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POLITICAL

FEDERAL GOVERNMENT

Federal election

The federal election was held on 21 May 2022. The Australian Labor Party won a majority government from Opposition with the largest number of seats (77). Anthony Albanese was sworn in as Prime Minister on 23 May 2022. The Australian Labor Party currently holds state and territory government in all jurisdictions except Tasmania (Liberal National Party in office)

STATE GOVERNMENT

State election

The WA Labour Party retained government following the March 2021 state election with 61% of the vote. The win provided the WA Labour Party with an additional eight seats. The Liberal Party lost two seats and the Nationals lost one seat. ([ABC news](#))

Mark McGowan led the WA Labour Party as Premier until his resignation on 2 June 2023, with Premier Roger Cook sworn in with a new cabinet on 8 June 2023. ([ABC news](#))

WA Recovery Plan

The \$5.8 billion WA Recovery Plan outlines how the state recovered from the impacts of COVID-19 to reposition itself as a thriving and innovative place to live, work, visit and do business. The plan has 21 priority streams, each underpinned by direct commitments, including investment, resourcing and programs of work. The scope is comprehensive, ranging from new technologies, local manufacturing and training for tourism, patient care and the environment. ([WA Government](#))

VenuesWest benefited from the \$300 million investment in sport and community infrastructure initiatives:

- \$1.5 million to upgrade existing lights to LED lighting at HBF Arena and HBF Stadium;
- \$1 million to install solar panels at HBF Stadium to reduce energy consumption and environmental impact;
- \$2 million for a high performance dry land diving centre at HBF Stadium; and
- \$350,000 to install permanent shade structures at outdoor pools at HBF Stadium and leisure spaces at HBF Arena.

WA job outlook

Labour force participation and unemployment rates ([Department of Jobs, Tourism, Science and Innovation](#))

- WA participation rate (the proportion of the civilian working age population (aged 15 and older) in the labour force) has been gradually declining from February 2022, and is currently 69.1% (March 2023).
- WA unemployment rate averaged 3.7% in 2021-22. The *2022-23 WA Government Midyear Financial Projections Statement* forecasted an average WA unemployment rate of 3.5% in 2022-23 and 4.0% in 2023-24. The current unemployment rate is 3.4% (March 2023).
- WA underemployment rate averaged 6.0% in 2022 and has remained steady. The current underemployment rate is 5.7% (March 2023).
- Online job advertisements have risen to the highest level since the last mining investment boom underpinned by strong economic activity. 33,127 WA jobs were advertised on SEEK, CareerOne and Australian JobSearch in March 2023.

WA Skills Summit

In 2021, the State Government in partnership with Western Australian industry leaders held the inaugural Skills Summit which was attended by more than 130 political and business leaders. The summit focused on identifying ways to attract a skilled workforce to the state and resulted in a number of initiatives aligned to the strategies discussed. ([Department of Training and Workforce Development](#))

ECONOMIC

WA ECONOMIC PERFORMANCE

WA Annual Report on State Finances 2021-22 ([WA Government](#))

- Operating surplus of \$6 billion for 2021-22, \$344 million higher than estimated 5.7 billion operating surplus estimated in the 2022-23 Budget
- Asset Investment Program totalled \$7.2 billion, the highest level of infrastructure spending since 2012-13. This includes \$19 million invested in VenuesWest infrastructure.
- Total public sector net debt on 30 June 2022 was \$29.2 billion. This outcome is \$4.3 billion lower than the level of net debt on 30 June 2021 and is the third consecutive year of declining net debt.
- The State's consistently strong financial outcomes have been recognised by S&P Global Ratings, which upgraded the State's credit rating to triple-A ('stable' outlook) in June 2022.
- Gross State Product grew from 3.25% in 2020-21 to an estimated 3.75%.

BUDGET

2022-23 Federal Budget

The [2022-23 Federal Budget](#) was released on 29 March 2022. With the unemployment rate expected to fall below 4%, the lowest in nearly 50 years, the time for emergency fiscal support has passed and the Government has transitioned to the second stage of its economic and fiscal strategy. Below are the key highlights from the document for areas directly impacting VenuesWest related industries (source is the above linked document unless otherwise specified).

Sport ([Senator the Hon Richard Colbeck media statement](#))

- \$10.6 million to Paralympics Australia to prepare and support its team for the Paris 2024 Paralympic Games
- \$10.3 million to promote and create leadership, safety, and long-term employment opportunities for women in sport to increase diversity and reduce female under-representation in sport:
 - \$6.3 million to Women Coaches Program to support over 200 coaches a year from grassroots to elite
 - \$4.1 million for Community Sport Leaders to implement women's leadership programs at a community level
- Major sporting events – the Government is investing \$10.7 million in major sporting events including:
 - \$4.4 million for the ICC T20 Men's World Cup 2022 legacy measures
 - \$3.1 million for FIFA Women's Football World Cup 2023 legacy measures
 - \$2.6 million for FIBA Women's Basketball World Cup 2022 legacy measures
 - \$400,000 for the 2023 World Transplant Games being held in Perth
- \$79.6 million to extend the Sporting Schools program for an additional two years, benefiting 2.2 million students per year.
- \$10.3 million for national sport participation programs targeted at populations which are currently physically inactive, or individuals who have 'dropped out' of sport
- \$3.4 million to continue the AusPlay survey, tracking the sport and physical activity behaviours of all Australians
- \$2.8 million for the ongoing development of the National Sport Injury Database
- \$27.3 million per year in funding for sport integrity measures, including \$7.5 million for the WADA-accredited Australian Sports Drug Testing Laboratory

Infrastructure

- Over \$2.1 billion committed to WA's infrastructure pipeline, including rail and roads projects (Prime Minister of Australia)
- \$21.1 million Priority Regional Infrastructure Investments (Budget Paper No. 2)
- \$1.69 billion toward the Perth City Deal, including \$15 million toward Edith Cowen University CBD Campus (Perth Now)

Financial

- Cash balance as a percent of GDP estimated at -3.4% for 2022-23 and halving to -1.6% by 2025-26 (actual percent in 2020-21 at -6.5% and estimated for 2021-22 at -3.5%) will flow through to lower debt
- Gross debt as a percent of GDP is expected to peak at 44.9% at 30 June 2025, then steadily drop to 40.3% by 2031-32
- Real GDP is up 3.4% compared to pre-pandemic levels, higher than all the G7 nations

2023-24 WA State Budget

The 2023-24 WA State Budget was released on the 11 May 2023. Initiatives which may impact VenuesWest are listed below. ([State Budget 2023-24](#))

Economic and Fiscal Outlook ([Fact Sheet](#))

- WA has a record 1.53 million West Australians in work, including the highest ever level of full-time employment. Unemployment rate remains low at 3.4% and is expected to remain low.
- Perth's Consumer Price Index growth is forecast to ease to 3.5% by the June 2024 quarter.
- WA Budget expected \$3.3 billion surplus in 2023-24.
- State net debt reduced by almost \$16 billion.

Economic Diversification ([Fact Sheet](#))

- \$15 million additional funding for tourism, including attracting additional major and business events to Perth.
- \$13 million to attract international students back to Perth, including marketing activities and support for accommodation and English-language training.

Cost of Living ([Fact Sheet](#))

- The 2023-24 Budget includes more than \$715 million of cost of living measures to support Western Australians.
- Capping Perth public transport fares to two zones has made travel in our suburbs cheaper, saving commuters up to thousands of dollars a year.

Taking Action on Climate Change ([Fact Sheet](#))

- The Budget invests \$3 billion to take action on climate change and achieve net zero emissions by 2050. This includes \$2.8 billion to deliver on the plan to decarbonise WA's electricity grid and replace state-owned coal-fired power stations with renewables by 2030.

Building METRONET and our Transport Future ([Fact Sheet](#))

- \$2.5 billion invested in road and rail infrastructure within this budget.
- Building 72km of new rail, with 23 new stations.

Investing in Arts, Sport and Recreation ([Fact Sheet](#))

- \$127.8 million to transform the **State Hockey Centre** into a world-class facility, following WA's bid to remain the home of hockey as the host of the Hockey Australia High Performance Program and Centre of Excellence.
- An additional \$97.9 million towards the **Perth Concert Hall** redevelopment to reinstate the venue as WA's premium cultural precinct and provide the West Australian Symphony Orchestra with a permanent home, bringing total investment in the redevelopment to \$150.3 million.
- \$55 million State Government contribution towards the **WACA's Ground Improvement** project, including construction of a new community aquatic facility.
- \$60 million set aside for the construction of the **High Wycombe Community Hub**, jointly funded with the Commonwealth.
- \$15 million increase to the **Community Sporting and Recreation Facilities Fund** to boost community participation in sport and recreation through development of sustainable and quality facilities at a local level.
- \$250 million for a new **Asset Maintenance Fund** to be allocated to the maintenance of State Government assets, including our cultural, sporting and entertainment venues.

OUTLOOK

Federal

The [Pre-election Economic and Fiscal Outlook](#) was released in April 2022, highlighting Australia's highly resilient economy throughout the pandemic. Output and employment were both back above pre-pandemic levels, with Australia avoiding the labour market scarring experienced in some other advanced economies. The economic outlook for Australia remains strong, despite significant global headwinds, including rising global inflation and the conflict in Ukraine. Real GDP (adjusted for inflation) grew by 4.25% in 2021-22, reflecting strong momentum in the labour market and a rebound in private sector activity. Continued high labour force participation, low unemployment and strengthening wages growth is expected to see real GDP grow by 3.5% in 2022-23 and 2.5% in 2023-24.

ENVIRONMENTAL SCAN

State

The state's economy grew an estimated 3.75% in 2021-22, which is the fastest rate of growth since 2013-14. Operating Surpluses are forecast in 2022-23 (\$1.6 billion) and across the entire forward estimates period. These surpluses have materially reduced the State's net debt levels, with net debt at 30 June 2022 only \$29.2 billion - \$3.4 billion lower than forecasted in the 2021-22 Mid-year Review. Western Australia's net debt is projected to peak at just 9.9% of Gross State Product in 2024-25, before declining from 2025-26.

Conservative forecasts predict a growth in Gross State Product (GSP) by approximately 2.0% in 2022-23. GSP growth is then expected to ease, reflecting the moderation in construction work on residential dwellings, as well as private and public sector investment stabilising at high levels. With the reopening of international borders, services imports (such as Western Australians travelling overseas) are expected to lift sharply over the next two years, moderating forecast growth in GSP. ([State Budget 2022-23](#))

INDUSTRY PERFORMANCE AND SUPPORT

Live entertainment

Current situation

- Live Performance Australia released their 2021 ticket Attendance and Revenue Report on 27 March 2023.
 - WA experienced growth in revenue (by 16.8% to \$85m) and in attendance (by 26.6% to 1.6m) 2020 and 2021, but still lower than the \$194m revenue with 2.6m attendance in 2019.
 - In 2021, WA spend per capita was \$30.77, the highest among all the states and territories.

Forecast for 2023-24

- PWC predicts the industry to fully recover within the forecast period (2021-2025) as venues have reopened and local and international acts return to touring.
- Total revenue for the live music sector is expected to increase steadily each year, climbing to \$2.2 billion by 2025 based on the midpoint forecasting scenario.

Arts and Culture

The Australia Council for the Arts releases regular *Audience Outlook Monitor* reports which describe changes in behaviours and sentiments of arts-goers in the wake of the COVID-19 pandemic. The Audience Outlook Monitor April 2023 Update provides the below insights. ([Australia Council for the Arts](#))

Current situation

- Audiences in all age groups are citing financial reasons as the top barrier to attending, and many are looking for free/cheap things to do (54%), staying close to home (45%) and taking longer to make decisions (50%). Rising costs are affecting families more than households without children (61%).
- With concerns about COVID-19 fading, audiences over 55 are the most likely age group to experience no barriers to attending (27%) and are spending slightly more than in August 2022.
- Most audiences continue to attend events despite cost-of-living pressures, but the profile of those attending is changing. Younger audiences are less likely to attend (67%) while older audiences are more likely (78%).
- 50% indicate both the price they are willing to pay, and the frequency of attendance has decreased.

Forecast for 2023-24

- 95% of audiences are more interested in attending fun, uplifting performances in the coming year.
- With 50% of audience members deliberating longer on purchasing tickets, last-minute ticket buying is likely to remain a trend. In April 2023, 69% of respondents said they were likely to book events within 2-3 weeks.

Community Sport & Commercial Sport

[Deloitte's 2021 Sports Industry Outlook](#) outlines three strategic opportunities to help sporting organisations thrive in a post pandemic world:

- 1) Reshape and expand revenue-generation models.
 - a) Data-driven platforms and artificial intelligence: sports analytics industry is expected to reach nearly \$4 billion by 2023 and can help understand fan sentiment and behaviour and better connect with fans.
 - b) Expand novel partnerships to develop complex stories and platforms in which multiple vendors can participate.
 - c) Attract private equity investment.

- d) Grow fan base by establishing a presence through community outreach and promotion.
- 2) Rethink the role of sports in society.
- a) Engage in social issues and social justice using LEAD framework (Listen, Engage, Acknowledge and Do)
- 3) Redefine relationship with fans.
- a) 95% of fans have some sort of interaction with their favourite team or league in the off-season.
 - b) 65% want to receive some sort of content from their team at least monthly during the off-season.
 - c) Fans who engage just once a month in the off-season spend 40% more than fans with no engagement in the off-season.
 - d) Organisations should consider other methods to drive fan engagement including esports, fantasy sports, sports betting, fan districts around stadiums and in-stadium improvements including contactless technology, connectivity (5G wireless technology) and more player-fan engagement.

SOCIAL

GLOBAL SPORTING TRENDS

Urban sports

The emergence of urban sports has driven an additional requirement for high performance sporting infrastructure within the state, the nation, and globally. This new infrastructure will enable an engagement with a new audience, drive participation and may also deliver new and exciting competition and entertainment within the state. Perth's proximity to Asia, as well as a favourable time zone to the world's largest domestic broadcast audience in China, provides an opportunity to develop the required sporting high performance infrastructure for these sports into the future. In this context, 'urban sports' refers to:

SPORT	PEAK COMPETITION
BMX Cycling (BMX Freestyle & Racing)	Tokyo 2020 Olympic Competition
Skateboarding	Tokyo 2020 Olympic Competition
Sport Climbing	Tokyo 2020 Olympic Competition
3 x 3 Basketball	Tokyo 2020 Olympic Competition
Breaking	Paris 2024 Olympic Competition
Parkour	World Urban Games

Urban Sports at the Olympic Games

- Recently the IOC has articulated a new standard for inclusive, gender-balanced and youth-centred games. Urban sports are typically easy to adopt and therefore more accessible to a broader audience. Ultimately the inclusion of these sports within the Olympics is driven by the requirement for the Olympic movement to remain relevant to a new generation.
- The inclusion of BMX cycling, skating, climbing, and surfing into the Tokyo 2020 Olympics provided a major catalyst for focus on the high- performance requirements of these sports. Once 'fringe' sports, these sports are now looking to the adopt cutting edge training fields of play as well as sports science and technology.
- Given the immediate Australian success in BMX freestyle and park skateboarding at Tokyo 2020 Olympics, these sports have been further thrust into the national consciousness and with this higher profile will come a greater expectation of investment and success.
- Now validated as Olympic sports, the requirements and demand for international urban multi-sport competitions such as the X- Games, Nitro Circus World Games and World Urban Games will increase.
- There is therefore an opportunity to better develop high performance sporting infrastructure and competition requirements to harness the momentum of these sports, providing competition and entertainment within the State to a new population/demographic as a result.

Esports

- Like urban sports, esports has become a global movement and is also targeting inclusion as a future Olympic sport. Whilst the merits of this are debated, the fact remains that the movement has a rapidly growing competition schedule and truly global fan base and, importantly due to the Perth location and time zone, opportunity for very substantial engagement in Asia.
- The growth of esports, its global scale and relevancy coupled with its blend of sport and entrainment make it an ideal consideration within the VenuesWest master plan framework. Initially there was a global trend towards utilising existing sporting infrastructure (typically arenas) due to their scale and existing power/ data infrastructure however there are now purpose-built esports stadiums across the world.
- Whilst it is not currently anticipated this demand is prevalent in Australia or Perth, it is important to be able to accommodate esports facilities as well as providing a central home for esports competitions within the State.
- Given the relative infancy of this movement in Australia there is also the opportunity to be a national leader in this space by initially utilising existing infrastructure but also having a vision on how purpose-built infrastructure could be considered.

MEGATRENDS IN AUSTRALIAN SPORT

CSIRO published 'The Future of Australian Sport' paper in December 2022, highlighting the six megatrends that will shape the sport sector over the coming decades. ([Future of Australian Sport 2022](#))

- **New pathways to sport** – There are a rise in participation in non-organised physical activities and the adoption of home-based exercise, fitness apps and wearable technologies through non-formal and semi-formalised participation and a growth in exercise groups, online communities and individuals accessing outdoor recreational infrastructure and green space within their communities. The increase in convenient and ad-hoc exercise creates new opportunities to increase inclusion, promote the social benefits of playing together and use new technologies to increase convenience.
- **Science and technology** – The global sport technology and innovation market is seeing substantial growth. A better understanding of the individual and biological diversity of athletes is leading to a personalised approach to performance sports.
- **The rise of entertainment sports** – Over-the-top (OTT) video-streaming are creating new audiences and connecting viewers globally. Digital sport and e-sports are becoming increasingly popular, offering access to new activities in virtual environments. Urban and adventure sports are engaging in the next generation of sports fans as they become more visible and available to mainstream audiences.
- **Generational and societal divides** – Australia's population overall is aging and increasingly diverse. Young Australians are growing up with new technologies and global connections, creating distinctly different behaviours and values.
 - The proportion of **women** in high performance sport is increasing. The Australian Olympic Team for Tokyo 2020 was 54% women, and the Australian Paralympic Team was 45% women. Women's sport is also growing in audience numbers. 2020–2022 saw record viewers for the Matilda's Olympic match against Sweden. Women's tennis, BBL and T20 World Cup, netball, and the AFLW, NRLW and WNBL are also attracting record engagement on free-to-air channels, social media and streaming channels.
 - Access to high performance sports and sports development for **people with disability** has expanded significantly over the last 60 years. However, there are still many barriers and complexities for people with disability navigating sports pathways at all levels. These include understanding and adhering to the classifications for disability, learning how to play with other differently abled players, and overcoming resourcing and support restraints, especially for those with more complex needs.
 - The generations born after the mid-1990s (**generations Z and Alpha**) have distinctly different behaviours and values reflected in their attitudes to and engagement with sports. Members of Gen Z, now of working age, are highly educated and value intellectualism. They are less nationalistic and more concerned about sustainability and egalitarianism. We can see the influence of this changing value set in Australian sports. The new focus on digital technology, sustainability, cultural diversity, disability sport, global communities and gender inclusion is closing the gaps in sport, while sport itself is helping to close the gaps across the broader Australian society.
- **Safe, sustainable, inclusive sport** – In the coming decades sports organisations will be faced with stronger social licence obligations and will seek well informed practices to encourage diversity, inclusivity and fair play. Offering athletes more choice, advocacy and individual expression.
- **Adapting to uncertainty** – Climate change is increasing seasonal temperatures and the frequency of extreme weather events. Heightened geopolitical tensions have given rise to more wars along with the threat of further military conflicts globally, trade sanctions, and threats and acts of terrorism. Pandemics, like the COVID-19 pandemic, have increased in likelihood – *with a 47% to 57% chance of a second pandemic of the same magnitude occurring in the next 25 years*. All these factors have disrupted scheduled sporting activities over recent years and this disruption is likely to continue and increase in frequency over the coming decades. This uncertainty will affect all sports, including event planning, infrastructure design and the types of sports that can be played in certain seasons. It will increase the need for some sports and their associated business models to make strategic 'pivots' or rapidly deploy alternative approaches and resources, move venues and competitions at short notice, or respond to other unexpected challenges when required.

MAJOR SPORTING EVENTS

Perth 2023 World Transplant Games

The 2022-23 Federal Budget included a commitment of \$400,00 toward the Games, which were held across multiple locations including Bendat Basketball Stadium, Champion Lakes Regatta Centre, Gold Netball Centre, HBF Stadium, Optus Stadium, and WA Athletics Stadium. Athletes and teams from 45 countries competed across 17 sports over six days.

FIFA Women's World Cup 2023

32 teams from around the world will compete in various locations across Australia and New Zealand, including Perth, in July and August 2023. \$35 million has been invested in upgrades at HBF Park in preparation for its five matches, and legacy infrastructure will benefit rectangular sports moving forward.

Commonwealth Games 2026

Regional Victoria will be the hosts of the 2026 Commonwealth Games from 17 to 29 March 2026. Geelong, Bendigo, Ballarat, Gippsland and Shepparton will be hosting 20 sports and 9 fully integrated Para Sports.

World Police and Fire Games 2027

Active or retired public officers in law enforcement, firefighter, customs and corrections from 70 countries will participate in the World Police and Fire Games in March 2027. The games are expected to draw 8,000 athletes and families, and 1,000 volunteers, with an economic impact of around \$40 million. The bid will be presented in July 2023.

Special Olympics World Games 2027

Athletes with intellectual disabilities and athletes who have neurotypical support from 170 countries will participate in the Special Olympic World Games in October 2027. The games are expected to draw 8,000 athletes and families, 20,000 volunteers, and 500,000 spectators, with an economic impact of over \$200 million. The bid will officially be submitted in July 2023 and the Special Olympic International Board of Directors will select a host city in November 2023.

Rugby World Cups 2027 and 2029

Australia will host the Rugby World Cup 2027 and 2029, as well as the Women's Rugby World Cup for the first time in 2029. The two Rugby World Cups in three years will deliver approximately \$2.8 billion for Australia and boost grassroots Rugby with 30,000+ participants. The host city is yet to be announced.

Brisbane 2032 Olympic Games

With Brisbane hosting the 2032 Olympic Games, there is no short or medium term ambition to host the Summer Olympics in Perth, however:

- The proximity to Asia, the city lifestyle and the development of world-class high performance infrastructure to facilitate lead-in competitions and training bases for visiting international teams provide a huge opportunity to leverage world class facilities, in the lead up to and during the Games.
- There are clear advantages of moving early and establishing key and targeted high performance sport training and competition facilities in the lead up to the Olympics. WA had 78 athletes in 19 sports at the Tokyo Olympic Games and it would be anticipated that with a home Olympics in 2032 the demand for participation in a wider range of high performance sports would increase.
- There is an opportunity for VenuesWest venues to be used as training hubs for international teams in the lead up to the Games:
 - HBF Stadium – swimming, diving, water polo
 - WA Athletics Stadium – athletics, pole vault
 - Mt Claremont Precinct, Urban Sports Park*– BMX freestyle, skateboarding, sport climbing, parkour
 - Champion Lakes Regatta Centre – rowing, canoeing
 - SpeedDome – track cycling

*subject to feasibility, funding and development through the Master Planning program of works.

PEERS

Department of Local Government, Sport and Cultural Industries (DLGSC)

Strategic Plan

DLGSC's [Strategic Directions: 2020 - 2023](#) strategies and programs have a number of priorities relevant to VenuesWest (listed in the Appendix). Of note for VenuesWest, WA does not have a State Strategy for high performance sport.

Infrastructure Plan

DLGSC also reviewed the [State Sporting Infrastructure Plan](#) (SSIP) in 2019 to provide insight into the provision of infrastructure to service State, National and International level sporting competition into the future and is aligned with broader State Government Policy. VenuesWest's remit is intrinsically linked with the SSIP and can utilize relevant data and analysis that had been conducted to support this plan.

Grants / investments

In March 2022, DLGSC announced [\\$400,000 investment](#) over two years thanks to the State Government which will be administered by DLGSC for state sporting associations (SSAs) to apply for funding up to \$15,000 per round. The funding will help SSAs develop initiatives that provide sustainable and inclusive support to coach and official development. DLGSC administers the [Industry Investment Program](#) for SSAs and utilises a Committee to receive the results of the assessment process and provide input on conclusions.

Western Australian Institute of Sport (WAIS)

The Federal Government's announcement of \$54.5 million investment in high performance sport is a welcome support for Australia's high performance athletes. The investment enabled AIS to maintain baseline support for National Sporting Organisations providing certainty for 2020 Olympic and Paralympic athletes who competed in Tokyo and athletes looking toward the 2022 Beijing Winter Olympic and Birmingham Commonwealth Games.

Impact on high performance athletes:

- 78 West Australians competed for Australia at the 2020 Tokyo Olympic and Paralympic Games
- 70 of the West Australians who competed for Australia were supported by WAIS
- Government exemptions during the pandemic allowed for a continuance of training for the Games
- Each WA Olympian and Paralympian selected for Tokyo 2020 received a \$4,000 State Government grant to support training and road to the Games.

TECHNOLOGICAL

EMERGING TECHNOLOGICAL TRENDS

Crypto tokens/currency

Sponsorships

Crypto-related sponsorships are growing exponentially faster than traditional categories according to Nielsen's 2022 global sports marketing report: [Fans are changing the Game](#). Between 2019 and 2021, crypto-related sponsorships grew by 1,100% globally compared to 81% for automotive sponsorships, 27% for insurance and -28% for airlines. The growth in 2021 was heavily impacted by the US\$700 million naming rights deal which transformed Staples Centre into Crypto.com Arena.

It is projected that by 2026, crypto-related sponsorships will grow by 778% on 2021 numbers reaching US\$5 billion. The growth will depend, however, on legitimacy and fan engagement. According to the Nielsen research, it will be "vital for organisations to properly vet sponsors and not let revenue impede due diligence". It will also hinge on engaging audiences and "bridging the gap between awareness and conversion".

Fan crypto tokens

European soccer teams Paris Saint-Germain and Juventus F.C. led the way with fan crypto tokens after listing them on three crypto exchanges in late 2020. Since then, more than 35 soccer clubs have followed suit. Token owners have the opportunity to vote on matters for their clubs, such as match locations and bus and uniform design.

Awareness and Interest

Esports fans are the most aware of (52%), and interested in (37%), crypto tokens according to the Nielsen research. Sports fans are the next closest with 39% aware of and 25% interested in crypto tokens. Both esports and sports fans top the general public with only 30% aware and 17% interested in crypto tokens.

Perth Heat

In November 2021, the [Perth Heat](#) baseball team partnered with OpenNode to become the first professional sports club in the world to operate on Bitcoin standard using the Lightning Network to pay players and staff in Bitcoin, to accept Bitcoin for sponsorships, merchandise and ballpark concessions, and to hold Bitcoin on its balance sheet.

Nonfungible Tokens (NFTs)

According to [Nielsen research](#), 24% of sport fans are interested in NFTs. NFTs are used as tokens to represent ownership of 'unique items' ([Ethereum](#)). Common uses of NFTs are for digital art. Non-fungible is a term in economics for items not interchangeable for other items due to their unique properties, such as furniture or collectibles. Fungible items, on the contrary, can be exchanged because "their value defines them rather than their unique properties", such as petrol (one litre = AU\$2.00) or any other commodity.

NFTs are valuable as they are digitally unique, cannot be duplicated, and can only have one official owner at a time. They can be used for tickets to events and traded on the Ethereum marketplace for an entirely new NFT. [YellowHeart](#) is an NFT marketplace for events all around the world.

Streaming sport

Just over 40% of global sport fans prefer to stream live sports events through digital platforms ([Nielsen research](#)). Fans are consuming an increased number of sports matches, both related and not related to live sports. Nearly 40% of global fans will watch non-live content related to a live sports event (e.g., highlights and match announcements) and just under 35% will watch non-live content not related to a sport event (e.g., docuseries and behind the scenes). Non-live sports content is also attracting new sport audiences that would not normally watch sport, especially when the content is outside of normal sports channels, such as streaming networks. A prime example of this is the AFL documentary, 'Making Their Mark', on Amazon Prime which captivated audiences worldwide.

WA DIGITAL STRATEGY 2021-25

Under the guidance of the *DigitalWA: Western Australian Government ICT Strategy 2016-20*, the WA Government has developed the [Digital Strategy for the Western Australian Government 2021-2025](#) to continue to change the way the public interacts with government. The strategy is focused on six key digital transformation areas:

ENVIRONMENTAL SCAN

Pestel

1. Improving online services
2. Implementing higher cyber security standards
3. Building data analytics capabilities
4. Developing policies that support a culture of data protection and sharing
5. Transforming how ICT services are purchased
6. Investigating strategies to reduce the digital divide in WA

The strategy also outlines four strategic priorities:

1. Better services
2. Informed decisions
3. Safe and secure
4. Digitally inclusive

The changing world of digital in 2023 ([We Are Social UK](#))

- Connected technologies are now an essential part of people's lives – social media, ecommerce, streaming content, and video games have all seen significant growth in the past 12 months
- Social media users are up 3% globally on previous year to 4.7 billion worldwide users
- New social media platforms, such as TikTok, are growing exponentially and social gaming is becoming prominent
- Ecommerce has grown rapidly, with 82% of households shopping online and 57% year-on-year growth in online purchases
- 96.2% of the Australian population uses the internet, with the number of social media users equivalent to 80% of the population and the number of mobile connections equal to 126% of the population.
- Australians spend an average of 5:51 hours a day on the internet across all devices, 4:54 hrs average daily time spend using mobile phones.
- Over 1 in 3 users in Australia use social media to gather information about brands they are considering. As a result, a brand's social presence is considerably important in communicating with customers and promoting goods and services
- Sport entities have created new content types with higher value engagements including storytelling to excite fans, celebrate victories and duration and format specific to social media channels ([Nielsen 2021](#))
- Various aspects of digital have become more politicised over the past year with some countries enforcing targeted platform restrictions to control political, monetisation and privacy issues.
- The rise of creative AI tools like ChatGPT, Dall*E, Midjourney, Stablediffusion and Synthesia are the beginning of a wave of 'creative' AI. ([RCR Wireless](#))

Sport and entertainment technologies:

- Interactive fan experience (Virtual Reality, Augmented Reality and Mixed Reality) – in terms of sports, VR, AR and MR may be used both to engage fans and to improve our athletes' performance.
- Artificial Intelligence (AI) – the power of algorithms and artificial intelligence in bettering our decision-making process, making predicting sports competitions' outcomes more reliable.
- Digital infrastructure – High speed Wi-Fi, LED lighting and digital displays, self-service POS
- Automated amenities – cashless stadiums, smartphone purchases, in-seat ordering
- Connecting venues – fully integrating venues into urban environments, so they are no longer standalone objects

In a [research report](#), Deloitte declared contactless sport venues as a way to optimise the customer experience:

- receiving a text message the day before the event with information on the game, including start time and venue map with best gate to enter.
- digital fan accounts where the patron can scan their ticket and buy food and merchandise at the game.
- placing bets via digital sports book linked to the digital fan account.
- a designated exit time via push notifications sent to their phone.
- push notifications for the post event feedback survey.

ENVIRONMENTAL

GLOBAL STADIUM ENVIRONMENTAL INNOVATIONS

The O2 Arena, London

In early 2021, the London arena, The O2, partnered with British start-up Alpha 311 to be the first venue in the world to trial ten of the start-ups ground-breaking vertical axis wind turbines. The partnership is in an effort by parent company AEG to reduce its carbon footprint by reducing GHG emissions and exploring new ways to power the planet via its global entertainment venues. The installation of the 10kW turbines would allow the venue to produce an estimated 87,600 kWhs a year, equivalent to the total electricity use by 23 British households. The O2 already has many energy-efficient initiatives in place including a state-of-the-art waste compound, green cleaning program, ongoing energy reduction projects and on-site Wormery and Eco-Digester. These initiatives have resulted in a 40% reduction in transport to site, less than 1% of waste going to landfill per year and reduction in GHG emissions by about 6,000 metric tonnes each year. The O2 shares its actions to fans, bands and brands via its Good Vibes All Round platform.

The start-up is also working with the US-based socially responsible asphalt manufacturer Green Asphalt which has ordered 54 turbines that will generate enough power to meet the energy needs of 43 American homes. In August 2022 Alpha 311 announced that they are working with Greater Manchester Combined Authority to bring 2000 turbines to the area and in October 2022 they announced that they have signed an MoU with Ubiquity Energy company for 3000 turbines. They also announced in October 2022 that they are collaborating with battery company Connected Energy to allow Alpha 311 customers to store excess energy generated by the wind turbines for later use.

- [Further Information: The O2 to generate power from wind turbines](#)
- [Further Information: The first O2 Arena turbine is revealed](#)
- [Further Information: Green Asphalt is the first US company to use Alpha 311 turbines](#)

VenuesWest contacted Alpha 311 in August 2021 to discuss how and when we may be able to make use of their product. Alpha 311 is starting the design process for the turbine using recycled plastic which they hoped to roll out in 2022. This design would be cheaper and more aligned to use at our venues compared to their carbon fibre design which is very expensive and more suited for freeway locations.

Xi'an Olympic Sports Centre Stadium, China

The Xi'an Olympic Sports Centre has the *14th National Transportation Power Supply Guarantee Joint Command Centre*, which can monitor the operation of equipment, the patrol of power protection personnel, and the emergency command of the entire precinct. It can effectively integrate power supply service command, substation robot patrol inspection, and other business system data to coordinate management of power grids, equipment, personnel, and materials. In addition, the precinct's "green electricity" deal was concluded, marking that all venues will achieve 100% clean energy power supply for the entire schedule of the National Games. These initiatives implement the concept of "Green National Games" by setting an example for the goal of carbon neutrality.

Allegiant Stadium, Las Vegas

In partnership with Coors Light, Ball Corporation will now use recyclable Ball Aluminium Cups at the Allegiant Stadium. Aluminium is the most sustainable beverage packaging material as it can be infinitely recyclable. In fact, Ball Corporation claims 75% of all aluminium ever produced is still in use today.

- [Further Information: Allegiant Stadium will now use recyclable aluminium cups](#)

WESTERN AUSTRALIA CLIMATE POLICY

The Government of Western Australia issued a Climate Policy in November 2020, which was updated on 12 December 2022. The strategy sets out the plan for a climate-resilient community and a prosperous low-carbon future. The policy looks beyond business-as-usual measures to highlight the significant actions that we are taking in collaboration with industry and the community to boost our economy and prepare for climate change. ([WA Government](#))

LEGAL

WASCT ACT CHANGES

- The Western Australian Sports Centre Trust Act (WASCT Act) was enacted in 1986 to enable management of one sporting venue (now HBF Stadium) and does not effectively meet the needs of VenuesWest today. Following extensive review and consultation, Cabinet approved a series of amendments in 2019.
- Upon engagement with the Parliamentary Counsel's Office to progress these amendments, a determination was made to repeal the WASCT Act and progress the drafting of a new Bill which addresses the Control of Conduct on Trust property and enables authorised persons to direct a patron contravening the Conditions of Entry to not only leave the venue but also to address those patrons who subsequently refuse to comply with an authorised officer's direction through infringement and exclusion powers on a temporary and permanent basis to allow venue staff to better enforce the Conditions of Entry and manage public safety.
- Changes which will be affected by the new Bill include:
 - Clear articulation of the management of the portfolio of venues rather than one venue
 - The Minister may declare places to be venues, enabling VenuesWest to activate temporary venues.
 - References to 'The General Manager' have been replaced with the term 'Chief Executive Officer'. The Bill also provides for an 'Acting Chief Executive Officer'.
 - The size of the Board has been reduced to seven members with the suitable skills categories now: commerce; law; financial management; human resource management; management of major events; infrastructure planning and management; sport; and public administration.
 - Appointment of a Deputy Chairperson to provide business continuity in the absence of the Chairperson.
 - Enhanced conflict of interest clauses clearly articulate the requirement for Board members to disclose material personal interests and that a Board member cannot vote or be present for discussions where a material personal interest exists. New penalties may apply to Board members who fail to comply.
 - Protection from liability for wrongdoing for a person acting in good faith in the performance of their role.
 - Clarification with respect to the use of the Common Seal.
 - General power to Borrow has been included, subject to the Treasurer's approval.
 - Exemption from State taxes is clearly described for the Trust.
 - A much broader definition of functions has been included.
- Cabinet have allocated a legislative drafting priority of 'AB' which means it was introduced prior to 30 June 2023, and is scheduled to be passed before 31 December 2023.

MAJOR EVENTS LEGISLATION

- The Major Events Bill 2023 was introduced to the Legislative Assembly on the 22 February 2023 and at the Legislative Council on 15 March 2023. It is expected to be in place for the 2023 FIFA Women's World Cup.
- The Bill will establish a legislative framework to support the attraction, facilitation, and retention of major events in WA and is intended to provide greater certainty to major event organisers and venue operators by providing for the safe and orderly running of major events, streamlining some approval processes and protecting the commercial interests of the major event organisers.
- The Bill provides for:
 - declaration of an event as a major event
 - specification of the major event organiser, major event area, major event period and responsible authority
 - specification of a controlled area and control period
 - suspension or modification of other legislation in limited circumstances
 - approval of temporary works for major events
 - management of roads, waters and traffic
 - safety and crowd management
 - commercial protections for major events organisers, including prohibitions on ambush marketing, unauthorised broadcasting and certain advertising; and restrictions on use of logos or titles
 - appointment of authorised officers and the powers of those officers in enforcing the requirements of the legislation.

MODERNISATION OF WORK HEALTH AND SAFETY LAWS

The updated *Work Health and Safety Act 2020* (WHS Act) came into effect on 31 March 2022. The most significant change in comparison to the *Occupational Safety and Health Act 1982* is the inclusion of a penalty provision for industrial manslaughter (s. 30A). It is intended that introducing industrial manslaughter provisions in the WHS Act will have a strong deterrence effect in accordance with community expectations that workers have the right to come home safely after a day at work. The Government has introduced these provisions to ensure that deaths at the workplace, caused by the conduct of PCBUs and their officers, are met with substantial penalties, up to imprisonment.

[\(Department of Mines, Industry Regulation and Safety\)](#)

- [Further Information: Work Health and Safety Act 2020](#)
- [Further information: Modernisation of WHS Laws - FAQs](#)

APPENDIX

DLGSC's Strategic Directions 2020-2023

Strategies and programs relevant to VenuesWest:

1. Strategic priority and infrastructure programs

- WA Recovery Plan — infrastructure investment program of work
- Local Government Sustainability — program of work
- State Football Centre
- State Sporting Infrastructure Plan — implementation
- Screen infrastructure
- Strategic asset maintenance guidance and monitoring
- Creative Industries Strategy
- Multicultural Policy Framework
- Regional Aboriginal Communities Framework.

2. Sector sustainability, capacity building and excellence

- WA Recovery Plan — sustainability program of work
- Women in sport and leadership
- Guidance/monitoring of sector infrastructure management practices
- Motorsport Strategy — continue implementation
- Regulations to support the Liquor Control Amendment Bill 2018
- Support Aboriginal Cultural Centre
- Lead truth telling Aboriginal History projects
- State Local Government Partnership Agreement

3. Agile operations and strong business support systems

- Develop Public Value Model and measurement framework
- Culture and values program — embedding values and behaviours
- Workforce planning — embed fit for purpose operating model
- System Enhancement and Digitisation (incl. digital security), contemporary systems integration (new technologies) and realise benefits of existing systems

[\(Department of Local Government, Sport and Cultural Industries\)](#)