunteers, local government, indoor sports centres and providers of uniforms and equipment. The sport has a good relationship with most suppliers. Developers and owners of indoor centres usually approach SANA for support. The small levels of expenditure on uniforms and equipment limit the interest and capacity of all suppliers to be involved in the planning and development of the sport.

Processes for Innovation and Quality

AANA manages most research effort which is devoted to player health and safety, improved design of footwear and floors and improved training methods. A Smart Play document has been prepared by SANA advising on warm up, fluids intake and training.



The management processes of netball are improving as planning improves. The increased use of paid staff and improvement of procedures and position statements is establishing a culture of continuous improvement.

Organisation and Performance

Netball is a successful international and local sport, with good facilities, strong participation and attendance, and relatively low participation costs. The sport has a significant economic impact. However it has an unwieldy management structure and is facing pressure to secure and retain skilled volunteers. The competitive strength of the sport in South Australia suggests that an international academy may be a real opportunity. Competition for media attention is also a threat to the continued funding of the growth of the sport.

Much of the current planning of netball is directed at improving organisation and communications within netball. The organisation and systems needed to grow and prosper are being put in place. The measurement of performance indicators and assessment of best practice will follow.







SOCCER

Often described as the global game, soccer is the world's most popular sport. In recent years Australia has produced a multitude of players who are playing professionally overseas in some of the world's best competitions. An immensely popular sport at the junior level, Australia is well and truly on its way to leaving its mark on the game of soccer.

Current Structure/Overview

Participation

The SA Soccer Federation and its affiliates have 30,164 registered players, including juniors and report rapid growth.

Administration Structure

Soccer Australia is the governing body for the sport in Australia. The South Australian Soccer Federation (SASF) affiliates with Soccer Australia and in turn affiliates with a wide range of soccer associations in South Australia.

The South Australian Soccer Federation is governed by 7 Commissioners elected by the clubs. The Commission is made up of people with a passion for the game, but with no current affiliation with any member.

South Australia has 12 Premier League teams and 12 State League teams. In addition there are active competitions for Women's soccer, Indoor soccer, Amateur, Veteran, Junior and Collegiate soccer.



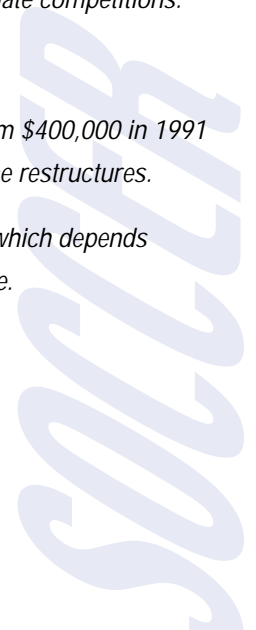
Employment

The South Australian Soccer Federation and affiliated bodies employ 15 full time staff including the South Australian Sports Institute (SASI) Soccer Coach. A further 47 people are working unpaid in the Soccer Federation, the Country Association, the South Australian Amateur Soccer League, the SA Women's Soccer Association, and in the Masters and Collegiate competitions.

Financials

Soccer is reliant on funding from players, spectators and sponsorships. Gross turnover has grown rapidly from \$400,000 in 1991 to almost \$2.6 million per annum in 1998-99. Budgets are expected to fall in the immediate future as the game restructures.

Affiliation and other fees on players amounted to \$324,393 in 1998. Participants pay a levy to affiliated clubs which depends upon the level of competition. Fees from transfers of licences of players are also important sources of revenue.





Net income from marketing and promotion amounted to \$421,079 in 1998 accounting for almost half the net revenues. Marketing activities include training camps, sponsorships and product endorsements. There are plans to expand training camps further in future.

Overall the South Australian Soccer Federation has achieved a small surplus on operations in 1997 and 1998.

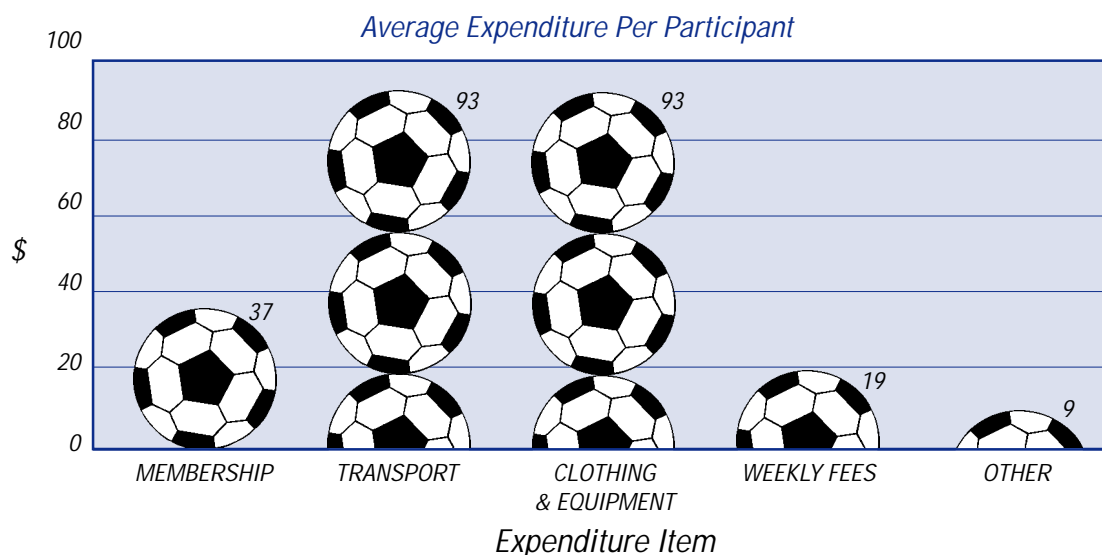
Economic Significance

Infrastructure

Altogether the infrastructure of soccer amounts to about \$75 million, and capital consumption is in the order of \$3 million per year. This includes Hindmarsh Stadium, 10 Premier league grounds and 115 other league grounds in South Australia.

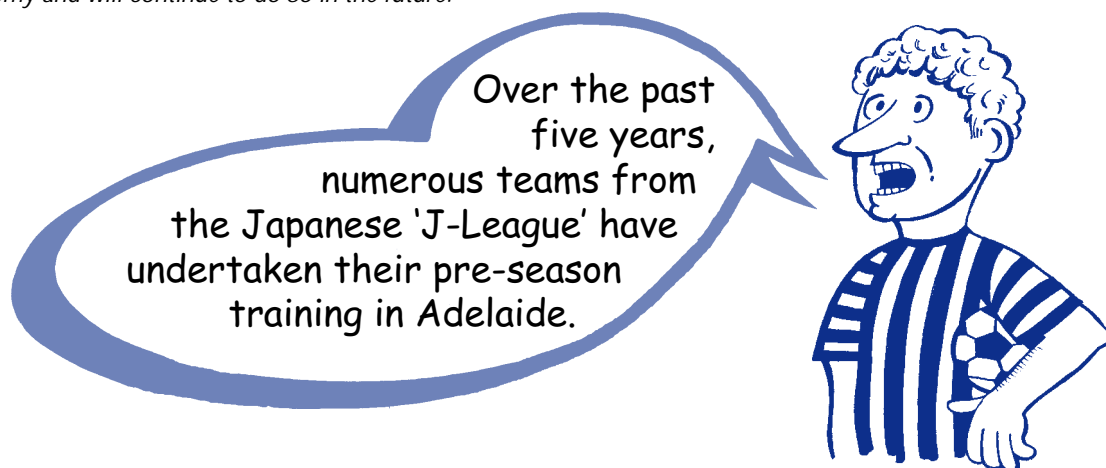
Expenditure

Aggregate expenditures by soccer players were \$2.7 million. Australian Bureau of Statistics data shows average yearly spending by soccer participants was \$253.



Exports

The SASF, in partnership with the South Australian Government, has actively marketed Adelaide as a destination for end of season training camps to overseas professional clubs. This program has resulted in economic benefits for the SASF as well as South Australia's economy and will continue to do so in the future.





Spectators

In the year to April 1999 just under 57,000 South Australians reported that they attended a soccer match.

The South Australian Soccer Federation notes a decline in aggregate attendance at scheduled soccer games in recent times. Soccer in Australia is pursuing international competitive success and expects that this will accelerate growth in spectator interest in Australia.

Merchandising

Merchandise is not well established and would ideally be linked to the national team. Merchandise is risky because of the high investment levels required on slow moving stock.

Sponsors/Media



Soccer focuses sponsor development efforts on the generation of sales for sponsors through linking participants and spectators directly to sponsor products or services. This is particularly strong for beverage provider sponsors.

Clubs receive rewards for using sponsor services and food, through rebates related to sales. This allows the sport to offer the sponsor product sales and the clubs win rebates. Sponsors are not interested in brand exposure in a participant and club based sport.

Soccer maintains close communications with the media, providing a steady flow of information and briefings around emerging issues. There are several radio programs dedicated to the exposure of soccer at all levels giving administrators a vehicle for getting their message across to the public. Weekly soccer results are published in the mainstream press. However, international and National Soccer League matters tend to displace local results.

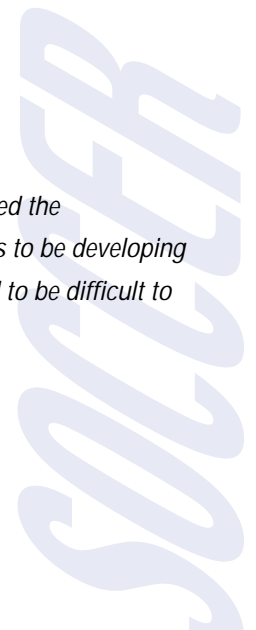
Professional clubs are licensed by Soccer Australia. The professional game generates national television coverage.

Marketing is able to achieve good sponsorship results because of the global profile of the sport and the strong links between domestic teams and specific cultural groups.

Management Practices

Leadership

The South Australian Soccer Federation has effective and energetic leadership, which has dramatically improved the infrastructure in order to attract and display international competition. Like all club-based sports, soccer needs to be developing and renewing leaders at all levels. At club level, where voluntary service is the mode of operation, leaders tend to be difficult to replace.





Customer Focus

The South Australian Soccer Federation has done its marketing well, as the marketing revenues show, and is improving the management of each element of the sport with a view to attracting the customer. However, more is needed to realise the potential of soccer in South Australia, bringing in money and retaining clients.

The target spectator segments are very broad including families, frequent paid spectators, premium members accommodated in grandstands and premium corporate box holders.

Target segments in the participants market are school children and juniors.

Coaching development efforts have doubled the junior level of the game. Introduction of player licence fees and uniform sales will improve the value of the participant market.



People

Employees in soccer are well able to provide for the growth of the sport but few volunteers are coming forward.

Efforts to improve the skills and recognition of the efforts of volunteers are needed. Volunteers available to soccer are diminishing rapidly. This imposes real difficulties on the clubs who find it difficult to retain and develop people to administer the sport. The Office for Recreation and Sport has been advising and training soccer clubs in recruiting and training volunteers.

Strategy and Planning

The South Australian Soccer Federation has a clear vision and objectives for the future. The translation of these into a well understood "road map" describing how objectives will be realised in each club, requires further work.

Suppliers

Soccer has excellent relations with the suppliers necessary to its future. The emergence of world class infrastructure and training facilities is a result of efforts to build relations with critical suppliers.

Processes for Innovation and Quality

The processes used in soccer to deliver innovative and quality services to its customers are being continuously improved.



Recent innovations include the introduction of a player levy, extension of the South Australian Sports Institute's program for elite young players, strengthened coach accreditation Top Five Series of games, held after the home and the and away series.

The Wakefield Clinic maintains a research program and support coaches with information about player fitness, conditioning and nutrition.

A key initiative in marketing has been Club 250. This offers spectators improved levels of service and has attracted outstanding response.



Organisation and Performance

Soccer is an international sport, with international careers for players and officials and a very large international following. In South Australia it has secured an excellent infrastructure. In Australia soccer organisation structures have been fragmented along ethnic as well as team lines, creating some difficulties for sponsors seeking to support teams but not wishing to offend ethnic sensibilities. Like many sports, soccer is having difficulties retaining volunteers. In addition soccer loses talented players to overseas teams.

The South Australian Soccer Federation provides a sound organisation base for soccer. It can facilitate and support the development of club structures, particularly by expanding systems which monitor key performance indicators at club level, and facilitate benchmarking of practices, learning and support systems.

The Olympics and first class competitions using the Hindmarsh Stadium facility are the key event targets of soccer. Training camps and the Grand Final of the Top Five series also provide event opportunities.



SOCCER





SURFING

With around 85% of Australia's population living in coastal regions, the "sun and surf" of Australia's many beaches is synonymous with our culture. In fact, it is often said that surfing embodies what is intrinsically Australian.

Surfing is a sport or recreational activity that operates outside of the traditional structure. The very nature of surfing can make the need to join a club or affiliated body irrelevant. In most instances, the surfer simply wants to load the board into the car and drive to some secluded beach. As a result, the surfing administrators face challenges not encountered by other sports.

Current Structure/Overview

Participation Levels

In 1998-99 almost 24,000 South Australians over 18 years of age went surfing. Anecdotal evidence suggests that there are at least twice this number participating in surfing who are under the age of 18.

In South Australia only a few hundred people would be regular participants in organised surf sport competitions, outside surf lifesaving. In 1999, membership of Surfing SA, the peak body for surfing in this State, was just over 400.



Surfing is the prime example of a sport where participation can take place outside the traditional organised structure.

Administration Structure

Surfing is governed and developed by the International Surf Association which conducts the Surfing World Titles. Surfing is now affiliated with the Olympic movement and it is hoped that it will be an Olympic Sport in coming years, after narrowly missing out on being a 'demonstration sport' at Sydney 2000.

Surfing Australia Inc. serves surfers in all Australian states but not in the territories of ACT and NT. Surfing Australia conducts the National Titles.

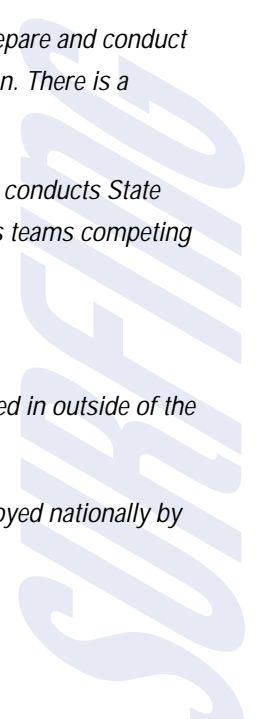
Surfing SA was incorporated in 1963, before Surfing Australia was formed. Surfing SA exists principally to prepare and conduct surfing competitions and is managed by people interested in competition either for themselves or their children. There is a committee of 11 persons that operates on a voluntary basis.

Surfing SA provides junior coaching and development, general coaching and coaching for elite competitors. It conducts State Titles for short board, long board, body board and knee board riding. It hosts interclub competitions, manages teams competing interstate and represents surfing to Government.

Employment

Surfing SA employs one part time administrator due to the very nature of the sport, which is largely participated in outside of the organised structure.

However, Surfing Australia data from a 1997 service industry report highlighted there were 3475 people employed nationally by the industry in the manufacturing and retail sectors of surfing.





Financials

The key revenue sources for Surfing SA are contest entry fees of about \$60,000 per year, membership fees of about \$10,000 per year and sponsorships of about \$10,000 per year. Total revenue is less than \$100,000 per year.

Almost all the expenditures are associated with the conduct of competitions (\$40,000 per year). Other costs include employment costs of about \$15,000 per year, affiliation and membership fees, and general expense costs. Surfing SA operates within its revenues.

Economic Significance

Infrastructure

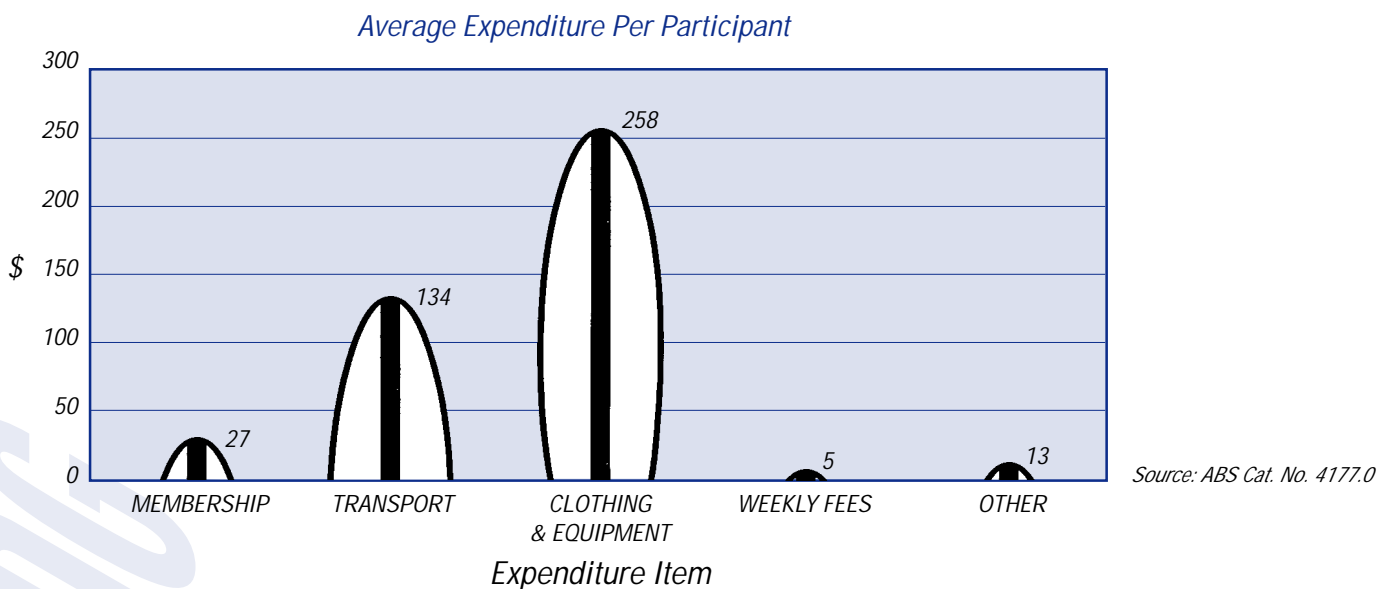
The facilities used for recreational and competitive surfing are natural coastlines. In relation to replacement costs, to place a dollar figure on the value of the coastline - surfing's major asset - is an extremely difficult task.

Needless to say, surfing organisations contribute to the maintenance and conservation of the areas which they use through a variety of organisations such as conservation groups.

Expenditures

Aggregate spending by participants in surfing in Australia in 1996/97 amounted to \$16.1 million (South Australian figures are not available). If the South Australian share of this expenditure is the same as the South Australian share of Australian participation in surf sports in 1998-99, then participant expenditure on surfing in South Australia would be in the order of \$1.3 million per year.

Average yearly expenditure per participant is \$434 per year.



Please note - Australian figures only

Export

Business suppliers of surf wear and equipment have generated employment and export from South Australia from the earliest days of the sport. Several retailers and manufacturers of surfboards and clothing are owned and operated in South Australia. There is also a surf school providing surfers with a range of skills in board riding, travel and environmental science.

In 1999 Australia exported \$26.2m of surf related product. The major destination of surf exports was Asia.

Spectators

Surfing generates no recorded attendances, although there are well attended surfing competitions and special events, especially interstate at professional surfing events like the Billabong and Rip Curl Pro events.

Merchandising

Whilst there are a few manufacturers of surfing merchandise such as surfboards, wet suits and clothing in South Australia, they are in relative terms, quite small compared to the large brands of Rip Curl, Quiksilver, Billabong and Rusty. Anecdotal evidence suggests that the majority of retail sales of 'surf brand' clothing are purchased by non-surfers as fashion items.

The profits from surfing-related merchandising does not benefit Surfing SA.

Sponsors/Media

The graphic and exciting nature of the sport of surfing makes for excellent pictures for both television and print media. Sponsors are attracted to the sport's image of being a vibrant and youthful activity which represents Australia's 'bronzed Aussie' culture perfectly.



Suppliers of surf equipment sponsor competitions rather than associations, where they can get brand association with the surfing image for example the Billabong and Rip Curl Pro events.

Sponsors of surfing competitions receive written proposals and efforts are made to service sponsors and provide media exposure. Sponsors are invited to competitions and are provided with results and photographs.

Key sponsors are suppliers of surf equipment and clothing, and radio stations seeking the surf demographic.



Surfing SA and the businesses operating competitions maintain contact with all media outlets. Details of upcoming competitions are sent twice to each outlet before the event in the form of media releases and followed up with telephone calls.

On the day of the contest media are contacted and informed of the venue and starting time. Results are faxed to media as soon as possible after completion of the contest. All media which support surfing are thanked in writing after the event and receive gifts of tee shirts, key rings or caps.



Management Practices

Leadership

Surfing in South Australia is in transition to a new leadership group but relies on a small group of volunteers committed to the competitive sport.

Customer Focus

Surf participants are segmented into recreational surfers and competitive surfers. The businesses serving recreational surfers provide quite strong customer focus, providing advice on surf spots and wave conditions. Surfing SA serves a minority of surfers who are interested in competitive surfing.

Through the efforts of Surfing SA, clubs are becoming attractive ways of improving surfing skills. Girls and juniors are now more likely to join clubs than they once were.

People

Surfing is a sport largely run by volunteers who perform their task admirably despite financial constraints. If there is one word which describes those involved in the sport it is 'passionate' and their passion is reflected in the way they undertake their tasks, run very successful events and manage a small, but expanding, membership base.

Strategy and Planning



Competitors are a more attractive segment because they share the aims of developing juniors and conducting competitions.

Several South Australian competitions are conducted and promoted as business ventures. These include the Morey Pro, the National Titles (when held in SA), Yorke Surfing Classics and Women's Classics. This practice provides stable event funding and avoids overloading volunteers.

A World Championship Title event could be attracted to South Australia but requires about \$300,000 to mount. This is beyond the present capacity of Surfing SA.

The competitive sport has not found effective ways of attracting recreational participants to pay for membership and organisation. Few recreational surfers or swimmers have an interest in competition. SA water space is not crowded. Few seek premium guided surfing, surf information or coaching services.

For most recreational surfers, entering a competition reduces recreational surfing time and results in discouragement from early elimination by more skilled competitors.

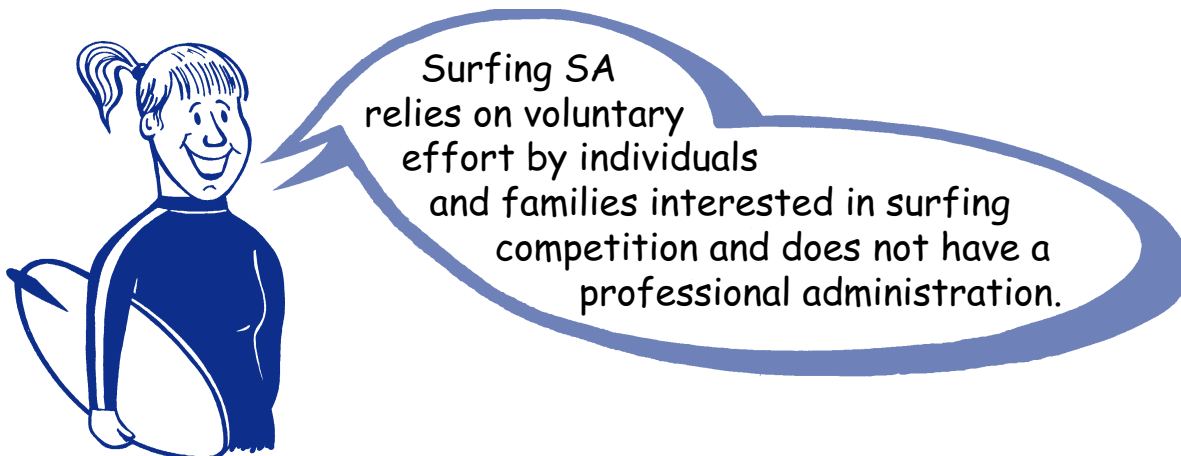


Suppliers

Surfing has good linkages with commercial suppliers of services. However emerging threats to access to sites for competitions suggests the need to strengthen relationships with managers and controllers of those sites.

Processes for Innovation and Quality

There has been some innovation in junior development and training programs for elite surfers but the scale is too small to allow any process of continuous improvement. The commercial suppliers of the sport have developed products and services to meet emerging customer interest.



The growth of the sport in South Australia is constrained by access to reliable surf spots, in close proximity to Adelaide. Participation, coaching and development of the sport would be stimulated by a wave pool in which surf skills could be taught and recreational surfing could be conducted. Such a facility could be commercially operated, perhaps as part of a regional shopping centre. An alternative would be a fixed or moveable artificial reef located near the Adelaide metropolitan area with controlled access.

Organisation and Performance

Surfing Australia is regarded as the best administrator of surfing in the world. Surfing Australia provides a wide range of advisory services nationally through seminars on administration, coaching and surf rider schools. The world meetings pool ideas and resources that are passed on at bi-monthly State meetings. Surfing SA benefits from its affiliation with Surfing Australia.

The sport does not have the organisation or the systems to monitor performance and benchmark processes used in the sport. Coaching is strong but administration is weak. Organisation is the most important issue affecting the future of the sport.

Membership provides national affiliation, insurance cover, access to Surfers Travel and car hire services, a newsletter and a discount telephone plan. Affiliation provides members with spectator entry to professional events and eligibility to compete in State contests.

Surfing has substantial recreational participation and is a highly visible, international, professional sport, in which all ages and abilities can participate.







TENNIS

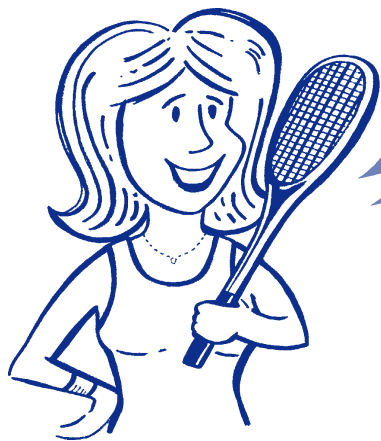
Tennis in Australia is currently riding high. The emergence of a new group of male players challenging for world rankings in the top ten and the winning of the Davis Cup has significantly raised the profile of Tennis in Australia to the levels it once had in the glory days of the 1950's and 1960's.

Along with cricket, tennis has always been Australia's traditional summer sport. However, unlike cricket, tennis is a sport that is played extensively by both sexes from the ages of 5 to 75.

Current Structure/Overview

Participation Levels

The Australian Bureau of Statistics have estimated that there were 74,200 tennis players 18 years of age and over in South Australia in 1998/99.



Tennis has a large number of social players, with only about 39% of tennis participants aged 18 years and over in 1998-99 taking part in organised games.

Few social players register with Tennis South Australia. In 1997 Tennis South Australia had 14,759 registered members, of whom about 5,700 were under 18 years of age. This was an increase from 13,169 registered members in the previous year. There was an increase from 267 clubs in the previous year to 297 tennis clubs in 1997.

Data on participation supports the view that social and recreational players are not attracted to the competitions run by Tennis SA, nor are many attracted to the clubs registered with Tennis SA.

Administration Structure

Internationally tennis is organised by the International Tennis Federation (ITF). Tennis Australia is the Australian affiliate of the ITF. Tennis SA, which incorporates the South Australian Hard Court Tennis League and the South Australian Tennis Association, is the State affiliate of Tennis Australia.

The SA Hardcourt Tennis League and the SA Tennis Association joined forces to grow and develop tennis on 1 July 1996.

Organised tennis is based on clubs and the Association. Tennis SA is responsible for all competitive tennis, from Davis Cup to Saturday competition, mid-week ladies and night team tennis and for organised social tennis played within clubs and associations.

Tennis SA has an elected Board of ten persons and 13 committees. Most committees include a member of the Board. This structure should give the Board the capacity to make decisions while ensuring a voice for players and officials.



Employment

Nine people are employed by Tennis SA. In addition South Australia has 126 tennis coaches who are members of Tennis Coaches Australia. Many of these would be earning some income from the sport.

Financials

Turnover of Tennis SA reached \$1.3 million in the 1998-99 year.

The principal sources of funds for Tennis SA in 1998-99 were:

- Tennis Australia \$375,000
- SA Government \$165,000
- Facilities and court hire \$160,000
- Player registration \$155,000
- Sponsorships \$110,000 and
- Other programs, entries and events \$370,000

Tennis Australia distributes to the States, on a population and needs basis, one third of the profit from the Australian Open.

Economic Significance

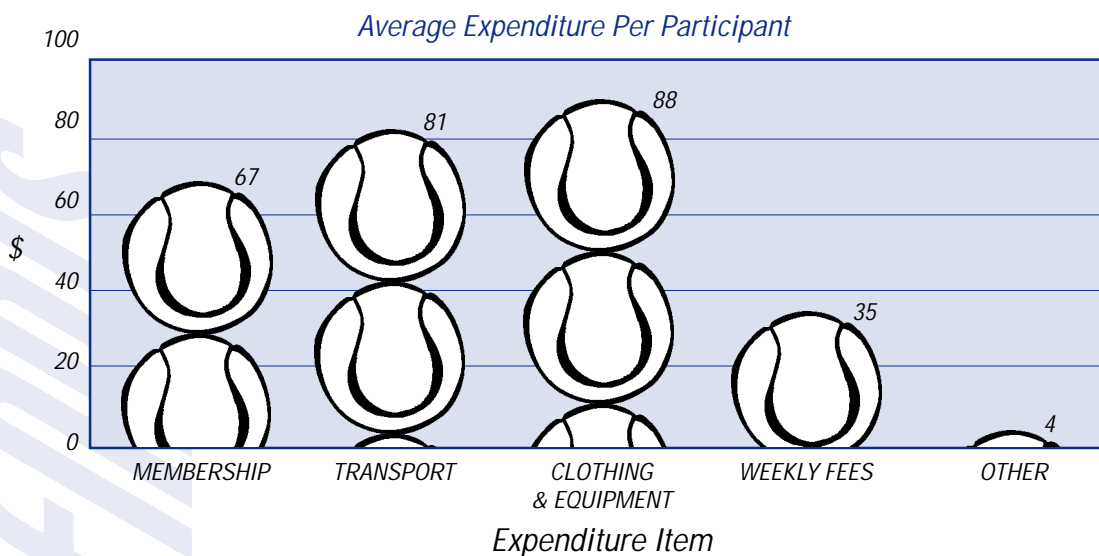
Infrastructure

Most infrastructure for competitive tennis in South Australia is owned for the community by local government. About \$90 million is invested in tennis courts for the competitive side of the sport. The value of recreational courts which are located in public reserves and on private land is also likely to be around \$90 million (no official figure is available).

Expenditures

Tennis participants in South Australia spent an aggregate of \$7.9 million per annum on their sport, while the average spend is estimated to be \$278 per annum.

Adding spectator expenditure of \$5 million gives tennis an estimated economic impact of about \$13 million per year.



Source: ABS Cat. No. 4177.0



Spectators

In the year to April 1999, an estimated 32,800 people attended a tennis event in South Australia.

Attendance at tennis is high in years in which South Australia hosts major tennis events. A Davis Cup tie can attract 8,000 people per day for three days. The Australian Men's Hardcourt Championships are held in South Australia and attract attendances growing from 15,000 in 1996 to 22,200 in 1997 and reaching 34,000 in 1998.

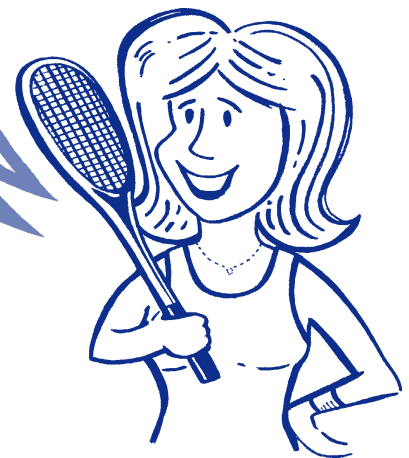
Attendance revenues are also growing. Tickets for three days of the Australian Men's Hardcourt Championships range from \$70 to \$210 each and boxes are \$1,000 per person. There are 24 boxes catering to 12 persons each. Gate revenues can be in the range of \$4 million and catering spend is budgeted at \$0.4 million.

The annual aggregate expenditure by all persons who report that they attend tennis has not been surveyed, but is likely to be in the order of \$5 million.

Sponsors/Media



Sponsor development is mainly focused on event sponsors. Sponsors are approached personally with a package of benefits from exposure to people attending a particular event.



Exposure at Davis Cup or Australian Men's Hardcourt Championships is valued by sponsors.

Some sponsors are approached on the basis of sale of goods at events. Coca Cola or Dunlop can be attracted by beverage or tennis ball sales.

Apart from events, sponsors are not regularly informed or involved in the development of tennis.

Tennis SA concentrates on print media because that is most relevant to local players. Relations with the media are maintained by regular press releases and personal contact with journalists. Timely submission of copy for print deadlines maintains newspaper coverage of local competition.

Tennis Australia deals with electronic media using the attraction of access to international players who have retired to the State, such as Darren Cahill. Media interest surrounds international events rather than local events.





Management Practices

Leadership: Tennis in South Australia does have the leaders required for the future but is having growing difficulty with succession and renewal of leadership. The most important area to be addressed for tennis to grow and prosper is in the development and renewal of leadership across the clubs and structures of the game, enabling existing leaders to bring their talents to new aspects and creating opportunity for emerging leaders.

Customer Focus

Tennis has not developed marketing or customer segmentation at the State level. Marketing effort is directed towards presenting tennis rather than towards raising funds.

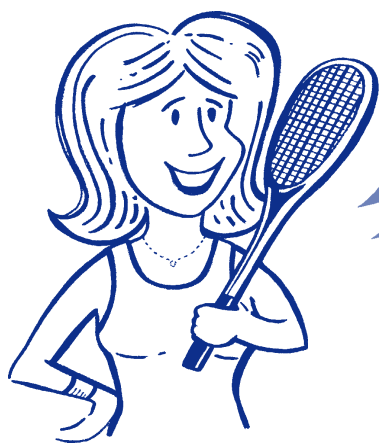
Tennis SA has a strong focus on competitors and is anticipating and responding to participant needs.

Spectators in corporate boxes are a premium segment for the Australian Men's Hardcourt Championship and for Davis Cup ties. General admission spectators are important to recruitment to the game.

People

Tennis does have the people it needs to sustain the sport. People have been loyal and are recognised for their efforts. The number of accredited coaches in South Australia has been maintained at 126. In some cases administrative skills have not been upgraded to deal with the challenges of a changing environment.

Tennis also relies upon large numbers of volunteers in the clubs, the committees and the administration of the competitive sport. Volunteers value the social opportunities of tennis and this helps clubs to be self sustaining.



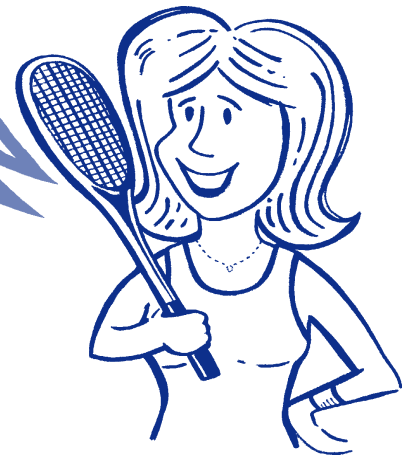
Efforts are being made to prevent individual volunteers becoming stuck in particular positions and to provide training and opportunities for incoming volunteers to make their contribution to tennis.

This is being achieved by clarifying the roles of committees, defining a range of service opportunities within tennis and providing volunteer training conferences. This allows volunteers to contribute and move between a variety of roles.



Strategy and Planning

Tennis South Australia faces a range of strategic challenges. The strategic plan aims to build a sound management and financial base to enable tennis to grow in South Australia and to support the objectives of Tennis Australia.



Participants who become registered members and regular players in clubs are the basis for development of the game.

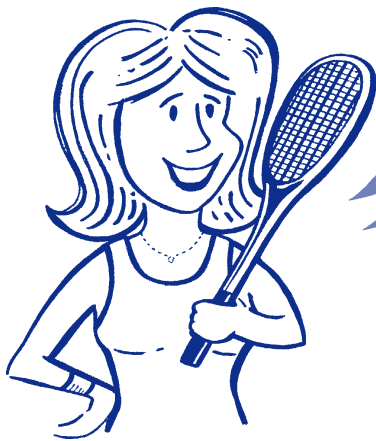
The major event targets for South Australia are Davis Cup ties, the Australian Men's Hardcourt Championships and Satellite Tour Challenges. Australian Major Events and Tennis Australia assists in the formulation and forwarding of bids.

Suppliers

Suppliers to tennis are connected to the game through participation in the tournament structures. As the game diversifies in form, new suppliers will become important, such as operators and owners of indoor venues.

Processes for Innovation and Quality

Tennis has quality processes and services needed to grow and progress, but lacks continuous improvement processes which will adapt to new challenges and changing participant needs.



Tennis is developing participation building programs including fun days, Fast Tennis, programs for people with a disability, and twilight competitions providing standard games at convenient hours.

Tennis SA and The South Australian Sports Institute provides programs for the top tennis athletes. Research into participation and volunteering has been commissioned in universities in conjunction with Volunteers SA. There are also projects to improve services to people with a disability and management of equal opportunity services.





Organisation and Performance

Tennis organisation has made great strides in recent years. Clubs and central organisations are developing the common systems and structures needed for the game to progress. However information systems and analysis have not been strong. Improvements could be achieved through benchmarking and best practice programs.

Tennis, like other sports, is threatened by other demands on leisure time and a growing resistance to clubs and structures. Time demands are driving a shift towards night time sport. Competition for sponsors is becoming more demanding.

Tennis has a number of models of good practice in tennis development and sport management. Spain has demonstrated the value of good coaching through the number of top players produced. US Tennis has produced an excellent model in the format of Veterans Tennis. Wimbledon and the Australian Open provide models for tournament management.

Regional multi-sport centres and the Convention Centre create opportunities for indoor tournaments. The development of tennis in Asia will create opportunities for South Australia.



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