



Australian Netball

State of the Game Review

Report Findings and
Recommendations

DECEMBER 10 2020

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Foreword

Netball. A sport with a rich and proud history and a bright and bold future. It is a passion for many, a place where friendships are formed, where girls and women shine - as leaders, as athletes, as coaches, administrators, umpires, and fans. It is Australia's dominant women's sport.

I feel incredibly fortunate and privileged to have had my life shaped by my involvement with netball, which is why I am delighted to be playing a role in this important conversation about Australian netball at this critical time. I am optimistic and excited about the future of this great sport, while also very alert and realistic about the challenges, and the opportunities our sport faces.

The State of the Game Review (the Review) has provided a vital 'listening post' at a critical juncture for netball. It has been an opportunity to not only capture the pulse of Australian netball in 2020, but to understand what is most important to netball's diverse stakeholders as we all chart the future post COVID-19. The Netball Australia Board, in consultation with the Member Organisations, Super Netball League and Clubs, initiated this independent review, supported by Sport Australia. The research undertaken has been transparent, system-wide, and highly consultative.

For me, and for my fellow Review Panel members, our critical objectives have been to identify the ingredients required for a strong and sustainable strategy for the game, the preferred structure(s) to drive this strategy and the development and implementation of the best systems and processes to serve and enable the game and its participants.

To maintain its leadership position, Australian netball needs to address its challenges and capitalise on opportunities within the sport's administration. Is Australian netball harnessing its strengths, and does it understand what is required to secure a vibrant and sustainable future for the game and its stakeholders?

The COVID-19 pandemic has had a significant financial impact on the netball ecosystem and comes at a time when the competition to own the hearts and minds of women in sport is at an all-time high. When Australian netball emerges from this major disruption, key partners (government, commercial and philanthropic) will expect the Australian netball ecosystem to be responsive to the changed environment and evolving consumer sentiment.

I am proud to have been asked to Chair this Panel (the Panel) comprising Kate Jenkins, Joe Pollard and Wendy Machin - three outstanding leaders with complementary strengths and a shared commitment to make a difference for the good of Australian netball and netballers. I thank them for the time and energy they have invested into the Review, and into netball.

As Australian netball marches proudly to its centenary in 2027, the Panel looks forward to this report further supporting the re-energising of Australian netball and building on its strong foundations to realise the full potential of the game at all levels.



LIZ ELLIS AO
Chair, Australian Netball
State of the Game Review Panel

Recommendations

1

RECOMMENDATION ONE

Core stakeholders agree and implement an aligned vision, purpose, and strategy for Australian netball.

2

RECOMMENDATION TWO

Netball Australia and Member Organisations establish a contemporary governance framework for Australian netball's future.

3

RECOMMENDATION THREE

Develop a Member Organisation-led participation strategy to make Australian netball the number one team participation sport in Australia.

4

RECOMMENDATION FOUR

Establish a High Performance Workgroup to align player pathways and high performance programmes with Suncorp Super Netball (SSN); resource Diamonds to ensure success at the Netball World Cup and Commonwealth Games; improve diversity in Australian netball pathways and high performance programmes; and improve coach and umpire development.

5

RECOMMENDATION FIVE

SSN Commission and Netball Australia make Suncorp Super Netball the commercial jewel in the crown of Australian netball by capitalising on growth and realising its full potential.

6

RECOMMENDATION SIX

Netball Australia and Member Organisations work together to drive operational efficiency.

7

RECOMMENDATION SEVEN

Netball Australia and Member Organisations develop and implement a national digital strategy that enables participation to grow, efficient administration, better fan engagement and new revenue streams.

8

RECOMMENDATION EIGHT

Core stakeholders commit to implement the recommendations of the report and appoint a State of the Game Manager to drive the process and publicly report against progress.

Executive Summary

Netball's strength is enormous. Its power as one of Australia's largest participation sports, with a national footprint second to none, and a passionate base of dedicated volunteers and administrators, is immense.

It is united as a place for women and girls to shine at all levels. Its endurance is evidenced in both its longevity as Australian netball's centenary approaches in 2027, and the historical success of the Australian netball team, the Diamonds. The growing success of the elite Suncorp Super Netball (SSN) competition provides the building blocks for a sustainable future.

Despite all of this, netball has challenges it must face. Externally those challenges include dealing with the impact of COVID-19, increased competition for female participation from a number of sports, including traditionally male sports, community expectations of greater diversity and inclusion, a trend towards recreational pastimes and digital-based activity, and changes to the 'business' of sport.

Nevertheless, the greatest challenges are internal. The most obvious one is the inability of Australian netball to align at all levels on what it wants to achieve and how it wants to achieve it. This is exacerbated by a lack of trust both vertically and horizontally in the Australian netball system; a lack of clarity at all levels around responsibilities and accountabilities; duplication and inefficiencies in administrative functions across the national and state bodies; and the financial costs of investing in and supporting the growth of SSN.

This is overlaid by an outdated governance system that has led at different times to overreach by and instability of boards at all levels. On court, Australian netball is facing challenges like never before, and for the first time ever Australia does not hold the Netball World Cup, the World Youth Cup, or the Commonwealth Games gold medal.

At this turning point in Australian netball history, the State of the Game Review (the Review) aims to ensure the ongoing sustainability, prosperity, and relevance of Australian netball. The Panel has sought to understand the strengths of and the challenges facing Australian netball, and endeavoured to identify opportunities and how the sport might imagine its future.

This Review is the largest the sport has undertaken. The opportunity to engage with a significant cross-section of the sport and its stakeholders, through direct qualitative and quantitative research means the findings and recommendations reflect the size of the opportunity for the sport. Stakeholders included players, parents, umpires, coaches, paid and voluntary administrators, elected officials, members of Aboriginal and/or Torres Strait Islander communities, members of the Diamonds and SSN teams, men's, and mixed netball representatives as well as commercial broadcasters, sponsors, media analysts, members of Parliament, senior executives and representatives from other sports and codes. This Review truly represents the voice of the netball nation.

Informed by a range of perspectives from those who care most about the future of netball, the Panel has identified four key areas of focus for reform.

Accordingly, the report, including findings and recommendations, is divided into four components reflecting the way netball is played:

- 1. THE GAME PLAN:** Purpose
- 2. CENTRE COURT:** Proprietors
- 3. DEFENCE:** Product
- 4. GOALING:** Profitability

This is underpinned by **ACTION:** Implementation.

THE GAME PLAN: Purpose

The game plan sets out what the team is aiming to achieve and how they are going to achieve it. It is about everyone understanding the game plan so thoroughly that they play to it intuitively, and it informs every decision.

For this Review, that game plan is a national strategic vision for netball. During the Review, the Panel heard that Netball Australia and Member Organisations each have their own purpose and strategic plans. These plans have largely been developed in isolation, resulting in lack of alignment, clarity, and purpose, as well as missed opportunities to address emerging challenges and, importantly, grow the sport.

The Panel advocates the importance of the adoption of a shared and aligned vision, purpose, and strategy, which is capable of local adaptation. While actions are allocated appropriately, key organisations share the responsibility to drive the strategy, with allowance for local variations. (See Recommendation One)

CENTRE COURT: Proprietors

The engine room of the netball team is the centre court. This is where the hard work is done to drive the opportunities the defence line creates.

One of the strongest themes to emerge from the Review was concern about governance instability, lack of clarity of responsibilities, transparency and accountabilities within the sport and an equally strong desire for that to be rectified.

The Panel concluded that governance reform remains a significant opportunity for development and alignment to underpin strengthening of Australian netball. (See Recommendation Two)

DEFENCE: Product

The bedrock of any great netball team is the defence line. It is the foundation upon which everything else is built.

Participation: Consultation feedback consistently spoke of the need to recognise a 'whole of netball' approach to tackle competition from other sports and build on netball's legacy of empowering females to address decreasing participation as a percentage of total population, and concerning trends of physical inactivity. The Panel concluded that accessibility, flexibility, and ease of delivery is required to attract and retain new and returning players and volunteers. Netball should embrace a more diverse participant base, including Aboriginal and/or Torres Strait Islander communities, culturally and linguistically diverse players, men's, and mixed netball; and recreational/social/indoor netball competitions. (See Recommendation Three)

High Performance Pathways and Programmes: While the Diamonds are number one in the world, the Review highlighted concern regarding recent results. Clarity regarding the contribution of SSN to high performance development was questioned, with suggestions that the sport is 'missing out' on talent due to the high performance pathways narrowing too early. Comparably, there is a perceived decline in the number of high-quality high performance coaches and umpires in the system, potentially due to the lack of defined and aligned pathways for their development.

Consistent with grassroots participation, the Panel heard that there is a lack of diversity at all levels of the high performance pathways and programmes, and that priority should specifically be given to advancing opportunities for Aboriginal and/or Torres Strait Islander peoples. (See Recommendation Four)

GOALING: Profitability

The goaling end of the court is where the hard work and good decisions get rewarded.

Suncorp Super Netball (SSN): Born out of opportunity, SSN has built a solid foundation in its first three years. SSN is positioned at the intersection of the critical competing and complementary elements of the game and is therefore bound to be a constant source of (positive) tension.

The Panel recognises that SSN is the commercial jewel in Australian netball's crown. The optimisation of SSN's commercial potential is one of the most critical platforms for the game's future. A focus on attracting fans to drive engagement and viewership, innovating to drive entertainment, and maintaining the integrity of netball will ultimately attract investment. The Panel recommends appointing a Netball Australia Board Member to the SSN Commission, and for consideration of opportunities to streamline the operations of SSN. (See Recommendation Five)

Efficiency: For the first time, it has been possible to review the consolidated financial picture of the sport. A lack of clarity and collaboration has contributed to ineffective behaviours and unnecessary duplication within the netball ecosystem. This highlights the priority, and potential benefit, of transparency, data standardisation and operational efficiency.

Given that many of the Member Organisations perform similar tasks, clarity of roles and improved collaboration is vital for growing the commercial and reputational value of netball. The Panel recommends Netball Australia and Member Organisations work together to identify opportunities to decentralise or consolidate activity to drive efficiencies. (See Recommendation Six)

Digital: The Panel concluded that high participation rates combined with a single national digital platform will contribute to growth of the game. The Panel supports urgent action towards a national data platform for excellence in registration, communication, and commercialisation. (See Recommendation Seven)

ACTION: Implementation

What gets measured gets done

The Panel acknowledges feedback that previous review recommendations were not effectively implemented. Therefore, the Panel recommends the Review outcomes are widely shared, stakeholders commit to recommendations, a State of the Game Manager is appointed to coordinate actions, and reporting includes another review in two years to track progress. (See Recommendation Eight)

These recommendations and the report are proposed through the primary lens of enabling and accelerating Australian netball's ability to build on its proud history to deliver a dynamic, collaborative, and sustainable future for the game.

State of the Game Independent Review Panel



LIZ ELLIS AO - PANEL CHAIR

Liz Ellis is Australia's most capped international netballer, playing 122 test matches for the Diamonds and captaining the team for four years, including winning the 2007 Netball World Cup. Liz's on-court

career highlights include three World Championship gold medals, two Commonwealth Games gold medals and four national league premierships, as well as being named Australia's Most Valuable Player on four occasions.

Liz holds a Bachelor of Arts/Law from Macquarie University and was admitted as a solicitor in 1996. She has sat on numerous boards both in government and in the private sector, including the Australian Sports Commission Board. Liz has been a consistent voice for netball over several years, and is currently a netball commentator, columnist, and host for Channel 9.



KATE JENKINS

Kate Jenkins is Australia's Sex Discrimination Commissioner, a member of the Australian Human Rights Commission and Co-Chair of Play by the Rules. One of Kate's

key priorities as Sex Discrimination Commissioner has been advancing gender equality in sport. Kate has lead reviews and worked with organisations like the Australian Defence Forces and Australian Universities on cultural reform.

Prior to joining the Commission, Kate spent three years as the Victorian Equal Opportunity and Human Rights Commissioner, 20 years as an employment lawyer and partner with Herbert Smith Freehills' and many years serving on the boards of Berry Street Victoria, Heide Museum of Modern Art, and Carlton Football Club.



WENDY MACHIN

Wendy Machin has two decades of experience as a non-executive director and chair in the private and public sectors with experience in large membership organisations, including the NRMA, Golf Australia and the Customer Owned Banking Association.

Wendy worked as a decision-maker on the Migration and Refugee Review Tribunal reviewing refusals to grant or renew visas to migrants and refugees. For 11 years, Ms Machin served as a member of the NSW Parliament representing the mid north coast. She was a Cabinet Minister under Premier John Fahey and, in that time, she was the first Minister to have a baby in office. Prior to that, she was the Deputy Speaker of the NSW Parliament – the first woman to hold that office.

Wendy's early career was in public relations. She now owns and operates beef cattle properties in the Manning Valley of NSW. She was an average goal keeper up until 10 years ago and is now an average golfer.



JOE POLLARD

Joe Pollard is an accomplished Executive and Non-Executive Director with more than 30 years' experience in CEO roles, brand and customer management, media, and technology roles.

She has worked across a broad range of industries and has held leadership roles in both domestic and international markets (UK, Hong Kong, USA and Japan).

Previous roles include the Chief Marketing Officer and Group Executive Media at Telstra, CEO of Publicis Mojo, CEO of Ninemsn, Sales and Marketing Director for Nine Entertainment Co. Joe also spent 10 years at Nike Inc in the United States in various marketing and digital roles. Joe has held Non-Executive Board director roles with Nine Entertainment Co, AMP Bank, 12WBT, ninemsn, I-Select and various industry boards.

Joe is currently a Non-Executive Director at Greencross Ltd and a Senior Advisor at Tattarang and Minderoo Foundation. She is also a member of the Australian Institute of Company Directors (AICD) and Chief Executive Women (CEW).

Terms of Reference

The Panel was asked to review and provide recommendations on the following:

STRATEGY FOR GROWTH

Is Netball Australia's purpose, vision, and strategy:

- understood and endorsed, as well as aligned with, the needs of its customers and key stakeholders;
- reflective of the sport's priorities, risks, and opportunities; and
- singularly focused on making netball the 'sport of choice' for communities, talented athletes, fans, broadcasters, sponsors, and government?

LEADERSHIP AND CULTURE

How can Australian netball's leadership structure, capability, behaviour, and style be best shaped to deliver its role across all levels of the sport?

GOVERNANCE, INTEGRATION AND SUSTAINABILITY

What is the optimal financial, delivery and commercial model / structure for netball in Australia and how can responsibilities be clearly divided across the eco-system to deliver the desired customer experience and long term financial sustainability?

Methodology

The Review was undertaken over the period from July to November 2020. The findings in this report are based on extensive consultation and research. The Panel gathered evidence for its findings through the following key activities:

- Previous commercial in confidence reviews of Netball Australia:
 - September 2017 - State of Play Report – Bluestone Edge
 - August 2018 – Operating Model Review – PricewaterhouseCoopers
 - April 2020 - Netball Australia's High Performance Review – Peter Sharpe
- 32 key stakeholder meetings – see Appendix One;
- Sport Australia – Sport Governance Principles and Sport Governance Standards – See Appendix Two;
- High Performance Review Summary – see Appendix Three;
- 2020 State of the Game National Survey data report – See Appendix Four;
- Participation Numbers AusPlay 2016-2019- See Appendix Five;
- Netball Australia First Nation State of the Game; qualitative research report – October 2020 – ORIMA – see Executive Summary at Appendix Six;
- 20 confidential written submissions from interested stakeholders;
- Academic and statistical literature available online – where relied up it has been cited in the footnotes; and
- Aggregated financial information for fiscal year 2019 across Netball Australia, SSN, eight Member Organisations and SSN Teams – provided confidentially to the Panel and will not be publicly disclosed.

Terminology

The Australian netball ecosystem is complex. Netball Australia is the peak body for netball in Australia and the entities named below under the 'Legal relationship' heading all have a legal relationship either directly with Netball Australia or through their state or territory Member Organisation. All entities, including those under the 'Connected relationship' heading, have a role to play in operating in a collaborative and connected manner to promote and grow netball. Across the ecosystem, the use of words is often inconsistent or understood differently. Therefore for clarity, the Panel has sought to define the organisations and other overarching key descriptors used throughout the report.

LEGAL RELATIONSHIP

Netball Australia – the peak body for the administration of netball in Australia.

Member Organisations – Members of Netball Australia pursuant to the Netball Australia Constitution and the peak netball entities in each of their own Australian state and territory. Specifically, these are A.C.T Netball Association Incorporated, the New South Wales Association Limited, Netball NT Incorporated, Netball Queensland Limited, South Australian Netball Association Incorporated, Tasmanian Netball Association Incorporated, Victorian Netball Association Incorporated, Netball WA Incorporated.

Associations/Affiliates – a region, district, association or club, which is a member of a Member Organisation.

Super Netball League (SNL) – the professional competition company owned by Netball Australia to deliver Suncorp Super Netball (SSN).

Suncorp Super Netball (SSN) – the professional women's netball league.

SSN Commission – the governing body for the SSN.

SSN Teams – the eight teams that make up the current SSN competition with two teams in Victoria, New South Wales, and Queensland and one team each in Western Australia and South Australia.

Six of the eight teams are owned and run by the Member Organisations. Of the two remaining clubs, Collingwood Magpies is owned by AFL club Collingwood while the Sunshine Coast Lightning is owned by Melbourne Storm and USC (University of the Sunshine Coast). All Teams have entered into a Team Participation Agreement with Netball Australia.

CONNECTED RELATIONSHIP

Australian Netball Players Association (ANPA) – a collective voice to promote the interests and protect the welfare of elite Australian netballers, as well as to provide education and support to those players.

Confident Girls Foundation (CGF) – Not-for-profit administered by Netball Australia that raises funds and distributes them to netball membership organisations and community organisations across Australia who run inclusive programs building resilience.

Australian Men's and Mixed Netball Association (AMMNA) – the governing organisation for Australian Men's and Mixed Netball Championships with a focus on participation for men's and mixed netball.

Other competitions - during the review, the Panel heard of thriving netball competitions that are played around the country, but do not fall under the jurisdiction of Netball Australia or the Member Organisations, including in the primary, secondary and tertiary education sector, indoor sports centres, and other social competitions.

For this report, the Panel considers that **Australian netball** is inclusive of Netball Australia, Member Organisations, Associations/Affiliates, SSN Commission, SSN Teams, ANPA and CGF.

Core Stakeholders – Netball Australia, Member Organisations, SSN Commission, ANPA and SSN Teams.

DISCLAIMER

This Review has been prepared in accordance with the Terms of Reference set out above.

No warranty of completeness, accuracy or reliability is given in relation to the statements and representations made by, and the information and documentation provided by the stakeholders who were engaged in this Review.

The Panel has indicated within this Review, where appropriate, the sources of the information provided. The Panel has not sought to independently verify those sources unless otherwise noted in the Review. The findings in this Review have been formed on the basis above.

Other than the Panel's responsibility to Netball Australia to deliver this Review in accordance with the Terms of Reference, the Panel does not undertake responsibility arising in any way from reliance placed by a third party on this Review. Any reliance placed by any other party is that party's sole responsibility.

Overview

Netball is the number one women's participation sport in Australia and is a recognised leader in female empowerment. Netball is a resilient, loved, and robust sport with deep tradition and loyal volunteer base. It is a sport which has inspired, connected, and encouraged women and girls to be spirited, strong and part of a team. Since 2017, the Australian netball fan base has rapidly grown and commercial opportunities for the national elite competition have expanded.

The tradition and spirit of netball is being challenged by changes in the Australian society and sport market. In 2020, this has been exacerbated by the impact of COVID-19. The forceful conflation of these positive and negative factors accelerated the need for deliberate consideration of the future of how the game, and its administration can ensure that Australian netball is fit for purpose beyond 2020. This is bigger than any single netball entity in Australia. It challenges thinking about how to work towards building a bigger grassroots footprint, a stronger delivery network, an entertainment product that delivers strong participation and commercial returns to the sport as a whole and a Diamonds team that are Commonwealth Games and Netball World Cup champions.

There has been a sharpened strategic focus on the value that women bring to sport, as participants, parents, volunteers, fans, and consumers. This strong momentum in growing equal opportunity for women and girls in many sports, including some that have been traditionally male dominated cannot be underestimated. COVID-19 has emphasised the mental, social, and physical health benefits that local sport can offer which were lost during the lockdown periods. It is clear there is a strong desire by the community and governments to see a return to grassroots sport as well as a continuation of elite sports. Australian netball is well positioned with its existing large base of players, officials, and volunteers to make its contribution and to capitalise on this opportunity.

While Australian netball has not suffered the setbacks that many other sports are enduring, its future dominance in women's sport is at risk. The inability of the sport to develop an agreed uniform national strategic vision, purpose, and plan for the game leaves it in a vulnerable position. The Panel agrees with previous reviews, that the way the sport is administered and governed must be modernised and evolved – through strategic clarity, culture, leadership, and structure.

The Review identified four key areas of focus for reform, building on the history and strength of the game while recognising current and emerging challenges, to build the foundations for a strong future for Australian netball. Accordingly, we have divided our report into four main components that reflect the way netball is played.

Origin Australian Diamonds players, Caitlin Bassett, Courtney Bruce and Jo Weston

For all parts of the team to work together, they all must stick to the GAME PLAN. Great teams go into big games with a tried-and-true game plan that everyone not only is aware of but buys into by way of being involved in its creation and development. Great teams understand their game plan so thoroughly that they play to it intuitively, and it informs every decision they make on the court. Their actions are driven by a vision for success of the whole team, not just success in their area of play or for individual players. For this Review, that game plan is a national strategic vision for netball, that every part of the system intuitively plays.

The engine room of the netball team is the CENTRE COURT. This is where the hard work is done to drive the opportunities the defence line creates. They must be agile, fast and have great decision-making capabilities. They create space

for each other and drive the ball towards scoring opportunities. This is where netball's leaders and the governance structures they work within sit.

The bedrock of any great netball team is the DEFENCE line. Often selfless and no-nonsense, defence does the hard work to create the opportunities for scoring further up the court. In this report, the product of netball is the defence end. It is the foundation upon which everything else is built. From grassroots to high performance, netball exists to create opportunities for everyone to be involved.

The GOALING end of the court is where the hard work and good decisions get rewarded. Goalers are creative and innovative, but they also have nerves of steel, able to deliver finesse under intense pressure. They provide reward for the effort of their teammates. SSN and the drive for profitability reflect these qualities.

THE GAME PLAN: PURPOSE

All key players agree to and implement an aligned vision, purpose, and strategic plan for Australian netball, and are accountable for their contribution.



The Game Plan

”

Unite the sport with a clarity of purpose; why netball exists, its reason for being.”

”

There is no national strategy. I can't see the red thread that binds the sport together.”

”

We have never seen a strategic plan for netball overall.”

— Stakeholder quotes.

86% OF ADMINISTRATORS AGREE THAT ‘COMPETING/ CONFLICTING PRIORITIES BETWEEN DIFFERENT ORGANISATIONS IN THE SYSTEM IS THE NORM’

ONLY 23% OF ADMINISTRATORS AGREE THAT ‘THERE IS STRONG STRATEGIC ALIGNMENT BETWEEN ORGANISATIONS WITHIN THE SYSTEM’

52% OF ADMINISTRATORS AGREE THERE IS VISION CLARITY WITH ONLY 45% AGREEING THE VISION DRIVES PRIORITISATION AND DECISION MAKING

State of the Game survey, 2020

The Review supported, and the Panel agreed with, recommendations contained in past review findings that identified the need:

- for Australian netball to have a shared vision, purpose, and strategic plan, and
- to reform and modernise the governance structures of Australian netball.

These recommendations are covered later in this report.

The leaders of Australian netball - CEOs, Executives, Presidents and Board members of Netball Australia, Member Organisations and SSN - demonstrated to the Panel that they have more that unites them than divides them. An aligned vision, purpose and overarching strategic plan for Australian netball across the country will provide the game plan foundation for netball to capitalise on opportunities and successfully tackle the threats, both internally and externally.

Netball Australia and the Member Organisations each have their own vision, purpose, and strategic plan. However, during this Review, it became clear that these have been developed in isolation. This means misalignment, duplication of effort and a lack of clarity of purpose throughout Australian netball, leading to missed opportunities to grow and diversify the sport.

The Challenges Facing Australian Netball

The Panel heard that Australian netball enjoys a great reputation. The players are stand-out role models, the sport is the dominant women and girls' sport in the country¹ and at an international level, it leads the world. Although superficially these comments are true, the data presents an alternate reality.

AusPlay, the national population participation tracking system for the sport and active recreation sector in Australia, has released data that shows over the past 20 years overall participation (as a percentage of population)² has declined from 4.5% in 2001 to 2.9% in 2020. The State of the Game survey produced data which showed 16% of junior and 17% of senior competition participants have left their competition in the past five years³ because of a cliquey and/or non-inclusive culture. This is approximately 100,000 participants leaving the sport in the past five years. Whilst 28% of current participants have 'considered dropping out of playing netball on several occasions'⁴ there are very few participants who are definitely considering this for any stated reason. For those that would consider leaving for another sport, the most common alternatives were swimming, soccer and basketball⁵.

Like all Australian sports, Australian netball is being challenged by the proliferation of alternative sport options, recreational 'non sport' activities and the rise of the internet and 'on-demand' consumerism. Reduced physical activity of Australians of all ages, and particularly of women and girls, is seen as a public health crisis. Australia is ranked one of the worst performers for physical activity for 11 to 17-year-old girls globally. Research funded by the World Health Organisation and published in the Lancet, Child, and Adolescent Health, showed in 2020 that 90% of girls surveyed reported insufficient levels of physical activity, with a marked decrease in sport participation by girls between 12-14 years of age and older than 17. As girls grow older, they

report lower levels of enjoyment, confidence, competence and understanding, particularly during the teenage years⁶. These statistics align with the AusPlay data which shows that peak participation in netball is in girls aged 12-14 after which there is a steady decline in participation.⁷

These ever-expanding sporting choices is a wonderful thing for Australian women and girls. It also represents a real threat that netball must not ignore. In 2022, Australia will host the FIBA Women's Basketball World Cup where the Opals will have the chance to represent Australia on home soil. Similarly, in 2023, Australia will host the FIFA Women's World Cup, a tournament of global significance that will give the Matildas the same opportunity. Of relevance to Australian netball, 2020 AusPlay data shows basketball and soccer have grown in overall participation percentages over the past twenty years and, as stated earlier in this report, participants are leaving netball to play these two sports⁸.

Further to these examples, the Australian women's Rugby Sevens team is set to defend their gold medal title at the postponed Tokyo Olympics. At the Tokyo Olympics, Australian women's teams will compete across a range of sports. This includes, but is not limited to, the Hockeyroos in hockey, the Stingers in water polo and the return of the Australian women's softball team.

Australian netball's role models are being eclipsed by women in cricket, soccer, AFL, tennis and Olympians. A basic Google search of female role models in Australian sport does not produce any stories about netballers and in mass media there are no netballers in the Australian greatest current athletes lists⁹. Women and girls (and their parents) have seen role models emerge as jockeys, world number one tennis players and world surfing champions. On home soil, the Australian women's cricket team won the 2019 T20 World Cup in front of a crowd of 86,174. In 2018, spectators were turned away from a sold-out debut of the AFLW competition and a national women's rugby league competition emerged with their marquee clash given State of Origin status.

¹ See Appendix Five to this report.

² Ausplay - Top 10 sports 2001-2020.

³ State of the Game Data Report page 49.

⁴ State of the Game Data Report - Figure 2.3C: Likelihood to Cease Participation

⁵ State of the Game Data Report page 49.

⁶ [https://www.thelancet.com/journals/lanchi/article/PIIS2352-4642\(19\)30323-2/fulltext](https://www.thelancet.com/journals/lanchi/article/PIIS2352-4642(19)30323-2/fulltext)

⁷ Ausplay Netball Report

⁸ State of the Game Data Report page 49.

⁹ Australia's 50 greatest current athletes for 2020

It is confronting to lean into the data which paints a slow but obvious decline of Australian netball because there are netball courts across the country filled with players every Saturday and there are close to half a million registered members. SSN has achieved year-on-year increases in TV audiences¹⁰ but raw numbers are masking the reality and the sport must now work together to face the reality and change it.

This Review has had reinforced to it what other reviews have stated: the leaders of netball have not agreed to a collective vision, purpose, and strategy for Australian netball.

A lack of strategic alignment risks profound consequences for Australian netball. There is a clear, though unstated, lack of will and discipline to agree, and collaboratively execute a nationally coordinated and aligned strategic plan. This exposes Australian netball to:

- competitors to step in and occupy its space, attracting netball's participants, volunteers, and fans;
- risks of failing to optimise scarce resources;
- risk of declining revenue streams;
- the failure to capitalise on growth;
- the risk of key on court and off court talent leaving; and
- the erosion of culture over time.

"We have a lot of meetings but when we can't agree we just agree to disagree and go back to our day jobs."

— Stakeholder quote.

This cannot continue. We do not want to see Australian netball become the squash of this century.¹¹

The Future Game Plan

The Panel found that there is not an effective strategic planning process, which is required to produce a series of mutually reinforcing plans that are agreed upon and supported by those who have accountability to contribute to the delivery.

Partners of the sport also feel this tension:

"Every single state has its own strategic plan. It's a good example of how everyone is working towards the same goal, but they're not completely aligned on how they're going to get there."

— Stakeholder quote.

It is important to note that unified does not mean uniform. An overarching strategy can be adopted and localised for different states and territories and teams can play distinct roles. In many of the interviews undertaken by the Panel, there was support for a more unified process, but there also seemed to be a lack of flexibility to compromise for the greater good of the game. Again and again, the clarity of responsibilities and accountabilities of each entity in the system was identified as an urgent requirement (addressed in the Proprietor section).

¹⁰ <https://supernetball.com.au/news/ssn-2019-viewership-attendance>

¹¹ <https://www.abc.net.au/news/2020-07-18/what-happened-to-squash/12444178>

Building a Unified Strategy

The Panel recommends that the CEOs of Netball Australia, SSN and Member Organisations, SSN Teams and ANPA come together to develop a strategic framework that will guide the sport for the next three years. It will be a framework that can be ratified by each of the boards of the organisations. Key elements to agree on include:

- **Vision:** Where do we want to go?
- **Purpose:** Why do we exist?
- **Who are our customers at a national, state and association level?**
- **Who is the competition?**
- **What is our promise?** What promises do we make to our core customers: (participants, coaches, umpires, administrators, sub-elite players, volunteers, elite athletes and to each other)?
- **What are our values?** The behaviours we commit to drive a culture that will enable the sport to thrive.
- **Where are the accountabilities?** How are people/organisations held accountable when they do not live the values of the sport? Who is responsible?
- **Key strategic priorities for everyone to work on together:** No more than five.
- **What does success look like?** Define and document these metrics. Agree key success metrics.

The process for developing the new strategic framework should involve wide stakeholder engagement and consultation, as well as be informed by the evidence and findings delivered by this Review.

The strategy session should be facilitated by an independent facilitator and a draft be completed by March 2021, then be fully endorsed by June 2021. Rules of engagement will need to be established to drive alignment and a mechanism created to encourage debate and drive agreement.

The Panel is mindful that previous efforts at agreeing and implementing an aligned strategy have failed, therefore the Panel has developed an example of a values statement for the game as a starting point.

For this, the Panel has borrowed from the strategy of the 2007 Netball World Cup-winning Diamonds team. That team set out at the beginning of 2007 to define what it wanted to be. The statement they produced was *“The Australian Netball Team is Proud, United and Relentless.”* They then established a series of behaviours related to each word, and then a series of accountabilities to those behaviours, which everyone in the team was empowered to call out without reprisal.

Critically, every decision made by the team, management, and the individual athletes through the course of that year was made through the prism of that values statement. In a similar vein, an aspirational statement for Australian netball could be:

AUSTRALIAN NETBALL IS UNITED, POWERFUL AND ENDURING

We are UNITED in:

- Vision, purpose, strategy, diversity, and ways of working. One voice in many accents.

We are POWERFUL:

- Diamonds to be the most aspirational Australian team.
- SSN is the best women’s sports league in the world.
- SSN and Diamonds have strong pathways.
- SSN is in the top five Australian sports for broadcast ratings.
- Our advocacy is strong to government at all levels.
- Athletes are powerful advocates and role models for the game.

We are ENDURING

- Number one in team participation.
- Our heritage supports our brand of the future.
- Athletes have a thriving future post-game.
- Australian netball is financially secure.
- Netball stands for the empowerment of women and girls.
- Netball is flexible and fun.

Should values like the above be decided on, they should appear on every board paper at every level of netball (local, state, and national) as a ‘red thread’ connecting every part of the sport to a bigger game. It would remind Australian netball’s leaders why they are there, their obligation to the game and serve as a guiding principle for complex decisions. How powerful could netball be if every decision in the system was made through the same, clearly defined prism?

RECOMMENDATION ONE

CORE STAKEHOLDERS TO AGREE AND IMPLEMENT AN ALIGNED VISION, PURPOSE, AND STRATEGY FOR AUSTRALIAN NETBALL.

1.1 By building on the suggested processes and division of duties outlined in this report, the Core Stakeholders within Australian netball participate in a process to agree and ratify the national strategic priorities for Australian netball for the next three years. From this, respective strategic plans can be developed/refined to demonstrate clear alignment around:

- purpose;
- vision;
- priorities; and
- agreed measurement and accountability.

1.2 The strategic plan will be completed and ratified by all Member Organisations, SSN Commission and Netball Australia by June 2021.

1.3 These priorities and plans will be publicly communicated by Netball Australia and the Member Organisations via websites and social media and include annual public updates on progress.

THE CENTRE COURT - Proprietors

"Netball risks being condemned to fail if the pettiness and fiefdoms are allowed to continue."

"Netball is at war with itself, and needs to be unified to fight the external challenges."

"Netball is constrained by the structure and the culture."

— Stakeholder quotes.

"Every time we talk to netball we have to speak to a different person."

— Major sponsor quote.

As noted above, the Panel has formed the view that the greatest threat to Australian netball comes from within. In this section, key recommendations to strengthen the foundations or *centre court* of a strong successful future for Australian netball are considered.

The Panel acknowledges the many committed, passionate, skilled, and dedicated people across the system who want the best future for netball. Developing and executing on a national strategic plan needs to be complemented by:

- clarity of responsibilities and accountabilities;
- a more contemporary fit-for-purpose federated governance model;
- transparency and accountability across the system;
- significantly improved communication;
- collaboration, trust and respect; and
- resolving financial and resourcing challenges.

The Panel is keen to see the wider netball ecosystem embraced, including AMMNA. For the purposes of this section, the focus is on the Core Stakeholders.

Responsibilities and accountabilities of Netball Australia and Member Organisations

“ Their process seems very fragmented between the states and the national bodies. Everyone seems to want to be the boss.”

— Stakeholder quote.

71% OF ADMINISTRATORS AGREE DUPLICATION OF EFFORT ACROSS THE SYSTEM IS COMMON

ONLY 34% AGREE THAT KNOWLEDGE SHARING IS COMMON THROUGHOUT THE SYSTEM AND ONLY 24% AGREE THERE IS TRANSPARENCY OF INFORMATION

State of the Game survey, 2020

64% OF ADMINISTRATORS AGREE THAT A LACK OF TRUST EXISTS IN THE SYSTEM

ONLY 36% OF ADMINISTRATORS AGREE THAT THE SYSTEM DEMONSTRATES ACCOUNTABILITY

State of the Game survey, 2020

One of the strongest themes to emerge in the Review was the concern about lack of clarity of responsibilities and accountabilities within the sport and an equally strong desire for that to be rectified. The Panel notes this has been a continual and core theme in recent reviews conducted by the sport. Failure to agree on a shared vision combined with a lack of trust across the sport has also contributed to a blurring of the lines of responsibilities. This brings inefficiency and a lack of accountability.

The Australian netball system cannot innovate, respond to changing stakeholder needs, or function efficiently unless people have access to relevant, timely, and valid information to support good decision making. The ultimate responsibility of the leaders in the sport is to create the strategy, systems, accountabilities, and norms that lead to a culture of commitment and transparency. This should include making Australian netball's processes and systems uniform and utilising and maximising the tremendous talent that exists within the netball ecosystem.

The Review found there is a logical division of roles for much of the work that is done, and the Panel has identified core roles below. There is some overlap, especially where programmes have both a local and national focus, and this is where leaders need to support and implement a clearly defined and agreed strategic framework, agree the division of roles and responsibilities, and commit to transparency and accountability.

For this change, it will mean letting go or reallocating of some functions, but more importantly, letting go of some of the behaviours seen in past years and highlighted in past reviews. The new national strategic plan must make clear who will lead the core strategic priorities for the betterment of the game. Based on the evidence before the Panel, the suggested allocation of responsibilities and accountabilities are outlined on the following pages.

NETBALL AUSTRALIA

- Lead the strategic planning process for the whole of game in partnership with key stakeholders to agree on the national priorities to grow the game. Each stakeholder can use this national strategic plan to build complementary plans for their organisations. (see recommendation one for details);
- Lead high performance programmes – Diamonds, 21/Under; Fast5; national talent squads; coach and umpire programmes;
- National competition management;
- Compliance, integrity, and diversity initiatives;
- Twice a year, lead a process to determine what products, systems, services, or projects could be beneficial to do on a national basis. These ideas need to be formally considered via a business case process. Not all stakeholders need to be part of a national project, but the business case needs to stand up. As part of the process, it can be determined who is best placed to lead a national project (based on capability, capacity, and experience) – Netball Australia, SSN, or a Member Organisation;
- Build a shared services operations model with Member Organisations as the ‘client’ to drive operational efficiency for the game; and
- Be the voice of netball to key stakeholders: government; media; commercial partners; other sporting organisations.

MEMBER ORGANISATIONS

- Develop the product for delivery;
- Deliver the product at state level;
- Support Associations/Affiliates to deliver the product;
- Manage and deliver development pathway through to SSN, including:
 - schools/educational institution championships;
 - state/territory championships;
 - state teams for national championships;
 - SIS/SAS regional academy programmes
 - ANL team(s) (or any competition that replaces ANL);

- Coach and umpire education and training;
- Facility development and management;
- Implementation of any national programmes as agreed between Member Organisations/NSO;
- Work with Netball Australia and other Member Organisations to develop, deliver and share information on specific programmes.

SSN COMMISSION

- Take the lead to build SSN to be a profitable, brand-enhancing asset that becomes the most successfully administered women’s professional league in the world;
- Build the strategy aligning with Netball Australia, Member Organisations and SSN Teams;
- Consider owning and operating all aspects of the ecosystem to enable a process for private equity investment in the league;
- Work with SSN Teams to deliver the players to the league and execute strategies for growth – audience engagement, revenue, profits, and operational efficiency;
- Build the commercial strategy and negotiations of all contract renewals; and
- Operate the SSN 2021 season.

NETBALL AUSTRALIA AND MEMBER ORGANISATION GOVERNANCE

The theme of governance was repeated in the qualitative discussions and quantitative data, and improved governance will without doubt set the foundation for Australian netball to best meet the emerging opportunities and threats.

The Panel heard of the harmful effects of recent governance instability that has occurred on the Netball Australia Board. In the past four years, seven directors have ceased as directors of the Board, which poses significant risks to Netball Australia in particular and Australian netball in general. Research indicates that high board turnover causes frustration and decreased motivation among both internal and related stakeholders,

which further spurs the decreasing performance of the whole organisation.¹²

The Panel has concluded that governance reform remains a significant opportunity for stability, development, and alignment to underpin strengthening of Australian netball. The recent release of the evolved Sport Governance Principles by Sport Australia in conjunction with all State and Territory Agencies for Sport and Recreation provides a constructive opportunity for the whole netball system to critically consider how they govern collaboratively and create accountability for modern progress in governing documents, systems, culture, and behaviours. See Appendix Two.

BOARD COMPOSITION

Netball's success is determined by the on-court contest and the off-court business. The Panel is keen to see netball be Australia's best on and off the court. To achieve this it is critical that the Netball Australia Board is the best sporting board in the country with the right mix of skills and experience to guide the next iteration of netball.

Currently the Netball Australia Board is comprised of six directors elected by the Member Organisations and up to two appointed directors. The current voting system, with members having sole responsibility for nominating and voting on candidates, does not deliver a board with the appropriate mix of skills and diversity, and with a preponderance of state-appointed representatives has the potential for conflicts of interest.

For the Netball Australia Board to constitute itself properly and perform effectively, it must identify which skills are required to deliver and oversee the organisation's strategy, and then secure these skills through the Board appointment process. If Australian netball's aspiration is to remain the leading sport for women and girls, to attract more participants, to represent the diversity of Australia in all parts of the organisation, to strengthen its development pathways, to ensure the Diamonds are gold medallists at benchmark events and to own an exceptional and profitable entertainment and commercial

product, it must also have the capability to operate as a visionary business with qualified and independent individuals. No longer is netball's success determined only by the on-court contest. The business of sport is competitive, technical, and intense and the time has come for Australian netball to mature to be Australia's best on and off the court. By promoting and codifying an independent and transparent board composition and nominations process the sport will be positioned to progress, grow, and reach its potential at all levels.

Further, to accelerate the commitment stated in the recent pledge of Declaration of Commitment signed by all stakeholders of the netball family, the Panel recommends the appointment of at least one Aboriginal and/or Torres Strait Islander member on the Netball Australia Board, which is also encouraged to be replicated on Member Organisation Boards.

Noting that similar challenges and opportunities exist at the Member Organisation Board level, the Panel recommends that the Netball Australia Board composition and nominations process is replicated in all Member Organisation constitutions. The proposed changes are recommended to deliver stability, consistency and increased capability and competence across Australian netball boards while ensuring member connection and maintenance of proper history and tradition. The changes will also ensure that Netball Australia is assessed at the highest level of governance maturity under the Sport Governance Standards.

Finally, it will allow executives at every level of the sport to focus on driving and implementing the change necessary to futureproof netball.

¹² <http://mdh.diva-portal.org/smash/get/diva2:1116040/FULLTEXT01.pdf>

RECOMMENDATION TWO

NETBALL AUSTRALIA AND MEMBER ORGANISATIONS ESTABLISH A CONTEMPORARY GOVERNANCE FRAMEWORK FOR THE FUTURE OF AUSTRALIAN NETBALL.

2.1 Netball Australia, through a Special General Meeting, should effect the following changes voted by the Member Organisations.

BOARD COMPOSITION

- Nine-person board with five appointed directors, three member elected directors and one athlete director**;
- Each director will be appointed/elected for three years and may serve three terms, equating to maximum tenure of nine years;
- Directors will be rotated such that three positions are declared vacant each year (one elected vacancy and two appointed; except in the third year which would be one elected, one appointed and the athlete director);
- Minimum one director who will be of Aboriginal and/or Torres Strait Islander descent; and
- All directors are independent, within the following definition. Independent directors are those who:
 - Are not elected by the members to represent any constituent body;
 - Are not employed by Netball Australia or any constituent body;
- Do not hold any other material office within the sport's organisational structure; and
- Have no material conflict of interest due to being a director.

Transitional arrangements will need to be determined.

*** the athlete director must not be a current member of the Diamonds or an SSN team but must have played in the Diamonds or an SSN team in the preceding ten years.*

Nominations Committee (codified in the constitution)

NOMINATIONS COMMITTEE COMPOSITION

- A Chair fully independent of netball (with casting vote), appointed by the Netball Australia Board;
- One Netball Australia Director, appointed by the Netball Australia Board;

- One nominee appointed by the Member Organisations accepted by six of the eight Member Organisations;

The Nominations Committee must assess nominations and candidates for all Director vacancies (including Elected Directors, Appointed Directors, the Athlete Director, and casual vacancies) and provide advice to the Netball Australia Board and, for Elected Directors, also the Voting Members, with respect to:

- the suitability of nominations or candidates for director positions, having regard to the skills and attributes of the nominees;
- the composition of the board, having regard to diversity of skills, gender, and backgrounds of directors; and
- considering skilled Aboriginal and/or Torres Strait Islander board members consistent with the Declaration of Commitment.

The Nominations Committee, by majority vote, has the power to determine that a nominee or candidate is unsuitable for further consideration by the Board or Voting Members (as the case may be) and is therefore ineligible for election or appointment to a Director vacancy.

2.2 All Member Organisations should amend their constitutions to apply this proposed Board Structure and Nominations Committee process consistently across the system. There may be nuances (for example fewer directors) but the percentages of elected/appointed directors and the Nominations Committee process should be replicated and codified in the Netball Australia Constitution and all Member Organisation constitutions.

2.3 The boards in the Australian netball system should review the evolved Sport Governance Principles, Sport Governance Standards, and agree a subset of nationally connected benchmarking standards that they remain publicly accountable to achieving and work together to implement.

2.4 Netball Australia, in collaboration with Member Organisations, to agree on their distinct roles and accountabilities across the key areas of

operation. This will include timely communication, commitment to collaboration both vertically and horizontally, clear accountabilities, and prioritising efficiency and alignment with the agreed national strategy.

DEFENCE: **Product**

“ *Netball can be played from age 6 to 60+.”*

“ *Netball is not always a safe cultural space for Indigenous girls and women.”*

“ *I think we need to be creative in how we include everyone in our sport.”*

“ *Netball is unique. Its values are powerful and the athletes are outstanding. It is part of the fabric of Australia but it is under threat from the new codes.”*

“ *Netball’s traditions are core to the Australia way of life - mateship, teamwork. I think the opportunity to add a broader range of competitions (such as men’s and mixed) into the landscape will allow for innovation, bigger events and more spectacle.”*

“ *Netball has traditionally been a seasonal sport and I wonder if there were more flexibility e.g., indoor netball plays weekly, if more people would participate. I would love to see that netball is the choice of sport for women within Indigenous communities.”*

“ *Netball is the only sport that doesn’t need a “W” in front of it.”*

— Stakeholder quotes.

Participation

Australian netball’s great strength is in its numbers. It remains Australia’s largest women’s sport in terms of participation with 536,336 women players over 15 years-old in 2019. The number of girls playing netball is almost double that of the next most popular sport for girls (soccer). Participation data is contained at Appendix Five.

This must be balanced against the decline in participation as a percentage of population, and the fact that during the past four years women’s AFL, rugby league and rugby union have grown exponentially - albeit off a small base. The only code to show declines across all parts of the sport is cricket. The fastest growing new sport for women and girls is AFLW with 68% growth rate for women and 31.4% for girls during the past four years. The growth rates for girls rugby league and rugby union are larger but off a small base. In the same period, the growth rate for women in netball was +10% and -4% for girls. The fact that participation has fallen slightly amongst girls is the ‘canary in the coalmine’ for the sport, and a warning that we must evolve our grassroots offering.

On the one hand, the statistics, and the concerted effort by traditionally male sports (such as cricket, AFL, soccer, rugby union, and rugby league) to strategically provide more opportunities than ever before to girls and women to attract participants could be a threat to netball’s position as the number one participation sport for women.

On the other hand, netball should maintain that the opposite is true. Australian netball has always been a true champion of women and girls’ participation in sport, and whilst it is determined to maintain its pre-eminent position, it is also supportive of the wider movement towards women and girls being welcomed in all sports.

The optimistic framing of the changing landscape is that it presents an opportunity for netball to reimagine itself.

Rather than adopting a defensive mindset and protecting its lead, Australian netball should be aggressively focussed on the opportunities. The key opportunity is for Australian netball to significantly grow its numbers. Leveraging

the fact that it is emerging from the COVID-19 crisis in a comparatively stable position, Australian netball must springboard a bold new strategy of becoming the number one team sport in Australia by 2028 - building momentum towards and in the aftermath of the 2027 Netball World Cup, which Australia has bid for the right to host.

Netball is currently Australia's second largest team sport, with 879,462 participants. It trails soccer by 605,181 participants. To surpass soccer, netball needs an uplift of 605,181 participants or 69% over the next seven years. This is ambitious, but not impossible.

Creating this future for Australian netball requires a thorough understanding of netball's current (and potential future) customer base, including developing additional products and competitions to get them playing more often, as well as an understanding of where the blue-sky opportunities lie.

The primary focus of the strategy around participation must be protecting and growing the current community of players and then attracting new participants. The strategy should combine both evidence around the cost (financial and non-financial) of retention and of new recruitment. Retention is a function of the quality of the participant experience - coaching, officiating, registration process, facilities and flexibility are all key to building a positive participant experience and one that keeps people in the game.

MORE THAN 'JUST A SPORT'

If Australian netball wants to remain as the place for girls and women to shine, it needs to play a bigger game, and be more than 'just a sport.' Leveraging its history and expertise, the opportunity is for netball to be a powerful agent of change for, and a strong advocate for the rights of, girls and women in Australia. The evidence is clear as to the benefits of a healthy and active lifestyle for women and girls, the challenge is making a healthy and active lifestyle accessible, safe, and fun. AusPlay reports that 89% of girls aged nine to 11 and 85% of girls aged 12-14 participate at least once a year in organised sport and active recreation outside of school hours, dropping

by 57% for those who regularly participate three times a week. When this is combined with research from the Suncorp Team Girls Project that revealed more than a quarter of Australian teen girls are at risk of not returning to play team sport after COVID-19, there is cause for concern.

The Suncorp Team Girls Project research revealed one in four have simply lost interest, while more than half (60%) reported 'nothing can be done' to make them look forward to participating in team sports again. The national survey of more than 1,000 Australian teenagers conducted as part of the Suncorp Team Girls initiative also revealed team sport was primarily replaced with 'screen time' (91%) including 63% spending more time on social media during social restrictions, and two-thirds (67%) of Australian girls admitted to being less active during lockdown, compared to the same time last year.¹³

This confronting research exists in direct polarity to the research that shows one of the best ways for girls and women to shine is by being physically literate, a skill that netball can and is already key in developing.

Physical literacy is lifelong holistic learning acquired and applied in movement and physical activity contexts. A physically literate person is able to draw on their integrated physical, psychological, social and cognitive capabilities to support health promoting and fulfilling movement and physical activity."

— Sport Australia.

¹³ <https://www.suncorpgroup.com.au/news/news/teen-girls-at-risk-not-returning-to-team-sport>

There is prolific and persuasive research which demonstrates a range of benefits for girls playing sport. These benefits go far beyond the simple physical value of participating in sport. Leading research shows:

- Physically literate girls do twice as much activity than those who are not. They are happier and more trusting of other children, and higher levels of resilience are evident in children who demonstrate competency in these aspects of physical literacy.¹⁴
- Girls and women who participate in sports are less likely to take drugs, engage in abusive relationships, or have unwanted pregnancies.¹⁵
- Sport is known to improve the memory and form traits such as discipline and perseverance that improve academic performance.¹⁶

The Australian Council for Health, Physical Education and Recreation has consolidated evidence to support that sport and physical activity improves academic and career performance with girls who play sport reported as more likely to graduate from high school, receive post-graduate degrees, and earn more money. And overall, physically active girls will be healthier, happier, have higher self-esteem and body confidence, and have better health outcomes in adult life.¹⁷

It has been acknowledged that girls face many barriers in their sport and physical activity journey, the majority of which are a response to their personal lived experience. These barriers have been identified as¹⁸:

- **Body image** – one in four girls are unhappy with their body image at 11-14 years of age, and this increases to one in three girls by the time they reach 14-16 years of age.
- **Low confidence** – girls who participate in physical activity at school identified low confidence and a dislike of being watched as significant barriers, particularly at 14-16 years of age.
- **Prioritising schoolwork** – girls identify

schoolwork as a barrier outside of school, particularly 14-16 years of age. This suggests girls prioritise schoolwork and need encouragement to stay active.

- **Gender constraints** – gender constraints and expectations can negatively influence adolescent girls' involvement in sport.
- **Less focus on competition** – a focus on competition is less desired by girls than boys.
- **Feeling uncomfortable** – girls from culturally diverse backgrounds are less likely than their peers to be physically active primarily based on feeling uncomfortable.

There can be no greater and impactful call to action for Australian netball than working together to ensure that netball is a place of fun and enjoyment and where the social aspects of sport are harnessed. Netball is uniquely placed to encourage women and girls at risk of unhealthy physical inactivity to engage with a sport that has been safe, inclusive, and welcoming of women and girls for generations. Netball can use this evidence of barriers to girls and women in promoting the sport through communication and marketing strategies along with a product design that collectively aims to influence behaviour change amongst women and girls.

COVID-19

The above-mentioned opportunities and issues must also be considered in the light of the effect of the COVID-19 health crisis on sport participation.

AusPlay's recently released report on the early impact of COVID-19 on sport and physical activity participation¹⁹ showed that the impact of COVID-19 lockdowns led to an increase in adults (over the age of 18) saying they had deliberately been more active, albeit in individual recreational activities like running and walking. This combined with the trend in the last 20 years towards a preference for non-sport-related activities for adults²⁰ is an early warning to the organised sports system that they must evolve or succumb. Given the

14 <https://www.yu.edu.au/about-yu/news-events/news/improving-the-state-of-play-for-girls>

15 <https://www.forbes.com/sites/alanaglass/2013/06/24/ernst-young-studies-the-connection-between-female-executives-and-sports/?sh=2d3cece333a2>

16 <https://www.ibcnschool.edu.in/blog/benefits-sports-students>

17 <https://www.achper.org.au/>

18 <https://achper.vic.edu.au/public/news/news-items/The-need-for-schools-to-develop-physically-literate-girls---new-infographic-released.aspx>

19 <https://www.clearinghouseforsport.gov.au/research/ausplay/results>

20 Exercise, Recreation and Sport Survey 2001-2010

more accessible nature of physical activity and individual activities during COVID-19, plus the introduction of new barriers to organised sport, the pandemic may provide additional challenges to sports in the future.

The upside was that the report also showed that Australians felt positive about them and their children returning to organised sport, with 59% saying their children were extremely or highly likely to do so when it was available.

In the words of the AusPlay Focus report, *“the successful re-booting of children’s organised sport is critical. Australia has historically performed well in this area compared to world standards and it needs to continue for the health and wellbeing of the next generation.”*

The ongoing uncertainty around COVID-19 and its potential effect on participation means that sports need to become more agile in how they deliver their product. From what the product looks like, to who delivers it and by what means are all things that require consideration. The Australian population wants to get back to sport, and their children back to sport in a safe manner. Sports that are agile, that can deliver a range of products with little runway, and that can do so in a COVID-safe manner will thrive.

Evolving the Product

Netball cannot afford to continue “business as usual” in an age of disruption and in an industry where standing still means going backwards. Netball must have more than a determination to maintain its position as Australia’s most popular participation sport for women and girls.

It is time for netball to challenge itself, and to be unashamedly ambitious. Australian netball must do in participation what it does in high performance, and that is aim to become number one. Australian netball must grow its core business to become the biggest player in Australia in sports participation. This will require agility, flexibility, and some creative thinking.

The Panel recognises that much has already been done at various levels of the netball ecosystem to innovate products and expand

upon the traditional seven player game. It is not in the interest of the system for there to be duplication of product innovation. Rather, the system would be served by working together to identify and determine which organisation takes the lead on each product in support of all organisations delivering the product.

Currently, the options to participate as a player in netball within the Netball Australia and Member Organisation network are a combination of national and local programmes and offerings. A product working group should be established, led by a Member Organisation with particular interest and expertise in this area to consolidate existing product offerings and develop new products for Associations/Affiliates. This will eliminate duplication of effort, inefficiency and cost and make available a wide suite of products to any Association/Affiliate in the system that wishes to activate them.

The State of the Game 2020 quantitative survey established that the top three reasons individuals participate in netball is for fun, fitness and for the enjoyment of being in a team. This provides a clear direction for the development and evolution of the participation products. Any evolution of current products or establishment of new products should be focused on delivering customer experiences which achieve the outcomes sought by participants.

One of the strong themes in the research was for netball to be more flexible in how it delivers its product. This includes:

- when and how often competitions are offered (year-round/evening/midweek/summer/twilight);
- how they are offered (shorter seasons, non-competitive leagues);
- providing support for participants including cultural, social, and childcare; and
- allowing participants to choose uniforms that cater for different comfort, modesty, cost, and cultural sensitivities.

There are opportunities to grow customer satisfaction along with revenue by making it easier and more enjoyable for people to play more often, wearing clothes they feel comfortable in.

” *We need to be creative in how we include everyone in our sport. For some people, the uniform is the issue and allowing them to wear different clothes would be a simple fix.”*

— Stakeholder quotes.

Diversity

Whilst Australian netball is commonly described as welcoming, and inclusive, there is room for improvement in attracting and retaining participants from diverse cultural, religious and gender groups²¹.

80% AGREE THE COMMUNITY ENVIRONMENT IS WELCOMING AND INCLUSIVE HOWEVER IT IS ACKNOWLEDGED THERE ISN'T A GREAT DEAL OF DIVERSITY IN MOST ENVIRONMENTS

WORDS COMMONLY ASSOCIATED WITH THE NETBALL COMMUNITY ENVIRONMENT ARE FRIENDLY (58%), WELCOMING (50%) AND FUN (42%)

State of the Game survey, 2020

Netball has a responsibility to make itself as broad and as inclusive as possible. It is clear from the surveys and discussions in this Review that it is important to netball that no individual or group of individuals are excluded from the sport. Whilst the sport does not seek to directly exclude individuals or groups there is a key need for action to improve diversity and inclusion in the sport at all levels.

Diversity and inclusion require role models in governance as well as in the elite and participation side. It is also critical to work closely with the next generation to ensure netball is delivered and experienced as encouragingly as possible to all individuals who take part whatever their gender, sexuality, cultural background, or ability. The netball ecosystem has not strategically sought to appreciate that there are cultural or systematic reasons why there is not a high level of diversity in the sport and why different cohorts of the Australian population might not take part in netball including as players, volunteers, and fans.

” *I would really like to see our state body do more to support and encourage All Abilities netball. We have been running a program for a few years now and there is very little support or development opportunities for organisations to run these programs. It seems to be left to individual clubs to develop in their own capacity. There has not been a consistent staff member to consult with in all this time which is incredibly frustrating.”*

— State of the Game 2020 survey respondent.

” *Ensuring umpire training allows for clarity of hand signals for hearing impaired persons as well as potentially having a flag to gain attention without whistle.”*

— Stakeholder quote.

²¹ State of the Game data report at page 34 Figure 2.1D outlines some of the open-ended feedback received from those within the community environment regarding inclusivity.

Social, Mixed and Men's Netball participation

A major opportunity exists to expand netball's grassroots reach by providing a value proposition for already existing netball competitions that currently do not come under the authority of Netball Australia or the Member Organisations. Sitting outside the network are indoor netball, men's and mixed netball and some schools/university competitions.

This presents an opportunity for Netball Australia and its Member Organisations to bring these outside organisations into the formal netball ecosystem. There is the potential for direct economic benefit via fees and indirectly by way of potential reach and engagement for sponsors and government.

AMMNA is potentially a key ally and resource in this process and Australian netball should work with it, and with other deliverers such as indoor netball, and school and university-based sports associations - with a view to formal affiliation where appropriate and to broaden the netball's community footprint.

Men and Boys

Netball Australia should be out to promote the engagement of all in netball but we only hear and see young white girls and blonde young women in the promotional material."

— Stakeholder quote.

The following statistics from male sports, combined with the fact that there is already a significant cohort of men who play netball in competitions outside the Netball Australia and Member Organisation delivery networks, indicate that netball could be a key competitor to cricket and the football codes for male participation without significant investment. Netball is well placed as a low contact physical sport offering that is an alternative to the high contact male dominated sports. The increased medical research relating to concussion and

the way in which it can affect athletes at all levels of sport from the part-time recreational athlete through to the full-time professional adds a further positive health and safety advantage for netball.

Netball has long dominated as a high participation sport for women and now there is an opportunity or significant growth as a participation sport for men. Almost 80,000 men currently play netball representing growth of 28% between 2016-2019 - the highest growth rate of any adult men's sport²². Anecdotally men participate in social and mixed netball competitions outside of the jurisdiction of Australian netball. There is an opportunity for Australian netball to bring these male participants into the sport and widen its opportunities for growth in all roles and as fans of the women's game.

Consideration should be given to delivering grassroots participation products and competitions for boys, men and mixed teams.

Whilst creating the opportunity for boys and men to formally participate as players in netball is a logical next step for the sport, consideration must also be given as to how that accords with Netball Australia's purpose as "empowering girls and women to shine". Greater participation of men and boys in netball supports the objective of gender equality in sport and the community, which is critical for the empowerment of women and girls. Boys and men who play, coach, umpire and administer the sport, are, by way of their participation, supporting the importance of gender equality, and debunking out-of-date myths and stereotypes about the roles of men and women that hold back all genders. The work of Our Watch, Australian Human Rights Commission, eSafety Commissioner and others confirms that Australian women and girls face higher risks of violence, online abuse, economic inequality, and other discrimination in the broader Australian society. Netball continues to have a significant role from grassroots to elite in combatting gender inequality across Australia, which could be significantly enhanced with the ability to communicate directly with many Australian boys and men.

²² Appendix five to this report.

Volunteers

Australian netball's superpower is its volunteer network. The volunteer network delivers an outstanding high-quality participant experience at a consistent time and place for hundreds of thousands of people. One of Australian netball's key points of differentiation is that participants (and their parents) know that they play at the same time, in the same place each week. That consistency and predictability in a world with so many unknowns are the envy of many other sports and is a strength to be proud of and capitalised upon.

Given how critical volunteers are to the delivery and participant experience, it was a concern that there is increased administrative burden being placed on a shrinking pool of volunteers. Increased compliance and governance responsibilities are more time consuming than ever, taking volunteers further and further away from the fun aspect of their roles.

Australian netball must work to provide its grassroots volunteers with proven opportunities for innovation and flexibility. It cannot ask its volunteers to drive participation growth, product innovation and diversity initiatives without significant support. This includes support to understand what alternative governance models may be available to minimise or eliminate governance burden and enable complete focus on the participants.

As a minimum, Australian netball must equip volunteers to perform and enjoy their contribution to community and netball by way of an aligned and locally adapted strategy, stability in overall governance, supported by unified robust and practical tools, systems, and communication. This must see the eradication of duplication and the provision of a single, fit for netball purpose digital registration and competition platform.

If Australian netball is to grow to be the number one participation sport in the country, the time has come for it to professionalise parts of its delivery network. It must provide a more enduring structure to be able to service the demand it aims to create. This is not to replace the volunteers nor to disparage their work, but to support them and enable them

to be at the forefront of the product delivery, rather than worrying about the paperwork and compliance issues associated with it.

A Member Organisation working group, with support from Netball Australia, should explore the best delivery model for this change, such as whether this should become a state network of development and administrative officers; whether local Associations/Affiliates should be responsible for staffing or whether franchises or licences should be granted. The opportunity to partner with government or the local arms of commercial partners should be explored, as well as the opportunity to increase diversity by attracting candidates from different backgrounds.

This initiative would provide workforce continuity and an on-the-ground link between the governing bodies and volunteers.

Aboriginal and/or Torres Strait Islander Peoples' Participation

"We need more opportunities for Indigenous players."

"Netball needs more scouting and nurturing of talent in rural areas which also tend to have more players of lower socio-economic status and more Indigenous players."

— Stakeholder quotes.

The Panel notes that during the drafting of this report Australian netball's Declaration of Commitment, signed by 20 peak organisations within the sport, was announced. This Declaration is to "commit to the change required to increase participation in netball's performance pathway for Aboriginal and/or Torres Strait Islander players, coaches, umpires and administrators. Change that will only be achieved in true partnership with Netball's Aboriginal and/or Torres Strait Islander communities". The Panel expects this Declaration of Commitment to be brought to life as a matter of urgency and notes that work is underway to do so. The Panel supports the importance of Australian netball playing

its part in Australia's broad commitments to Aboriginal and/or Torres Strait Islander self-determination and social justice.

Whilst the Declaration of Commitment relates to increasing the representation of Aboriginal and/or Torres Strait Islander athletes in netball's representative pathways and high performance programmes, it will be a hollow, tokenistic commitment if Australian netball cannot attract and retain Aboriginal and/or Torres Strait Islander girls and women to participate in grassroots netball, driven by strong relationships forged by the communities and netball associations across this country.

The initiatives to promote progression of Aboriginal and/or Torres Strait Islander peoples within Australian netball must be system wide. The phrase *"you cannot be what you cannot see"* should be a guiding principle for any work to be done. To that end, it is recommended Netball Australia, and every Member Organisation, creates a board position for a person of Aboriginal and/or Torres Strait Islander descent to ensure Indigenous business and issues are raised at the highest level of the sport. It should become part of a wider step-change process to grow and nurture Aboriginal and/or Torres Strait Islander role models into every facet of the sport.

It is also recommended that within the organisational structures of Netball Australia and Member Organisations, an Aboriginal and/or Torres Strait Islander person is engaged to lead the development and implementation of the National Indigenous Netball strategy, in consultation with Aboriginal and/or Torres Strait Islander stakeholders and appropriate members of the non-Indigenous netball community. This position would also provide support and administration services (and where appropriate lead/manage) the Indigenous Steering Committee that is being established as an obligation of the Declaration of Commitment.

Technology

75% OF ADMINISTRATORS AGREE THAT UNDERINVESTMENT IN TECHNOLOGY IS ONE OF THE MOST SIGNIFICANT CHALLENGES FOR THE SPORT

ONE-THIRD OF THE COMMUNITY WORKFORCE IS LIKELY TO PERSONALLY PAY FOR ENABLING TECHNOLOGY E.G. AN APP, IF IT WERE AVAILABLE TO THEM

State of the Game survey, 2020

Earlier in the report, the Panel noted that the position of traditional sport in Australian culture is being challenged by the increase of recreational activities and the rise of the internet and 'on-demand' consumerism. More than ever before, Australians are choosing 'non-sport' options for their physical activity including parkrun, boot camps and centre based high intensity interval training. There are also data in the Review that the single biggest barrier for adults to participate in netball is *"I am not fit enough"* (18%)²³. This is a significant opportunity for netball to create related products that are delivered digitally and innovatively. The partnership with NETFIT puts netball in a lead position to gain competitive advantage in this space. Consideration should be given to netball delivering a wide range of digital products to all participants including fitness, health, and overall wellness products.

Digital disruption has well and truly hit the sport sector and netball is far behind. It is so easy for people to shop, bank, listen to music, socialise and communicate online. Why is interacting with netball so much harder? Underinvestment may certainly be a key contributor, but that is only one aspect. Investment must be underpinned by data and a lack of transparency of data across the system is limiting at best and crippling at worst.

²³ State of the Game data report at page 52 - Figure 2.3F: Barriers to Participation - Adults by Segment

Netball needs to fundamentally transform itself by leveraging new and emerging technology in three important ways:

- by delivering personalised netball experiences for all Australians, with strong in-person and digital engagement, that allows a deeper understanding of and support for the customers and fans to engage and connect;
- by digitally connecting netball to streamline sport delivery and operations, share knowledge, drive performance and efficiency, and make the customer's interaction with netball simple, and in turn simplifying the roles of the volunteers who are the lifeblood of the sport; and
- by leveraging digital and technology to imagine new netball experiences, create new commercial opportunities, deliver new business models and ways of operating.

This digital transformation programme needs to be created together. It will not serve netball's community if technology is not driven by a single strategy, where there is power and efficiency in co-creation. The job of the leaders and administrators is to uncover the needs of Australian netball's customers and potential customers and collectively build an experience that meets those needs. This requires an integrated and collaborative approach, rather than building isolated products that deliver only part of the netball experience.

The intention should be that Australian netball is consistent, not uniform. Netball should use the same language and the same design patterns wherever possible. This creates familiarity, but when this is not possible, netball should make sure its approach is consistent.

Processes and data exchange between organisations within netball are still mostly manual. This causes increased work for volunteers, allows data silos, and hampers the ability for netball to drive analysis and insights from data. This limitation is highlighted in the survey data. Netball must unify behind a single digital strategy that enables a single view of the customer which will create operational efficiency, streamlined communication, and drive potential new revenue streams for the game (Refer to specific details in Recommendation Seven).



RECOMMENDATION THREE

DEVELOP MEMBER ORGANISATION-LED PARTICIPATION STRATEGY TO MAKE AUSTRALIAN NETBALL THE NUMBER ONE TEAM PARTICIPATION SPORT IN AUSTRALIA.

Create a workgroup led by a Member Organisation CEO, and consisting of a representative of one large Member Organisation and one small Member Organisation, Netball Australia's Executive General Manager Sport and representatives from two local Associations/Affiliates to develop a Participation Strategy to:

3.1 Protect and grow core business (participation of women and girls)

- Retain the current participants.
- Increase market share by attracting more women and girls to play more often by evolving the product(s) to be more accessible and flexible to suit customers and potential customers. This includes digital delivery of "tailored for netball" fitness products.
- Develop a plan for netball to deliver its product in an agile and flexible manner to reflect the new "COVID normal." This includes planning for multiple, shorter competitions through the year when required.
- Develop an inclusion plan that addresses both unconscious bias and systemic barriers to entry and progression for diverse communities and sets out a plan to actively engage and support the participation of these communities.
- Develop a marketing plan that drives grassroots participation by capitalising on Benchmark Events (SSN, Netball World Cup, Commonwealth Games).

3.2 Create an Aboriginal and/or Torres Strait Islander identified position to develop the National Indigenous Netball Plan/Strategy, which would be a stand-alone and complementary plan to the Netball Australia Participation and Pathway strategy. This Plan/Strategy will also include appropriate targeted actions/KPIs and timelines to ensure the

outcomes of the Plan/Strategy are achieved. This position should be in place by end of April 2021.

3.3 Develop and grow new business:

- Unify netball delivery networks to gain new customers by providing a compelling value proposition for already existing netball competitions that currently do not come under the jurisdiction of Netball Australia or the Member Organisations.
- Embrace and offer boys', men's, and mixed competitions within the formal Netball Australia/Member Organisation delivery system.
- Enable while easing the load on volunteers.

3.4 Professionalise the delivery network

In addition to implementing a customer-friendly national database platform, Australian netball recognises the demands placed upon the volunteer workforce in maintaining and in growing participation. Working with Associations/Affiliates to employ professional managers of local Associations/Affiliates or regions will enable the upskilling and supercharging of netball's delivery network. The development of a business model to achieve this should be initially trialled on a pilot basis, including exploration of whether this should be a Member Organisation owned/administered network of development and administrative officers or whether local Associations/Affiliates should administer and appoint their own staff, and whether the latter is achieved by way of a partnership/investment model with government or existing sponsors.

DEFENCE:

Product – Pathways and High Performance

86% OF HIGH PERFORMANCE SYSTEM RESPONDENTS AGREE THE SPORT SHOULD DO A BETTER JOB OF CONNECTING THE GRASSROOTS AND ELITE LAYERS OF THE SPORT

58% OF HIGH PERFORMANCE PERSONNEL AND WORKFORCE ARE CONCERNED WE ARE NOT DEVELOPING ENOUGH TALENT FOR THE DIAMONDS TO REMAIN WORLD NUMBER ONE, AND THIS NUMBER JUMPS TO 72% AMONG ELITE COACHES

State of the Game survey, 2020

Australia's historic dominance of world netball has been built on world class pathways developing and producing world class athletes. The fact that the Diamonds were beaten at the last two major Benchmark Events illustrates that the rest of the world has caught up and it is time to evaluate the effectiveness of Australian netball's pathways and high performance programmes, critically analyse where the gaps are, and identify improvements, driven by the historical expectation and business imperative that the Diamonds are successful.

In stakeholder discussions, it was articulated that Australia's once clear pathways which had been easy to navigate, and capable of identifying and developing the next generation of elite athletes, were no longer effective. The pathways have narrowed in certain parts and are not fully articulated as far as the links into SSN and the Diamonds are concerned, and many parts of the sport's pathways and high performance teams are lacking diversity.

The Panel notes the findings of Netball Australia's High Performance Review, the executive summary of which is attached as Appendix Four. To critically evaluate these findings it is recommended that a High Performance Pathways and Programmes

working group is established to create a Pathways and High Performance Plan, having regard to the High Performance Review and the further recommendations contained below.

This working group should be led by Netball Australia's Executive General Manager Performance, and membership could include a High Performance Manager from an SSN club, the newly created Indigenous role (title to be advised), a senior executive of SSN, the Diamonds and Australian 21/Under coaches, a Member Organisation Pathways Manager, and the National High Performance Umpire Manager.

The Panel recognises that there are significant cost implications in enhancing investment in the pathways and high performance programmes, and coach and umpire development. However, in the context of this Review, there have been significant opportunities identified to save money and increase revenue. Achieving the efficiencies and driving revenue will support Australian netball to fund the Diamonds programme for success and increase investment in the pathways and high performance programmes to drive athlete, coach, and umpire development as a priority.

This also relates to the structure, transparency, and governance of SSN. Until such time that SSN is profitable there is significant tension in the system between the need to subsidise SSN and the need to fund and resource Australia's pathways and high performance programmes including the Diamonds.

This was borne out by the financial analysis completed by the Panel, with Netball Australia, SSN and each Member Organisation/ Owner of an SSN team investing a significant amount of financial and human resources into the SSN competition and their teams over the first four years of SSN. Whilst the Panel cannot unequivocally state that the money invested into the SSN competition and teams was therefore not invested in other pathways and high performance programmes, it is a reasonable assumption that there has been less money to spend on this part of the system.

Based upon feedback to the Panel, priority must be given to the following:

- **PATHWAYS**
 - Creating clear pathways that connect athletes emerging from the 19/Under age group with SSN/Diamonds by way of a reinvigorated ANL (or similar);
 - Understanding the impact of SSN on the high performance pathways, with regard to reduced opportunities for Australian players, and developing additional opportunities for those players;
 - Ensuring the high performance pathways are clearly enunciated and aligned, easily navigated and have as wide a catchment as possible; and
 - Addressing underinvestment in coach and umpire pathways.
- **HIGH PERFORMANCE**
 - Understanding any impact of SSN rule changes on the Diamonds in international competitions; and
 - Funding and planning the Diamonds programme for success at Commonwealth Games and Netball World Cup.
- **DIVERSITY**
 - Addressing the lack of diversity in the pathways and the Diamonds.

Pathways

The biggest – and most positive – disruption to the Australian talent development pathways has been the introduction of SSN.

There is no doubt that it is creating more commercial value and exposure for Australian netball. SSN has become the largest, most unifying netball entertainment product in Australia accessible to the broad population live or via broadcast. SSN creates the opportunity for netball's athletes to earn a living by being a professional sportsperson.

On the other hand, the modifications to the rules that have occurred have, anecdotally at least, made the task harder for Diamonds athletes when they move to international competition, and the policy of unlimited international players has made the task harder for young Australian players to get court-time in the world's best netball competition.

It is time for SSN's role in Australia's high performance programmes and pathways to be clearly defined. There is no doubt it is a premium entertainment product that has the potential to deliver significant resources into Australian netball. A clear enunciation of the intersection between entertainment and high performance will enable the full value of SSN to be activated as a key driver of Australia's international success. The culture of excellence and high performance does not need to be compromised in the design and delivery of a modern, professional domestic league: in fact, careful definition and execution will be a win-win for the sport.

Clear definition of the entertainment product will sharpen the commercial and broadcast value of SSN which should create revenue streams to ensure the development of players is able to be prioritised and delivered.

SSN is played by the best athletes in the world, profiling them and their sport, and delivering a salary and access to a daily high performance training environment. SSN is a product that has the potential to drive profitability to invest in Australia's high performance programmes. It provides the daily training environment for Diamonds and elite pathway players, as well as providing access for Australian players to weekly competition against the best international players in the world. As a result, SSN should be considered a key component of the high performance pathway by giving Diamonds athletes the opportunity to hone their skills against the world's best netballers on a regular basis, as well as creating revenue that can be reinvested back into the system.

To ensure SSN can fulfill its twin mandates, as a premium entertainment product and a vital part of Australia's high performance pathway, consideration must be given to how it can harness and develop more Australian athletes.

When SSN was established, a key feature was the concurrent establishment of the Australian National League (ANL), which was originally planned as a season-long underpinning competition designed to act as a direct pathway into SSN, and to alleviate concerns about the impact of unlimited international players in SSN by way of a regular elite competition to develop SSN-ready athletes. It was also seen as a pathway for athletes emerging from the 19/Under competition to have a place to continue development.

One of the key findings from the High Performance Review was that ANL is an expensive product with compromised outcomes. The Panel notes that the ANL has been discontinued and is to be replaced by the Australian Netball Championships (ANC), which will take place in 2021. They will be delivered in a tournament-style format at a specific location over one to two weeks with expanded team entry parameters that will allow inclusion of teams from Member Organisations and SSN clubs, or a combination of both.

Whilst this is a sensible move considering the tighter fiscal environment faced by Australian netball including through the unanticipated impact of COVID-19, a one-to-two-week competition is a significant downgrade from the multi-week competition initially envisaged. Given the importance of this component of the pathway, reconstituting the ANL in a form that provides significant development opportunities should be a priority as Australian netball's financial situation improves. Further, in developing the detail around the ANC, priority must be given to creating clear opportunities for those athletes who have emerged from the 19/Under age group competitions but are not yet SSN-ready.

In addition, every effort should be made to create opportunities for emerging Australian athletes to play in SSN. The 2020 SSN season saw squad sizes for teams increased from 10 to 12 to allow for the increased demands of a condensed season. As a result, there were 16 further spaces which were filled at various times by 27 young Australian athletes across the competition, all of whom gained valuable court time in the world's best league. Given the discontinuance of the ANL, SSN squad sizes should be permanently increased to 12, with these additional two positions to be filled by Australian athletes.

Further, the injury replacement protocol for SSN teams should mandate that replacement players must come from the existing team and training partners. This would ensure that should an injury occur, the replacement players would be Australian. Whilst it is vital to improve opportunities for Australian athletes, it should be noted that with the right structures and investments it is possible to navigate the tension between the need to develop Australian athletes, and the role of SSN as the place for the world's best

netballers. The latter is a unique selling proposition of the league and is one that drives commercial investment which in turn provides athlete salaries and the daily training environment.

High Performance

Concerns around the impact on the Diamonds of the differing rules in SSN versus those of international competitions are significant within the system. However, the evidence that the SSN rules are negatively affecting the Diamonds is currently anecdotal. Whilst it seems intuitive that rolling substitutions, timeouts and the Super Shot will affect the Diamonds athletes in international competition, there is no data available to prove or disprove the theory. It should be noted that whilst the rule changes are significant, SSN still requires the same skills set as international competition. Work should be done to quantify the effects of the rule changes and develop strategies for the Diamonds programmes to address them. This may include increased investment into the Diamonds programme to ensure adequate preparation time under international rules before the Commonwealth Games and the Netball World Cup.

In reviewing other sports, the opportunity for experimentation invariably causes disruption. It also must occur within the elite competition. Sports that rely on international changes to filter down are late to change. Others accept that modification and experimentation are part of the evolution and adaptation required in modern sport.

It should be noted that unlimited international players also allows Diamonds athletes to regularly train with and play against key international competitors. This gives the Australian netball system key insights into competitors that no other nation has, and it is an advantage that should not be readily surrendered.

Importantly, the Diamonds must not be an afterthought to SSN. Any development of SSN must be made with its role in mind as being a significant component of the Diamonds high performance programme.

Further resource allocation must ensure that the Diamonds programme is resourced to return the Diamonds to gold medal positions at the 2022 Commonwealth Games and the 2023 Netball World Cup.

Diversity in Pathways

Educational reform undertaken system-wide to understand and embrace distinctive styles of play and the strengths and benefits this brings to a team's playing 'style' is required. This also means that the pathways systems – from underage representative and school teams, through to SSN and Diamonds – must evolve, embrace and improve in their support for social, cultural, and religious needs of players and coaches. The sub-elite and elite pathways must explore and be open to diverse ways of playing the game. This means introducing educational initiatives that demonstrate what is required and then developing appropriate selection criteria to actively incorporate players and their playing styles that do not fit the 'Australian style' of play.²⁴

“ My job is to not coach instinct out of kids – instead, I look at what they do and add to their tool bag of tricks.”

– Stakeholder quote.

Whilst acknowledging the qualitative and quantitative feedback in this review highlighted the broad need for a more strategic review of diversity in netball's pathways and high performance programmes, it is necessary to focus on the barriers that confront Australia's First Nations peoples in the netball system. It is clear strong Aboriginal and/or Torres Strait Islander participation rates and talent within netball's grassroots and at state and territory competitions are not translating into netball's elite pathway.

The number of registered players in 2019 who identified as being of Aboriginal and/or Torres Strait Islander descent was 20,849 which is equal to approximately 5% of the

total 2019 netball participants. This is a strong representation and well above the nationally identified parity in the Australian population who identify as being of Aboriginal and/or Torres Strait Islander descent (3.3%).

This significant representation of Aboriginal and/or Torres Strait Islander players as grassroots participants continues in Australian netball's under age pathways, but it all but disappears in the high performance programmes. Of the 315 pathway athletes across the system, 5% (18) of these athletes identify as Aboriginal and/or Torres Strait Islander. This drops to one per cent in SSN, where there is currently only one Aboriginal athlete. In the Australian team, the Diamonds, there has not been an Aboriginal and/or Torres Strait Islander athlete since 2000.

Representation of Aboriginal and/or Torres Strait Islander peoples is equally low in the coaching and umpiring ranks. In the senior coaching ranks, none of the 47 High Performance²⁵ coaches and only three of the 54 who hold an elite²⁶ coaching qualification identify as being of Aboriginal and/or Torres Strait Islander descent. Umpiring is equally, if not more, problematic with not a single umpire amongst either the AA-Badge²⁷ or International Umpire Award²⁸ cohort of umpires identifying as being of Aboriginal and/or Torres Strait Islander descent.

Cultural awareness, cultural safety, and the opportunity to see role models at the elite levels of participation (“*You cannot be what you cannot see*” concept) were highlighted as key factors in sustaining the engagement of Aboriginal and/or Torres Strait Islander participants. The cultural obligations of community and family for Aboriginal and/or Torres Strait Islander participants are significant factors that can prevent participation in any sport. Training and education of the non-Indigenous netball community members will go a long way in providing the necessary understandings and empathy to address these constraints. This is the investment required to ensure the system change to improve the Aboriginal and/or Torres Strait Islander participation rates at all levels of our sport is achieved in an equal and just way.

²⁴ Characterised by one on one defence; fast, hard shoulder passes; and a shooting style typified by a one handed release with a high arc.

²⁵ Targeted at highest level State League, Deakin University Australian Netball League (DUANL) and Suncorp Super Netball (SSN) coaches working in a head coach capacity and have overall responsibility for the delivery of a netball program within netball's High Performance system.

²⁶ Those coaching at highest level of State League, Deakin University Australian Netball League (DUANL) and Suncorp Super Netball (SSN), who are aspiring to be potential high performance coaches.

²⁷ Able to Umpire ANL and/or SSN

²⁸ Able to umpire the highest level of domestic competition and international netball

RECOMMENDATION FOUR

ESTABLISH A HIGH PERFORMANCE WORK GROUP TO ALIGN PLAYER PATHWAYS AND HIGH PERFORMANCE PROGRAMMES WITH SSN; RESOURCE THE DIAMONDS TO ENSURE SUCCESS AT NETBALL WORLD CUP AND COMMONWEALTH GAMES; IMPROVE DIVERSITY IN AUSTRALIAN NETBALL PATHWAYS AND HIGH PERFORMANCE PROGRAMMES; IMPROVE COACH AND UMPIRE DEVELOPMENT.

4.1 Establish a Pathways and High Performance working group to develop a Pathways and High Performance Plan. This working group should be led by Netball Australia's Executive General Manager Performance, and membership could include:

- a High Performance Manager from an SSN club;
- the newly created Indigenous role (title to be advised);
- A senior executive of SSN;
- Diamonds and Australian 21/Under coaches;
- Member Organisation Pathways Manager; and
- the National High Performance Umpire Manager.

In developing this Pathways and High Performance Plan priority should be given to the following:

4.2 Develop and invest in clear competition and development pathways that connect the 19/Under cohort with SSN and the Diamonds and provide opportunities for Australian players to progress into SSN, including working towards a reinvigorated ANL competition.

4.3 Ensure diversity in pathways and high performance programmes by:

- Linking the High Performance Plan to the National Indigenous Netball Strategy;
- Identifying current Indigenous specific competitions and programmes and consult with appropriate stakeholders on the inclusion of these competitions and programmes in the high performance pathways. This also requires investment in sending selectors/Talent ID to regional/remote areas to identify and support

talented Aboriginal and/or Torres Strait Islander athletes for whom living regionally/remotely could be a barrier to progression.

- Addressing barriers to diverse (Aboriginal and/or Torres Strait Islander/CALD) athletes, coaches and umpires progressing through the development pathways.

4.4 Improve coach and umpire development, including the creation of roles at Netball Australia and Member Organisations dedicated to the development of these crucial parts of the high performance pathway.

4.5 Develop, implement and communicate system-wide selection and coaching principles to assess players on their raw talent and assist them to develop their inherent abilities, rather than focusing on a particular style or body type.

4.6 Clearly enunciate the role of SSN in Australia's high performance pathway, including creating more opportunities for Australian athletes to play in SSN. To this end, the panel recommends as a minimum permanently increasing the SSN squad size from 10 to 12, with the extra two athletes to be Australian athletes; and modifying the injury replacement protocol for SSN teams so that replacement players must come from an existing training partner;

4.7 Align the Diamonds programme and SSN to harness the best of SSN to ensure the ongoing success of the Diamonds;

4.8 Prioritise strategy for and resourcing of the Diamonds programme to return the Diamonds to top of the podium at 2022 Commonwealth Games and 2023 Netball World Cup.

GOALING: Profitability

" *It is imperative for netball to become a viable fighting commercial entity in the most competitive commercial sport environment in the world."*

— Stakeholder quote.

Background

The Panel has shared commentary in previous sections about the constructive tension between SSN as a vehicle for player development to the Diamonds and as an entertainment product to commercialise and return maximum profitability and sustainability to Australian netball. The Panel has taken the rare opportunity this Review provides to holistically view netball as a product (or series of products) and experiment with new ways to commercialise and make money which can be reinvested in all of the Australian netball stakeholders.

To determine opportunities to grow revenue and drive efficiencies, the Panel needed to be driven by the data – both qualitative and quantitative. To help with the profitability analysis, Netball Australia, SSN, Member Organisations and SSN Teams submitted their detailed financial reports. This has enabled the Panel to consolidate financial data across the sport to generate financial insights that underpin our recommendations. The Panel also spent time with key commercial stakeholders to gain insights into what is working well and areas of improvement. Stakeholders included: Netball's broadcast partners (Nine Entertainment Co and Telstra); key sponsors; Member Organisations; SSN management; and SSN Teams.

The Panel appreciated the transparency and good faith in which all stakeholders have submitted their detailed financial reports beyond audited accounts as it has enabled the Panel to put forward recommendations based on robust 2019 financial data across the ecosystem. The financial data showed there is room for improvement in efficiencies for the sport and in standardising the classification

of revenue and operational costs within Netball Australia, SSN, Member Organisation and SSN Teams, which would facilitate better analysis of the performance of the sport. We have based our recommendations on financial trends and top-line insights.

The financial analysis focused on:

- A full 2019 consolidated profit and loss across Netball Australia, SSN, Member Organisations and SSN Teams to analyse all sources of revenue, cost allocation and cross subsidising of major initiatives.
- Profit and loss of Netball Australia and Member Organisations excluding SSN to ascertain the health of sport without the investment in the professional game.
- Profit and loss of SSN (including all sponsorship and cost allocation) to determine the standalone financial health of the professional league.
- Consolidated view of all operating costs to ascertain opportunities for optimising efficiency.
- Consolidated view of all revenue to ascertain risks and opportunities for growth.

Consolidated profit and loss across the netball ecosystem:

- Total consolidated operating revenues across the ecosystem for 2019 were \$91.9 million. Main sources of revenue: 67% being generated by Member Organisations (membership, participation, sponsorship, events, facilities, and grants) and 33% of operating revenues generated from the Netball Australia/SSN activities.
- Consolidated whole of netball expenses (before depreciation charges) for 2019 was \$90.9 million. 2019 operating expenses: 51% of this expense can be attributed to Member Organisations with the remaining 35% to SSN direct operations and 14% to Netball Australia. Given that every Member Organisation has similar operating activities (finance, HR, operations, IT), the question needs to be asked - could a portion of expenses be centralised in a shared services model to drive efficiencies for reinvestment into the game?

SSN Background

In 2017, a five-year joint venture (JV) arrangement was struck between Netball Australia, Nine Entertainment Co, and Telstra. It was an innovative approach to a commercial partnership between a sports administrator and broadcast partners as the JV was set up to incentivise all parties to grow the sport together. Some (but not all) of the commercial rights of SSN Teams were centralised within the JV arrangement to maximise the ability of the JV to generate national sponsorship revenue. Some commercial rights are retained by the clubs to generate revenue at a club level with local sponsors. As the details of the JV partnership are confidential, the insights in this report will focus on the strengths and areas of improvement in the current arrangements. The renewal of various rights (broadcast rights partnerships, SSN licenses and sponsorship arrangements) will occur in 2021 so this is the perfect opportunity for reflection. It is also an opportunity to collectively challenge all stakeholders to generate a step change in revenue growth for the next five years.

In 2017, the league was unproven from several perspectives: audience viewership; fan engagement; commercialisation of sponsorship; and partnership management and co-ordination between Netball, SSN, Member Organisations, SSN Teams, broadcast, and sponsorship partners. The insights in this report are written in the spirit of learning for the next five years and should not to be taken as criticism.

SSN Financial Insights

Revenue is generated from the net revenues gained from the broadcast JV, national and local sponsorship, ticket sales, promotions, and grants. There is also an overly-complex cross subsidisation of Netball Australia to SSN, Netball Australia to Member Organisations and SSN Teams (and vice versa) and Member Organisations and SSN Teams. There are no standard accounting practices for how indirect costs are distributed from the Member Organisation into SSN Team expenses. There is an opportunity for this to be standardised and simplified to gain better transparency and to gain a more aligned valuation of the professional league. The panel offers the following insights:

- SSN sponsorship and event revenues formed 76% of national SSN operating revenues. Membership and ticketing income represented 22%.
- 49% of gross SSN sponsorship and event revenue was generated at the national level and 51% at the team level.
- Consolidated SSN sponsorship and event costs as a percentage of SSN sponsorship and event revenues was 53%. This percentage varied across SSN teams between a high of 76% and a low of 37% indicating potential opportunity to manage the cost aspects of sponsorship and events more consistently.
- SSN Teams' employment and related contractual costs as a proportion of revenues was 52%. The highest individual team proportion was 99% and the lowest 45%. Seven teams' costs were in the range of 45% - 49% of their revenue.
- There is an overarching belief in many stakeholder interviews that the SSN League is a significant financial burden on the ecosystem. However, when aggregating the net revenues and costs on a direct basis, the league is close to breakeven.

Member Organisations Financial Insights

Consolidated Member Organisations' profit of \$917,000 (before depreciation) as a percentage of consolidated Member Organisation revenues was 6%. The highest individual Member Organisation pre-depreciation profit/(loss) to revenue proportion was 12% and the lowest -2%. Six Member Organisations' proportions were in the range 5% to 10% of their revenue.

Consolidated Member Organisation employment cost as a percentage of consolidated Member Organisation revenues was 45%. The highest individual Member Organisation's proportion was 52% and the lowest was 33%. Seven Member Organisations' proportions were in the range of 38% to 52% of their revenue. Smaller Member Organisations tended to have a lower employment cost to revenue ratio.

Consolidated Member Organisation administration and overhead costs represented 15% of consolidated Member Organisation revenues. The highest administration and overhead rate was 20% of revenues and the lowest 4%. Administration and overhead rates for remaining Member Organisations were mostly in the range of 14-18% of revenues, with two of the smallest Member Organisations showing 8-9% of revenues.

Financial Resiliency

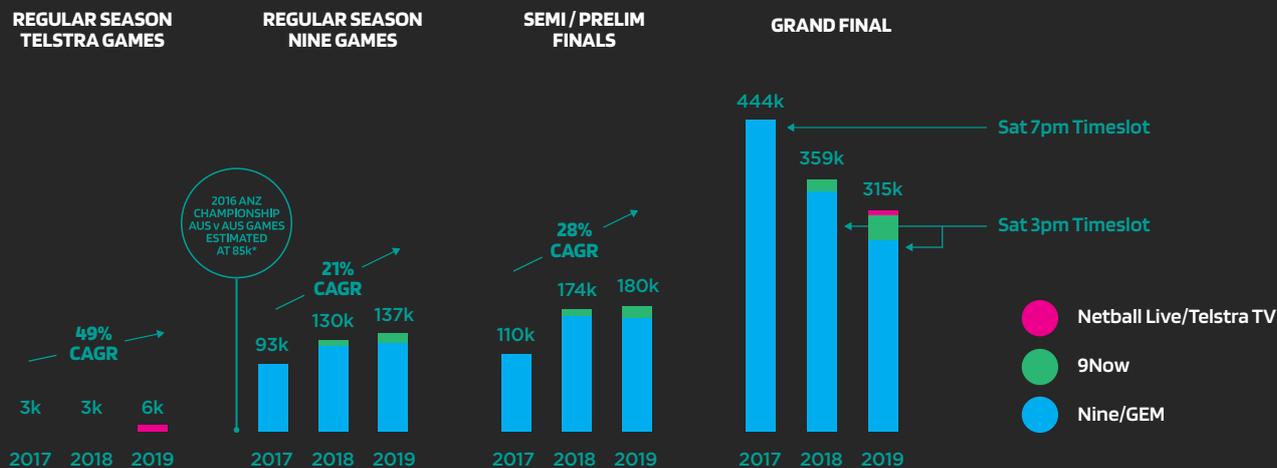
Despite the appearance of consolidated healthy cash reserves at the end of 2019, the current liquidity ratio indicates a level of financial resiliency which should be monitored heading into what has become a financially challenging 2020. A current ratio of greater than 1.5 is often cited as representing lower solvency risk. Ratios between 1 and 1.5 reflect heightened risk, indicative of requiring active liquidity monitoring. Ratios below 1 are strong indicators of short-term solvency crisis.



SSN Broadcast Insights

Since 2017, netball has grown its audience consistently with an average growth of 20% per annum over the past three years.

SSN AUDIENCES BY YEAR - Excludes on-demand and replays

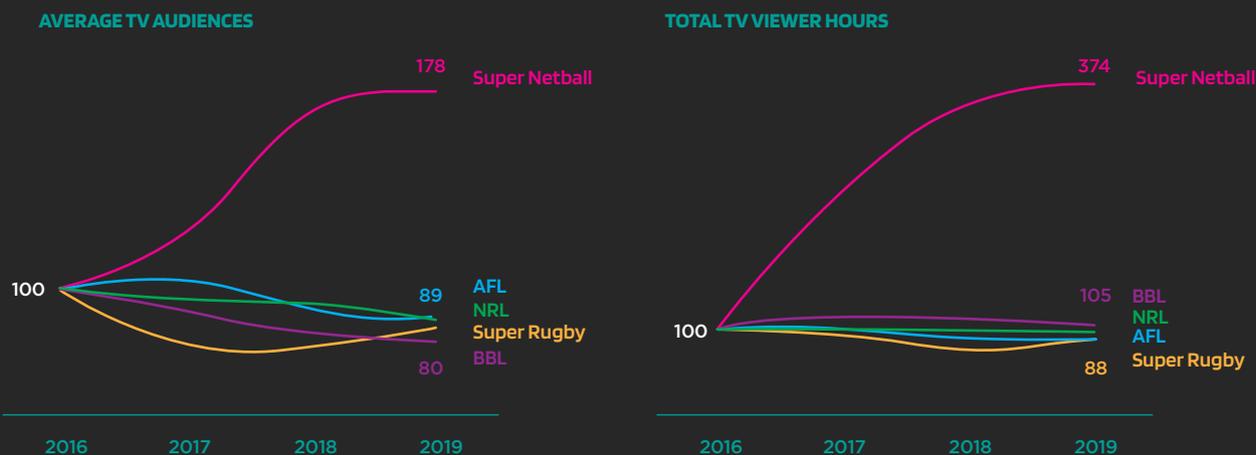


*Based on 53k metro average audience and assuming 36% of national audiences are in regional audiences as per SSN

Using an index of average TV audiences, SSN is the only sport to have significantly shown growth versus the other domestic leagues.

NETBALL TV AUDIENCES HAVE GROWN SIGNIFICANTLY WHERE OTHER LOCAL LEAGUES HAVE HELD FLAT OR DECLINED

- Indexed TV Viewing Performance of Home and Away Seasons for Domestic Leagues



In the most recent ratings results, almost one million people tuned into the 2020 SSN Grand Final between the Melbourne Vixens and West Coast Fever.

Nine's broadcast of the match reached more than 930,000 people nationwide, making it the highest rating netball match of the 2020 season, with viewership within all key demographics up on the 2019 Grand Final.

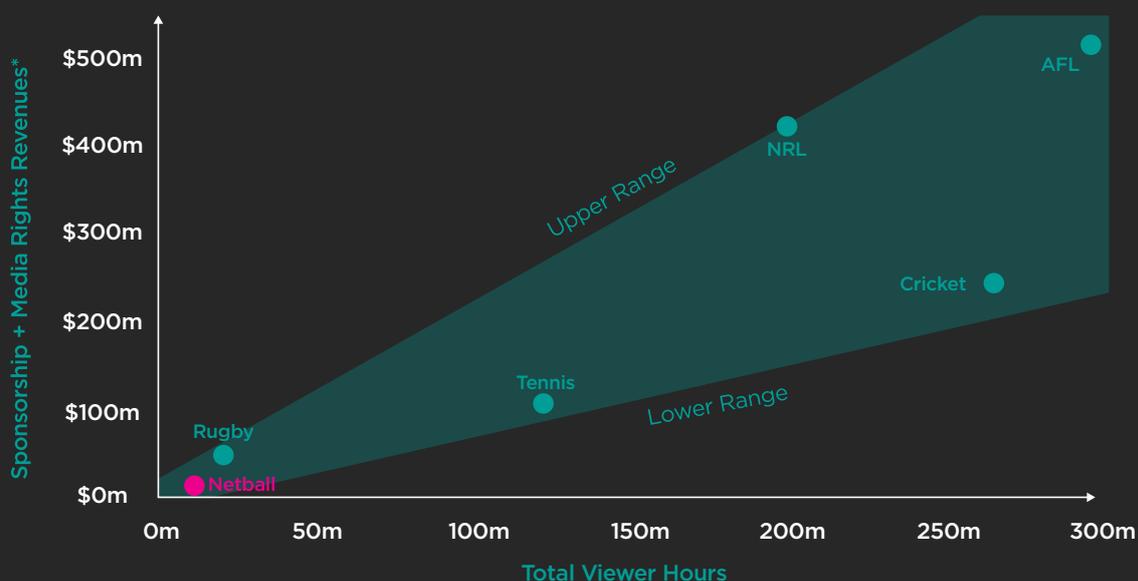
Across the season, more than five million people tuned into SSN broadcasts on Nine and the average time spent viewing these matches increased by 16% compared to last year. In total, there were 34 million minutes streamed across both the Netball Live Official App and Telstra TV throughout the 2020 season.

With these successful rating results in mind, the sport still has so much more opportunity for growth. Feedback from the broadcast partners was clear:

- While there has been significant audience growth since 2017, there is still room for improvement in growing fan engagement and in turn, growing revenue. There needs to be joint focus on growing fan engagement, cross promotion, joint marketing and for the long-term profitability of the game. For example:
 - More grassroots promotion of tune-in times for broadcast;
 - Grow the profile of the teams and athletes on and off the court to build 24/7 interest in the league;
 - There are too many gatekeepers when trying to get access to athletes in and around broadcast times; and
 - Better co-ordination between all parties. It is very fragmented and at times difficult to manage on gameday.
- The broadcasters wanted reassurance that there was a commitment from the netball ecosystem to grow the entertainment value of the sport thus growing fan engagement. While the Super Shot has been a powerful addition to the viewer experience, this innovation took too long to implement.
- There needs to be more focus on profitability together as a JV. A concerted effort to move some of the games into prime-time would be a game changer for the sport. It would enable broader commercialisation opportunities with sponsors and could be the key to growth in profitability of the JV.

NETBALL HAS SIGNIFICANT HEADROOM TO GROW IN TERMS OF FAN ENGAGEMENT, VIEWERSHIP AND COMMERCIAL REVENUES

- Rights Revenues vs Viewer Hours for Selected Sports



Note: *For Netball= Net JV revenues
Source: MRV Analysis; Code Annual Reports; Kinetica Commercial Insights and Valuation Project - Final Report 2019

Sponsor and Partner Insights

“ *Netball talks about its numbers, now it's time to deliver them.”*

— Sponsor quote.

Inaugural sponsors took a risk to partner with SSN as the league was unproven. They saw an opportunity to support a new professional women's league that gave them ability to shape their involvement. They wanted the ability to access the large participation base at the grassroots level. While the disruption of COVID-19 has meant several elements of sponsorships needed to be reworked, the overall sentiment from sponsors was positive for SSN.

Approximately 70% of the sponsorship revenue is generated from the top six sponsors who signed long-term partnerships at the launch of SSN. Audience growth over the past three years has not generated the respective growth in revenue due to the long-term nature of these deals and early lock in of sponsor assets. There is an opportunity to capitalise on this audience growth in sponsorship renewals.

In consolidation with key sponsor feedback, there was a balance of positive sentiment and clear areas of improvement.

POSITIVES

- National footprint, high participation numbers and broad demographic reach. The major sponsors felt that partnering with the number one women's sport in Australia was a significant opportunity given high participation rates and potential growth of the fan base. It is a product that attracts broad viewership demographics which is a positive from a commercial perspective.
- Being part of the growth of the netball league.
- The values of netball are powerful, and the athletes are excellent role models.
- There is the potential to access nationally co-ordinated assets as most other sports are very fragmented.

AREAS TO IMPROVE

- In practice, it is a very fragmented ecosystem when operationalising the sponsorships on the ground. Too many parties to deal with making it more work for internal sponsorship teams. Inconsistent and fragmented execution as dealing team by team personally puts more pressure on the sponsor to co-ordinate and resolve blockages.
- The promise of access to a national database of participants to connect sponsors with consumers is the single biggest commercial opportunity yet to be realised. The grassroots to elite are not connected so there are many opportunities missed.
- Communication to sponsors could be improved. Too often the sponsors are told things too late which does not allow them to either capitalise on the opportunity or deal with the downside.
- While audiences have grown, there needs to be more work done together to prove the return-on-investment value of sponsorship investment to enable ongoing support of netball in a future where options are increasing with competitors.
- Continuing to engage with key State and Federal Government stakeholders to lobby for ongoing and increasing support of Australian netball given the size, impact, and importance of the sport to Australian society.
- Lack of a national database (and the digital database proposed currently does not include Queensland and Victoria) may reduce the commercial value of SSN because Australian netball is unable to deliver a single view of the customer to broadcasters or potential national sponsors. Multiple digital platforms also involve wasted cost.

Align on strategy for SSN with a business mindset

SSN has built a solid foundation over the past four years - lessons have been learnt, both positive and negative. Now is the time to put the foot on the accelerator of growth - product, fan base, league and player profiles, partnerships, and profitability. The key to SSN's future success will be relentlessly focusing on the drivers of growth. This will need a clear and aligned strategy and there are still too many debates and decisions that need to be made to clear the way for growth. Too often, black and white questions are being asked:

- Is it sport or entertainment?
- Is it the highest-level competition or for local talent only?
- Is it a commercial product or a high performance product?
- Are teams an extension of a Member Organisation or owned by an independent entity?
- Is it for marketing products to little girls or should it evolve to be an entertainment product directed towards women and men?

SSN must be clear on what it wants to look, feel and sound like through a clear articulation of strategy to drive positive commercial outcomes. These questions need answering but they do not always need to be hard line either/or tradeoffs. There must be a balance. For the sport to grow, more work is needed on the strategy to give SSN clarity of purpose and a clearer vision on how it grows.

Implement multiple strategies to drive profitability

SSN must be the commercial jewel in Netball Australia's crown. This means a focus on attracting more fans to drive engagement and viewership, innovating to drive entertainment, and attracting more dollars into the sport.

Product and promotion: SSN must be viewed as a 24/7 entertainment product, played at the highest level, and targeted at a broad audience. Promoting team rivalries and

growing individual player profiles on and off the court needs to be embraced by the players and owners of the teams. Fans need to get to know the players as role models on and off the court. Marketing expertise and building strong social followings through media partnerships are all critical to build fan engagement. There needs to be a commercial overlay on the 12-month rolling calendar of events to improve commercialisation e.g. better align the international calendar so that the Diamonds' games can start after SSN finals to continue momentum.

Operations: Professional sports expertise is at the heart of any successful professional sports administration. It is difficult to be focused on delivery of grassroots products into the community while also running a professional team or league and all that this entails. These capabilities and ability to focus on SSN growth must be considered when awarding new licenses in the future.

Revenue Growth: SSN will be at a critical point in 2021 as it completes new broadcast deals, sponsorship arrangements and awarding team licenses for 2023 and beyond. The current structure and way of working is not optimised for commercial growth. A way to drive focus could be to set up a more accountable commercial group responsible for end-to-end commercialisation who would be accountable for both national and local revenue. This could also help streamline execution of sponsorship programmes for partners.

With 20% growth in audience over the past three years, sponsorship assets need to be repackaged to capitalise on this audience growth. All metrics point to the 2021 renewals (of broadcast rights and sponsorships deals) driving SSN into profitability.

Innovation: Innovative commercial structures to attract private investment into the league should be a priority - private equity, owners of other complementary team franchises or broadcast partners. Work should be done on the viability of private equity investment as part of preparing for the 2021 contract renewals of broadcast, team, and sponsorship deals. Innovation in product - the Super Shot should just be the beginning. SSN should be used as a testing ground to innovate in the sport.

Setting up SSN for success and optimise for private investment

Simplify and standardise the financials. The current funding structure of SSN is complex and cumbersome. Money flows back and forth between Netball Australia, Member Organisations, SSN Teams and vice versa. There is no consistent definition of direct and indirect revenue and costs associated with running a team making reporting the profitability of SSN difficult. If the league is to attract outside investment, consistent and clear financials will be critical. It is recommended that a uniform classification of revenue and costs be developed within Netball Australia, Member Organisations and SSN to give consistency and transparency on the profitability of SSN. These should be formally reported on an annual basis. Netball Australia needs to dedicate more time and resource to help the team build SSN.

Focus the SSN Board and management. There is a separate and independent board governing SSN. While it was set up to govern SSN with more independence to the Netball Australia Board, it does add a layer of complexity. There is room for improvement in utilising the commercial expertise of the SSN Board. As the SSN structure will be reviewed as part of the renewal process in 2022, the Panel is not making any major structural recommendations on governance. However, given the importance of SSN to the overall success of Australian netball, there is an opportunity to bring a Netball Australia Board Member into the SSN Board. There may also be opportunities to streamline the operations of SSN with Netball Australia teams and determine if there are any inefficiencies in the system. For example, commercial accountabilities between Netball Australia and SSN are not clear or optimised. Programmes to streamline SSN and Netball Australia operating model should be linked to recommendation six.

Given the importance of the next 12 months, it is recommended that the SSN Board focuses on getting alignment on the SSN strategy to deliver improvement of SSN as a high-entertainment, high performance, profitable business. There needs to be a focus on:

- Building the commercial case and pitch for private investment;
- Support for the executive team on the critical commercial renewals in 2021 to capitalise on audience growth over the past three years; and
- Support the high performance recommendations outlined in Recommendation Four.

If SSN wants to attract private equity investment, it is important the board remains a separate entity to the Netball Australia Board in the near term. There are too many variables (who owns and operates the teams, future partners) to put forward recommendations beyond 2022.

Role of independent clubs

Collingwood Magpies and Sunshine Coast Lightning have brought fresh perspective into SSN. They open an opportunity for new fans to come into the league as well as best practice learnings from their broader operations. While they have enjoyed differing rates of success, the Panel believes they provide real value as a platform for what SSN might look like in the future.

These clubs are equal partners in the SSN competition and need to be treated accordingly. Barriers to these clubs' ability to promote netball, the competition, and their clubs needs to be improved. Where Member Organisations also own teams in a particular state, they need to consider their constitutionally-defined role to grow netball in the state, which means embracing the sister clubs into their state. Working together to build netball fans and membership across the ecosystem should be embraced across all teams equally.

RECOMMENDATION FIVE

SSN COMMISSION AND NETBALL AUSTRALIA MAKE SSN THE COMMERCIAL JEWEL IN THE CROWN OF AUSTRALIAN NETBALL BY CAPITALISING ON GROWTH TO DATE AND REALISING ITS FULL POTENTIAL.

5.1 SSN to produce a more concise and clear strategy for growth as a sports entertainment and high performance business:

- Long term vision and strategy;
- Commercial, sponsorship and broadcast growth opportunities;
- Fan engagement (including innovation in game);
- Social media and digital opportunities;
- Prioritising professional team and player development; and
- Clear enunciation of its role in Netball Australia's high performance pathway and programmes.

5.2 The SSN Commission to build a business case that supports investment from private equity, team franchisers and/or broadcaster/ sponsor partners in readiness for team license renewals in 2022.

5.3 Appoint a Netball Australia Director to the Commission creating a direct link at the governance level between the two organisations.

5.4 Create a new commercial strategy that capitalises on the growth of the past three years. Consider a centralised team responsible for driving end to end commercialisation of all available assets to maximise returns at both a national and local level. This group would need to have representation and expertise in national and local commercialisation.

5.5 Appointment of a Senior Relationship Manager for all major sponsorship to streamline operations and significantly reduce the multiple interactions with all SSN team commercial and operational teams.

5.6 Appointment of a Senior Relationship/ Operations Manager for broadcast partners.

5.7 Convene a facilitated forum for all commercial partners and key Netball Australia and SSN executives to share and proactively develop strategies for the 2021 season.



Paige Hadley, NSW Swifts

GOALING: Profitability - Driving Operational Efficiency

Standardise information to drive transparency

Information empowers. Information is truth. Information is critical to building an Australian netball culture and way of working. To establish trust, transparency, and insight, it is recommended that every part of the of the netball ecosystem (Netball Australia, SSN, Member Organisations and SSN Teams) share its financial data on an annual basis (for internal use only). This should be done at the beginning of the fiscal year outlining planned expenditure and at the end of the fiscal year to complete reconciliation. It is recommended all data should be standardised - revenue, operational costs, and indirect cost allocation to allow for apples with apples comparison.

Establish a process to enable the ecosystem to work together on projects that drive operational efficiency

As part of the annual planning process a subcommittee across Member Organisations, SSN and Netball Australia should be established to review consolidated profit and loss and to recommend a series of efficiency drivers that will be adopted for the upcoming fiscal year. A declaration of commitment is established with a challenge of 20% savings over two years. All savings will be earmarked for reinvestment back into the sport. Establish a scorecard that is reviewed quarterly to ensure all efficiency driver projects remain on-track.

Some ideas for consideration:

- Establish a shared service model for tasks that are replicated across the organisation for example centralised finance, IT, HR. This should be established and funded by all with key performance indicators and service level agreements. As a first step, consider this model for the smaller Member Organisations who could benefit immediately by combining resources.
- Develop centers of excellence to maximise the expertise in the ecosystem and drive operating efficiency. During consultation there were several programmes and initiatives that could be elevated from a state perspective and turned into national programmes. This would also allow a Member Organisation to lead elements of the national sport based on best practices taken nationally. For example: diversity programmes in Queensland, Shooting Stars in Western Australia.

RECOMMENDATION SIX

NETBALL AUSTRALIA AND MEMBER ORGANISATIONS WORK TOGETHER TO DRIVE OPERATIONAL EFFICIENCY.

6.1 To drive savings, collaboration, and operational efficiencies across Australian netball and to establish trust, transparency and insight, Netball Australia, SSN, Member Organisations and SSN Clubs:

- agree a set of standardised financial metrics (revenue, operational costs, and indirect cost allocation); and
- will share their financial data on an annual basis (for internal use only), at the beginning of the fiscal planning process showing planned expenditure and at the end of the fiscal year to complete reconciliation.

6.2 As part of the annual planning process a subcommittee across Netball Australia, Member Organisations and SSN should be established to review consolidated profit and loss and to recommend a series of efficiency drivers that will be adopted for the upcoming

fiscal year, with a scorecard that is reviewed quarterly to ensure all efficiency driver projects remain on-track. The obvious first project would be to consider establishing a shared services group – legal, finance, HR, IT to service all entities. Centralising some or all of these operational groups to service the businesses through agreed key performance indicators and service agreements could generate significant savings over time.

6.3 Netball Australia and Member Organisations formally commit to the operational efficiency target of 20% savings over two years. All savings will be earmarked for consolidated reinvestment back into the sport.

RECOMMENDATION SEVEN

NETBALL AUSTRALIA AND MEMBER ORGANISATIONS DEVELOP AND IMPLEMENT A NATIONAL DIGITAL STRATEGY THAT ENABLES PARTICIPATION GROWTH, EFFICIENT ADMINISTRATION, GROWTH IN FAN ENGAGEMENT AND NEW REVENUE STREAMS.

7.1 A national Digital Platform Working Group be established with the single purpose of developing the implementation of a single digital strategy and integrated platforms that will deliver the priorities of registration, grassroots communication, marketing promotions, fan engagement and commercialisation. This group should be established as a matter of urgency to work through what is needed to ensure that Queensland and Victoria can operate into a unified digital strategy and data ecosystem.

IMPLEMENTATION

Throughout the consultation process the Panel has been encouraged by the strong commitment to support recommendations that would enable the continued success of Australian netball.

The Panel recognises that Australian netball has undergone a range of subject-specific reviews over recent years, covering much of the territory traversed by this Review and identifying multiple priorities for change. The Panel agreed with many of the recommendations from those prior reviews, so in consultations sought feedback on why those recommendations had not been implemented and ideas to maximise the chance that this Review's recommendations would be implemented.

The Panel heard that there was clear commitment towards a stronger Australian netball system, but that implementation of previous reviews and national initiatives have stalled because of a combination of:

- Poor consultation and communication;
- Lack of awareness and/or commitment to a national strategy;
- Lack of trust and transparency;
- Lack of accountability for action and outcomes;
- Resourcing challenges;

- An inability or unwillingness to move on from past issues, especially around the establishment of SSN;
- Reverting to local priorities over the harder work of collaboration and compromise for the broader good; and
- Lack of appreciation of the opportunities and benefits in better collaboration and co-ordination.

The Panel also notes that demonstrable stability in governance is critical to the successful and sustainable implementation of the recommendations.

The recommendations therefore have also incorporated a strong focus on implementation. With commitment, collaboration, resourcing, measurement, and transparency, the Panel is confident the recommendations in this Review can be implemented through a phased approach over two years.

The Panel is happy to be consulted about implementation as required, including providing advice on the intent of recommendations. The Panel (or similar) will be reconvened at 12 months and two years after the release of the Review to seek feedback and assess progress. After two years, the Panel will publish a report on progress against the Review recommendations.

RECOMMENDATION EIGHT

CORE STAKEHOLDERS COMMIT TO IMPLEMENT THE RECOMMENDATIONS OF THE REPORT AND APPOINT A STATE OF THE GAME MANAGER TO DRIVE THE PROCESS AND PUBLICLY REPORT AGAINST PROGRESS.

The Panel urges the swift and transparent implementation of the adopted recommendations.

1. An agreed communication strategy for this Review report be developed by Netball Australia in consultation with Member Organisations and SSN which includes digital, written and face to face interactions.
2. The Core Stakeholders publicly commit to support implementation of the recommendations.
3. A separate resource (SOTG Manager) be appointed by Netball Australia to support implementation of the recommendations. The SOTG Manager will be responsible for:
 - a. leading and/or coordinating each project ensuring strong and appropriate collaboration and driving results, whether projects are led out of Netball Australia or a nominated Member Organisation;
 - b. ensuring that all central commitments are documented, communicated, and tracked; and
 - c. coordinating regular updates and preparing an annual progress report for Core Stakeholders and the Panel against the Review recommendations, including explanations for delays or changes to recommendations.
4. The Panel (or similar) will be reconvened annually for a two-year period after the release of the Review report to seek feedback and assess progress. After two years, the Panel will publish a report on progress against the Review recommendations.

Appendix

APPENDIX ONE: STAKEHOLDER MEETINGS

THE PANEL MET WITH A RANGE OF STAKEHOLDERS, IN INDIVIDUAL AND/OR GROUP FORUMS.

Netball Australia Board & Management

Netball Member Organisations - Boards and Management

SSN Commission and SSN Management

Australian Institute of Sport

Collingwood FC (Collingwood Magpies) and Melbourne Storm (Sunshine Coast Lightning) - Boards and Management

Netball current SSN and Diamonds players

Netball past players, coaches, umpires and administrators

Netball Service Award holders

Australian Men's & Mixed Netball Association (AMMNA)

Australian Netball Players' Association (ANPA)

Aboriginal and/or Torres Strait Islander past players, coaches and umpires

Nissan

Sport Australia

Telstra media

Suncorp

Origin Energy

HCF

International Quarterback

Telstra - Sponsorship and Awards

Channel Nine - Executive and Operations

Victorian Institute of Sport

Media Rights Value

Football Federation Australia

APPENDIX TWO: SPORT GOVERNANCE PRINCIPLES AND STANDARDS

[HTTPS://WWW.SPORTAUS.GOV.AU/ __ DATA/ASSETS/PDF_FILE/0006/912705/SPORT-GOVERNANCE-FRAMEWORK.PDF](https://www.sportaus.gov.au/__data/assets/pdf_file/0006/912705/sport-governance-framework.pdf)

[HTTPS://WWW.SPORTAUS.GOV.AU/ __ DATA/ASSETS/PDF_FILE/0006/913515/SPORT-GOVERNANCE-STANDARDS-FINAL.PDF](https://www.sportaus.gov.au/__data/assets/pdf_file/0006/913515/sport-governance-standards-final.pdf)

APPENDIX THREE: HIGH PERFORMANCE REVIEW EXECUTIVE SUMMARY

[HTTPS://NETBALLVOICE.COM.AU/SITES/NETBALLVOICE/FILES/2020-11/SOTG-APPENDIX-3.PDF](https://netballvoice.com.au/sites/netballvoice/files/2020-11/sotg-appendix-3.pdf)

APPENDIX FOUR: STATE OF THE GAME 2020 QUANTITATIVE SURVEY DATA REPORT

[HTTPS://NETBALLVOICE.COM.AU/SITES/NETBALLVOICE/FILES/2020-11/SOTG-APPENDIX-4.PDF](https://netballvoice.com.au/sites/netballvoice/files/2020-11/sotg-appendix-4.pdf)

APPENDIX FIVE: PARTICIPATION NUMBERS AUSPLAY 2016-2019

Females 15+	Current participation (adults) all participation (organised or not)			
	2019	2018	2017	2016
Australian football	122,923	117,955	63,963	73,286
Basketball	214,941	197,550	191,537	217,096
Cricket	60,959	63,456	53,781	73,022
Football/soccer	271,989	240,720	240,791	260,183
Netball	587,186	453,917	533,861	533,671
Rugby league	26,017	29,764	34,115	17,042
Rugby union	21,881	14,508	25,459	11,923

Males 15+	Current participation (adults) all participation (organised or not)			
	2019	2018	2017	2016
Australian football	426,910	466,911	404,658	426,601
Basketball	549,380	503,212	515,522	472,101
Cricket	428,961	477,671	448,922	504,445
Football/soccer	817,998	765,434	867,695	883,456
Netball	89,122	63,393	58,299	69,471
Rugby league	120,147	171,186	137,520	148,036
Rugby union	111,211	121,204	85,694	137,776

Girls 0-14	Current participation (children) all participation (organised or not)			
	2019	2018	2017	2016
Australian football	66,471	59,511	63,255	50,578
Basketball	138,034	93,881	134,836	95,658
Cricket	28,010	27,046	15,811	30,755
Football/soccer	168,166	160,649	135,702	151,501
Netball	312,190	335,564	304,671	325,199
Rugby league	7,802	13,487	9,740	2,760
Rugby union	4,436	19,699	4,260	680

APPENDIX FIVE: PARTICIPATION NUMBERS AUSPLAY 2016-2019

Boys 0-14	Current participation (children) all participation (organised or not)			
	2019	2018	2017	2016
Australian football	362,846	330,508	351,857	330,406
Basketball	265,208	228,788	208,172	194,691
Cricket	196,293	230,688	240,194	230,056
Football/soccer	575,584	539,027	527,659	528,636
Netball	8,337	19,716	4,545	3,396
Rugby league	103,896	95,481	137,917	131,982
Rugby union	72,360	68,272	76,457	51,672

Participation changes 2016-2019 women and men 15+; girls and boys <14

CODE	WOMEN 15+	MEN 15+	Girls 0-14	Boys 0-14
Australian football	+68%	+0.7%	+31.4%	+9.8%
Basketball	-0.9%	+16.4%	+44.3%	+36.2%
Cricket	-16.5%	-15.8%	-8.9%	-14.7%
Football/soccer	+4.5%	-7.4%	+11%	+8.9%
Netball	+10%	+28.3%	-4%	+145.5%
Rugby league	+52.7%	-18.8%	+182.7%	-21.3%
Rugby union	+83.5%	-19.3%	+552.4%	+40%

APPENDIX SIX: NETBALL AUSTRALIA FIRST NATIONS STATE OF THE GAME; QUALITATIVE RESEARCH REPORT – OCTOBER 2020 – ORIMA

[HTTPS://NETBALLVOICE.COM.AU/SITES/NETBALLVOICE/FILES/2020-11/SOTG-APPENDIX-6.PDF](https://netballvoice.com.au/sites/netballvoice/files/2020-11/SOTG-APPENDIX-6.PDF)





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