



**NORTHERN  
NSW  
FOOTBALL**



**FOOTBALL  
NSW**

# **NSW FOOTBALL INFRASTRUCTURE STRATEGY**

**BETTER FACILITIES, CONNECTED COMMUNITIES**





# FOREWARD



It is our pleasure to introduce you to the NSW Football Infrastructure Strategy – a document that sets the future direction for football facility planning, provision and development across NSW for the decade 2020-2030.

This Strategy has been collectively developed by Football NSW and Northern NSW Football through our Facilities and Advocacy Unit. While our organisations individually plan for and deliver football across the state of NSW, this jointly funded and developed project is one of the largest planning exercises undertaken by a NSW peak sporting body in recent times.

With almost 300,000 individual registered players, close to 1,000 sites and 2,250 playing fields used for football every week, Football is the largest participation sport in NSW, with current rapid growth certain to continue.

We need to plan for the future. We need to identify the needs of our sport for those that currently play and for those that want to but cannot. We've identified there could be as many as 30,000 additional players across NSW that could have played in 2019 if they had access to a football facility.

Australia and New Zealand are set to co-host the FIFA Women's World Cup in 2023. This is a once in a lifetime event that will unlock the untapped football potential of the Asia-Pacific region and increase participation growth at the grassroots level here in Australia. An influx of participants correlates to an increase in demand for football facilities. Therefore now is the time to invest in improved football facilities for girls and women to accompany the growing demand we are experiencing and will continue to experience for many years because of this worldwide event.

Football's contribution towards the health, social and economic benefit of the NSW community is well documented. It contributes \$515 million annually to the local economy and \$4.5 million annually in community health benefits. This is a significant contribution to sport and to our great State.

Finally, to our partners, our clubs, the football community and of course our facility providers and sponsors in local government. We wish to thank you all for supporting Football in NSW and we look forward to continuing our work with you into the future and through the implementation of the Strategy.

Stuart Hodge  
CEO, Football NSW

David Eland  
CEO, Northern NSW Football



# ACKNOWLEDGEMENTS

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## ABOUT THIS DOCUMENT

The NSW Football Infrastructure Strategy provides the NSW football community and its stakeholders with a detailed assessment and analysis of the state's football facility landscape across metropolitan, regional and northern NSW.

The Strategy identifies the key focus areas for the future planning and development of almost 1,000 community football facilities and over 272,970 active club participants across NSW. The Strategy will provide a strategic framework to support football's vision of connecting communities through well located, welcoming, accessible and sustainable football facilities.

Specific facility and infrastructure priorities are provided in 26 Football Area Summaries, comprising:

- 16 Metro Football NSW Associations
- 3 Regional Football NSW Branches, and
- 7 Northern NSW Football Zones.

Priorities have been recommended following a detailed need and demand assessment. Local area priorities are evidenced based and will enable the football community and government partners to confidently and jointly invest in future football related projects.

The Strategy will evolve over time and is versatile enough to respond and adapt to changes in the local, state and federal environments. Collaboration between Football NSW (FNSW), Northern NSW Football (NNSWF), their respective Associations and Zones, and all levels of government, is key to this Strategy and its collective funding.

The Strategy delivers on a range of recommendations established in the 2014 Football NSW Facilities Strategic Plan and has been led and supported by the joint FNSW and NNSWF Facilities and Advocacy Unit.





# EXECUTIVE SUMMARY





**With 272,970 registered seasonal club competition players, football in NSW is by far and away the biggest state body of all sports in Australia.**

The NSW Football Infrastructure Strategy is focused on identifying and understanding the infrastructure required to support and sustain community football over the coming decade. Using a sound evidence base of on and off-field facility audits, existing participant and likely market demand data, this Strategy strives to identify the current infrastructure gaps and future requirements needed to better support football across NSW.

The Strategy seeks to highlight the key population areas that have significant football participation now and project the areas of greatest need by 2030 and beyond. It also provides decision making tools in order to identify the areas where funding and investment is needed most.

Many key stakeholders have been involved in the preparation of the NSW Football Infrastructure Strategy, including more than 68 Local Government Authorities (LGAs) as owners and managers of land and facilities used by football.

All 38 Football NSW and Northern NSW Football affiliated Associations and Zones were engaged via surveys and face-to-face workshops in strategic locations across NSW. As the key deliverers of community football activities and users of facilities, consultation with Associations and Zones is imperative to ensure a well represented view is presented.

993 community football venues were identified in NSW, with 938 visited and audited in 2018 and 2019 as part of NSW's largest ever football facilities assessment. In order to understand what is needed in the future, the current supply and provision of what we have and use now was essential. The audit highlighted significant opportunities for improving and increasing the capacity of infrastructure as a key tool for sustainable and financially responsibly provision, while also providing for the future.

This extensive facility audit has formed the basis of the strategic framework, key focus areas and football area summaries. The audit itself, and the creation of a state-wide facility database and GIS mapping platform were also key outcomes within the Football NSW Facilities Strategic Plan created in 2014.

Research undertaken into existing facility provision, condition and capacity revealed a number of critical challenges for stakeholders to collectively address, including:

- Ageing nature of existing infrastructure
- Quality of playing fields and underlying drainage and irrigation issues
- Extensive use of existing playing fields
- Need for a greater number of more robust playing field surfaces
- Pitch lighting struggling to meet minimum standards
- Ability of change room amenities to provide inclusive environments
- Inadequate number of playing fields to cater for training and competition needs
- Attracting shared investment into infrastructure projects that are rising in cost
- Providing the right, balanced mix of facilities in new open space areas
- Relatively limited number of well-sized, quality community and social rooms.

In-line with the significant sport and government sector consultation, and review of the NSW Government and football stakeholder directions, a strategic framework with accompanying principles and infrastructure pillars has been developed. It also delivers on Football NSW's strategic objective of developing **more and better facilities** and Northern NSW Football's strategic priority of **facilities to support participation**.

The NSW Football Infrastructure Strategy identifies the following key pillars and associated objectives for guiding support and investment into community facilities:

- **Improve existing venue capacity:** Maximise the carrying capacity and activation of existing football grounds and venues.
- **Inclusive football facilities:** Support diversity of game formats and participants through inclusive facilities.
- **Homes of football:** Improve access to football programs, pathways and development services.
- **Planning for growth and demand:** Plan to maximise participation through new and innovative venue opportunities.
- **Partnerships and investment:** Develop and maintain relationships with all levels of government and industry partners.





# EXECUTIVE SUMMARY

In delivering on the above pillars and key focus areas that are presented later in the Strategy, Football NSW and Northern NSW Football, along with strategic partners will also align with the principles of accessibility, innovation, inclusivity and sustainability through implementation.

In addition to the strategic framework and pillar structure provided, detailed assessment, strategic priorities and recommendations have been provided in 26 Football Area Summaries covering the 16 metropolitan Sydney Football Associations, 7 Northern NSW Football Zones and 3 Regional NSW Football Branches.

Football Area Summaries provide customised and unique insights that consider current and future populations, municipal areas, facility condition and growth trends in football, which determine the future planning priorities for each identified area under the state-wide strategic framework.

This NSW Football Infrastructure Strategy primarily focuses on participation at a community football level and is best described as a Strategy that supports and maximises activation, ensuring venue capacities are fully utilised and aligns with best practice football guidelines and standards.

The challenges for football that have been highlighted are related to existing players numbers and unprecedented participation growth experienced now and into the future. **This Strategy recognises that football demand is already exceeding facility supply.** If action is not taken now to plan infrastructure over the coming decade, then the gap will widen and opportunities to play will be lost.

The age group seeing the highest rate of participation growth is the 5 to 9 year old cohort where young children are introduced to the game, which has seen a 20% increase since 2014.

Should this trend be ongoing, with todays children continuing to play football as adolescents and adults,

football is on track to increase its total participation by a further 50% over the next 20 years.

To manage football participation growth, addressing existing on-field issues of sports lighting provision to Australian Standards, turf quality, presence of functional irrigation and drainage is required. When combined with football's off-field issues of amenity support, change room upgrades to gender neutral standards and storage availability, this will continue to impact on football's potential to deliver on the NSW Government Office of Sport Mission of Building Active Communities.

In-line with strategies and recommendations that address football's growing pains, several broad critical actions have been identified for the NSW Facilities and Advocacy Unit to address in partnership with the broader football community and government sector stakeholders.



## CRITICAL ACTIONS

1	Provide leadership to stakeholders on facility planning and renewal through provision of current Football NSW and NNSW Football participation data and community football on-field and off-field venue condition information.
2	Support players, officials and referees of all genders by prioritising and supporting the upgrade and development of facilities at sites with identified female participation.
3	Partner with identified stakeholders including, but not limited to, Federal, State and Local government, Football Associations and clubs to contribute expertise and leverage funding to support football infrastructure initiatives.
4	Collaborate with developers, growth area Councils, State Government, commercial partners and other sports on future football facility provision to guide precinct structure planning in new, growing and established communities.
5	Deliver a consistent and united football message through club, association and state body communications.
6	Identify key strategic facilities and locations where football can deliver more streamlined localised services to the regional NSW football community.





# INTRODUCTION & CONTEXT





# INTRODUCTION

Football as the most played outdoor team sport in NSW (and Australia), identified a dedicated resource was required to ensure the planned and effective growth of the beautiful game occurs.

In response, the NSW Facilities and Advocacy Unit (previously known as Facilities and Government Relations Unit) was created as a partnership between Football NSW and Northern NSW Football which was established in 2016.

## NSW FACILITIES AND ADVOCACY UNIT

The centralised unit provides tangible assistance and advice to clubs and local government authorities (LGA's) throughout NSW who are committed to providing their members and constituents with access to football facilities and local infrastructure which are safe, welcoming, accessible, inclusive and conducive to the provision of an enjoyable football experience for all.

The NSW Facilities and Advocacy Unit has the responsibility for providing leadership, information and advice to stakeholders of both Football NSW and Northern NSW Football, reporting through to the CEOs of both organisations.

Even though the unit is focussed on facilities development, you will clearly see later in this document the role the unit

plays is far greater by creating links for the various internal departments to prosper from all levels of stakeholder and government relations.

The NSW Football Infrastructure Strategy 2020-2030, was commissioned by the Unit and provides a framework enabling football and its strategic partners to better understand and prioritise its facility needs both now and in the future.

Localised Football Area Summaries are a product of the Strategy, providing associations and clubs with clarity and direction in their facility planning and development initiatives. It also provides government with clear evidence and direction for prioritising football infrastructure projects.

A key objective of each Football Area Summary is to address the challenges that the sport is currently facing, and to lead the enhancement, sustainability and growth of the sport in NSW. Some of the challenges for football this Strategy aims to address include:

- **Outdated infrastructure:** While still very much valued, many football facilities are not contemporary in nature and do not meet best practice present day sport guidelines or community expectations. All gender changeroom facilities with private lockable cubicle showers compared to open communal showering

facilities is an example of outdated infrastructure.

- **Improve capacity:** Achieving more participation from existing football infrastructure. Existing on-field and off-field football infrastructure has been inspected, football trends understood in different areas and targeted facility investment recommended. Introduction of sports lighting at unlit sites and improvement of ground conditions (above and below surfaces) will improve site capacity.
- **Participant growth:** 11% participant growth in club football has occurred across NSW over the past 5 years (this equates to in excess of 25,000 additional players). The Strategy identifies current and future participation hot spots, demographics, land availability and demand rates.



**350 infrastructure upgrades valued at \$354m have been identified to date to service football's current participation, let alone what will be needed in the future to service the projected demand.**



# INTRODUCTION

## PROJECT DELIVERABLES

The NSW Football Infrastructure Strategy 2020-2030 will provide a 10-year road map that addresses the planning, provision and enhancement of community football facilities, and identifies the areas of greatest need for investment.

Project deliverables that inform the key recommendations and actions in this Strategy include:

- A detailed football facilities audit, data collection and GIS mapping process was undertaken over 2018/2019 to determine the current provision, condition, use and location of 993 community football venues across NSW.\*
- Consultation with the football community represented by associations, facility providers and local government organisations via online surveys and workshops. This provided an understanding

of user need, facility challenges, barriers to participation development aspirations and resource capacity.

- Participation analysis and demand assessment through examination of 2014 and 2019 registered winter season NSW football club players.
- Production of 26 Football Area Summaries that considered all football areas across NSW.

**\*Note: Of the 993 identified venue locations, 938 have been identified as being used for community football training and competition in NSW. This does not include sites used for NPL competition only, training only sites or sites identified for potential future use. Audit findings and analysis are also influenced by 18 venues not having an audit started and 20 incomplete audits undertaken at the time of writing.**

# RESEARCH & CONSULTATION

**More than 180 government and football community stakeholders were engaged in the development of the NSW Football Infrastructure Strategy. In addition to seeking the views of stakeholders, significant data collection, analysis and reporting systems were also developed and used to identify priorities. The tools developed are available for Football NSW's and Northern NSW Football's use and will be extremely valuable in monitoring and evaluating the progress of strategy implementation.**

## INDUSTRY CONSULTATION

Direct consultation was undertaken with the football community and government stakeholders in the development of the NSW Football Infrastructure Strategy. The aim of the consultation process was to create awareness of the project and accurately capture and test the facility issues, challenges and aspirations for football.

Key stakeholders engaged in the development of the Strategy included Football Federation Australia, all 38 Football Associations and Zones across NSW, Office of Sport NSW and Local Government Authorities (LGAs).

**80% of all local government football field owners in NSW completed a survey or participated in a workshop**

The following consultation methods were used to collect information and provide opportunity for stakeholders to have input into the development of the Strategy:

- Project information bulletins and dedicated webpage.
- Individual meetings with FNSW and NNSW Football representatives.
- Stakeholder workshops for LGAs and Football Associations and Zones at Valentine Sports Park and in Lake Macquarie, Orange, Wagga Wagga, Moruya and Cessnock (78 attendees).
- Online survey of NSW Local Government Authorities (68 responses).
- Football Association and Zone survey (38 responses representing a one hundred percent completion rate).

## DATA SOURCES

Football participation numbers presented and analysed throughout this document were provided by Football NSW and Northern NSW Football and are based on registered club participants. Social players, futsal, summer football and school participants have not been counted, as these players are typically registered with an affiliated club and detailed planning for these activities has not formed part of this Strategy.

SportsEye, a product of ActiveXhange, was used to undertake an extensive participation analysis and future demand assessment for club based football in NSW. The data analysis explores 2014 and 2019 registered football participant data to better understand current participation trends and future participation outcomes. SportsEye assists informed decision making and provides in-depth analysis of customers, activity programs and facility infrastructure and its relative capacity.

Football facility provision and condition information was collected by Football NSW and Northern NSW Football staff, contractors and association and zone representatives using a customised Football Facility Audit Tool (SFA-

Football). Every effort has been made to ensure data is as detailed as possible, accessing 975 of the total identified 993 community football venues (located in NSW) that host community training and/or competition activities. 18 venues remained un-audited at the time of writing.

Initial facility audit data was collected in 2018 and 2019, with data quality testing and refreshing conducted as part of the data analysis phase of strategy preparation.

**In total, 938 (of the identified 993 venues) have complete community football venue audits that have been analysed as part of this Strategy (the 18 not started and 20 incomplete audits have not been analysed, along with 6 training only sites and 11 potential future venues).**

All population and demographic data (and associated analysis) was sourced from NSW Government population projections, 2018 edition; Australian Bureau of Statistics.



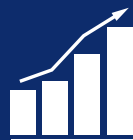


# VALUE OF COMMUNITY SPORT INFRASTRUCTURE

## THE VALUE OF COMMUNITY SPORT INFRASTRUCTURE

In 2018, Sport Australia (formerly the Australian Sports Commission) commissioned a report to quantify the value of community sport infrastructure. Sport is synonymous with the Australian culture and psyche. As a nation we intuitively understand its benefits, with this report articulating fiscal values.

**Summary of key impacts of sporting infrastructure includes:**



### ECONOMIC IMPACTS

The economic value of community sport infrastructure has been estimated at \$6.3 billion. Employment of approximately 57,000 people directly (equating to 33,900 Full time positions) related directly to community sport infrastructure. Volunteers were estimated to contribute \$1.3 billion annually to the economy.



### HEALTH IMPACTS

The health value of community sport infrastructure is estimated to be \$4.9 billion. Health benefits across the community include:

- A lower risk of being affected by chronic diseases such as cancers, dementia, diabetes and cardiovascular disease.
- Improved mental health
- Health system benefits as a result of a lower incidence of disease, or better managed mental health issues, including lower wait times, less congestion and health savings costs.



### SOCIAL IMPACTS

The social value of community sport infrastructure is estimated to be \$5.1 billion. The social benefits are derived by users of facilities through both the sport activity and social connection networks created. Academic benefits, including young people staying in school for longer and positive educational aspirations (desire to attend university) and ultimately higher wage earnings are all measured social impact benefits. Heightened community pride and reduced crime and anti social behaviour are also identified.



**COMMUNITY SPORT  
INFRASTRUCTURE IS  
VALUED AT \$16.2 BILLION  
TO AUSTRALIA.**

# VALUE OF FOOTBALL

Football in NSW provides a significant positive impact on the NSW community. It contributes significantly to the economy, to developing social capital and impacts on people's physical and mental health and well-being. The total community impact of football to NSW is expected to reach \$1 billion by 2025.

With almost 300,000 registered football participants in NSW and participation growth of 11% since 2015, there is no doubt that there is significant interest in football. Accompanying this growth is an increase to the positive benefits that football provides to the whole community.

As the number one club-based sport for participation in Australia, football draws on half a million players, coaches, officials, administrators and volunteers to demonstrate its value across the NSW community. NSW also contributes more than 50% of football participants in Australia, and as such, also provides a significant economic, health and social contribution to the entire country.

The *Community Impact of Football in NSW Report* was originally commissioned in 2015. Between 2015 and 2018, **the total annual community impact of football in NSW grew by 23% from \$421 million to \$520 million.**

This increase validates football's ability to advocate to all levels of Government, and other key stakeholders, about the valuable contribution football makes to communities in NSW and positions the administration to continue to grow investment in our game.

The physical and mental health benefits delivered by the sport to the NSW community are simply astonishing. This study documents the health advantages which participation and engagement in football delivers. It also identifies the positive social benefits which come from the football community.

## Football contributes \$515,334, 869 p.a. in Economic Benefits and \$4,557,899 p.a. in Community Health Benefit

Sport Business Partners 2018



### Economic impact

Football in NSW via Football NSW, Northern NSW Football, the Associations, Zones, clubs, participants, spectators and aligned businesses contributed an estimated \$515 million to the NSW economy in 2018. This contribution was collectively spread across the State, with some local communities benefiting by almost \$30 million in annual local impact.

### Social impact

The following key statements reflect football's contribution to the social fabric of NSW communities:

- **Social network diversity:** Football clubs bring together people of different ages, genders and backgrounds.
- **Multicultural engagement:** Football transcends race, religion and gender to create community connections.
- **Social skills and behaviour:** Football clubs develop well rounded individuals who make a positive contribution to society.

- **Community connectedness:** People identify themselves as being part of their community through their connections with a football club.

### Health impact

Regular participation in physical activity provides significant physical and mental health benefits to individuals. The lifetime contribution of football to the health of NSW grew 42% between 2015 and 2018. The lifetime contribution of football in 2018 was estimated at \$89 million.

The physical health benefits analysed in this study are derived from reducing the prevalence of chronic diseases (breast cancer, coronary heart disease, diabetes, bowel cancer and stroke) as identified by the Australian Institute of Health and Welfare.

The mental health benefits are derived from reducing the prevalence of anxiety and depression.

The annual community contribution which football provides through reducing the prevalence of these diseases is valued at \$4.5 million.





# STATE GOVERNMENT ALIGNMENT

The NSW Football infrastructure Strategy builds on NSW Government strategic priorities for sport and recreation. Future investment by the NSW Government in sport and recreation projects and initiatives will be guided by a number of strategic priorities and initiatives, many of which are identified below.

## OFFICE OF SPORT STRATEGIC PLAN 2020-2024

The NSW Office of Sport's vision;

**"Sport and Active Recreation creating healthier people, connecting communities and making a stronger NSW."**

The Office further recognises that sport and active recreation is important, contributing significantly to the health, economy and social wellbeing in the following ways:

**Social Outcomes:** Sport and active recreation are an important part of the fabric of our communities. It reaches across age, cultural background and demographic groups. Sport and active recreation strengthens social networks and builds a sense of belonging for participants.

**Health Outcomes:** People who participate in sport and active recreation enjoy better physical and mental health. A child participating in sport and active recreation early in

**"Sport and Active Recreation creating healthier people, connecting communities and making a stronger NSW."**

NSW Office of Sport  
vision



life is more likely to maintain active and healthy behaviors throughout life. Participation in sport and active recreation can improve life expectancy and can reduce the rate of non-communicable diseases.

**Economic Outcomes:** Sport and active recreation creates jobs and opportunities for investment. Voluntary work enables many sport and active recreation events and activities and makes a large contribution to the economy.

The Strategic Plan has 4 key focus areas being:

**Participation** - Everyone in NSW participating in sport and active recreation throughout their whole life. As the

largest team sport in NSW, football's highest growth demographic is in the under 14 category forming the ideal base for lifetime active participation.

**Places and Spaces** - Everyone in NSW can access places and spaces for sport and active recreation. This area of focus identifies the importance of fit-for-purpose infrastructure which aligns with the NSW Football Infrastructure Strategy accessibility and all gender infrastructure priorities.

**Sector Sustainability** - Continue to grow sport and active recreation across NSW. A key area of focus in both strategies is the use of evidence based data to better understand challenges and opportunities.

**Partnerships and Investment** - Maximise the value for everyone in NSW. Building relationships, forming partnerships and applying an evidence base are keys to sustainable football projects with the goal to achieve mutually beneficial outcomes.

The Office of Sport provides guidance on the use and treatment of data informing planning and analysis functions;

***"Understanding and responding to the changing needs of customers and the sector requires a strong evidence base. The translation of data into insight reports has been identified as an avenue to assist in strengthening and shaping future decision making across the sector".***

Through this Strategy, Football NSW and Northern NSW Football have invested in the largest sport facility, data analysis and demand assessment project undertaken by any state sporting organisation in Australia. With 938 venues audited and more than 272,970 participant data records analysed, a sound evidence base is now in place to not only build decisions around, but it creates a platform for football in NSW to monitor their effectiveness and the performance of government and public investment.



# STATE GOVERNMENT ALIGNMENT

## HER SPORT HER WAY

With a clear female focus, Her Sport Her Way, examines the way sport in NSW is delivered, coached, marketed, led, sponsored and consumed. One of the twelve key objectives is to lead, guide, inform and invest in the provision of sport facilities that support women and girls.

More than 23% of 2019 registered football participants in NSW were female (more than 63,000), making it the largest female football participation code in Australia.

This Strategy identifies the current football infrastructure available to female participants and identifies the gaps required to help grow and support the game for women and girls.



## ACTIVE KIDS

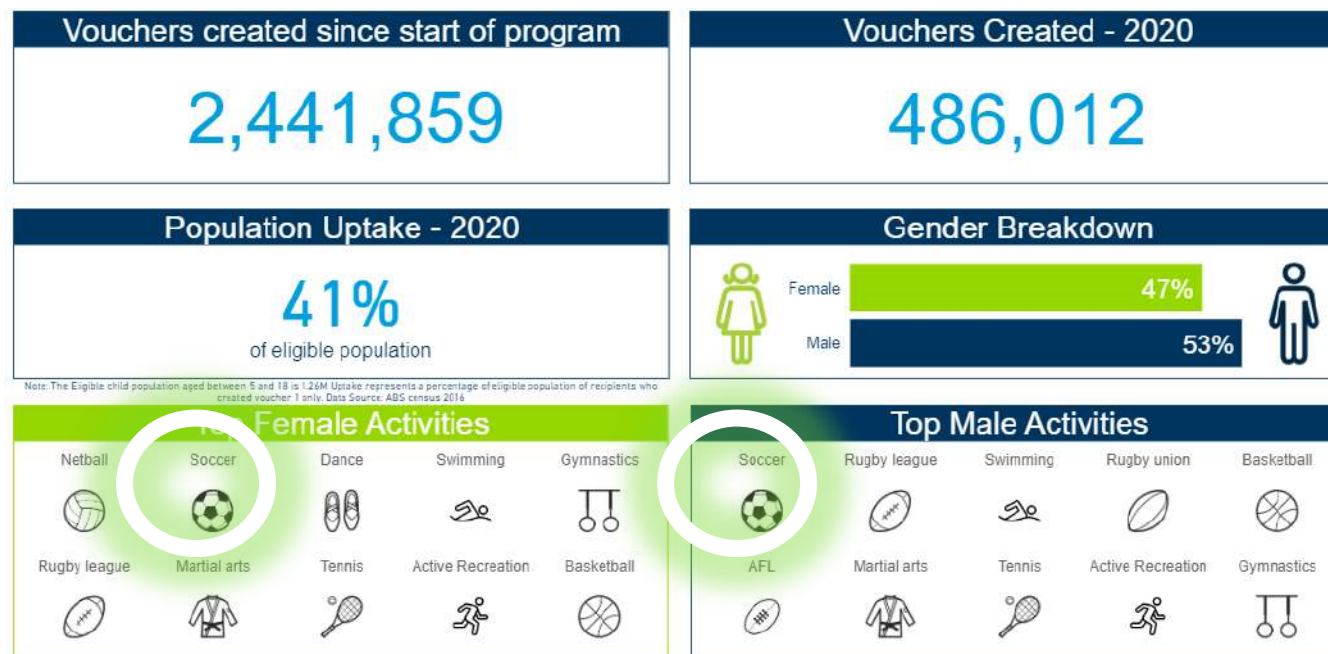
Data from the NSW Population Health Survey shows that 75 per cent of children in NSW are not meeting the daily recommended level of physical activity, which is 60 active minutes each day. Further, 22 per cent of children aged 5 to 16 years are reported as being overweight or obese.



The Active Kids program, launched in 2018, aims to increase participation of school-enrolled children in sport and physical activity by providing parents with vouchers to help cover the cost of registration and membership fees.

Through the 671,756 vouchers issued in 2018, football was the number 1 activity for boys and number 2 activity for girls in NSW. The additional 1,284,091 vouchers issued in 2019 saw football again be the top activity for boys (and fourth activity for girls). Overall, football has had the most vouchers issued for any team sport and football code when compared to other sports such as AFL, cricket, rugby league and rugby union.

As at the end of February in 2020, of the 486,012 vouchers currently issued for the year, football is again the top ranked activity for boys and second for girls. All of these numbers indicate that football is clearly the most participated activity for voucher recipients and a strong indication that cost can be a barrier to participation.





# STATE GOVERNMENT ALIGNMENT

## GREATER SYDNEY COMMISSION

The Greater Sydney Commission (GSC) is an independent New South Wales Government agency responsible for land use planning across the metropolitan area of Sydney. Its vision is **to make Greater Sydney more productive, sustainable and liveable.**

Greater Sydney is growing fast. The region will be home to an estimated 1.6 million more people towards 2040.

The role of the GSC is to coordinate and align planning that will shape the future of Greater Sydney. The GSC is taking a “one government” approach to this, so they can lead and guide development, transport and housing outcomes for the benefit of the region and its residents, workers and visitors.

To do this, the GSC have developed a Greater Sydney Regional Plan - *A Metropolis of Three Cities*. The Plan integrates land use, transport and infrastructure planning between the three tiers of government and across State agencies. It also centres around a vision for three inter-connected cities where most residents will live within 30 minutes of their jobs, education and health facilities and community services.

To meet the needs of the growing and changing population the vision seeks to transform Greater Sydney into three cities:

- The Western Parkland City
- The Central River City
- The Eastern Harbour City.

With football being the number one participation sport in NSW it can play a major role in assisting and advocating to all levels of government to ensure open spaces and community sporting infrastructure are considered when planning and future proofing Greater Sydney. Future participation and demand projections provided later in this Strategy clearly identify Greater Sydney as the major growth area for future participants. 17 of the top 20 local government areas in NSW where most demand for football is projected by 2031 are located within the Greater Sydney region.

Two specific infrastructure pillars identified within this Strategy directly align with the Greater Sydney Commission’s A Metropolis of Three Cities approach – **Planning for growth and demand** and **Partnerships and investment**. The NSW Football Infrastructure Strategy and the Greater Sydney Commission’s regional approach to planning have very strongly matched principles that can create a culture and program of joint planning to make Greater Sydney more productive, sustainable and liveable.

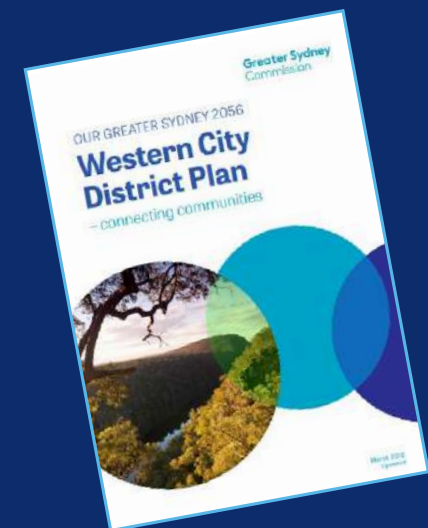


## FIVE DISTRICT PLANS

The Greater Sydney Commission’s five District Plans provide a guide for implementing A Metropolis of Three Cities at a more localised level.

These 20-year plans bridge the gap between regional and local planning. They inform local environmental plans, community strategic plans and the assessment of planning proposals.

The five District Plans also assist councils to plan and deliver for growth and change, and to align their local planning strategies with place-based outcomes.



# KEY DRIVERS FOR CHANGE

**Football in NSW continues to set new participation benchmarks and trends for organised sport in Australia. There is no doubt that football continues to grow in popularity and participation, which is a becoming a significant driver of need and change across the sector.**

## STRONG CURRENT AND GROWING PARTICIPATION

In October 2019 National Sports Survey (AusPlay) results indicate that football is the number one organised sport in Australia with more than 1,853,600 million participants – a 13% increase on the previous year.

Children aged under 14 account for an estimated 42% of participation reported by AusPlay data, indicating a strong base at the introductory level of the game, with clearly an already existing significant number of current adult (aged 15+) participants.

In 2019, Football NSW and Northern NSW Football collectively registered over 272,970 club participants of all ages – 11% growth since 2014. This figure does not include school based competitions, social football or futsal or indoor football activities.

**This level of registration numbers makes football in NSW the largest of any State Sporting Organisation in Australia.**

## DIVERSIFYING PARTICIPATION

Football is a game for everyone with Football NSW and Northern NSW Football driving participation growth by broadening the football offering beyond the traditional 11-a-side winter season game.

Mini-Roos and summer football are some examples of program initiatives focused on broadening the football participant base and ensuring there are opportunities for more people to experience football.

AusPlay (October 2019) reported an estimated 396,000 girls and women play football in Australia. Football NSW and Northern NSW Football reported 63,160 female participants across NSW in 2019, contributing 23% of

all registered club participants. This makes football in NSW the largest of all football codes in terms of female club participants.

## ROLE OF SPORT IS CHANGING

Football plays an important role in communities, providing significant physical and mental health benefits, helping to raise physical activity levels, promoting social cohesion and fostering multicultural inclusion.

The Federal Government and Football Federation Australia have also partnered to deliver new participation programs to improve the health and wellbeing of local communities. New program initiatives include the 'Walking Football' program targeting older Australians, as well as new safe, inclusive and social football programs such as 'Soccer Mums' (focusing on adult female participation) and 'Kick On for Women' (targeting non-active females 16 and over including CALD communities).

## IMPACT OF GROWTH AND CHANGE

With unprecedented growth, comes the need for investment and access to facilities. Being ranked as **Australia's number one participation sport**, does lead to a range of challenges and barriers impacting facility provision, including:

Unprecedented growth in participation not necessarily matching the condition and number of existing facilities.

Historically established and ageing facilities not catering for all gender use, and not adequately supporting participation by women and girls.

Potential over use of the existing available playing surfaces and the further impact of ground closures due to climatic conditions.

Additional participation leads to additional costs, for example the installation of additional playing field lighting, increased field maintenance and calls for more expensive all year-round products such as synthetic surfaces to improve venue capacity.

Expansion of programs and opportunities drives the desire and opportunity for participants who want to play all year round, rather than be limited to seasons, creating challenges for multi-sport usage.





# **FOOTBALL INFRASTRUCTURE FRAMEWORK**



# SUMMARY OF KEY FACILITY ISSUES

**The following key facility issues were identified as having the greatest impact on the growth and sustainability of football in NSW. Addressing these issues through the implementation of the NSW Football Infrastructure Strategy will be required in order to plan and develop fit for purpose and flexible facilities that meet the needs of current and future participants.**

## EVERYONE WANTS TO PLAY

Football has many appealing benefits including fitness, hand eye coordination, teamwork, social skills, is fun, easy to understand and is generally non-contact which is appealing to many parents.

The highest rate of participation is the 5 to 9 year old age group with 84,188 registered participants in NSW, closely followed by 77,914 in the 10 to 14 year old age group. Collectively, the number of 5 to 14 year old's totals 162,102, equating to 60% of the 272,970 registered participants in 2019.

In addition, participation rates remain strong in the 30 to 39 year age cohort with 1.8% of the population playing competition football. The 40 to 49 year age bracket also continues to provide strong participation with a 1.5% participation rate.

There is significant potential for adult participation to grow in the future as a "flow on" effect of today's juniors becoming tomorrow's adults.

## WE ARE FULL

Football has 2,253 playing fields extensively used for training and competition that are generally operating at capacity, given the quality of existing infrastructure. Strategy research and facility audits conducted indicate that football fields lose around 34% of their capacity due to current playing field conditions.

While participation capacity at some existing venues can be increased, many locations particularly across Metropolitan Sydney Football Associations, are at maximum capacity.

Various examples exist where player numbers have been capped, with junior players on waiting lists hoping to join a club. As an example, with the football participation rates and unmet demand that exists across NSW today, an estimated additional 2,000 hours of football in Sydney alone could be played each week if access to additional pitches were to be available.

**These participation numbers make football the most popular team sport in Australia.**

The Sutherland Shire FA have had to restrict participation to those that live within the Association boundary, turning others away due to capacity challenges.

Training space availability, accompanied by greater provision of playing field lighting are seen as the key facility issues to address. These, in turn, will increase participation opportunities and reduce the need for player waiting lists.

## FEMALE PARTICIPATION

23% of registered football club participants are female, which equates to 63,160 of all football participants in NSW. The highest participation numbers are found in the 5 to 9 age group (18,540) and the 10 to 14 age group (19,902) totaling 38,442. This makes up 61% of all female footballers. These participation numbers make football the 2nd most popular team sport for females in Australia behind Netball.

## OFF-FIELD FACILITY CONDITION

Off-field facility conditions predominately consider change room amenity, and to a lesser extent, social and canteen spaces.

In NSW, female participation rates in the club environment remain lower than males, with facilities at community football venues playing a key factor in encouraging and supporting female participation.

Historically for football, facilities have been primarily designed to meet the needs of male participants, but to encourage more women and girls to participate in sport today as a player or official, more user-friendly facilities are required.

### Examples of all gender facilities include:

- Change facilities that cater for the needs of all genders.
- Individual and lockable showers for players and referees.
- Privacy screens and no urinals
- Inviting community spaces.
- Clean and easily assessable facilities.
- Family friendly attributes (e.g. baby change).









# SUMMARY OF KEY FACILITY ISSUES

## ON-FIELD FACILITY CONDITION

**On-field football condition is effected by a range of different factors, including:**

- grass type and coverage
- irrigation
- drainage
- surface level
- maintenance regime, budget and expertise
- overuse
- original construction methods
- shared use
- floodlighting

Minimum requirements for a usable field of play are related to safety which requires an even playing surface and consistent grass cover. As players skills improve and children progress through to higher levels of competition, the quality of the playing surface has a direct correlation to the enjoyment derived from the game and standard of coaching able to be delivered.

### OF THE 1,582 FULL-SIZED PLAYING FIELDS IN NSW:

- **292 (18%)** with no floodlighting
- **291 (18%)** with floodlighting below 50 Lux
- **796 (50%)** with no automated irrigation
- **969 (61%)** with no functional drainage
- **145 (9%)** with no floodlighting, automated irrigation and drainage



## SPORTS LIGHTING

Provision of sports lighting is a key infrastructure requirement to build participation that allows football infrastructure to be used at its maximum capacity.

Without floodlighting, clubs are restricted in terms of providing training opportunities and hosting competitive games during the week, resulting in all activity being facilitated on weekends. Over time there will be reduced capacity on weekends and alternative times will be required to deliver more football.

Of the 2253 playing fields across NSW, 641 (or 28%) do not have sports lighting. In addition, there are a further 383 (17%) fields that do not meet the 50 lux Australian training standard. Collectively this means 45% of all sports lighting currently provided does not meet the minimum participant training standards.

## IRRIGATION AND DRAINAGE

The combinations of dry weather - no irrigation and wet weather - no drainage are proven conditions that ensure poor playing surfaces, and in the worst-case scenario, unsafe to use.

When combined with significant participation demand, these football surfaces are susceptible to damage that cannot be quickly or easily repaired.

Of the 2253 community playing fields across NSW, around 1,138 (or 51%) do not have functional drainage infrastructure and 517 (natural grass fields) have no irrigation, equating to 25% or 1 in 4 fields. Combined, there are around one third (33%) of playing fields that don't have the necessary below ground infrastructure to cater for the significant use, growing demands and climatic conditions experienced across NSW.



## SUMMARY OF KEY FACILITY ISSUES

### SYNTHETIC PLAYING FIELDS

There are 58 synthetic playing fields used for club football competition in NSW, with this number continually increasing. The benefits of providing synthetic surfaces are well documented and their ongoing provision form a strong objective within this Strategy.

When delivered in the correct manner, through professional design and construction methodologies that are 'site suitable', their use can be significantly maximised. In many cases, a full-size synthetic playing field (with multiple small sided options), floodlit to match capable standards can deliver up to 2.2 times the utilisation hours of grass pitches.

In areas where opportunity to deliver new playing fields is limited and demand is exceeding capacity, synthetic fields need to be considered as a viable option to manage participation and field quality challenges.

**“Everyone knows how popular soccer is on the Northern Beaches when it comes to participation numbers, and it is great to have two more synthetic pitches at Lionel Watts”**

Northern Beaches Council Mayor, Michael Regan



# SUMMARY OF KEY FACILITY ISSUES

## PLANNING FOR THE FUTURE

The NSW government has developed a new approach to precinct planning with the focus around people, places, public spaces and the environment, placing greater responsibility for planning in the hands of Council and local communities.

The North West and South West Growth Centres guide the future development of green field sites and the redevelopment of existing land spaces. There is a range of new open spaces, new infrastructure and mixed-use development that supports local community transport, employment, education, housing and recreation needs.

In green field sites, ideal land parcels for community football are typically flat grasslands, (no mountains, waterways, bushland) and can cater for a minimum of 2 preferably synthetic fields. Ideally they are co-located in an adjacent configuration, close to pavilion, supporting amenities and car parking.

To guide best practice planning, a land space of up to 6 hectares is recommended that allows sufficient space for supporting community infrastructure inclusive of parking, play spaces, public amenity, pathway connections and community pavilion.

For the redevelopment and repurposing of existing land, football as a rectangular field of play sport, can make best use of open spaces where land availability is at a premium. Football has the flexibility to play a range of modified activities on irregular sized spaces, increasing the potential of use of new open space opportunities.

Football NSW and Northern NSW Football also have a range of facility guides to support construction of football facilities.

**VISION** Creating a new town centre on the Parramatta River for the community to enjoy beautiful parks and open spaces, with a revitalized riverfront and an active street life that is connected to the greater Parramatta.



Camellia Town Centre Draft Master Plan



Football and Northern NSW Facility Guides



# STRATEGIC FRAMEWORK

The diagram below outlines the strategic framework for the future provision of football facilities and their development throughout NSW for the period 2020 to 2030. Five key infrastructure pillars and supporting objectives have been identified and are underpinned by prioritised actions.

## PRINCIPLES: ACCESSIBLE, INNOVATIVE, INCLUSIVE, SUSTAINABLE

### NSW INFRASTRUCTURE PRIORITIES



**IMPROVE  
EXISTING  
VENUE CAPACITY**



**INCLUSIVE  
FOOTBALL  
FACILITIES**



**HOMES OF  
FOOTBALL**



**PLANNING FOR  
GROWTH AND  
DEMAND**



**PARTNERSHIPS  
AND  
INVESTMENT**

### STRATEGIC OBJECTIVES

**Maximise the safety, carrying capacity and activation of existing football grounds and venues**

**Support diversity of game formats and participants through inclusive facilities**

**Improve access to football programs, pathways and development services**

**Plan to maximise participation through new and innovative venue opportunities**

**Develop and maintain relationships with all levels of government and industry partners**

### KEY AREAS OF FOCUS AND STATE-WIDE INFRASTRUCTURE PRIORITIES

The following pages provide a summary of the 34 state-wide infrastructure priorities, their drivers and proposed strategic responses to address football facility planning and development across NSW between 2020 and 2030.

### FOOTBALL ASSOCIATION / ZONE INFRASTRUCTURE PRIORITIES

26 Football Area Summaries identify the infrastructure priorities, their drivers and proposed strategic responses to address localised football facility planning for each Football Association, Zone and Regional Branch.

# STATE-WIDE INFRASTRUCTURE PILLARS & AREAS OF FOCUS



- 1.1 Maintain SFA-Football and SportsEye use and data in conjunction with clubs, associations and councils
- 1.2 Increase pitch lighting levels and introduce more LED lighting
- 1.3 Increase synthetic and hybrid surface provision
- 1.4 Increase industry education on the importance of pitch drainage and irrigation
- 1.5 Engage associations and councils in venue and resource allocation to match capacity
- 1.6 Monitor ground closure impact
- 1.7 Support preferred suppliers to assist with site investigations and capital projects including pitch renovations (inc. drainage, irrigation, surfaces), synthetic surfaces, lighting, player benches, scoreboards, goal posts provision.



## IMPROVE EXISTING VENUE CAPACITY

Maximise the safety, carrying capacity and activation of existing football grounds and venues

### GARDEN SUBURB FOOTBALL CLUB

**How improving the capacity of existing pitches helped to provide more opportunities for women and girls to play football, resulting in rebuilding a community Club**

Garden Suburb Football Club (GSFC) is a community football club located at Lance Yorke Oval near Newcastle. During the mid-2000s, the GSFC faced a significant decline in membership due to increased competition from other clubs in the area offering other programs. This led to difficulties recruiting new members and threatened the Club's long-term sustainability.

At the time, a number of the Club's committee had young daughters and identified there weren't many opportunities for women and girls to play football. As a result, the Committee decided to invest in providing girls only football teams and development opportunities. Initially the Club focused on recruiting junior girls to the club, but as this grew, so did the number of senior women who also joined the club.

To accommodate the increased growth of women and girls' football, the Club needed to improve the standard of the two pitches it had access to, in order to provide a quality playing experience to all members.

Over the last five years, GSFC has seen the number of members grow from 170 to over 470 for the 2019 season, with further growth anticipated into the future.

The improved condition of the playing surfaces and additional training areas has provided the pitch capacity that has allowed the Club to grow. For GSFC to continue to grow along this trajectory, further investment will be required to upgrade the lighting at the facility. This will allow more training during the evenings and allow an additional two women's teams to play in the Friday night competition.

An upgrade to the lighting would also increase the GSFC ability to expand the "Kick On for Women" program, a non-judgement, friendly and social introductory program which encourages mothers to get involved in the game.

In addition to the facility improvements which have directly benefitted the Club, it has also created a more inviting environment for people in the local community to use the facility as an active recreation space.



# STATE-WIDE INFRASTRUCTURE PILLARS & AREAS OF FOCUS



- 2.1 Increase and improve gender neutral player and match official change room provision
- 2.2 Identify practical shared and multi-use design models for built facilities with alternate and compatible sports
- 2.3 Create an amenities guide that promotes universal and gender neutral design principles and related information on building and site planning for inclusive football activities
- 2.4 Identify opportunities for shared school based facility models
- 2.5 Identify opportunities to collaborate with other 'outdoor pitch sports' to unlock investment for multi-sport venues



## INCLUSIVE FOOTBALL FACILITIES

Support diversity of game formats and participants through inclusive facilities

### CHARLES PIRIE RESERVE

**Inclusive facilities and amenities for the St George Warriors, Carss Park Football Club and the St George Football Association Referee's**

Charles Pirie Reserve is home to the Carss Park Football Club (CPFC) who play in the St George Football Association (SGFA). With 476 registered participants in 2019, Carss Park FC is one of the largest clubs within the SGFA.

The Reserve also hosts the St George Warriors, who participate in the SGFA special needs program. The program has grown to four teams in the space of a few short years; however the Charles Pirie Reserve amenities building did not comply with minimum standards and didn't provide adequate levels of access for disabled players or their carers.

The site also provides a home for the SGFA referees branch. Together these key user groups create a truly diverse range of uses for the site, well beyond a typical single club environment.

To add to the complexity of the challenges at Charles Pirie Reserve, the site is in a flood prone location and existing amenities were also not meeting the current and longer term needs of the Carss Park FC.

The development of the new amenities building provides the Club's and the community with an innovative, safe, inclusive and fully compliant facility.

The new facility has been designed to meet the needs of everyone, with all areas of the facility to be modified to enable access for players and their carers.

The new facility includes: canteen, storage, gender neutral change rooms (each change room includes a compliant change facility which meets Australian Standards), referees rooms, medical room, public amenities, covered BBQ area and wider door opening and circulation spaces to comply with Australian Standards.

At a total project cost of \$1.75 million, the provision of inclusive football facilities will have a long term positive impact on football participation in the local community.

\$750,000 in funding was provided through the Greater Sydney Sports Facility Fund and a \$1,000,000 from the Georges River Council.

# STATE-WIDE INFRASTRUCTURE PILLARS & AREAS OF FOCUS



- 3.1 Establish a minimum of one Home of Football per football catchment area (regional branch, association, zone)
- 3.2 Identify potential Home of Football locations and their type of focus (football, multi-sport, community)
- 3.3 Develop a core service program and preferred facility and amenity requirements for Homes of Football (including event capacity)
- 3.4 Identify business and management plan objectives for Homes of Football
- 3.5 Prepare case studies for successfully operating Homes of Football for promotion
- 3.6 Identify land, investment and partnership opportunities for new Homes of Football development



## HOMES OF FOOTBALL

Improve access to football programs, pathways and development services

### CHRISTIE PARK

**Transforming a grassroots football club facility into a dedicated football hub for football clubs, NPL teams and the broader North West Sydney community via the Christie Park Master Plan**

Christie Park has been the home of football for North West Sydney Football Association (formerly known as Gladesville Hornsby Football Association) for many years. Christie Park is the administration home for NWSFA, the 5th largest football association in NSW.

The site accommodated one full sized natural turf field used for competition and one smaller sized natural turf field used for youth training. One building was provided on site, incorporating office space, canteen, change rooms, referees' room.

The Spirit Football Club were the only key user of the facilities.

The Christie Park Master Plan was commissioned and delivered in 2016. The four-stage master plan included full site redevelopment inclusive of full-size and small sided synthetic pitches, new off-field amenities and an improved Home of Football for the North West Sydney Football Association.

A key outcome of the master plan was unlocking open space for the community.

The key elements of the plan for football included two FIFA accredited synthetic fields with cork infill to provide cooler playing conditions, new tiered seating for 500 spectators and floodlighting to 200 lux for both synthetic fields for night matches.

Stage 1 of master plan implementation was \$3.5m and was funded City of Ryde.

Christie Park has now become a centralised home for Ryde based NPL clubs:

- North West Sydney Spirit FC (NPL Men's)
- North West Sydney Koalas FC (NPL Women's)
- Gladesville Ryde Magic (NPL Men's)
- Gladesville Ravens (NPL Women's)
- Grassroots clubs in the North West Sydney FA.

The synthetic fields at Christie park are each accommodating almost three times the use of the previous natural grass pitch and have created a consistent and safe playing surface for all users.



# STATE-WIDE INFRASTRUCTURE PILLARS & AREAS OF FOCUS



- 4.1 Engage with planners, developers, NSW Government and commercial sector to identify future sites for football current needs and long-term requirements
- 4.2 Identify flexible facility designs that address evolving community needs and uses
- 4.3 Develop sustainable football model venue designs and land area requirements to support precinct structure planning
- 4.4 Support satellite venue management of new venues via the existing club network (maximising and streamlining volunteer resources)
- 4.5 Advocate for football through offering expertise (or review) of site master plans and precinct structure plans
- 4.6 Continue to identify sites not yet accessed by football, where capacity may exist for future use (eg. school sites, multi-sport sites)
- 4.7 Continue to use data driven techniques to ensure there are enough facilities in the right locations to meet football's current needs and long-term aspirations



## PLANNING FOR GROWTH AND DEMAND

Plan to maximise participation through new and innovative venue opportunities

### GLENMORE PARK FOOTBALL CLUB

**How a new facility has helped Glenmore Park Football Club cater for its growth and build a community focused club culture**

Glenmore Park Football Club (GPFC) is a community football club located near Penrith. After successive years of growth, GPFC had reached capacity with its facilities. With over 1,100 members and 100 teams, the Club had been forced to train and play games across two venues, Glenmore Park and Cheds Town Reserve.

Being split across two facilities required the GPFC to find twice as many volunteers each week, placing pressure on parents with multiple children at the Club. Additionally, some of the Club's teams had to play home games at neutral venues because of the shortage of pitches available for weekend matches.

At both venues, the facilities were aged, run-down and required significant annual investment from the Club to maintain them. Further adding to the financial strain was the close proximity of Cheds Town Reserve to the local shopping centre and fast food outlet, which negatively impacted the Club's ability to generate revenue through the canteen.

"The Nest" as it is known by Club members, was opened in 2017 and provides the Club with a single facility to host weekly home matches.

The new facility allows for all of GPFC home games to be played at one facility, which has led to a more cohesive culture across the Club. It has also halved the number of volunteers required on weekends.

The Club is now located further away from shopping centres and fast food outlets, resulting in increased revenue generated through the canteen. This additional revenue has allowed the club to invest in other aspects of the club, including subsidising courses for coaches and improving the player experience through purchasing new equipment.

In addition to the benefits to the Club, the fields provide a community hub for local residents to engage in active recreation such as personal training, recreational running and other leisure activities. The clubrooms have also provided a space for other community groups to utilise for meetings and community activities.

# STATE-WIDE INFRASTRUCTURE PILLARS & AREAS OF FOCUS



- 5.1 Develop a *Stakeholder Engagement Framework* that, when applied, builds relationships with all levels of local and state government and is implemented by football associations, zones and regional branches
- 5.2 Promote the *NSW Football Facility Hierarchy* to demonstrate venue priorities over 'desirable amenities'
- 5.3 Develop relationships with partners that will better position football in NSW as a key influencer in sports facility provision and policy development (e.g. Sport NSW, Office of Sport, Local Councils)
- 5.4 In conjunction with facility and sport partners (e.g. Tennis NSW, Bowls NSW), identify opportunities for small-sided football / futsal facility provision
- 5.5 Continue to develop internal investment capacity within FNSW and NNSWF to support and contribute to state and local government facility initiatives and funding programs
- 5.6 Continue to deliver a program of state-wide facility planning, advisory and education forums
- 5.7 Continue to provide and develop facility planning and guidance materials to facility providers and landowners
- 5.8 Make available and conduct training for associations / zones on SportsEye and SFA-Football tools
- 5.9 Share football data with local government to drive and guide football's needs locally and to embed accurate data into local area planning



## PARTNERSHIPS AND INVESTMENT

Develop and maintain relationships with all levels of government and industry partners

### NORTH EPPING RANGERS SPORTS CLUB

**Community and local sporting clubs coming together with Federal, State and Local Government to create a truly multi-purpose facility**

The North Epping Rangers Sports Club (NERSC) is a combined football and netball club in the Sydney suburb of Epping.

When the NERSC experienced a surge in registrations, the club rapidly started running out of space at their facility at North Epping Oval to accommodate all of the club's junior teams, particularly in netball. Adding to this pressure was the use of the netball courts for tennis during the summer months.

The NERSC had been lobbying local government for over 10 years to have additional netball courts built but had challenges finding the appropriate space in the local area.

With the help of the Hornsby Council, the NERSC identified a parcel of land owned by the North Epping Bowls Club (NEBC). This land had previously been earmarked for a third bowling green almost 50 years ago, however, declining membership at the Bowls Club meant that a third green was no longer required, and this land was available for development.

The new multi-purpose facility has primarily been used by the NERSC to run MiniRoos and Summer Football programs. The first season of summer football proved to be so popular, the NERSC had to find additional space to run some matches. Many of the participants in the summer football program were parents of existing junior players at the club.

On the back of summer football, NERSC has seen an increase in registrations for the overaged teams, with an additional three men's and two women's teams registering for the winter season.

The bowls club has also benefitted from the new facility with more people coming through the door and spending money on food and beverage. The club is now open later on weeknights, with many parents and summer football participants staying at the club after the game for dinner.

In addition to providing a space for the Club to run these programs it also provides an all-weather training option for when the fields at North Epping Oval are out of action as a result of bad weather.

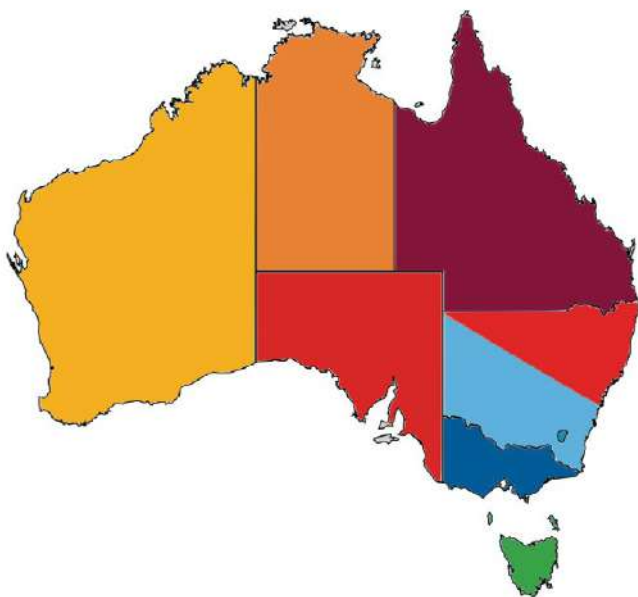




# FOOTBALL CONTEXT



# FOOTBALL IN AUSTRALIA



## HISTORY

Football Federation Australia (FFA) is the governing body of football in Australia and is a member of Federation Internationale de Football Association (FIFA). Football Federation Australia was established in 2004 and is a member-based organisation with membership comprised of:

- Football New South Wales
- Northern New South Wales Football
- Capital Football
- Football Victoria
- Football Queensland
- Football West
- Football South Australia
- Football Tasmania
- Football Northern Territory.

## FFA ROLE

FFA oversees the men's (Socceroo's), women's (Matilda's), youth, Paralympic, beach and futsal national teams in Australia, the national coaching programs and the nine state governing bodies for the sport. There are over 100 district, regional and local zones and associations that the States collectively supervise.

The FFA manage a number of significant football events, including the Football Federation Australia Cup (FFA) Cup which is a football knockout competition held across Australia.

## WHOLE OF FOOTBALL PLAN, A VISION FOR FOOTBALL IN 2035

The Whole of Football Plan (WOFP) provides long-term targets with an emphasis on redistribution of resources to community football so that the game will continue to thrive at the grassroots.

Facilities is one of the nine identified interconnected components to achieve an expanded football community where football can be enjoyed "Anytime, Anyhow, Anywhere".

Through the delivery of the NSW Football Infrastructure Strategy, Football NSW and Northern NSW Football bring a coordinated approach to the delivery of football facilities across the State. The challenge to improve existing football facilities while planning to support long-term participant growth is a key deliverable of the strategy.





# FOOTBALL IN AUSTRALIA

## FFA HEALTH, FOOTBALL AND COMMUNITY FACILITIES PLAN

Football, as the largest participation sport in Australia, has a significant role to play. However, football's demand is exceeding the current number of facilities and leaving many kids behind. To promote healthy lifestyles, there is an untapped opportunity for government, community and sports clubs to partner and grow participation, and drive positive health outcomes.

Roy Morgan Research conducted in 2017 identified that football had increased its competition participants by 46% since 2001 across Australia. In 2017 AusPlay data identified more than 1.1 million participants were engaged in football. FFA projections at the time indicated that football participation across Australia could grow to more than 3 million by 2030.

The FFA conducted a State of the Game in Australia assessment to help identify the extent of the challenges that this rapid growth was having on the game and stakeholders nationally. The following key findings were reported in 2017, many of which remain current in 2020 across the country and have been reinforced within NSW through this Strategy:

- 29% of LGAs reported they had **no facilities to support football activities**.
- Inadequate facilities were **holding back football's growth**.
- Around 2,500 players were **turned away each season** due to capacity issues.
- **Female registrations were growing at 8% annually**, with 23% of total national registrations female.
- **Women's and girls' facilities were the priority**.
- 92% of 8,500 survey respondents indicated **they would support a government** that invested in the improvement of local facilities.

The FFA's *Health, Football and Community Facilities Plan* identified a number of strategic objectives and related outcomes:

- Build local support for Government
- Stimulate local economies
- Alignment of local development with National priorities
- Increase participation and improve access for girls and women in sport
- Improve general health outcomes
- Establish a \$100 million national community fund through Government investment.

Many of these strategic objectives and outcomes remain relevant for Football NSW and Northern NSW Football. NSW peak bodies also have the opportunity to provide the greatest impact on delivering these national priorities due to the volume of participants within NSW – being more than 50% of national football participation.

## FFA GENDER EQUITY ACTION PLAN (2019)

Released in 2019, the FFA's Gender Equity Action Plan focuses on closing the gap and transforming men's football and women's football into football. The Action Plan recognises that participation by women and girls is the fastest growing area of the game, with around 139,000 female players participating in regular structured football activities nationally.

The FFA believe that by ensuring 50/50 women and men playing football, improving on-ground facilities, recruiting and supporting women into leadership positions and bridging the pay gap, football can become leaders in community sport.

The Action Plan further identifies five key focus areas, of which **Participation and Facilities** is one. Increasing the capacity of facilities to cater for new participants via increased facility funding is one of the key initiatives outlined by the FFA to support future facility provision.





# STRUCTURE OF FOOTBALL IN NSW

**NSW is managed via two peak football bodies, Football NSW and Northern NSW Football, both of which are affiliated to the FFA.**

While both organisations operate independent competitions, development activities and education courses, planning and supporting football facilities and infrastructure improvement is conducted in a very coordinated way.

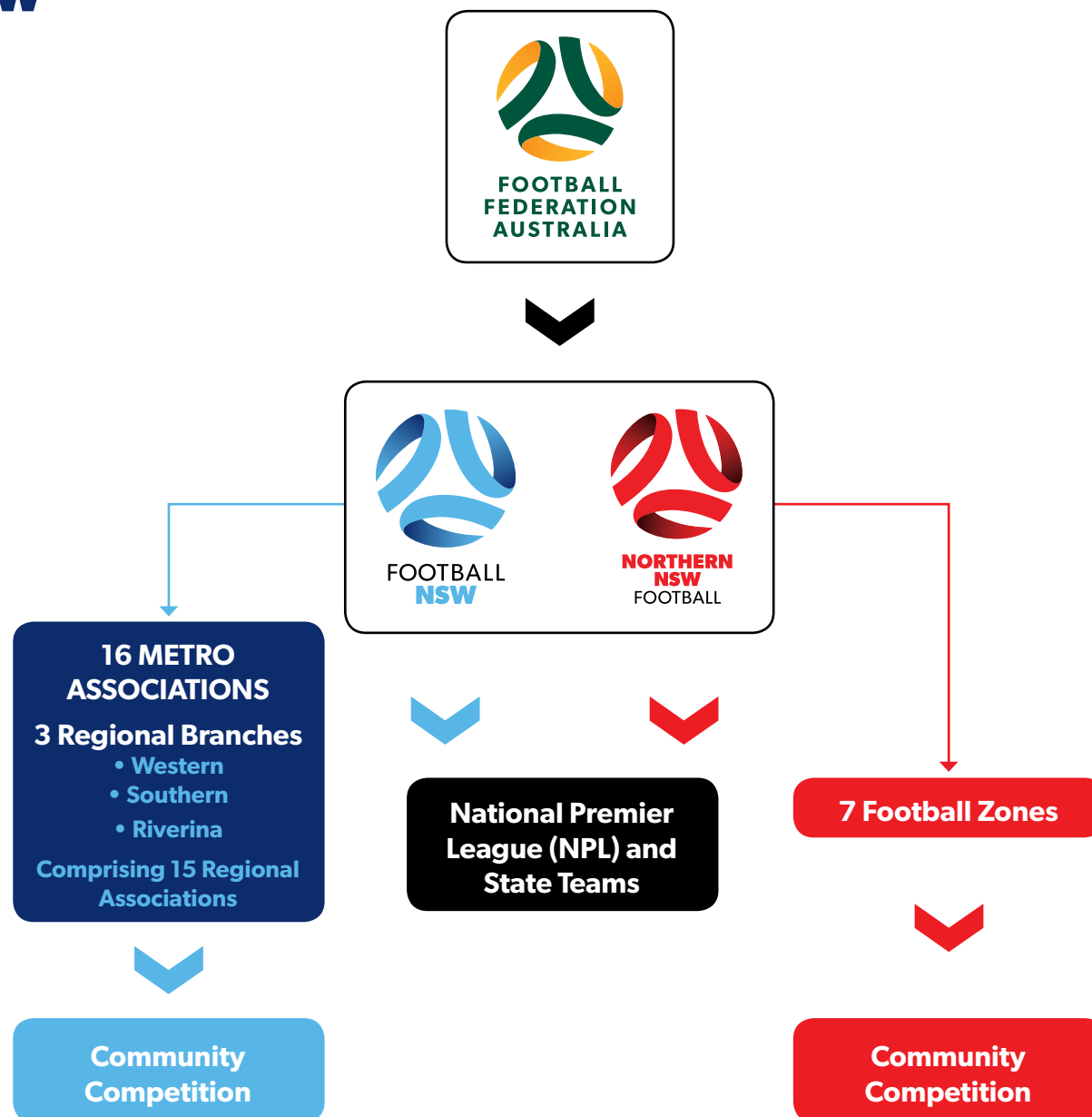
The NSW Facilities and Advocacy Unit has the responsibility for providing leadership, information and advice to stakeholders of both Football NSW and Northern NSW Football, reporting through to the CEOs of both organisations. This allows both organisations to share resources and collectively and strategically target key projects and initiatives at a state-wide level.

In terms of club football management, typically, youth and senior competition are divided into two sections:

1. Representative or semi-professional Football which is run by Football NSW and Northern NSW Football (referred to as the National Premier League or NPL competition).
2. Club competition or amateur community competition – which is typically run by the 38 Football Associations and Zones (31 affiliated with Football NSW and 7 affiliated with Northern NSW Football)

The 31 Football NSW Associations are managed by 16 Metropolitan Sydney Associations and via 3 Regional Branches (Western, Southern and Riverina), containing 15 independent Regional Football Associations.

Capital Football manages the competition and football activities delivered within the ACT, as well as providing competition opportunities for some clubs in the surrounding areas of NSW. This is to ensure travel time and distance are not barriers for local clubs to participate in community football.

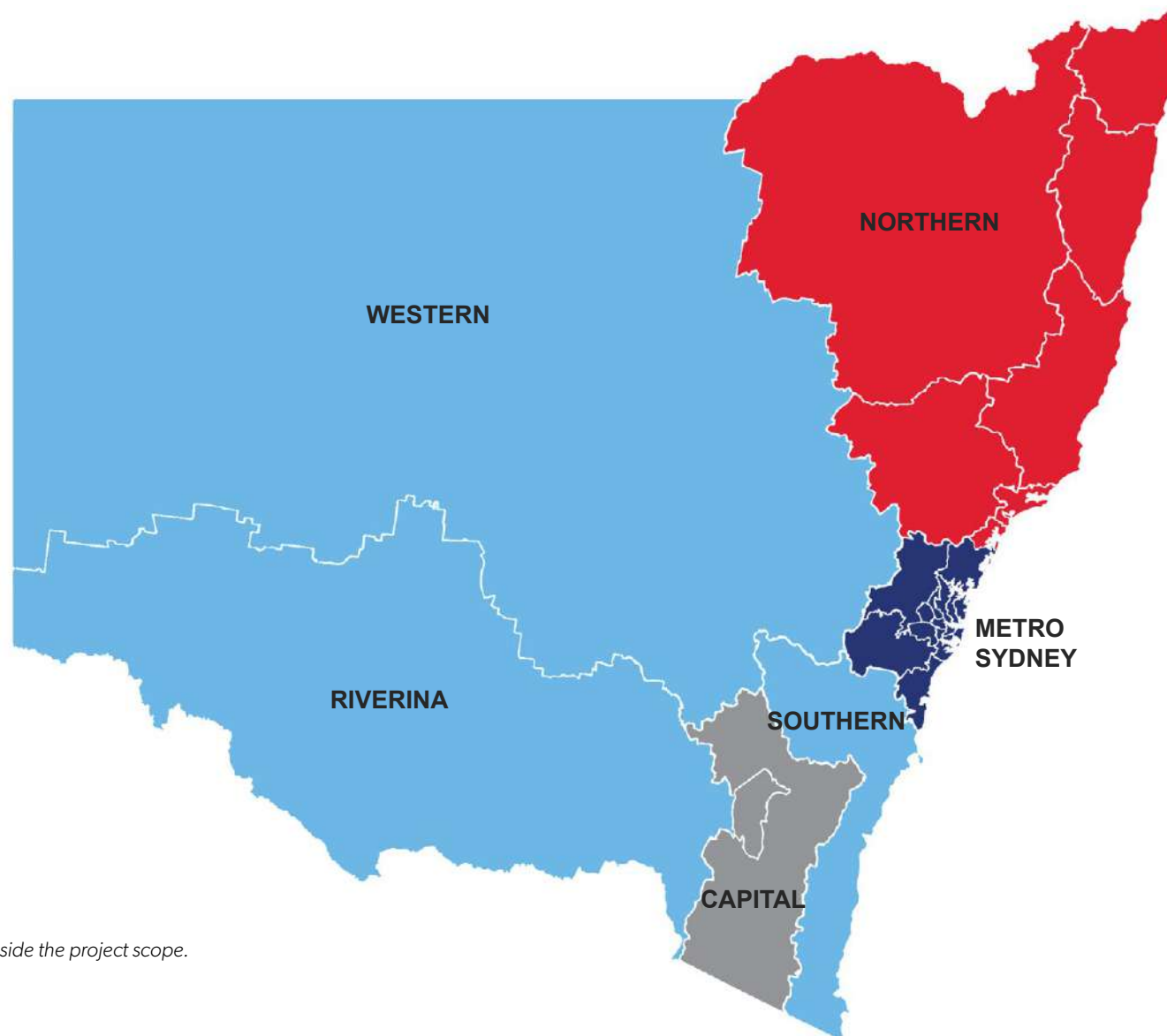




# NSW FOOTBALL REGIONS

## Football NSW Associations, Regional Branches and Northern NSW Football Zones Map

### KEY:



*Note: The Australian Capital Territory (ACT) and Capital Football are outside the project scope.*

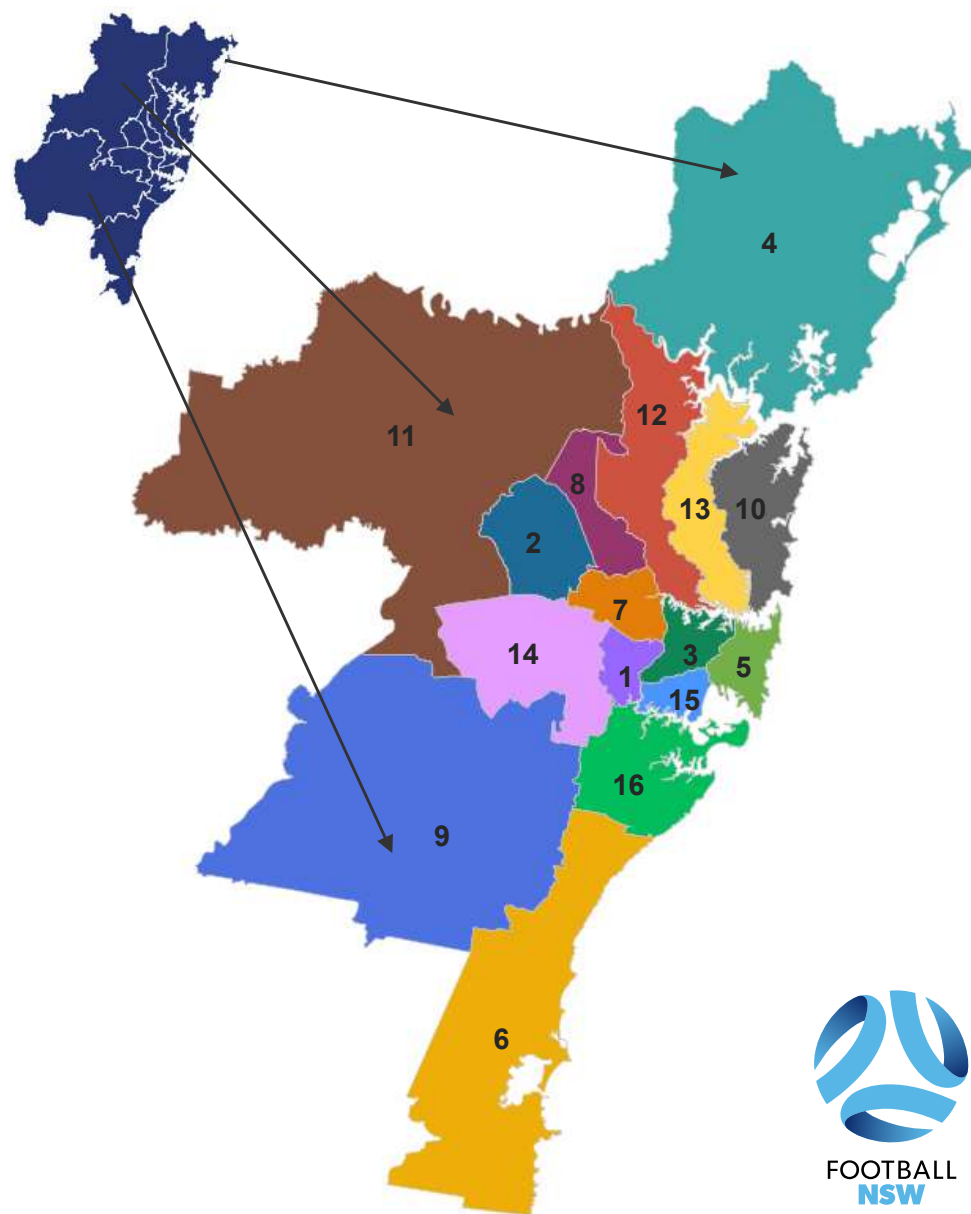
# FOOTBALL NSW – METRO FOOTBALL ASSOCIATIONS

**Sydney is Australia's most populated city with an estimated population over 5 million people.**

**There are approximately 650 suburbs that cover land areas approximately 70km to the west, 40km to the north and 60 km to the south that are serviced by the 16 Football NSW Metropolitan Associations.**

**Metropolitan Associations provided 71.6% of the total registered winter participants in NSW in 2019, equating to 195,341 players.**

1	Bankstown District Amateur Football Association	9	Macarthur Football Association
2	Blacktown District Soccer Football Association	10	Manly Warringah Football Association
3	Canterbury & District Soccer Football Association	11	Nepean Football Association
4	Central Coast Football	12	North West Sydney Football Association
5	Eastern Suburbs Football Association	13	Northern Suburbs Football Association
6	Football South Coast	14	Southern Districts
7	Granville & Districts Soccer Football Association	15	St George Football Association
8	Hills Football	16	Sutherland Shire Football Association





# FOOTBALL NSW – REGIONAL FOOTBALL ASSOCIATIONS

## 1 WESTERN BRANCH

Bathurst Football  
Dubbo & District Football Association  
Lachlan Amateur Soccer Association  
Lithgow District Football  
Orange and District Football Association  
Western Plains Association

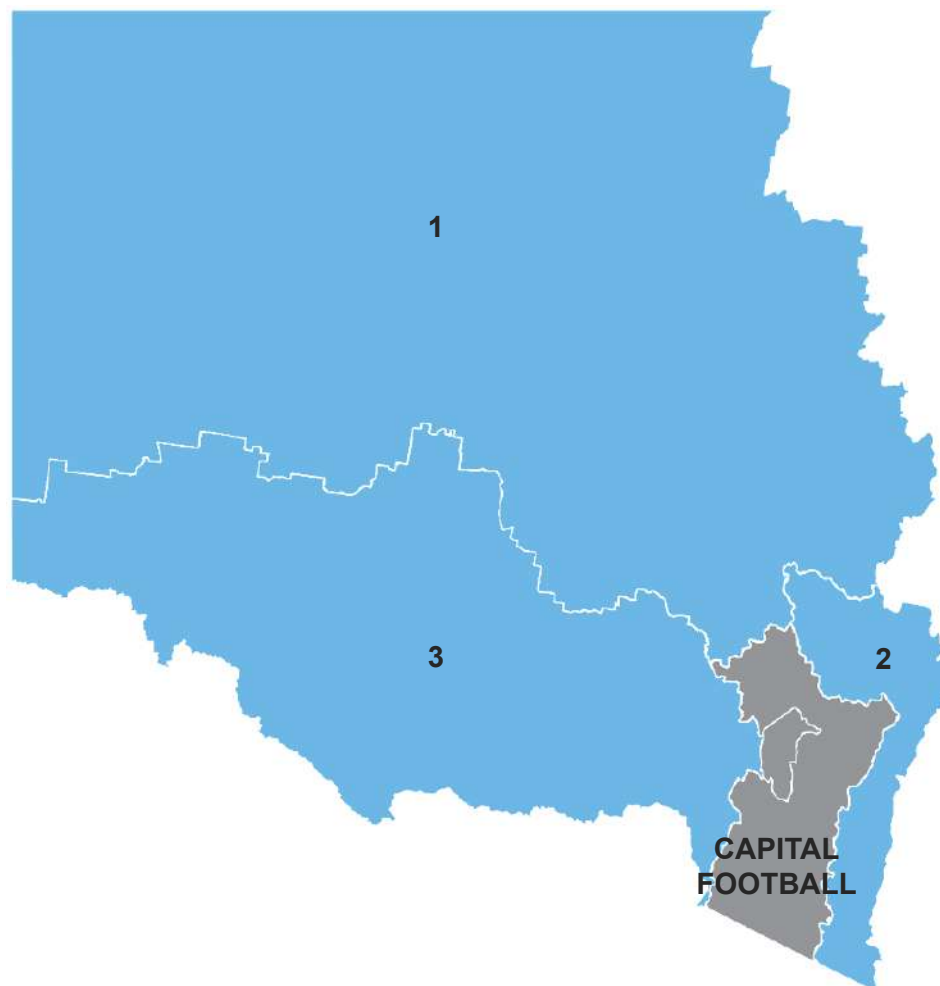
## 2 SOUTHERN BRANCH

Eurobodalla Football Association  
Far South Coast Football Association  
Highlands Soccer Association  
Shoalhaven District Football Association  
Southern Tablelands Football

## 3 RIVERINA BRANCH

Albury Wodonga Football Association  
Football Wagga Wagga  
Griffith and District Football Association  
South West Slopes Soccer Association

*Note: The Australian Capital Territory (ACT) and Capital Football are outside the project scope.*



Three football branches; Western, Southern and Riverina, provide community football competition via 15 Regional Football Associations across the regional NSW football community.

The population serviced extends to Dubbo in the North, services central population centres in Orange, Wagga Wagga and Albury and the coastal areas of Moruya and Bega in the south.

The three football branches managed 24,266 registered participants in the 2019 season, which equates to 8.9% of total registered participants.

# NORTHERN NSW FOOTBALL – FOOTBALL ZONES

Seven zones provide football services to the Northern NSW Football community. The population serviced extends to Lismore in the north of the state, services central and coastal population centres in Tamworth, Port Macquarie, Coffs Harbour and includes Newcastle to the south.

In 2019, the seven zones managed 53,363 registered participants, which equates to 19.5% of the winter community football competition in NSW serviced by 222 affiliated clubs.

## NORTHERN NSW FOOTBALL ZONES

- 1 Football Far North Coast
- 2 Football Mid North Coast
- 3 Hunter Valley Football
- 4 Macquarie Football
- 5 Newcastle Football
- 6 North Coast Football
- 7 Northern Inland Football







# PARTICIPATION OVERVIEW





# NATIONAL PARTICIPATION IN FOOTBALL

## PARTICIPATION

The latest participation findings reported in October 2019 via the AusPlay national sports participation survey undertaken by Sport Australia indicates that football is ranked as the most popular organised sport in Australia. In the year to June 2019, 1,853,600 people played football in Australia comprising 1,084,200 adults and 769,400 children, with football having almost twice as many participants as any other football code.

The AusPlay survey, estimates that 5.7% of the adult (15 years old+) male population regularly participates in football activities, with more than 431,900 girls and women participating across Australia. The survey reports, that more than 681,000 children aged up to 14 years took part in organised out-of-school football. Boys accounted for 78% of all children's football participation.

Adult participation in football is weighted towards males with 77% equating to 814,800 players. It should be noted, that football is still one of the most participated team sports by women in Australia, with AusPlay estimating that 269,300 women play football.

**Football participation rates were estimated to be higher in New South Wales (6.9%) and the Australian Capital Territory (7.2%) compared to all other states.**

Other state participation rates included Western Australia (4.9%), Queensland (4.8%), Northern Territory (4.8%), Tasmania (4.7%), Victoria (4.7%) and South Australia (3.9%).

The peak participation rate for organised football/soccer was among children aged 9 to 11. Participation started to decline slightly earlier for boys (after 14 years of age) than girls (after 17 years). These trends are consistent with 2019 Football NSW and Northern NSW Football registrations.



**AusPlay advise that NSW provides 40% of all football participants in Australia**



# NATIONAL PARTICIPATION IN FOOTBALL

Both adult and children's participation in football was highest in major cities compared to regional or remote areas.

## NATIONAL FFA PARTICIPATION REPORT

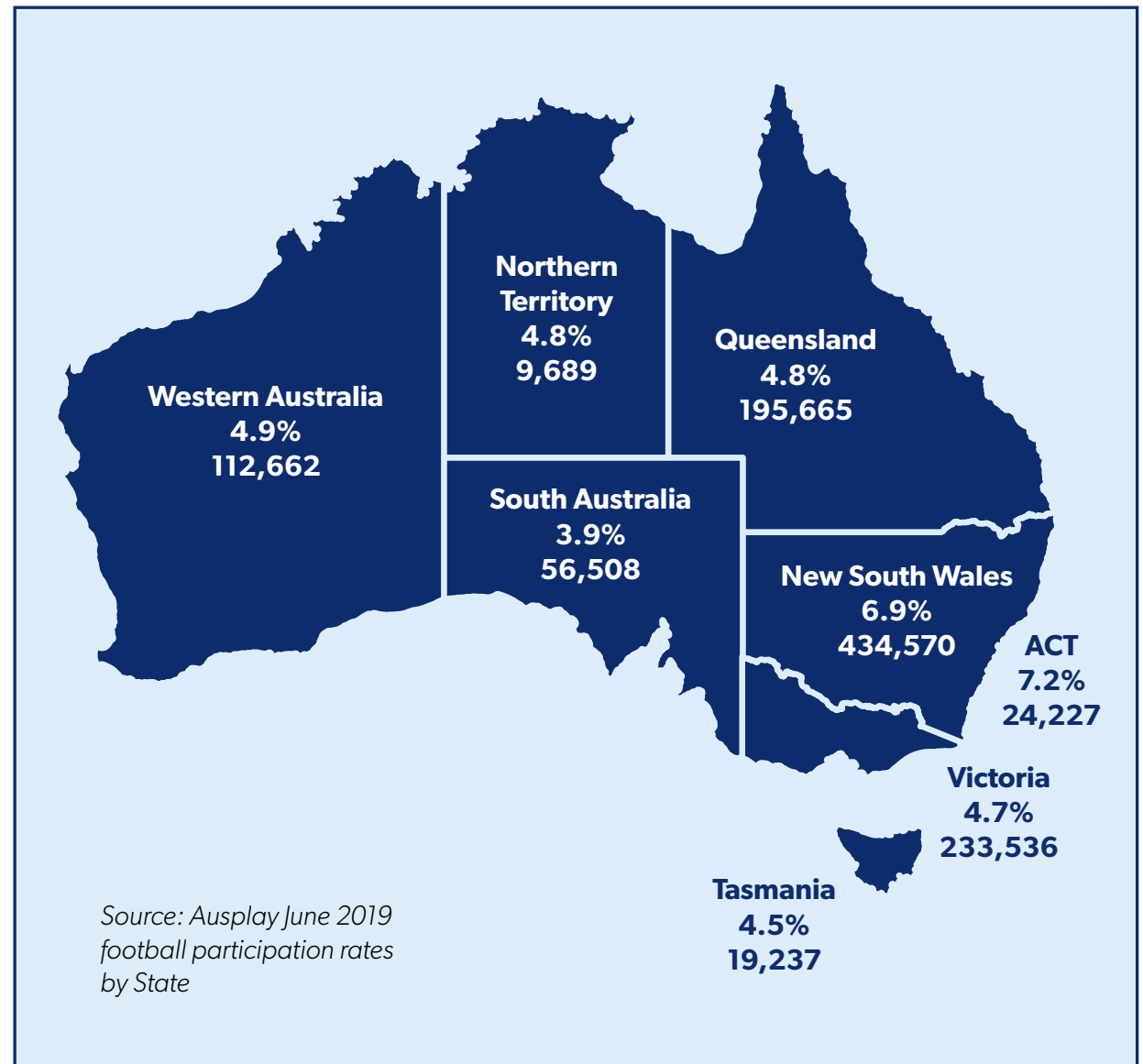
The FFA 2019 National Participation Report, using participation data gathered from A-League and W-league Clubs, Associations, Zones and community clubs identified 1,957,522 participants. This was a 6% overall increase on 2018 participation figures.

The independent October 2019 AusPlay survey identified 1,853,600 football participants with the FFA 2019 National Participation Report identifying 1,957,522 football participants. When compared, the participation reports are considered to be generally in accordance with the 103,922 variation likely due to the timing of the surveys undertaken in 2019 and participation counting method for futsal. The participation growth trends by demographic and gender in both participation reports are consistent.

## FUTURE GROWTH

Identifying trends, AusPlay recognise a net growth market opportunity for football with children. There was high consideration among young children aged 5 to 8 to play football, including stronger interest (compared to current participation rates) from girls.

Football is a sport that can be played by all ages, skill levels and backgrounds. As the most popular club-based participation sport in Australia, it also has wide appeal as a recreation activity.



# NSW FOOTBALL PARTICIPATION PROGRAMS



## MINI-ROOS

With 227,000 boys and girls estimated to be playing in NSW per annum, the Mini-Roos 'kick-off' program is a fun, safe introductory program designed for new players aged between 4 and 9. Mini-Roos 'kick-off' programs are operated by clubs, scheduled after school, conducted at early learning centres or held during school holidays.

Daily or weekly 45 minute sessions that build skills through games and simple drills delivered in an engaging and inclusive environment. Every player gets plenty of time on the ball and the prime aim of each session is for children to build fundamental motor skills.

Full sized football fields can be modified to accommodate up to 8 games and/or coaching sessions at the one time and is seen as an effective way to maximise use.

Participants can progress from Mini-Roos 'kick-off' programs into club-based football under the Mini-Roos structure. Clubs provide coaching sessions and set up matches in a relaxed environment where the aim is to teach new skills in an enjoyable way.

The smaller fields, modified rules and fewer players mean a more enjoyable game with more opportunities to touch the ball and more opportunities to score goals, once again increasing the likelihood of an overall positive experience.



## JUNIOR PARTICIPATION

While football has averaged a 11% increase overall in participation between 2014 and 2019, the highest participation increases experienced in 5 to 9 year old's and 10 to 14 year old's.

This growth provides a significant opportunity to convert young players to "footballers for life" with potential to transition participation into older age groups. This statistic also highlights the importance of the "whole football experience" with investment in facilities, coaching and player wellbeing, likely to further increase thriving participation levels into the future.



## FOOTBALL4ALL

Football4all was established in 2008 to further develop special needs and disability football programs across NSW. Football4all creates a support network for volunteers, coaches, parents and players to get involved in football inclusion and experience all its benefits.

There are around 30 individual football4all club or association programs operating that offer the opportunity for players to enjoy football participation in a fun, safe and inclusive environment.





# NSW FOOTBALL PARTICIPATION PROGRAMS



## WALKING FOOTBALL

It is low-impact, team-based exercise, utilising the defined 'Walking Football Rules and Formats' specifically non-contact with the players 'always having one foot on the ground'. Matches are played with modified formats (5v5/6v6) on smaller pitches with shortened game times.

Walking Football aims to provide participants physical and mental health benefits, social connectedness and promotion of the benefits of ongoing physical activity.



## KICK ON FOR WOMEN

Is an introductory program to football designed specifically for women to fit into their busy lives whilst juggling their commitments of family, work and friends. The program provides 45-minute sessions and has a strong focus on fun, inclusion and friendship while learning basic football competencies in a relaxed, non-competitive setting.



## COMMUNITY FC

Community FC aims to provide an avenue for integration, social cohesion and harmony using football as a vehicle for social change and to ensure that those that are inactive due to their lack of access to grassroots football are provided with the same opportunity as others.

The Community FC program provides various program opportunities for the following key target age groups:

"Future Champions" for male and female participants aged 12 to 18.

"Just Play" for adult participants aged 18 to 30.

"Girls United" targeting disadvantaged groups aged 12 to 30.

Programs involve weekly sessions focusing on individual and team skill development as well as small sided game plan.







## **CASE STUDY: MANAGING THRIVING JUNIOR PARTICIPATION**

**Northern Beaches Council has 119 football fields and provides football facilities for clubs operating in the Manly Warringhah Football Association. This equates to 5.2% of all fields in NSW, making Northern Beaches Council the largest local government provider of football facilities. Manly Warringhah Football Association has 18,534 registered participants within its Geographic Area.**

**With 1 in 14 people playing winter football in Northern Beaches Council, investment has been made in synthetic football facilities at Cromer Park, Melwood and Lionel Watts. Synthetic football fields are revolutionising the game with more matches scheduled, in all-weather conditions while producing consistent and quality football playing surfaces.**

***\*Note: In this Strategy Geographic Area registered winter football participants have been counted using home address postcode. Registered winter football participants can choose to play for any football association of their choice and are not restricted to play in the Association competition where they live.***



# NSW FOOTBALL PARTICIPATION SUMMARY

WINTER REGISTERED PLAYERS

**260,875**

TOTAL REGISTERED PLAYERS

**272,970**

NPL REGISTERED PLAYERS

**12,095**

COACHES

**19,784**

REFEREES

**6,549**

VOLUNTEERS

**12,876**

COMMUNITY CLUBS

**849**

TOTAL CLUBS

**932**

NPL CLUBS

**83**

Source: 2019 NSW Football Registered Clubs,  
Players, Coaches, Referees and Volunteers

# CURRENT AND FUTURE NSW FOOTBALL PARTICIPATION



## NSW FOOTBALL PARTICIPATION ANALYSIS - SPORTSEYE

To complement the independent AusPlay data gathered via survey, SportsEye, a product of ActiveXchange, has undertaken an extensive participation analysis of 2014 and 2019 winter registered football participants across NSW to better understand current participation trends and future participation outcomes.

Registered football participant information considers participant age, gender, where they live and play football. The advantage of analysing actual membership data is that it provides real “feet on the ground” participation numbers, as opposed to gathering participation population samples and then calculating football participation projections by formula.

The 2014 and 2019 membership data gathered can be applied in many ways to provide State, Regional NSW, Metro Sydney, Football Association, Football Zone and/or local government area participation summaries. SportsEye also has the capability to overlay State and Federal electorate districts.

Comparing actual membership data from 2014 and 2019 considering age group, gender and location has provided meaningful measures shown in the adjacent table with their in-depth application showcased in each of the 26 Football Area Summaries.

In summary, SportsEye assists informed decision making and provides in-depth analysis of customers, activity programs and facility infrastructure and its relative capacity, with measuring meaningful data as the cornerstone.

MEASURE	DEFINITION
<b>Participation Counts</b>	Highlights growth and participation hot spots.
<b>Participation Rate</b>	Rate of ‘main winter season’ participants compared to the current population of an area. This compares population data to the member participation for a given area.
<b>Demand Rate</b>	The rate of calculated demand compared to the population of an area. This highlights areas that have high demand relative to the population in the area.
<b>Demand Conversion</b>	The rate of participants compared to calculated demand in an area. This shows areas that are performing well in regard to converting demand into registered participants and those that are not performing as well.

**By 2023 football is projected to have in excess of 2 million participants, with estimated demand supporting growth to 2.25 million by 2036.**

## NSW PARTICIPATION LIMITATIONS

Social players, futsal, summer football and school participants have not been counted, as these players are typically registered with an affiliated club with infrastructure planning for these forms of football not specifically considered in this Strategy.

***The residential location of a registered participant is the key geographic measure used. If a registered player lives within the geographical boundary of a specific Football Association or Zone, then that player has been analysed within that geographical area and may not necessarily be registered with their local Football Association.***





## NSW PARTICIPATION HIGHLIGHTS

**272,970**

winter registered football participants in 2019,

up from 245,845 in 2014

which equates to a

**11% increase in total participation.**

**162,248**

winter registered football participants are under 14,  
which equates to  
**60% of total football participants.**

**84,188**

winter registered football participants  
are in the 5 to 9 age category which is the  
**fastest growing age demographic.**

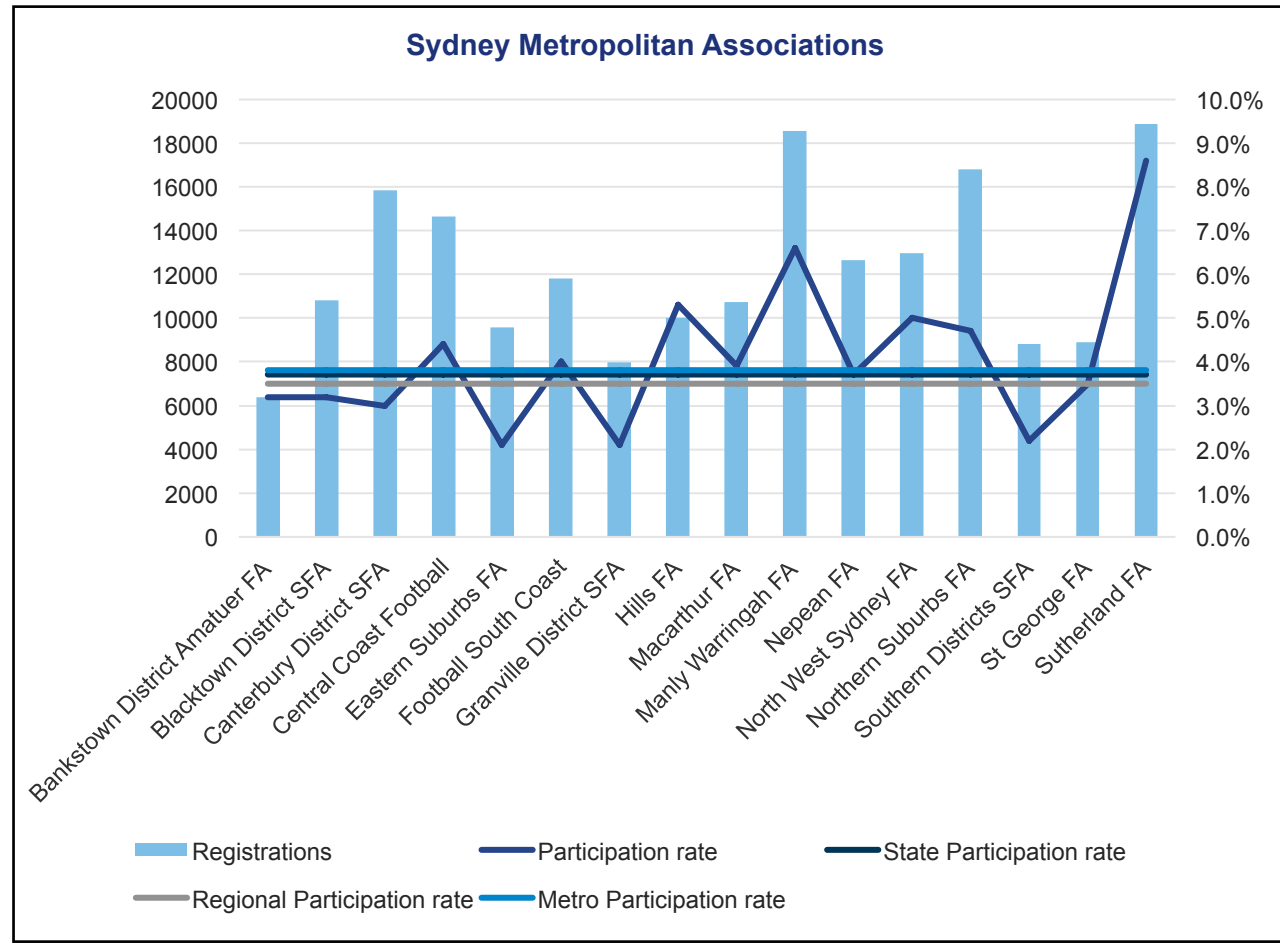
**63,160**

female winter registered football participants  
which equates to  
**23% of the total participants.**

In the event participation rates continue to grow at **11% growth** for the next 5 years,  
in excess of **300,000 registered winter members** are anticipated.

# FOOTBALL NSW METRO ASSOCIATION PARTICIPATION RATES

## FOOTBALL ASSOCIATION METROPOLITAN WINTER SEASON REGISTERED MEMBERS AND PARTICIPATION RATE



Note: Data based on registered players living within each geographic association boundary.

## OVERVIEW

In 2019, there were 195,341 registered football participants with 548 community and 72 NPL affiliated football clubs located in the Metropolitan Sydney area.

All Metropolitan Sydney Football Associations experienced participation growth between 2014 and 2019.

**Club participant numbers across Football NSW Metropolitan Associations have increased by an average of 13.2% from 172,544 in 2014 to 195,341 in 2019.**

In terms of 2019 football participation rates, the Sutherland Shire Football Association (8.6% participation rate), Manly Warringah Football Association Football (6.6%), Hills Football Association (5.3%) and North West Sydney Football Association all had participation rates of over 5.0%.

**Club participant numbers across Football NSW Metropolitan Associations have increased by an average of 13.2% from 172,544 in 2014 to 195,055 in 2019**

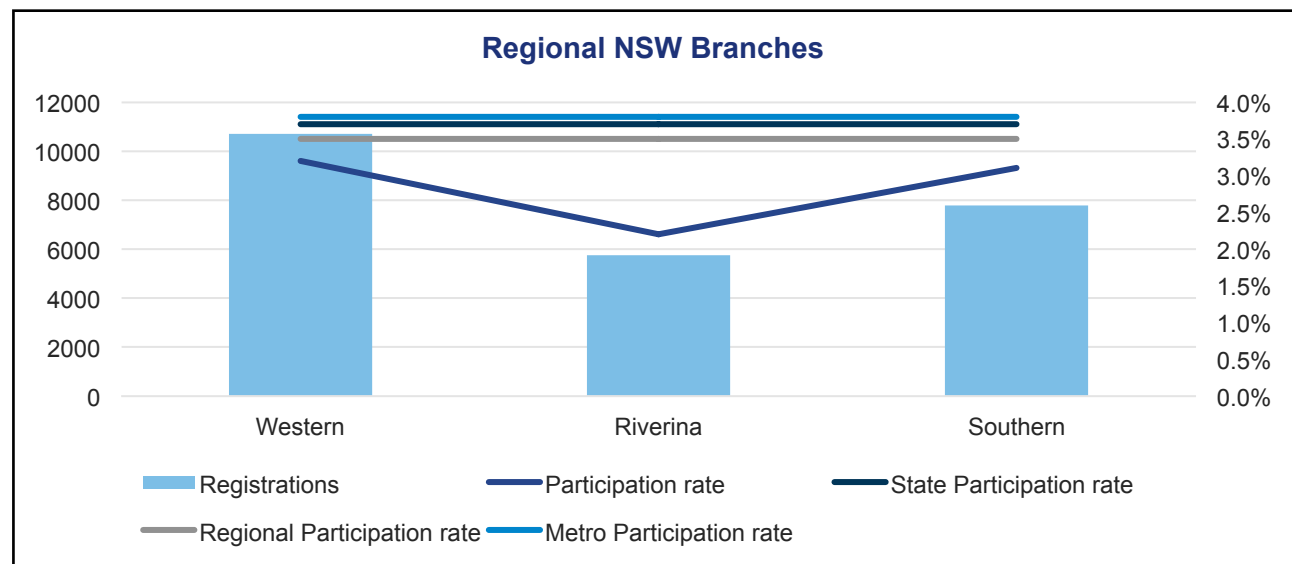
Nine of the 16 Metropolitan Sydney Football Associations exceeded the NSW State participation rate average of 3.7%.

The adjacent graph shows the 2019 number of participants by Sydney Metropolitan Football Association and the corresponding participation rates against state, metropolitan and regional averages.



# FOOTBALL NSW REGIONAL BRANCH PARTICIPATION RATES

## FOOTBALL ASSOCIATION REGIONAL WINTER SEASON REGISTERED MEMBERS AND PARTICIPATION RATE



*Note: Data based on registered players living within each geographic regional branch boundary.*

## OVERVIEW

In 2019, there were 24,266 registered football participants with 151 affiliated football clubs located in Football NSW Regional Areas:

- Western: 75 clubs
- Riverina: 31 clubs
- Southern: 45 clubs

Each of the three Football Branches have experienced participation growth between 2014 and 2019, with the Western Branch providing the greatest number of registered participants (10,492) and the highest participation rate of 3.2%.

**Club participant numbers across Football NSW Branches and corresponding Associations have increased by an average of 8.7% from 9,843 to 10,697.**

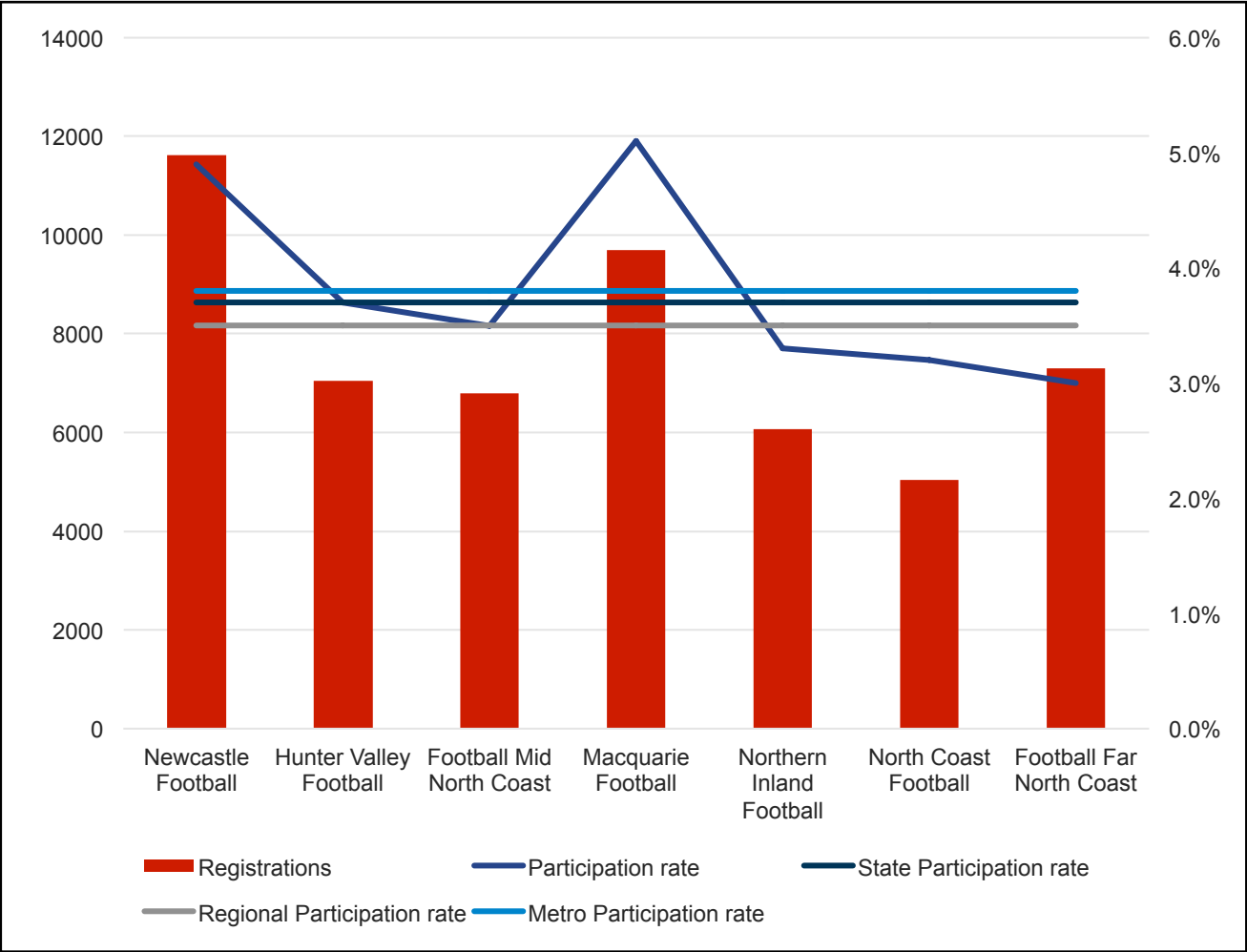
Participation hot spots are found in the regional population centres of Dubbo, Bathurst, Wagga Wagga, Albury and Griffith, with strong participation also recorded across population centres along the southern coast of NSW.

The adjacent graph shows the 2019 number of participants in Football NSW Regional Branches, and the corresponding participation rates against state, metropolitan and regional averages.

**Football participant growth is greatest in large regional population centres such as Wagga Wagga.**

# NORTHERN NSW ZONE PARTICIPATION RATES

## FOOTBALL ZONE WINTER SEASON REGISTERED MEMBERS AND PARTICIPATION RATE



*Note: Data based on registered players living within each geographic football zone boundary.*

## OVERVIEW

In 2019, there were 53,544 registered football participants with 222 affiliated football clubs located in Northern NSW.

All Football Zones in Northern NSW have experienced participation growth between 2014 and 2019. Newcastle Football (4.9%) and Macquarie Football (5.1%) exceeded State, Metropolitan and Regional participation rate averages for the year.

**Club participant numbers across the Northern NSW Zones have increased by an average of 17% from 45,604 in 2014 to 53,363 in 2019.**

All of the 7 Northern NSW Zones experienced participant growth over the past 5 years. The minimum growth rate of 10% was recorded by North Coast Football, with Football Mid North Coast and Newcastle Football both recording 18% growth.

**Club participant numbers across the Northern NSW Zones have increased by an average of 17% from 45,604 in 2014 to 53,544 in 2019.**

The adjacent graph shows the 2019 number of participants by Northern NSW Football Zone and the corresponding participation rates against state, metropolitan and regional averages.



# FOOTBALL ASSOCIATION WINTER FOOTBALL REGISTRATIONS

Based on Association 2019 registered winter football participants, the following football community competition providers are ranked in order of the greatest number of players registered with each association, zone or branch. A comparison to registered players residing within the association area is included.

## REGISTERED WINTER PLAYERS – FOOTBALL ASSOCIATIONS, ZONES AND BRANCHES 2019

	Association / Zone / Branch	Registered Winter Players 2019	Registered Winter Players living in area	Football Region
1	Manly Warringah FA	18,559	18,534	FNSW Metro
2	Sutherland Shire Football	18,503	18,866	FNSW Metro
3	Northern Suburbs FA	16,863	16,797	FNSW Metro
4	Canterbury and District FA	15,816	15,826	FNSW Metro
5	Northwest Sydney FA	15,565	12,971	FNSW Metro
6	Central Coast Football	14,446	14,635	FNSW Metro
7	Hills Football	12,106	10,029	FNSW Metro
8	Football South Coast	11,989	11,823	FNSW Metro
9	Nepean FA	11,918	12,627	FNSW Metro
10	Newcastle Football	11,311	11,612	Northern NSW
11	Blacktown & District SFA	10,823	9,596	FNSW Metro
12	Western Branch	10,697	7,370	Regional Branch
13	Macarthur FA	10,198	10,738	FNSW Metro

	Association / Zone / Branch	Registered Winter Players 2019	Registered Winter Players living in area	Football Region
14	St George FA	9,574	8,882	FNSW Metro
15	Eastern Suburbs FA	8,813	9,555	FNSW Metro
16	Southern Districts FA	7,860	8,830	FNSW Metro
17	Southern Branch	7,848	7,773	Regional Branch
18	Macquarie Football	7,635	9,689	Northern NSW
19	Football Far North Coast	7,304	7,301	Northern NSW
20	Football Mid North Coast	6,563	6,788	Northern NSW
21	Northern Inland Football	6,161	6,072	Northern NSW
22	Bankstown District AFA	6,141	6,377	FNSW Metro
23	Hunter Valley Football	6,017	7,053	Northern NSW
24	Granville District SFA	6,007	7,968	FNSW Metro
25	Riverina Branch	5,923	5,737	Regional Branch
26	North Coast Football	4,970	5,034	Northern NSW

\*Note: In this Strategy Geographic Area registered winter football participants have been counted using home address postcode. Registered winter football participants can choose to play for any football association of their choice and are not restricted to play in the Association competition where they live.

Typically Individual Football Associations/Zones may experience a winter football registration +/- variation of up to 5% when compared to geographic area registered participants. Reasons for this variation can include quality of competition, historical participant affiliations and closest venue to home.

# LOCAL GOVERNMENT WINTER FOOTBALL REGISTRATIONS

Based on the participation analysis completed, the following are the top 20 Local Government football hot spots that provide the highest number of residents participating in winter club football. Appendix 1 provides a summary of all Local Government 2019 registered participant numbers.

## REGISTERED WINTER PLAYERS - TOP 20 LGAS 2019

	Local Government Area	Registered Winter Players 2019	% Football Participation rate by population	Football Region
1	Sutherland Shire	18,864	8.6%	FNSW Metro
2	Northern Beaches	17,488	6.9%	FNSW Metro
3	Central Coast	14,501	4.4%	FNSW Metro
4	Blacktown	10,779	3.2%	FNSW Metro
5	Canterbury-Bankstown	10,343	3.0%	FNSW Metro
6	Lake Macquarie	10,040	5.1%	Northern NSW
7	Wollongong	8,712	4.3%	FNSW Metro
8	Newcastle	8,694	5.6%	Northern NSW
9	The Hills Shire	8,680	5.5%	FNSW Metro
10	Hornsby	7,783	5.5%	FNSW Metro

	Local Government Area	Registered Winter Players 2019	% Football Participation rate by population	Football Region
11	Parramatta	7,075	3.1%	FNSW Metro
12	Inner West	6,989	3.8%	FNSW Metro
13	Penrith	6,929	3.5%	FNSW Metro
14	Ku-ring-gai	6,489	5.5%	FNSW Metro
15	Liverpool	5,635	2.8%	FNSW Metro
16	Ryde	5,333	4.6%	FNSW Metro
17	Georges River	5,291	3.6%	FNSW Metro
18	Bayside	4,719	3.0%	FNSW Metro
19	Campbelltown	4,435	2.8%	FNSW Metro
20	Cumberland	4,383	2.0%	FNSW Metro

\*Note: In this Strategy Geographic Area registered winter football participants have been counted using home address postcode. Registered winter football participants can choose to play for any football association of their choice and are not restricted to play in the Association competition where they live.

Typically Individual Football Associations/Zones may experience a winter football registration +/- variation of up to 5% when compared to geographic area registered participants. Reasons for this variation can include quality of competition, historical participant affiliations and closest venue to home.







# FACILITIES AUDIT OVERVIEW





# FOOTBALL FACILITY PROVISION IN NSW

## COMMUNITY FOOTBALL VENUES

 **938** \* 

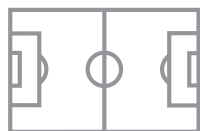
## FOOTBALL PLAYING FIELDS

**2,253**

## FLOODLIT PLAYING FIELDS

**1,574**

## FULL-SIZE SYNTHETIC FIELDS



**58**

## VENUES WITH PLAYER CHANGE ROOMS

**720**

## VENUES WITH REFEREE CHANGE ROOMS

**342**



Data is provided via the NSW Football Facility Audit undertaken over 2018 and 2019 by Football NSW, Northern NSW Football and affiliated Football Association and Zone staff. A small number of venues (38 at the time of writing) identified as existing have not yet completed audits due to their remote nature and do not appear in the data presented within this report section. \*118 NPL venues have also been audited against relevant NPL venue requirements. Where a venue is used for NPL activities only, these venues have been excluded from the community facility audit. Separate information and data on NPL venues is available via the NSW Facility & Advocacy Unit.



# FOOTBALL FACILITY AUDITS

## AUDIT INTRODUCTION

In a first for football in NSW, the development of the NSW Football Infrastructure Strategy involved the auditing of all facilities across the state, including all on-field and off-field football infrastructure. This included playing fields, sports lighting, player change rooms, referee facilities, clubrooms, canteens, storage, car parking and other supporting infrastructure.

The on-site audits were completed over a 12-month period between April 2018 and May 2019. Football NSW, Northern NSW Football and Football Association and Zone staff undertook the audits, with support provided by a casual workforce. To facilitate the audit process, a customised web-based audit program was developed – Sports Facility Auditor (SFA-Football).

SFA-Football was designed to collect baseline data for the following key areas:

- Current facility provision, dimensions, condition and amenity type.
- Auditor commentary and photo records.
- Location of venues and individual pitches using GPS coordinates.
- Identification of potential future projects and development opportunities for each venue.
- Pitch utilisation (estimated hours and time of use) and maintenance responsibilities.

The audit program is based on a range of best practice preferred facility guidelines developed by Football NSW and relevant Australian Standards (e.g. playing field lighting levels).

## AUDIT METHODOLOGY

The analysis of onsite audit information has focused on the four most critical areas of football infrastructure and the relevant capacity and impact of being able to facilitate community football activities:

1. Playing field surfaces (type, condition, size, drainage and irrigation)
2. Playing field lighting (type and level)
3. Change room amenity (for players, match officials and all gender use)
4. Clubrooms (size and overall condition).

## SPORTS FACILITY AUDITOR (SFA) – Football



# AUDIT FINDINGS – PLAYING FIELDS

## PLAYING FIELD SURFACE TYPE

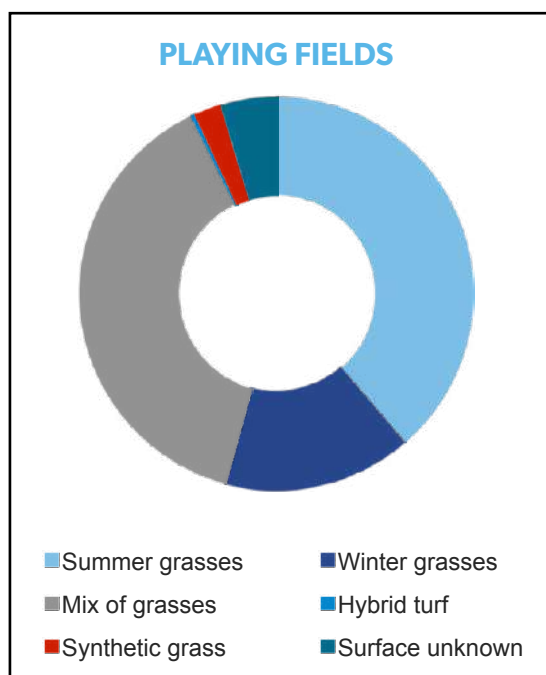
Playing field surfaces generally provide a mix of surfaces, including cool season grasses, warm season grasses, a mix of grasses and synthetic surfaces.

The following provides an overall number of the different playing field surface types provided across all community football facilities. Overall the mix of surface types were consistent across NSW, with the exception of summer grasses which were more prevalent across Football NSW Associations.

Synthetic surfaces are predominately located in the Metropolitan Sydney area, with only two full-size synthetic playing fields provided in Lake Macquarie in the north.

Surface type	Number of playing fields	Percentage of provision
Summer grasses	870	38.6%
Winter grasses	349	15.5%
Mix of grasses	867	38.5%
Hybrid turf	10	0.4%
Synthetic grass	49*	2.2%
Surface unknown	103	4.6%
<b>TOTAL PLAYING FIELDS</b>	<b>2,253</b>	<b>100%</b>

\* A further 9 synthetic playing fields are used for NPL only activities and are not included in the above count.



## PLAYING FIELD SIZE

Playing size has been categorised into two key sizes:

1. **Full-size**, capable of hosting 11 v 11 senior competition.
2. **Other size**, catering for modified and/or junior football and other training or program activities.

Across NSW there are 1,582 full-size football playing fields (73%) and 593 other sized fields (27%). 78 pitches have no playing field size identified.

Surface types are mixed across both full-size and other sized pitches, with the synthetic surface pitches generally being full-sized for maximum capacity.

It should also be noted that many full-sized pitches are also used for multiple football activities and can be configured a number of different ways to cater for many different programs.



# AUDIT FINDINGS – PLAYING FIELDS

## PLAYING FIELD SURFACE CONDITION

Playing field surfaces were rated as part of the facility audit process. Playing field conditions were rated at various times of the year where conditions may have been impacted by both dry and wet climatic conditions. The following data provides ‘a guide’ to the general overall observed condition of playing fields across NSW and is used to identify geographical areas of concern.

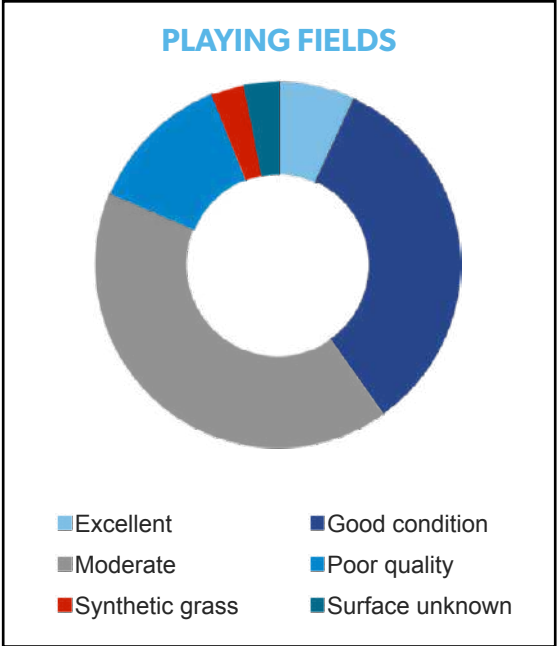
Playing field surfaces were rated using the following scale:

Condition rating	Definition
Excellent	As new
Good	Some wear observed across playing surface
Moderate	Considerable wear across playing surface but still playable
Poor	Multiple quality and playability issues observed, safe play may be impacted
Very poor	Playing area requires immediate rejuvenation or replacement

Not surprising, synthetic surfaces rated the highest in terms of surface quality overall. Playing surfaces that were uneven in nature provided the greatest challenges to game quality and player safety.



Surface condition	Number of playing fields	Percentage of provision
Excellent	149	7%
Good	772	34%
Moderate	919	41%
Poor quality	279	12%
Very poor	64	3%
Condition not assessed	70	3%
<b>TOTAL PLAYING FIELDS</b>	<b>2,253</b>	<b>100%</b>



# AUDIT FINDINGS – PLAYING FIELDS

## DRAINAGE AND IRRIGATION

The quality of playing fields can be impacted by a range of different factors, including age, original construction methods, usage levels, maintenance regimes, climatic conditions, drainage function and availability of irrigation.

The presence of drainage and irrigation infrastructure was identified through the facility audit as it is considered to have a significant impact on the continued capacity of playing fields and is required to enable effective ground maintenance. Without this infrastructure in place, playing fields are significantly restricted in terms of the capacity to accommodate use.

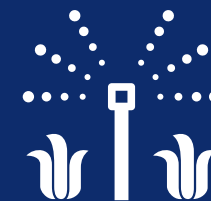
### Across all playing fields it was identified that:

- 51% of all natural grass playing fields **did not have functional drainage**.
- 38% of full-size natural grass playing fields **have functional drainage**, however 44% **have no identified drainage infrastructure**.
- 60% of other sized playing fields **did not have functional drainage** infrastructure in place.
- 25% of all natural grass playing fields **have no irrigation infrastructure**.
- 47% of natural grass playing fields **have automated irrigation** systems in place.

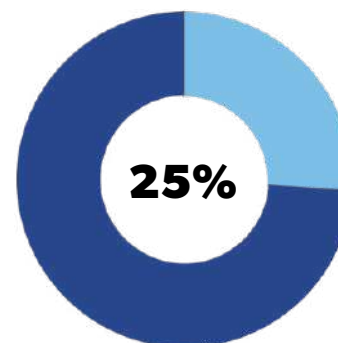
Levels of drainage and irrigation provision were varied across all areas of NSW and are often specific to local government areas as to what level it is provided. In general terms, playing fields in regional areas of NSW provide lower levels of drainage and irrigation infrastructure.

The direct correlation between the provision of functional drainage and irrigation infrastructure and playing field surface quality is evidenced by:

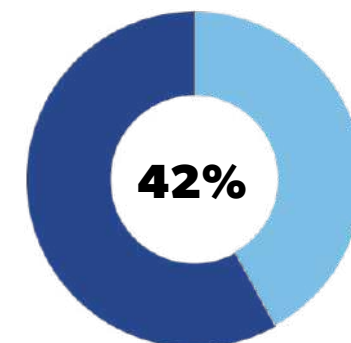
- 72% of **very poor** playing fields have no drainage or automated irrigation infrastructure – this figure is 56% for **poorly** rated playing fields.
- The same assessment for **good to excellent** playing fields identified that less than 30% had no drainage or automated irrigation systems in place.



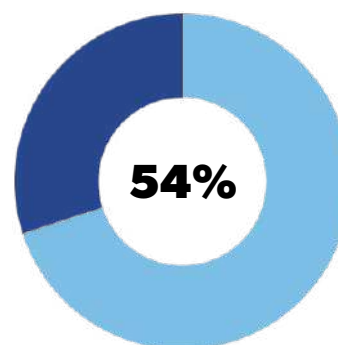
### FIELDS HAVE NO IRRIGATION INFRASTRUCTURE



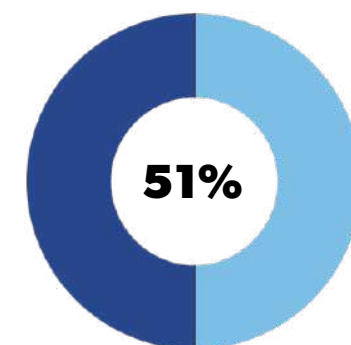
### FULL SIZE FIELDS WITHOUT DRAINAGE



### OTHER (NON-FULL SIZE) SIZED FIELDS WITHOUT DRAINAGE



### FIELDS WITHOUT FUNCTIONAL DRAINAGE





# AUDIT FINDINGS – PLAYING FIELDS

## PLAYING FIELD CAPACITY

Playing field data analysed through this Strategy has assisted to create a model for assessing the Full-Size Equivalent (FSE) pitch capacity of playing fields, using the data held within SFA-Football.

While this method does not take into account all the factors that may impact capacity (including weather conditions, maintenance regimes and fixturing), the following elements of a playing field have been analysed to create a consistent capacity model across all playing fields.

- Playing field size
- Usage type (modified to senior competition)
- Lighting levels
- Drainage functionality
- Irrigation provision
- Surface type (natural grass or synthetic)
- Surface condition.

The model created allows all playing fields to be scored based on the features above, with a maximum score of 1.0 FSE pitch attributed to the most functional playing areas. Full-size, floodlit synthetic playing pitches have the ability to score a maximum of 2.2 based on their additional utilisation capabilities.

While the need to plan and develop new football venues in growing population areas is required in the longer term, increasing the capacity of existing playing fields via improving their associated quality is an efficient, sustainable and cost effective method. Increasing capacity supports maximizing playing field use, improving and renewing existing infrastructure and partnering with councils to better manage venue and club requirements.

If existing playing field capacity can be enhanced through the improvement of drainage, provision of automated

irrigation, change in surface type and/or the upgrading of lighting to expand the hours of use, this could have a significant impact on the entire NSW playing field network.

Routine sport field maintenance practices such as aeration, weed and feed combined with responsible use (as opposed to overuse) can reduce times and increase capacity.

Increased capacity would also assist in supporting the future planning of new venues in terms of identifying what is required through new facilities to cater for the demands of football.

**State-wide, the capacity assessment of 2253 playing fields identified a collective full-size pitch equivalent capacity of 1,494 full-size playing fields. Based on all the above factors it could be assumed that around 34% of playing field capacity is being lost due to existing conditions.**



# AUDIT FINDINGS – PLAYING FIELD LIGHTING



## WHY SPORTS LIGHTING IS ESSENTIAL

Where absent, provision of playing field lighting is a proven method of increasing participation capacity. Sports lighting allows players of all ages and abilities to train safely at night and can provide the opportunity to play competition football providing flexibility in scheduling.

Installation of sports lighting is often the easiest method of increasing football capacity as:

- Budgets to construct new sports lighting are significantly smaller than those to construct a new field.
- Typically there is no playing field down time as works are conducted off field (compared to drainage and irrigation renewal works) thus club relocations are not required.
- At the conclusion of lighting works, field carrying capacity can increase to maximum participation levels immediately.

Uniformity of sports lighting assists in discouraging high participation use in “well lit areas” and spreads training loads evenly, better managing field wear and required maintenance. Sport lighting is proven to improve social connection compared to unlit venues. Members stay longer at clubs with sports lighting which in turn helps drive localised club economies.

## INGREDIENTS OF A GOOD FOOTBALL LIGHTING PROJECT

A uniform lighting level of 50 lux is required to be able to undertake training, with 100 lux required for community standard competition football to be played.

Present day, \$100,000 for a base lighting installation would be the minimum funding required with some projects nearing \$250,000 to deliver a four pole community football lighting installation for one field to Australian Standards.

While securing funding is a key trigger to confirm a sport lighting project, effective working partnerships with local government are essential as most sports fields are owned by LGA's.

Environmental sustainability, light spill management considering local residents, planning approval, lighting design, the underwriter of the project and appointment of a project manager to deliver the works are all project steps best confirmed before works commence.

Sports Lighting Checklists and further detailed lighting information is contained within the Footballs Facility Guides - Football Lighting.

## SPORT LIGHTING AUDIT FINDINGS

Auditors reported on the presence or otherwise of playing field lighting on each football pitch. Where sports lighting was present, evidence of the lighting lux levels, number of lighting poles and fixtures were provided, as was the type of lighting (e.g. LED or metal halide).

Across all playing fields it was identified that:

- 28% or (641) of all playing fields in NSW **do not have sports lighting.**
- 46% or (1024) of all playing fields in NSW **do not have sports lighting or have lighting below 50 lux** which is the minimum Australian Standard for training.
- Only 21% of all playing fields in NSW **have 100 lux (or greater) lighting** that is considered suitable for community competition football.

*Note: Auditors were reliant on the provision of sports lighting design advice. At 263 sites the auditor was unable to confirm light lux levels.*



# AUDIT FINDINGS – CHANGE ROOM AMENITY

## BARRIERS TO FEMALE PARTICIPATION IN SPORT

Traditionally, sporting facilities were constructed to meet the needs of male participants. Present day, best practice sport facilities should provide a range of amenities that attract and sustain access for all.

Increasing female participation in safe and welcoming environments is a strategic priority of the NSW State Government, Football NSW, NNSW Football and local government authorities. The support of all is welcomed as it is acknowledged, there is plenty of work to be undertaken to improve the accessibility of changeroom amenity.



Photo 1 – Non compliant open showers

## GENDER NEUTRAL CHANGEROOM AMENITIES

The NSW football facility audit reported on player and match officials/referees changeroom number, condition and gender neutral compliance.

Change room provision trends are very much based on historical male sport requirements and each existing Council capital provision policy in place, which is inconsistent in across municipalities.

For example Newcastle City Council provides change rooms at all 33 venues, whereas Northern Beaches Council currently provides change rooms at 13 of 36 venues.



Photo 2 - All gender compliant cubicle showers

## GENDER NEUTRAL CHANGEROOM AMENITY FINDINGS

- 23% of all football venues in NSW **do not provide player change room facilities.**
- 53% of all player change room facilities **are rated in the moderate, poor and very poor categories.**
- 81% of all player change rooms in NSW **are not gender neutral.** This equates to only 1 in 5 change rooms being gender neutral compliant.
- 64% of venues **do not provide a change room for match officials/referees.**
- 82% of all match official change room facilities **are not gender neutral compliant for match officials/referees.**

## GENDER NEUTRAL CHANGE ROOM FACILITIES

Typical features of a welcoming gender neutral change room and associated amenity include:

- Private lockable shower cubicles.
- Each shower has a change space with a robe hook, seat and shelf to place a bag.
- Toilets with full height petitioned pans and no urinals.
- Baby change facilities.
- Wash basins with vanity shelf space, mirrors and electrical outlets.

# AUDIT FINDINGS – CLUBROOMS AND SOCIAL SPACES



Source: Budgewoi Soccer Club

## THE VALUE OF SOCIAL SPACES

The community sporting club environment is designed to build a stronger, healthier, happier and safer communities, on the playing field, and in the social spaces, are often where strong social bonds are formed.

It is evident that social spaces:

- bring people together, providing opportunities for social interaction and networking
- can improve mental health
- provide a vehicle for inclusion, drawing people together of different races, religions and cultures
- provides a sense of where everyone belongs.

While difficult to measure, easing pressure on the health system, fostering community pride and promoting volunteering opportunities are all benefits realized from thriving clubs and social spaces.

## CLUBROOM FINDINGS

- Of the 938 football venues, **717 do not have social spaces** which equates to 76%.
- Of the 221 venues with social spaces, **44% were rated in the moderate, poor and very poor categories.**

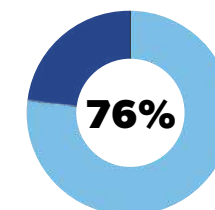
## SOCIAL SPACE FEATURES

A good social space is easily accessible, with natural light, ideally has site lines to the playing fields and are inviting, well lit at night safe places. Quality social spaces organically become the meeting point for all club activities outside the playing arena.

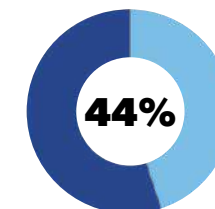
A space of 100m<sup>2</sup> fits 80 to 100 people seated pending the table configuration and capacity can be increased by a further 80% when visitors are standing only. The required size of social areas varies between local government areas with the membership size of the community football club to be considered.

Of the venues that provide a clubroom building, **54% of them either do not provide a social / function room or the space provided is less than 100m<sup>2</sup> in size.**

VENUES WITHOUT  
SOCIAL SPACES



SOCIAL SPACES  
RATED MODERATE  
TO VERY POOR





# FACILITY AUDIT FINDINGS SUMMARY



## AUDIT SUMMARY

The below tables provide a summary of:

- The numbers of venues audited.
- The numbers of key on-field and off-field infrastructure found.
- The number of facilities in each Football Area.

#	Facility Statistics Football NSW Metro
576	Venues
1321	Playing Fields
423	Player Changerooms
77	Gender Neutral Player Changerooms
162	Match Officials Changerooms
15	Gender Neutral Match Official Changerooms
555	Football Field Lighting with no or less than 50 lux
452	Football Fields with Functional Drainage
605	Football Fields with Automated Irrigation
148	Community Pavilion Social Spaces

## KEY FINDINGS SUMMARY

- In excess of 1,100 football fields in NSW **are rated as being in moderate to poor condition.**
- 1 in 2 football fields **do not meet the minimum 50 lux training standards for playing field lighting.**
- 3 out of 4 football venues **do not have a social space.**

#	Facility Statistics Football NSW Branches
150	Venues
375	Playing Fields
120	Player Changerooms
28	Gender Neutral Player Changerooms
60	Match Officials Changerooms
25	Gender Neutral Match Official Changerooms
235	Football Field Lighting with no or less than 50 lux
238	Football Fields with Functional Drainage
278	Football Fields with Automated Irrigation
32	Community Pavilion Social Spaces

- 4 out of 5 change rooms **do not meet all gender requirements.**
- Half of all football fields audited **do not have functional drainage.**
- 1 in 4 natural grass playing fields **do not have any irrigation infrastructure in place.**

#	Facility Statistics NNSW Football
212	Venues
557	Playing Fields
177	Player Changerooms
37	Gender Neutral Player Changerooms
121	Match Official Changerooms
26	Gender Neutral Match Official Changerooms
265	Football Field Lighting with no or less than 50 lux
122	Football Fields with Functional Drainage
133	Football Fields with Automated Irrigation
41	Community Pavilion Social Spaces





# CONSULTATION FINDINGS





# KEY STAKEHOLDERS CONSULTED

## FOOTBALL ASSOCIATIONS AND ZONES

There are 38 affiliated Football NSW Associations and Northern NSW Football Zones that represented 849 community and 83 NPL clubs in 2019.

Each of these organisations have a goal to grow, develop, promote and service football while encouraging equity for all. Typically, each Association and Zone implement local initiatives, in addition to programs that have been adopted by Football NSW and Northern NSW Football.

The range of activities and programs delivered include:

- Amateur (community football) services.

- Competition management.
- Regulatory oversight of member clubs.
- Operating Association or Zone representative teams.
- Academy and skill acquisition programs.
- Coaching and referee education and accreditation.
- Futsal, mini-roos and other participation programs and formats.

Depending on the strategic direction of each organisation, some Associations and Zones also manage the scheduling of venues and playing fields within their geographical area. They may also oversee management of a key venue and/or their administrative home.



## LOCAL GOVERNMENT

There are 129 NSW Local Government Authorities (LGAs) who own and manage 98% of the total 993 community football venues across the state. Arguably local government is collectively football's biggest sponsor and a significant stakeholder in the provision, management and investment into community football facilities.

As land owners, LGAs perform the following functions for football venues:

- Local planning authority.
- Policy development.
- Setting fees and charges.
- Developing and negotiating tenancy conditions.
- Venue and playing field maintenance.
- Capital renewal.
- New venue planning and development.
- Investment partner.

## STATE GOVERNMENT

The NSW Government through its various departments, agencies and elected members are a strategic partner of football. State Government sets the policy framework under which local government operate, in addition to guiding the priorities for planning (including land release) and investment into sporting infrastructure (both current and future).

The NSW Office for Sport is a closely aligned partner for Football NSW and Northern NSW Football and their endorsement and support for the implementation of the NSW Football Infrastructure Strategy will be critical in attracting future investment to support its implementation.



# CONSULTATION FINDINGS

## SUMMARY OF FOOTBALL AND LOCAL GOVERNMENT CONSULTATION



The NSW Football Infrastructure Strategy included an online survey that was distributed to all 129 Local Government Authorities and 38 Football Associations and Zones across NSW. The consultation period extended from April 2019 to September 2019.

In total, 68 survey responses were received from LGAs providing a broad cross section of football experiences. Of the 129 LGAs in NSW, 20 do not have any football facility provision, with another 29 having

3 or less football fields. Typically these LGA's are located in central and remote areas of NSW and have very low population bases.

All 38 Football Associations and Zones responded to the survey, representing a 100% completion rate.

A series of workshops were also held for LGAs and Football Associations and Zones across six strategic locations including Sydney, Lake Macquarie, Orange, Wagga Wagga, Moruya and Cessnock.

A high level summary of survey and workshop responses are provided in the following pages. These key facility findings have helped to shape and influence the overall strategic pillars and recommendations provided in the Strategy.

Football Association and Zone survey recipients were also asked to identify high priority local football projects in their locality.



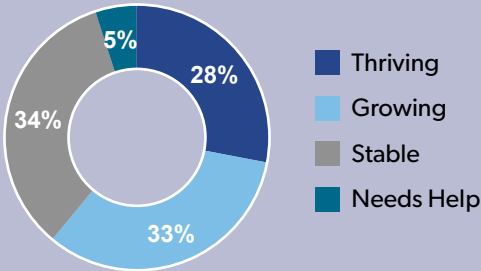
# CONSULTATION FINDINGS

## Word that best describes current football participation

## Identified challenges

## Key Priorities

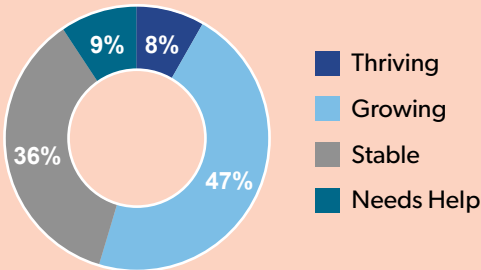
### LOCAL GOVERNMENT



- Effectively maintaining grounds when they are closed or in seasonal transition
- Ability to upgrade playing field lighting
- Securing funding to address facility requirements
- Poor quality of playing fields from overuse
- Inadequate number of playing fields to cater for growing demands

- Address levels of ageing infrastructure
- Secure partner investment for new facility development and/or renewal works
- Development of gender neutral change room facilities
- Increase levels of storage provision
- Attract support to improve maintenance regimes

### ASSOCIATION/ZONES



- Inadequacy of existing playing field lighting for competition
- Securing funding for facility improvements
- Limited number of synthetic fields
- Not enough playing fields with adequate lighting to cater for training
- Inadequate number of playing fields to cater for growing demands
- Poor quality of playing fields

- Provision of gender neutral change rooms
- Maintaining amenities to a safe and suitable standard
- Secure partner investment for new facility development and/or renewal works
- Address levels of ageing infrastructure
- Increase levels of club storage provision

# STAKEHOLDER WORKSHOP THEMES

**State Government, Local Government and Associations agree football participation is growing and thriving**



**Accessible, factual data on football participation in each Association, Zone, Local Government Area needs to be shared and used for decision making**



**75% of LGAs agree that ageing infrastructure, securing funding and gender neutral change rooms are key priorities**



**Synthetic fields are increasing community football capacity and should be considered in more locations**



**School access provides participation opportunities for football, if formal agreements were easier to negotiate**



# DEMAND ASSESSMENT





# INFLUENCES ON FUTURE DEMAND

## POPULATION AND DEMOGRAPHICS

Australia's current population is estimated at 25,592,295, with NSW making up 32%.

Sydney is Australia's most populated city with an estimated population of over 4.4 million people. The population of New South Wales is expected to grow on average by 100,000 people each year until 2041 and reach 10,572,700 million people by 2041.

Key population growth areas for NSW predominately include the Greater Western Sydney area, following the sprawling Sydney settlement pattern. This growth provides key opportunities to reinforce existing hot spots for football, as well as opportunities to build a new footprint in areas that are yet to be established.

LGA's that will experience some of the largest growth over the 2020-2030 period are Blacktown (estimated 113,000), Parramatta (81,000), Liverpool (77,000), Hills Shire (71,000), Canterbury-Bankstown (67,000), Cumberland (63,000), Penrith (61,000) and Camden (52,000).

Within these LGA areas alone, more than 115,000 children aged between 5 and 14 are anticipated to move into the region. This has particular importance for Football NSW and the Associations managing football as it could mean an additional 5,000 children playing football based on current state average participate rates.

For Northern NSW Football, the areas of Lake Macquarie and Newcastle will contribute the majority of population growth to 2030, with around 25,000 new residents.

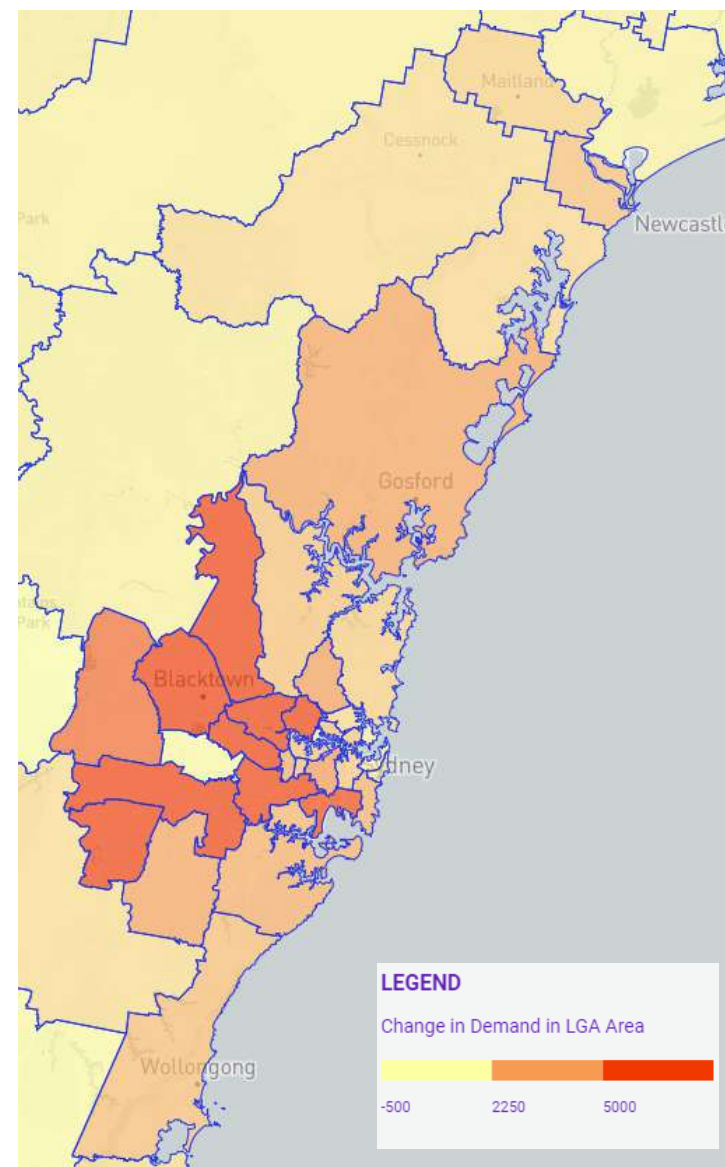
New venue planning, club development and investment advocacy will require additional resources in order to sustainably deliver football over the coming

**A vast number of factors influence the demand for football, with SportsEye taking into account a series of demographic, location, education and household factors. In simple terms, key areas of population growth and demographic change provide high level indicators where new football participation growth will be generated.**

decade and beyond in the identified growth areas.

FNSW & NNSWF will always look to encourage the development of a football facility that supports the current demand and future increase in participation, with each particular project considered on its own merit considering the unique local conditions in place.

The overall projected change in demand trends for football is represented via the adjacent LGA area map, where the red areas indicate the greatest projected increase in potential demand for football participants from 2019 to 2026.





# INFLUENCES ON FUTURE DEMAND

## DISTRIBUTION OF PARTICIPANTS

Registered player numbers have been used as a measure to assess current use and future demand.

The 2019 registered winter players total 272,970 an 11% increase on the 245,845 registered in 2014. This rate of growth for registered club players is a significant increase in the number of regular footballers each week, all requiring space to train and play.

Registered football participation is spread across the three football areas:

1. Football NSW Metro (195,341 registered players)
2. Football Northern NSW (53,363 registered players)
3. Football NSW Regional (24,266 registered players)

In identifying priority areas of future demand, it is important to note that Football NSW and affiliated Associations oversee 71.6% of registered players across NSW, with Northern NSW Football Zones responsible for 19.5% and the Regional Football NSW Branches the remaining 8.9%.

## GROWTH RATE TRENDS

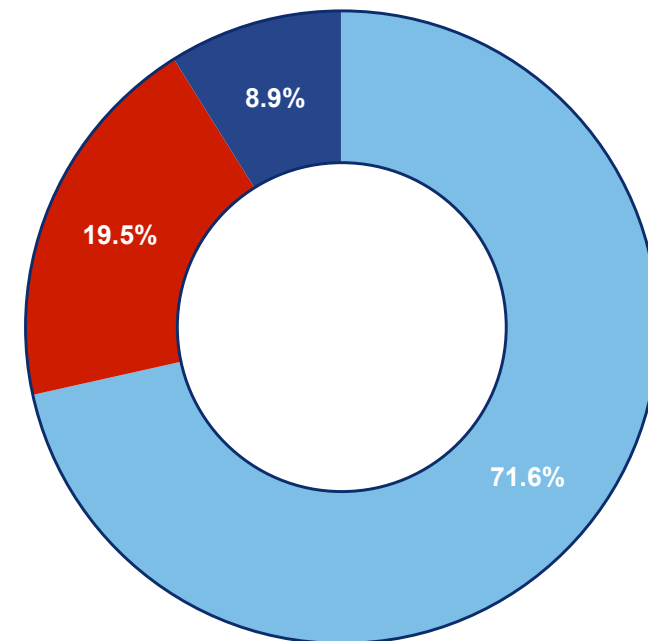
The following pages provide an overall summary and assessment of the potential change in football demand, based on the previous five year historical growth trends across each football area. While it may be difficult for all Football Associations and Zones to maintain their recent historical trends in growth, we can assume that with population change, an improvement in infrastructure quality and access to new facilities, continued growth is possible.

The following tables also assume that the same local growth rate between 2014 and 2019 continues from 2019 to 2024 to identify a potential market for new football participants. This is a simplistic measure to ascertain what continuing trends look like across NSW.



## 2019 REGISTERED NSW FOOTBALL PARTICIPANTS

**272,970**



- Football NSW Metropolitan Sydney Associations
- Northern NSW Football Zones
- Football NSW Regional

*Note: Summer football, futsal, coaches, referees, volunteers and school participants are additional football participants not included in this graph.*

# GROWTH RATE TRENDS – METROPOLITAN ASSOCIATIONS

The table below provides participation comparisons using registered winter season football participants between 2014 and 2019 for Football NSW Metropolitan Associations. Participation projections for 2024 are provided by applying the five-year historical growth rate. In the event football participation rates in each Football Zone were to increase, the growth projections provided would significantly increase. Participation decline was only identified in two Associations (Nepean and Southern Districts), where only marginal declines in local football participants was identified.

Football NSW Metropolitan Association	2019 Football Participation Rate	Total Registered Players 2014	Total Registered Players 2019	Change in Registered Players 2014-2019	Rate of Change in Participation 2014-2019 (%)	Estimated Change in Registered Players by 2024
Bankstown District Amateur Football Association	3.2%	5,837	6,377	+540	9%	+590
Blacktown District Soccer Football Association	3.2%	10,119	10,823	+704	7%	+753
Canterbury & District Soccer Football Association	3.0%	14,064	15,826	+1,762	13%	+1,983
Central Coast Football	4.4%	13,263	14,635	+1,372	10%	+1,514
Eastern Suburbs Football Association	2.1%	7,161	9,555	+2,394	33%	+3,194
Football South Coast	4.0%	11,603	11,823	+220	2%	+224
Granville and Districts Soccer Football Association	2.1%	7,407	7,968	+561	8%	+603
Hills Football	5.3%	8,970	10,029	+1,059	12%	+1,184
Macarthur Football Association	3.9%	9,688	10,738	+1,050	11%	+1,164
Manly Warringah Football Association	6.6%	15,700	18,534	+2,834	18%	+3,346
Nepean Football Association	3.7%	12,671	12,627	-44	0%	-44
North West Sydney Football Association	5.0%	11,792	12,971	+1,179	10%	+1,297
Northern Suburbs Football Association	4.7%	15,281	16,797	+1,516	10%	+1,666
Southern Districts Soccer Football Association	2.2%	8,830	8,604	-226	-3%	-220
St George Football Association	3.5%	8,039	8,882	+843	10%	+931
Sutherland Shire Football Association	8.6%	17,645	18,866	+1,221	7%	+1,305
<b>Average Participation Rate</b>	<b>4.1%</b>	-	-	-	-	-
<b>Average Participation Growth</b>	-	-	-	-	<b>9.8%</b>	-
<b>TOTAL REGISTERED PLAYERS</b>	-	<b>178,070</b>	<b>195,055</b>	<b>+16,985</b>	-	<b>+21,515</b>

\*Note: In this Strategy Geographic Area registered winter football participants have been counted using home address postcode and is represented in the above and following tables. Registered winter football participants can choose to play for any football association of their choice and are not restricted to play in the association competition where they live.



## GROWTH RATE TRENDS – METROPOLITAN ASSOCIATIONS

**The average rate of growth in participation over the past five-years in Metropolitan Sydney has been around 9.8%. All Associations with the exception of Southern Districts SFA, Nepean Football and South Coast FA experienced strong growth of 7% or above.**

**Growth rates indicate that a market for an additional 21,515 participants may exist across Metropolitan Sydney Football Associations should football continue to grow at the same historical five-year rate.**



## GROWTH RATE TRENDS – REGIONAL BRANCHES

The table below provides participation comparisons using registered winter season football participants between 2014 and 2019 for Regional NSW Branch areas. Participation projections for 2024 are provided by applying the five-year historical growth rate. In the event football participation rates in each Regional Branch were to increase, the growth projections provided would significantly increase - currently none of the NSW Football Branches meet the state average participation rate of 3.7%.

Football NSW Metropolitan Association	2019 Football Participation Rate	Total Registered Players 2014	Total Registered Players 2019	Change in Registered Players 2014-2019	Rate of Change in Participation 2014-2019 (%)	Estimated Change in Registered Players by 2024
Western Branch	3.2%	9,843	10,712	+869	9%	+964
Southern Branch	3.1%	7,042	7,773	+731	10%	+777
Riverina Branch	2.2%	5,095	5,737	+642	13%	+746
<b>Average Participation Rate</b>	<b>2.8%</b>	-	-	-	-	-
<b>Average Participation Growth</b>	-	-	-	-	<b>10.7%</b>	-
<b>TOTAL REGISTERED PLAYERS</b>	-	<b>21,980</b>	<b>24,222</b>	<b>+2,242</b>	-	<b>+2,487</b>

- All NSW Regional Football Branches have experienced significant growth with a collective additional 2,242 registered players over the past 5 years.
- Growth rates indicate that a market for an additional 2,487 participants may exist across Regional NSW should football continue to grow at the same historical five-year rate.
- The Riverina Branch, including population centres of Wagga Wagga, Griffith and Albury had the lowest participate rate at 2.2%, however it experienced the highest rate of growth over the past five years.





## GROWTH RATE TRENDS – NORTHERN NSW

The table below provides participation comparisons using registered winter season football participants between 2014 and 2019 for Northern NSW. Participation projections for 2024 are provided by applying the five-year historical growth rate. In the event football participation rates in each Football Zone were to increase, the growth projections provided would significantly increase - currently only the Macquarie Football (5.1%) and Newcastle Football (4.9%) exceed the state average participation rate of 3.7%

Football Zone	2019 Football Participation Rate	Total Registered Players 2014	Total Registered Players 2019	Change in Registered Players 2014-2019	Rate of Change in Participation 2014-2019 (%)	Estimated Change in Registered Players by 2024
Football Far North Coast	3.0%	6,308	7,301	+993	+16%	1,149
Football Mid North Coast	3.5%	5,588	6,788	+1,200	+21%	1,458
Hunter Valley Football	3.7%	5,953	7,053	+1,100	+18%	1,303
Macquarie Football	5.1%	8,640	9,689	+1,049	+12%	1,176
Newcastle Football	4.9%	9,562	11,612	+2,050	+21%	2,490
North Coast Football	3.2%	4,540	5,029	+489	+11%	542
Northern Inland Football	3.3%	5,013	6,072	+1,059	+21%	1,282
<b>Average Participation Rate</b>	<b>3.6%</b>	-	-	-	-	-
<b>Average Participation Growth</b>	-	-	-	-	<b>+17.1%</b>	-
<b>TOTAL REGISTERED PLAYERS</b>	-	<b>45,604</b>	<b>53,544</b>	<b>+7,940</b>	-	<b>+9,400</b>



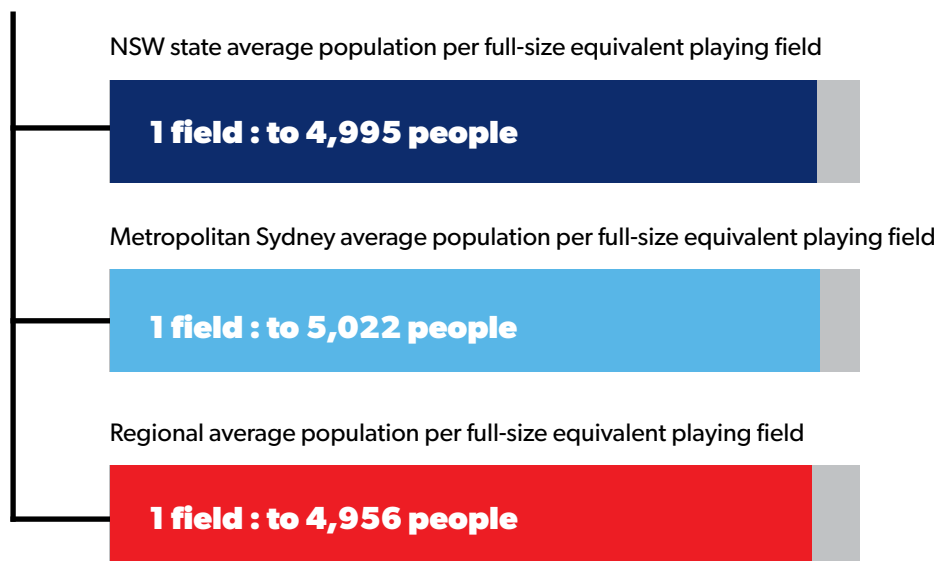
- All Football Zones in Northern NSW are experiencing significant growth with Newcastle Football introducing over 2,000 registered players over the past 5 years.

- Growth rates indicate that a market for an additional 9,400 participants may exist across Northern NSW Football Zones should football continue to grow at the same historical five-year rate.

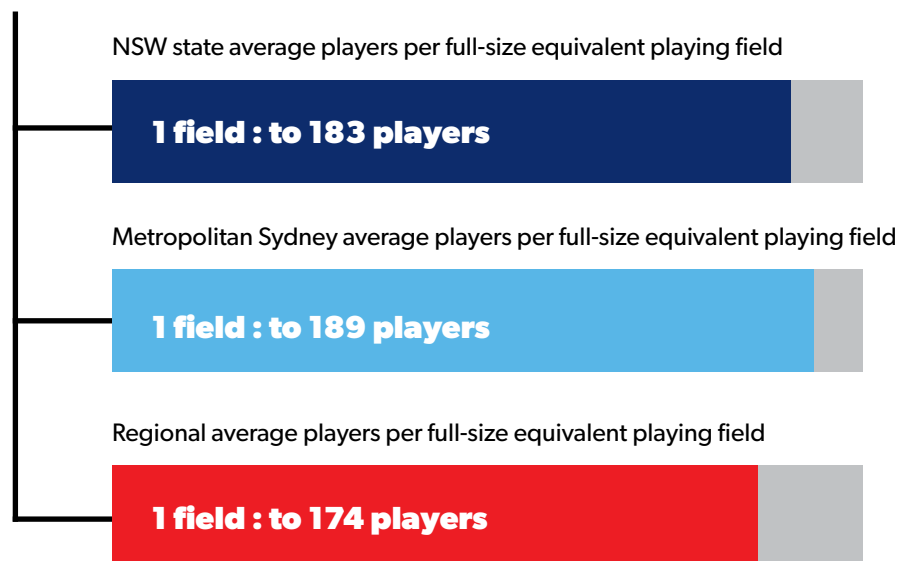
# PROVISION RATIOS

Pitch, participant and population provision ratios provide a general guide to the average number of playing fields (pitches) per registered participant (participant) and resident population (population) within a specific geographic area. While local ratios can be influenced by a range of factors (including planning policies, facility quality, support amenities, access, user activities), they do provide a general comparative guide to provision and usage levels and highlight potential areas for more detailed investigation.

## PITCH TO POPULATION RATIOS



## PITCH TO REGISTERED PARTICIPANT RATIOS



**State-wide average football registered participant to playing field ratio of 1 field to 4995 people.**

**Football's participation and growth rates have highlighted a demand requirement closer to 1 field per 4000 residents state-wide.**



# FUTURE DEMAND HOT SPOTS

## FUTURE LGA DEMAND HOT SPOTS

Forecasting specific areas of future growth and demand should be undertaken with caution as results can be influenced by a range of environmental, climatic, demographic and other football related changes (including cost of activities, program offering, access to facilities).

The SportsEye model calculates demand via a sophisticated market assessment, identifying residents of similar demographics and characteristics to the existing football participant base, and placing them on a scale of likelihood to become registered participants in the future. It takes into account the current actual take up of registrations against the local population and aggregates the data against the projected future population.

Refer to Appendix 2 for definitions and a more detailed description of LGA specific breakdowns.

However, when overlaying existing football participation rates and SportsEye demand projections, the top 10 LGA hot spots with the most potential for increasing football participation include:

- 1. Northern Beaches Council (Manly Warringah Football Association)**
- 2. Central Coast Council (Central Coast Football)**
- 3. Blacktown City Council (Blacktown District Soccer Football Association)**
- 4. Canterbury-Bankstown City Council (Canterbury District Soccer Football Association and Bankstown District Amateur Football Association)**
- 5. Sutherland Shire (Sutherland Shire Football Association)**
- 6. City of Parramatta (Granville District Soccer Football Association)**
- 7. The Hills Shire (Hills Football Association and North West Sydney Football Association)**
- 8. Wollongong City Council (Football South Coast)**
- 9. Penrith City Council (Nepean Football Association)**
- 10. Lake Macquarie City Council (Macquarie Football).**

# FUTURE DEMAND HOT SPOTS

## Top 20 NSW LGA future demand hot spots

Local Government Area		Predicted Population Growth 2021 – 2031	Potential market for new participants if current 3.8% state average participation rate is applied
1	Blacktown	113,624	4,318
2	Parramatta	81,071	3,081
3	Liverpool	77,127	2,931
4	The Hills Shire	71,916	2,733
5	Canterbury-Bankstown	67,669	2,571
6	Cumberland	63,129	2,399
7	Penrith	61,730	2,346
8	Camden	52,425	1,992
9	Ryde	41,305	1,570
10	Central Coast	39,396	1,497
11	Campbelltown	32,314	1,228
12	Bayside	30,455	1,157
13	City of Sydney	29,867	1,135
14	Inner West	25,363	964
15	Wollongong	23,862	907
16	Fairfield	22,700	863
17	Burwood	19,182	729
18	Georges River	18,460	701
19	Sutherland Shire	17,901	680
20	Canada Bay	17,593	669
TOTAL		907,089	34,469





# FUTURE DEMAND HOT SPOTS

**Top 10 Northern NSW LGA future demand hot spots**

Local Government Area		Predicted Population Growth 2021 – 2031	Potential market for new participants if current 3.8% state average participation rate is applied
1	Newcastle	14,386	547
2	Maitland	12,090	459
3	Cessnock	11,932	453
4	Lake Macquarie	10,907	414
5	Port Macquarie-Hastings	8,526	324
6	Tweed	7,176	273
7	Coffs Harbour	5,754	219
8	Port Stephens	4,715	179
9	Mid-Coast	4,221	160
10	Armidale Regional	3,750	143
<b>TOTAL</b>		<b>83,457</b>	<b>3,171</b>

**Top 10 Regional NSW LGA future demand hot spots**

Local Government Area		Predicted Population Growth 2021 – 2031	Potential market for new participants if current 3.8% state average participation rate is applied
1	Shoalhaven (S)	6,571	250
2	Orange (W)	4,649	177
3	Albury (R)	3,785	144
4	Queanbeyan-Palerang (C)	3,530	134
5	Wagga Wagga (R)	3,488	133
6	Bathurst Regional (W)	3,440	131
7	Dubbo Regional (W)	3,202	122
8	Goulburn Mulwaree (S)	1,465	56
9	Wingecarribee (S)	1,297	49
10	Mid-Western Regional (W)	1,047	40
<b>TOTAL</b>		<b>32,474</b>	<b>1,236</b>

(S) – Southern Branch (W) – Western Branch (R) – Riverina Branch (C) – Capital Football





# FOOTBALL FACILITY HIERARCHY





# NSW FOOTBALL FACILITY HIERARCHY

## HIERARCHY LEVELS

The NSW Football Facilities Hierarchy considers several strategic documents and planning frameworks that guide and influence the provision of sport and recreation facilities in NSW.

The competition structure of football in NSW (including the National Premier League (NPL) competition) and the governance of football in Northern NSW, metropolitan Sydney and regional NSW also play a key role in defining the relative levels and hierarchy of facilities.



The following definitions outline the purpose and context of each level of the hierarchy.

HIERARCHY LEVEL	EXAMPLE	CURRENT PROVISION	TARGET
<b>NATIONAL</b>	Bankwest Stadium McDonald Jones Stadium	2 in Sydney 1 in Newcastle	2 in Sydney 1 in Newcastle
<b>STATE HQ</b>	Valentine Sports Park Lake Macquarie Regional Football Facility	1 in Sydney 1 in Northern NSW	1 in Sydney 1 in Northern NSW
<b>NPL VENUE*</b>	Marconi Stadium (Bossley Park)	86 in Metro / Regional NSW 11 in Northern NSW	Provision to meet NPL competition structures and venue capacity needs
<b>HOMES OF FOOTBALL*</b>	Proctor Park (Bathurst District FA)	8 in Sydney 4 in Regional NSW	1 in each Metropolitan Sydney Association (16) 1 in each Regional NSW Branch (3) 1 in each Northern NSW Zone (7)
<b>LOCAL CLUB</b>	Caddies Creek Reserve (Hills Football Association)	930+ venues state-wide	Provision to meet local club requirements and service competition structures
<b>PLAYING &amp; TRAINING SPACES</b>	Charles Bean (UTS Ku-ring-gai)	14 identified in NSW facility audit currently being accessed for football	School fields, open parkland, alternative sports fields with access to areas on an as-needs-basis

\* In some instances Homes of Football and NPL Venues are (or can be) the same venue, where community and NPL activities are conducted at the same location.

# NSW FOOTBALL FACILITY HIERARCHY

## NATIONAL

Stadium facility designed to meet the elite and professional needs of NSW based clubs. This level of facility sits outside the NSW community football facility hierarchy and should be addressed via the FFA Professional Clubs and NSW Government.

## STATE HQ

Headquarters for the administration levels of football that provides a home for FNSW and NNSWF. The range and mix of facilities allows for flexible use in order to serve community football, as well as high performance and event needs. They also act as a central venue for football development and education. Venues are not club owned or controlled but managed by FNSW and NNSWF respectively.

## NPL VENUES

NPL venues provide a mix of football facilities and amenities that primarily meet the needs of user club(s) competing in NPL level competition. NPL venues will generally have multiple fields (with a main match pitch) and be capable of accommodating multiple teams.

The difference between NPL venues and Homes of Football is the likely club control and management of NPL venues, compared to the broader community, event and development focus of Homes of Football.

In some instances Homes of Football and NPL Venues are (or can be) the same venue, where community and NPL activities are conducted at the same location.

## HOMES OF FOOTBALL

Homes of Football provide a range of facilities, amenities and services that are targeted to meeting the needs of

community football within a geographical area and/or to meet metropolitan association or regional zone needs. They are best located in key population centres to improve levels of accessibility.

Homes of Football may be managed by local associations/zones or local government and be accessible to the broader football community. Having a professional level of management and oversight promotes a greater range of services and events and helps to ensure venue sustainability.

Facilities and amenities at Homes of Football are provided to a higher standard to service the mix of use. They are also viewed as football development centres that also have a centralised administration and service delivery role for their given region or football area.

They are provided in both metropolitan and regional areas, however their geographical catchment in regional or rural settings will be larger than in metropolitan areas or major population centres.

## LOCAL CLUB

Local Clubs will form the majority of community football hierarchy in NSW. They are generally provided for individual clubs and their activities and could also be provided within schools. They are commonly shared with other sports and seasonal users.

Local clubs facilitate access to the game in individual localities and communities across NSW and primarily serve neighbourhood

catchment areas in larger population centres and individual townships in regional and rural settings.

The local club network, in association with local government, will be responsible for the provision, use and development of local club facilities.

## PLAYING AND TRAINING SPACES

Playing spaces are generally unformed or informal areas of green / open space used for training and kick-about activities. Many of these spaces are not bookable and not managed to a level suitable of providing competition football activities and are mainly used for additional training venues.

School fields, open spaces and alternative sports fields also fall into this category and may provide more formalised playing areas than can be bookable.







# NSW FOOTBALL FACILITY HIERARCHY

The following tables provide an overview of the general levels of activity and facility / amenity provision expected within each level of the NSW Football Facility Hierarchy. Details within these tables should be used as a guide to plan new and develop existing venues but should not be used as a definitive criteria to be provided across every existing venue within the NSW facility network.

HIERARCHY LEVEL	EXAMPLE VENUES	KEY FOOTBALL ACTIVITIES	FUNDAMENTAL FACILITIES
<b>NATIONAL</b>	<ul style="list-style-type: none"> <li>Bankwest Stadium</li> <li>McDonald Jones Stadium</li> </ul>	<ul style="list-style-type: none"> <li>A-League team training and matches</li> <li>W-League team training and matches</li> <li>Visiting team / club / high performance training</li> <li>NPL grand final</li> </ul>	<ul style="list-style-type: none"> <li>As per A-League / W-League stadium requirements</li> </ul>
<b>STATE HQ</b>	<ul style="list-style-type: none"> <li>Valentine Sports Park</li> <li>Lake Macquarie Regional Football Facility</li> </ul>	<ul style="list-style-type: none"> <li>Representative football</li> <li>Under and over age state team training</li> <li>Football development and education centre</li> <li>Coach and referee development and education</li> <li>NPL club and team competition</li> <li>Community and school football competition</li> <li>Regional, State, National carnivals and events</li> <li>Social football competitions and casual hire</li> <li>Football Administration</li> <li>Onsite management presence</li> <li>FFA, FNSW, NNSWF programming</li> </ul>	<ul style="list-style-type: none"> <li>NPL competition capable</li> <li>Multiple full-size floodlit pitches (minimum 4)</li> <li>Mix of grass and synthetic pitches</li> <li>Small-sided and/or indoor pitches</li> <li>Players and referee change rooms</li> <li>Medical amenities</li> <li>Office, meeting and education accommodation</li> <li>Commercial café</li> <li>Spectator amenities and viewing</li> <li>Event capacity / temporary overlay capacity</li> <li>Dedicated car parking for 200+</li> <li>Access to fitness facilities</li> </ul>
<b>NPL VENUES</b>	<ul style="list-style-type: none"> <li>Marconi Stadium (Bossley Park)</li> </ul>	<ul style="list-style-type: none"> <li>NPL club and team competition</li> <li>Local finals venue</li> <li>Community events</li> <li>Community football competition (potential)</li> <li>Football program delivery (potential)</li> </ul>	<ul style="list-style-type: none"> <li>NPL competition capable</li> <li>Multiple full-size floodlit pitches (desirable 1-3)</li> <li>Mix of pitches surfaces and sizes (could be more than minimum pitches in regional settings)</li> <li>Players and referee change rooms</li> <li>First-aid and medical amenities</li> <li>Canteen / Kiosk (permanent)</li> <li>Spectator amenities and viewing</li> <li>Media and broadcast capabilities</li> <li>Dedicated car parking for 150 (estimated)</li> <li>Access to fitness facilities (desirable)</li> </ul>



# FOOTBALL FACILITY HIERARCHY

HIERARCHY LEVEL	EXAMPLE VENUES	KEY FOOTBALL ACTIVITIES	FUNDAMENTAL FACILITIES
<b>HOMES OF FOOTBALL</b>	<ul style="list-style-type: none"> <li>Proctor Park, Bathurst District FA</li> <li>Christie Park, North West Sydney FA</li> </ul>	<ul style="list-style-type: none"> <li>Representative football</li> <li>Football, coach, referee development centre</li> <li>NPL club and team competition</li> <li>Community and school football competition</li> <li>Regional finals venue</li> <li>Regional carnivals and events</li> <li>Social football competitions and casual hire</li> <li>Association / Zone administration</li> <li>Onsite management presence</li> <li>Football program delivery</li> <li>Entry level football activities</li> </ul>	<ul style="list-style-type: none"> <li>NPL competition capable</li> <li>Multiple full-size floodlit pitches (desirable 3-4)</li> <li>Mix of grass and synthetic pitches</li> <li>Players and referee change rooms</li> <li>Medical amenities</li> <li>Office, meeting and education accommodation</li> <li>Café / kiosk</li> <li>Spectator amenities and viewing</li> <li>Event capacity / temporary overlay capacity</li> <li>Dedicated car parking for 200 (estimated)</li> </ul>
<b>LOCAL CLUB</b>	<ul style="list-style-type: none"> <li>Caddies Creek Reserve (Hills Football Association)</li> </ul>	<ul style="list-style-type: none"> <li>Community football training and competition</li> <li>School football use</li> <li>Football program delivery</li> <li>Entry level football activities</li> </ul>	<ul style="list-style-type: none"> <li>Floodlit pitch(es) (minimum 1-2)</li> <li>Mix of full-size and small-sided pitches</li> <li>Players and referee change rooms</li> <li>Canteen / Kiosk</li> <li>Dedicated car parking for 60-80 (estimated)</li> </ul>
<b>PLAYING &amp; TRAINING SPACES</b>	<ul style="list-style-type: none"> <li>Charles Bean (UTS Ku-ring-gai)</li> </ul>	<ul style="list-style-type: none"> <li>Community football training</li> <li>Social football activities</li> <li>School football activities (if at school sites)</li> <li>Entry level football activities</li> <li>Unrestricted community access and use</li> </ul>	<ul style="list-style-type: none"> <li>Access to grassed or multi-use area</li> <li>Access to toilets / water</li> </ul>

*\*Note: Specific sizes, dimensions and other prescribed minimum or required levels of infrastructure provision are purposely not provided within these hierarchy tables. This level of detail is represented within local area and association competition rules and state-wide NPL match requirements. More detail on recommended provision levels and technical information is also available from the NSW Football Facilities Unit website at <https://footballfacilities.com.au/facility-guides> and via the range of Facility Guides outlined on Page 22 of this Strategy.*







# STRATEGY IMPLEMENTATION





# WHY INVEST IN FOOTBALL?

Football is big and has been getting bigger over the past decade. We are now the largest team sport in Australia for participants. However, the levels of investment into community football infrastructure across the State have not been able to keep pace with this growth. As a result we are falling behind and the experience of new and long serving participants is being diminished as our facilities age and deteriorate. The investment, the preparation and the in-depth analysis of this Strategy demonstrates Football's commitment to making a difference. It shows our desire and aspirations to create better outcomes for communities and football alike.

## WHY FOOTBALL IS THE SPORT WORTH INVESTING IN

### TO SUPPORT THE CONTINUED GROWTH OF AUSTRALIA'S LARGEST FOOTBALL CODE

With 272,970 registered competitions players and 11% growth over the past five years we will soon run out of spaces and places to play. Many venues are at capacity and clubs are turning away players due to spatial constraints and the inability of grounds to cater for increased use. We estimate that 25-30% of existing ground capacity is lost due to the condition, age and performance of playing pitch infrastructure. We could fill the equivalent of 500 extra pitches a week through current and unmet demand for football, we just don't have access to the quality spaces we need.

### WE ARE WILLING TO INVEST AND PARTNER

Football NSW and Northern NSW Football have recently supported and invested into a range of facility funding programs, designed to leverage greater levels of investment into football facility projects. We will continue to do this via state and local government facility funds, as we see investment into the facilities and venues we use as a shared responsibility. Football has also secured a range of technical and supply partners that can assist in developing projects, from site assessment to design and through to construction.

Our partners understand what we need, they know we need to manage expectations and best of all, they know we need to manage project costs so we can collectively achieve more with less. The resourcing of the Facilities & Advocacy Unit is also an ongoing commitment to investing in and support the sport moving forward.

### WE PROVIDE STRONG LEADERSHIP

The NSW Facilities & Advocacy Unit is one of the few of its kind at state sporting body level. It combines the collective experience and resources of both FNSW and NNSWF and provides strong advocacy and leadership across the government sector and to the broader football community.

The development of education resources, securing of technical and industry partners and the alignment of objectives through this Strategy demonstrates our capacity to deliver and work in partnership with our stakeholders to provide the best advice.

### TO BETTER MANAGE NEEDS OVER WANTS

The individual outcomes and 'wish lists' of the 938 community football venues was not the focus of the NSW Football Infrastructure Strategy.

Providing a collective voice for the 'whole of football needs' across NSW is the outcome we are trying to achieve, by strategically targeting issues and challenges

that if addressed, will have the greatest positive impact on football as a sport.

Providing a state-wide framework and associated actions that respond to the detailed analysis of the extensive data we have collected and collated provides clear direction for what is needed. Localised priorities and needs can all be assessed under this framework and collectively we can work from the ground up to all contribute to broader needs of football facilities.

### WE DELIVER SOCIAL, COMMUNITY AND ECONOMIC BENEFITS

Football clubs play an ever increasing and important role in connecting communities and promoting active lifestyles. Football as a sport encourages social inclusion, promotes diversity of culture and multi-cultural engagement and provides numerous opportunities to participate in a vast range of programs and activities, all aimed at connecting and developing people.

Independent research conducted in 2018 further identified that football contributes more than \$515 million per annum in economic benefits and \$4.55 million per annum in community health benefits to the state of NSW. This was a 23% increase from 2015 figures. With continued growth in the sport across the State, it can be expected that these figures will only continue to escalate, demonstrating the significant impact football has on the NSW community.

# STRATEGY IMPLEMENTATION

## ACTIVE CAMPAIGNS AND CRITICAL ACTIONS

State-wide infrastructure priorities and areas of focus have been allocated a level of priority based on their relative impact on delivering the desired outcomes for football and the football community across NSW.

The level of priority should be used to inform all stakeholders of the relative importance of each identified action.

To support the achievement of proposed strategic objectives and to ensure the high priority needs of football in NSW can be met in the future, **Six Active Campaigns** have been identified to lead investment advocacy.



Active campaigns have been created to help generate awareness of football infrastructure challenges and to promote the need for shared resources to address the challenges ahead. Addressing critical actions should be a key focus for the NSW Facilities & Advocacy Unit.

**Key deliverables have also been identified within each Active Campaign. Critical Actions are those deemed to have a significant impact on ongoing service delivery and without achievement, other recommended actions within the strategy cannot be progressed or will be severely hindered in their implementation. They are identified in the adjacent table.**

The key deliverables are identified as the highest priorities and should form the focus of Football NSW and Northern NSW Football resource allocation and advocacy. They have also been identified due to their strong alignment with the four key principles of the strategic framework: **Accessibility, Innovative, Inclusive and Sustainable.**

A summary table of Active Campaigns and Key Deliverables is provided on the following page.

## CRITICAL ACTIONS

1	Provide leadership to stakeholders on facility planning and renewal through provision of current Football NSW and NNSW Football participation data and community football on-field and off-field venue condition information.
2	Support players, officials and referees of all genders by prioritising and supporting the upgrade and development of facilities at sites with identified female participation.
3	Partner with identified stakeholders including, but not limited to, Federal, State and Local government, Football Associations and clubs to contribute expertise and leverage funding to support football infrastructure initiatives.
4	Collaborate with developers, growth area Councils, State Government, commercial partners and other sports on future football facility provision to guide precinct structure planning in new, growing and established communities.
5	Deliver a consistent and united football message through club, association and state body communications.
6	Identify key strategic facilities and locations where association or zone homes of football can deliver more streamlined localised services to the entire regional NSW football community.



# ACTIVATION CAMPAIGNS

ACTIVE CAMPAIGN	CAMPAIGN OBJECTIVE	CAMPAIGN DELIVERABLES
<b>FACILITIES FUND</b> <ul style="list-style-type: none"> <li>• <b>Football NSW – Let’s Light Up Football</b></li> <li>• <b>Northern NSW Football – Facilities Fund</b></li> </ul>	<p>Increase the availability of playing field lighting to increase the capacity, safety and user experience across the facility network and support improvements and innovation in lighting technology.</p> <p>The Program aims to improve football facilities for a variety of benefits including increasing participation, improving safety and security, assisting in building stronger communities through football and improving the overall football experience for all stakeholders.</p>	<ul style="list-style-type: none"> <li>• Increase the quality of pitch lighting levels to Australian Standards</li> <li>• Increase the number of playing and training fields with lighting</li> <li>• Introduce more LED lighting across the NSW facility network</li> <li>• Significantly increase the presence of females throughout the sport.</li> <li>• Address the reasons within the game’s control which are influencing why players are not being retained.</li> <li>• Increase the number of community football facilities that are fit for purpose.</li> </ul>
<b>10% MORE</b>	Seek to achieve 10% more capacity across the NSW playing pitch network to accommodate projected growth in use via the improvement of surface quality, drainage and irrigation projects.	<ul style="list-style-type: none"> <li>• Increase education on the importance of pitch drainage and irrigation</li> <li>• Investigate preferred suppliers that can assist in the assessment, planning and implementation of ground renovation projects</li> <li>• Support ground assessment, renovation and rejuvenation projects</li> </ul>
<b>SUSTAINABLE SYNTHETICS</b>	Implement synthetic turf pitches in key strategic locations with sustainable management models to help build regional playing field capacity, improve access to development programs and support Association and Zone operations.	<ul style="list-style-type: none"> <li>• Increase the number of FIFA Quality synthetic pitches</li> <li>• Improve financial sustainability of existing synthetic pitches</li> </ul>
<b>FACILITIES FOR ALL</b>	Deliver new, improved, innovative and gender neutral facilities and amenities that specifically address the gaps in supporting female football and other forms of participation by under-represented groups.	<ul style="list-style-type: none"> <li>• Increase the number of gender neutral player and match official change room amenities</li> <li>• Promote shared facility design models for facilities that deliver flexible use and access for community sport</li> <li>• Identify opportunities to use a mix of built-form and modular solutions to meet a range of budgets</li> </ul>
<b>EXPANDING FOOTBALL’S FOOTPRINT</b>	Target key land development areas and precinct structure plans to have facilities suitable for football planned and delivered as part of public open space provision. Identify sporting facilities that are under-utilised and partner with alternate sports and venue operators to introduce football into multi-sport environments.	<ul style="list-style-type: none"> <li>• Engage with planners, developers and commercial sector to identify future sites for football</li> <li>• Identify potential Home of Football locations, partners and investment opportunities</li> <li>• Create opportunities to access more shared school based facilities for football use</li> <li>• Create opportunities to develop multi-sport playing fields in collaboration with other sports and venue operators (full-size and modified fields)</li> </ul>
<b>UP SKILL</b>	Implement a range of football staff and community training initiatives to improve volunteer capacity and education around football facility planning and development (e.g. fact sheets, project planning, grants guide).	<ul style="list-style-type: none"> <li>• Continue to enhance, develop and promote facility planning and guidance materials to the football community and government network</li> <li>• Conduct ongoing training on digital platforms (SFA-Football, SportsEye) for Association and Zone representatives</li> <li>• Develop stakeholder engagement framework to drive better communications between football and government</li> </ul>

# AREAS OF FOCUS

## IDENTIFYING THE IMPORTANCE OF FOCUS AREAS

The proposed state-wide infrastructure Areas of Focus have been allocated a level of priority based on their relative impact on delivering the desired outcomes for Football NSW and Northern NSW Football and its stakeholders.

The level of priority should be used to inform all stakeholders involved in the delivery and use of football infrastructure of the relative importance of each identified action.

A description of each action priority level is provided below:

### HIGH (H)

Recommended action that significantly contributes to addressing an issue or challenge identified within the strategy and will lead to overall service delivery improvement. They may also be viewed as actions requiring immediate or short-term commencement.

### MEDIUM (M)

Recommended action that contributes to meeting overall strategy objectives and delivers a positive change to user or stakeholder experiences. They may also be viewed as actions that may become a higher priority over the next three to five years.

### LOW (L)

Recommended action that contributes to addressing site specific challenges or actions that provide benefit to a single stakeholder group. They may also be viewed as medium to longer-term actions.

### ONGOING (O)

Recommended action that requires a change in FNSW or NNSWF and/or stakeholder service delivery and requires an ongoing commitment to implementation.







## AREAS OF FOCUS

### IMPROVE EXISTING VENUE CAPACITY

Maximise the safety, carrying capacity and activation of existing football grounds and venues

#### AREAS OF FOCUS

H	1.1 Maintain SFA-Football and SportsEye use and data in conjunction with clubs, associations and councils.
H	1.2 Increase pitch lighting levels and introduce more LED lighting.
M	1.3 Increase synthetic and hybrid surface provision.
H	1.4 Increase industry education on the importance of pitch drainage and irrigation.
O	1.5 Engage associations and councils in venue and resource allocation to match capacity.
O	1.6 Monitor ground closure impact.
M	1.7 Support preferred suppliers to assist with site investigations and capital projects including pitch renovations (inc. drainage, irrigation, surfaces), synthetic surfaces, lighting, player benches, scoreboards, goal posts provision.

# AREAS OF FOCUS

## INCLUSIVE FOOTBALL FACILITIES

Support diversity of game formats and participants through inclusive facilities

### AREAS OF FOCUS

H	2.1 Increase and improve gender neutral player and match official change room provision.
H	2.2 Identify practical shared and multi-use design models for built facilities with alternate and compatible sports.
H	2.3 Create an amenities guide that promotes universal and gender neutral design principles and related information on building and site planning for inclusive football activities.
M	2.4 Identify opportunities for shared school based facility models.
M	2.5 Identify opportunities to collaborate with other 'outdoor pitch sports' to unlock investment for multi-sport venues.

## HOMES OF FOOTBALL

Improve access to football programs, pathways and development services

### AREAS OF FOCUS

M	3.1 Establish a minimum of one Home of Football per football catchment area (regional branch, association, zone).
M	3.2 Identify potential Home of Football locations and their type of focus (football, multi-sport, community).
M	3.3 Develop a core service program and preferred facility and amenity requirements for Homes of Football (including event capacity).
M	3.4 Identify business and management plan objectives for Homes of Football.
H	3.5 Prepare case studies for successfully operating Homes of Football for promotion.
M	3.6 Identify land, investment and partnership opportunities for new Homes of Football development.



## PLANNING FOR GROWTH AND DEMAND

Plan to maximise participation through new and innovative venue opportunities

### AREAS OF FOCUS

H	4.1 Engage with planners, developers, NSW Government and commercial sector to identify future sites for footballs current needs and long-term requirements.
O	4.2 Identify flexible facility designs that address evolving community needs and uses.
H	4.3 Develop sustainable football model venue designs and land area requirements to support precinct structure planning.
O	4.4 Support satellite venue management of new venues via the existing club network (maximising and streamlining volunteer resources).
O	4.5 Advocate for football through offering expertise (or review) of site master plans and precinct structure plans.
O	4.6 Continue to identify sites not yet accessed by football, where capacity may exist for future use (e.g. school sites, multi-sport sites).
H	4.7 Continue to use data driven techniques to ensure there are enough facilities in the right locations to meet football's current needs and long-term aspirations.

## PARTNERSHIPS AND INVESTMENT

Develop and maintain relationships with all levels of government and industry partners

### AREAS OF FOCUS

H	5.1 Develop a Stakeholder Engagement Framework that, when applied, builds relationships with all levels of local and state government and is implemented by football associations, zones and regional branches.
O	5.2 Promote the NSW Football Facility Hierarchy to demonstrate venue priorities over 'desirable amenities'.
O	5.3 Develop relationships with partners that will better position football in NSW as a key influencer in sports facility provision and policy development (e.g. Sport NSW, Office of Sport, Local Councils).
M	5.4 In conjunction with facility and sport partners (e.g. Tennis NSW, Bowls NSW), identify opportunities for small-sided football / futsal facility provision
O	5.5 Continue to develop internal investment capacity within FNSW and NNSWF to support and contribute to state and local government facility initiatives and funding programs.
M	5.6 Continue to deliver a program of state-wide facility planning, advisory and education forums.
O	5.7 Continue to provide and develop facility planning and guidance materials to facility providers and landowners.
H	5.8 Make available and conduct training for associations / zones on SportsEye and SFA-Football tools.
H	5.9 Share football data with local government to drive and guide football's needs locally and to embed accurate data into local area planning.

# MEASURING SUCCESS

## MONITORING AND EVALUATION

Formal evaluation of strategic priorities, active campaigns and critical actions by Football NSW, Northern NSW Football and partners will be required to ensure ongoing and consistent alignment with government and regional objectives.

The data platforms provided through Sports Facility Auditor – Football and SportsEye provide for the ongoing updating of data and information and should be used as a consistent source to inform evaluation methodologies.

Evaluation of strategic outcomes should also identify key success and overall benefits for football and the communities in which it is played. The following monitoring and review process will be led by Football NSW and Northern NSW Football to ensure the NSW Football Infrastructure Strategy and associated Football Area Summaries remain relevant for all stakeholders.

## IMPLEMENTATION CHALLENGES

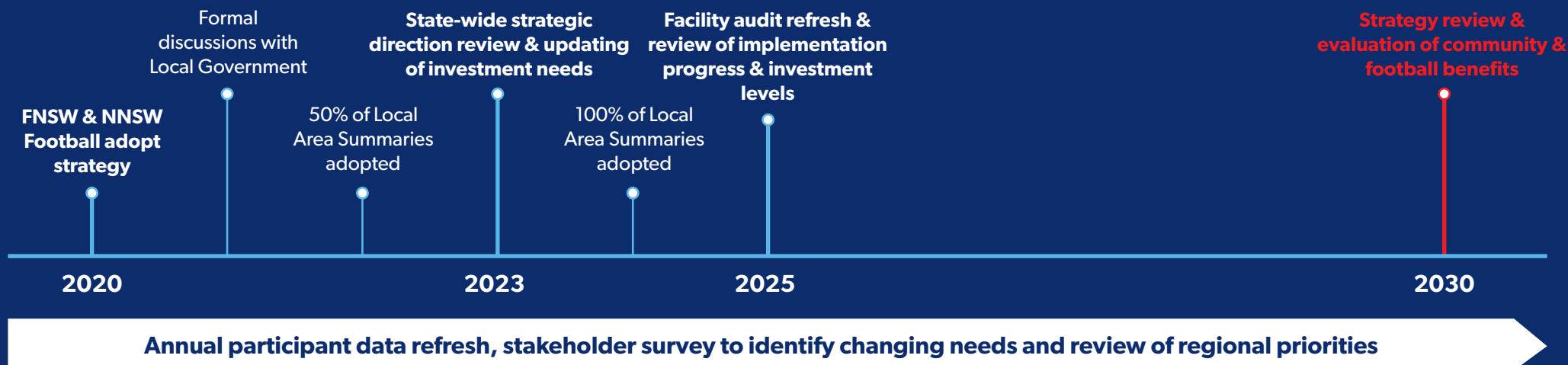
Football understands the funding constraints within the public sector and fully appreciates the challenging financial climate and competing priorities that all local government authorities delicately balance in each and every local community.

State and local governments face a difficult task in allocating finite funding in an equitable manner with health, education, transport and aged care just a sample of the important services required in any community setting.

While the long-term health benefits of providing communities with places and facilities that encourage active lifestyles are well known, the initial financial outlay to construct football facilities is significant. A long community health pay back period combined with a typically discounted tenancy and maintenance responsibilities can detract from football investments in sports fields and gender neutral change rooms.

The solution therefore lies in a collaboration and engagement approach that:

- Identifies football sites requiring upgrades are eligible for joint funding, or third-party funding opportunities.
- Prioritise opportunities and upgrades based on participation rates and demand within specific sites to achieve the best community outcomes.







# APPENDICES



# APPENDIX 1

## Summary of all 2019 Local Government Area registered participants and participation rates.

#	Local Government Area	Registered Winter Players 2019	% Football Participation rate by population	Football Region
1	Sutherland Shire	18,864	8.6%	FNSW Metro
2	Northern Beaches	17,488	6.9%	FNSW Metro
3	Central Coast	14,501	4.4%	FNSW Metro
4	Blacktown	10,779	3.2%	FNSW Metro
5	Canterbury-Bankstown	10,343	3.0%	FNSW Metro
6	Lake Macquarie	10,040	5.1%	Northern NSW
7	Wollongong	8,712	4.3%	FNSW Metro
8	Newcastle	8,694	5.6%	Northern NSW
9	The Hills Shire	8,680	5.5%	FNSW Metro
10	Hornsby	7,783	5.5%	FNSW Metro
11	Parramatta	7,075	3.1%	FNSW Metro
12	Inner West	6,989	3.8%	FNSW Metro
13	Penrith	6,929	3.5%	FNSW Metro
14	Ku-ring-gai	6,489	5.5%	FNSW Metro
15	Liverpool	5,635	2.8%	FNSW Metro
16	Ryde	5,333	4.6%	FNSW Metro
17	Georges River	5,291	3.6%	FNSW Metro
18	Bayside	4,719	3.0%	FNSW Metro
19	Campbelltown	4,435	2.8%	FNSW Metro
20	Cumberland	4,383	2.0%	FNSW Metro
21	Camden	4,339	5.5%	FNSW Metro

#	Local Government Area	Registered Winter Players 2019	% Football Participation rate by population	Football Region
22	Randwick	3,736	2.7%	FNSW Metro
23	Maitland	3,464	4.5%	Northern NSW
24	Willoughby	3,280	4.4%	FNSW Metro
25	Shoalhaven	3,160	3.2%	Southern Branch
26	Mid-Coast	3,140	3.5%	Northern NSW
27	Canada Bay	3,078	3.5%	FNSW Metro
28	Fairfield	2,992	1.5%	FNSW Metro
29	Blue Mountains	2,950	3.8%	FNSW Metro
30	Port Macquarie-Hastings	2,704	3.4%	Northern NSW
31	Sydney	2,658	1.3%	FNSW Metro
32	Hawkesbury	2,600	4.0%	FNSW Metro
33	Port Stephens	2,474	3.6%	Northern NSW
34	Coffs Harbour	2,423	3.3%	Northern NSW
35	Wagga Wagga	2,253	3.6%	Riverina Branch
36	Shellharbour	2,235	3.3%	FNSW Metro
37	Dubbo Regional	2,233	4.5%	Western Branch
38	Wollondilly	2,220	4.6%	FNSW Metro
39	Tamworth Regional	2,209	3.7%	Northern NSW
40	Ballina	2,140	5.1%	Northern NSW
41	North Sydney	1,963	2.9%	FNSW Metro
42	Lismore	1,962	4.5%	Northern NSW



# APPENDIX 1

#	Local Government Area	Registered Winter Players 2019	% Football Participation rate by population	Football Region
43	Cessnock	1,935	3.5%	Northern NSW
44	Bathurst	1,880	4.6%	Western Branch
45	Lane Cove	1,801	5.0%	FNSW Metro
46	Orange	1,718	4.3%	Western Branch
47	Waverley	1,693	2.5%	FNSW Metro
48	Clarence Valley	1,630	3.2%	Northern NSW
49	Byron	1,600	5.1%	Northern NSW
50	Wingecarribee	1,581	3.3%	Southern Branch
51	Albury	1,309	2.6%	Riverina Branch
52	Armidale Regional	1,264	4.3%	Northern NSW
53	Kempsey	1,078	3.7%	Northern NSW
54	Griffith	1,077	4.2%	Riverina Branch
55	Mosman	1,046	3.7%	FNSW Metro
56	Bega Valley	1,032	3.1%	Southern Branch
57	Goulburn Mulwaree	940	3.2%	Southern Branch
58	Eurobodalla	930	2.5%	Southern Branch
59	Woollahra	893	1.6%	FNSW Metro
60	Kiama	878	4.1%	FNSW Metro
61	Burwood	835	2.3%	FNSW Metro
62	Tweed	794	0.9%	Northern NSW
63	Hunters Hill	792	5.7%	FNSW Metro
64	Mid-Western Regional	716	3.0%	Western Branch

#	Local Government Area	Registered Winter Players 2019	% Football Participation rate by population	Football Region
65	Strathfield	692	1.7%	FNSW Metro
66	Singleton	679	3.0%	Northern NSW
67	Cabonne	569	4.3%	Western Branch
68	Parkes	556	3.8%	Western Branch
69	Richmond Valley	554	2.4%	Northern NSW
70	Lithgow	522	2.5%	Western Branch
71	Hilltops	514	2.8%	Southern Branch
72	Bellingen	510	4.0%	Northern NSW
73	Gunnedah	500	4.1%	Northern NSW
74	Nambucca	471	2.4%	Northern NSW
75	Dungog	467	5.2%	Northern NSW
76	Narrabri	464	3.5%	Northern NSW
77	Inverell	392	2.3%	Northern NSW
78	Forbes	339	3.5%	Western Branch
79	Muswellbrook	337	2.1%	Northern NSW
80	Blayney	327	4.5%	Western Branch
81	Moree Plains	327	2.5%	Northern NSW
82	Liverpool Plains	317	4.1%	Northern NSW
83	Cowra	316	2.5%	Western Branch
84	Cootamundra-Gundagai	300	2.7%	Riverina Branch
85	Kyogle	252	2.8%	Northern NSW
86	Upper Hunter Shire	242	1.7%	Northern NSW

# APPENDIX 1

#	Local Government Area	Registered Winter Players 2019	% Football Participation rate by population	Football Region
87	Uralla	216	3.6%	Northern NSW
88	Snowy Valleys	215	1.5%	Riverina Branch
89	Glen Innes Severn	214	2.4%	Northern NSW
90	Upper Lachlan Shire	162	2.1%	Southern Branch
91	Narromine	160	2.5%	Western Branch
92	Oberon	140	2.6%	Western Branch
93	Junee	123	2.0%	Riverina Branch
94	Weddin	110	3.0%	Western Branch
95	Leeton	107	1.0%	Riverina Branch
96	Temora	106	1.7%	Riverina Branch
97	Lachlan	103	1.6%	Western Branch
98	Warrumbungle Shire	97	1.0%	Western Branch
99	Greater Hume Shire	95	0.9%	Riverina Branch
100	Cobar	93	2.0%	Western Branch
101	Tenterfield	77	1.1%	Northern NSW
102	Coonamble	71	1.8%	Western Branch
103	Bourke	69	2.6%	Western Branch
104	Warren	57	2.1%	Western Branch
105	Walcha	56	1.8%	Northern NSW
106	Gilgandra	51	1.2%	Western Branch
107	Bogan	48	1.8%	Western Branch
108	Coolamon	44	1.0%	Riverina Branch

#	Local Government Area	Registered Winter Players 2019	% Football Participation rate by population	Football Region
109	Gwydir	38	0.7%	Northern NSW
110	Narrandera	24	0.4%	Riverina Branch
111	Edward River	20	0.2%	Riverina Branch
112	Federation	19	0.2%	Riverina Branch
113	Lockhart	16	0.5%	Riverina Branch
114	Carrathool	15	0.6%	Riverina Branch
115	Queanbeyan-Palerang	13	0.1%	Capital Football
116	Bland	11	0.2%	Western Branch
117	Murrumbidgee	11	0.3%	Riverina Branch
118	Walgett	9	0.1%	Western Branch
119	Yass Valley	8	0.1%	Capital Football
120	Brewarrina	7	0.4%	Western Branch
121	Snowy Monaro	5	0.0%	Capital Football
122	Berrigan	1	0.0%	Riverina Branch
123	Central Darling	1	0.1%	Western Branch
124	Hay	1	0.0%	Riverina Branch
125	Balranald	0	0.0%	Riverina Branch
126	Broken Hill	0	0.0%	Western Branch
127	Murray River	0	0.0%	Riverina Branch
128	Wentworth	0	0.0%	Riverina Branch
129	Unincorporated NSW	0	0.0%	Western Branch



## APPENDIX 2

**Summary of future 2021-2031 participation demand projections by Local Government Area based on current 3.8% state participation rate, applied to 2031 projected population figures.**

Local Government Area		Predicted Population Growth 2021 – 2031	Potential market for new participants if current 3.8% state average participation rate is applied
1	Blacktown	113,624	4,318
2	Parramatta	81,071	3,081
3	Liverpool	77,127	2,931
4	The Hills Shire	71,916	2,733
5	Canterbury-Bankstown	67,669	2,571
6	Cumberland	63,129	2,399
7	Penrith	61,730	2,346
8	Camden	52,425	1,992
9	Ryde	41,305	1,570
10	Central Coast	39,396	1,497
11	Campbelltown	32,314	1,228
12	Bayside	30,455	1,157
13	Sydney	29,867	1,135
14	Inner West	25,363	964
15	Wollongong	23,862	907
16	Fairfield	22,700	863
17	Burwood	19,182	729
18	Georges River	18,460	701
19	Sutherland Shire	17,901	680
20	Canada Bay	17,593	669
21	Strathfield	17,430	662

Local Government Area		Predicted Population Growth 2021 – 2031	Potential market for new participants if current 3.8% state average participation rate is applied
22	Randwick	16,567	630
23	Newcastle	14,386	547
24	Ku-ring-gai	13,605	517
25	Wollondilly	12,241	465
26	Northern Beaches	12,206	464
27	Maitland	12,090	459
28	Cessnock	11,932	453
29	Lake Macquarie	10,907	414
30	Shellharbour	10,079	383
31	Hornsby	9,397	357
32	Willoughby	9,200	350
33	Hawkesbury	8,788	334
34	North Sydney	8,644	328
35	Port Macquarie-Hastings	8,526	324
36	Tweed	7,176	273
37	Shoalhaven	6,571	250
38	Coffs Harbour	5,754	219
39	Lane Cove	4,729	180
40	Port Stephens	4,715	179
41	Orange	4,649	177
42	Mid-Coast	4,221	160

## APPENDIX 2

Local Government Area		Predicted Population Growth 2021 – 2031	Potential market for new participants if current 3.8% state average participation rate is applied
43	Albury	3,785	144
44	Armidale Regional	3,750	143
45	Queanbeyan-Palerang	3,530	134
46	Wagga Wagga	3,488	133
47	Bathurst Regional	3,440	131
48	Tamworth Regional	3,394	129
49	Dubbo Regional	3,202	122
50	Byron	2,077	79
51	Ballina	2,011	76
52	Goulburn Mulwaree	1,465	56
53	Wingecarribee	1,297	49
54	Kiama	1,294	49
55	Mid-Western Regional	1,047	40
56	Waverley	909	35
57	Griffith	899	34
58	Muswellbrook	856	33
59	Blue Mountains	845	32
60	Woollahra	819	31
61	Leeton	573	22
62	Nambucca	569	22
63	Murray River	426	16
64	Richmond Valley	360	14
65	Yass Valley	350	13
66	Greater Hume Shire	334	13

Local Government Area		Predicted Population Growth 2021 – 2031	Potential market for new participants if current 3.8% state average participation rate is applied
67	Balranald	327	12
68	Clarence Valley	318	12
69	Upper Lachlan Shire	302	11
70	Forbes	235	9
71	Mosman	220	8
72	Dungog	169	6
73	Cabonne	165	6
74	Bogan	143	5
75	Inverell	128	5
76	Cowra	126	5
77	Gunnedah	117	4
78	Berrigan	106	4
79	Blayney	95	4
80	Bellingen	70	3
81	Oberon	68	3
82	Coolamon	57	2
83	Singleton	50	2
84	Temora	37	1
85	Lockhart	-13	0
86	Parkes	-13	0
87	Bourke	-22	-1
88	Hunters Hill	-58	-2
89	Central Darling	-92	-3



## APPENDIX 2

Local Government Area		Predicted Population Growth 2021 – 2031	Potential market for new participants if current 3.8% state average participation rate is applied
90	Murrumbidgee	-97	-4
91	Bland	-101	-4
92	Unincorporated NSW	-105	-4
93	Carrathool	-116	-4
94	Wentworth	-119	-5
95	Lithgow	-126	-5
96	Brewarrina	-153	-6
97	Kempsey	-164	-6
98	Gwydir	-177	-7
99	Junee	-177	-7
100	Warren	-189	-7
101	Lachlan	-193	-7
102	Walcha	-199	-8
103	Cobar	-233	-9
104	Uralla	-256	-10
105	Hay	-271	-10
106	Bega Valley	-295	-11
107	Narrabri	-303	-12
108	Coonamble	-306	-12
109	Edward River	-312	-12
110	Weddin	-336	-13
111	Narrandera	-375	-14
112	Walgett	-397	-15

Local Government Area		Predicted Population Growth 2021 – 2031	Potential market for new participants if current 3.8% state average participation rate is applied
113	Liverpool Plains	-426	-16
114	Gilgandra	-433	-16
115	Tenterfield	-447	-17
116	Narromine	-556	-21
117	Upper Hunter Shire	-579	-22
118	Eurobodalla	-683	-26
119	Kyogle	-686	-26
120	Cootamundra-Gundagai	-717	-27
121	Hilltops	-799	-30
122	Lismore	-805	-31
123	Federation	-806	-31
124	Warrumbungle Shire	-836	-32
125	Snowy Valleys	-880	-33
126	Glen Innes Severn	-892	-34
127	Snowy Monaro Regional	-1,019	-39
128	Moree Plains	-1,291	-49
129	Broken Hill	-1,692	-64
NSW TOTAL		1,145,589	43,532

Source: NSW 2019 Population Projections provided by the NSW Government(ASGS 2019 LGA Projections)





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