




# Tennis NSW

State Infrastructure  
Investment Strategy



The Tennis NSW State Infrastructure Investment Strategy is delivered in two companion sections - Greater Sydney and Regional NSW - to provide an important investment priority framework which intends to shape the planning and development of a network of sustainable tennis venues that support the growth and needs of the sport in line with the Tennis NSW Strategic Plan - Vision 2025. A key objective is to inform where investment by the sport and Government should be prioritised such that it maximises the opportunities for tennis participants across NSW.

The Greater Sydney component was developed in 2020 and endorsed by the Tennis NSW Board in June 2021.

The Regional NSW component was developed in 2019 and endorsed in December 2020.

This document (published December 2023) includes minor updates of both documents, including the Tennis NSW Network Planning Framework (current at December 2023).

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# Tennis NSW

Greater Sydney Infrastructure  
Investment Strategy



# Executive Summary

The Greater Sydney area is home to over 370 tennis venues which are accessible to the wider community. These venues host more than 3.8 million visits per annum, delivering substantial health, social and economic benefits to the community.

Tennis is a growing sport in NSW, underpinned by its safety and incredible inclusivity, providing opportunities for people of all ages, gender, abilities, physical capabilities (including those with disabilities), cultural and socio-economic backgrounds.

However, through its extensive engagement with Clubs, Coaches and Councils, Tennis NSW (TNSW) has identified 4 critical challenges and threats to the sport moving forward:

1. An undersupply of ITF Venues (Regional and Metro Performance Hubs);
2. An ongoing threat to existing Premier Community Venues;
3. A lack of Grand Slam surfaces for the performance pathway; and
4. An inadequate provision and management of venues to meet community demand.

The Tennis NSW State Infrastructure Investment Strategy is delivered in two companion sections (Greater Sydney and Regional NSW) to provide an important investment priority framework which intends to shape the planning and development of a network of sustainable tennis venues that support the growth and needs of the sport in line with the Tennis NSW Strategic Plan - Vision 2025. A key objective is to inform where investment by the sport and Government should be prioritised such that it maximises the opportunities for tennis participants across NSW.

The Greater Sydney component has been informed by key principles arising from concurrent strategic work including Tennis Restart, the Sydney Tennis Review and national Competitive Play Review as well as engaging with Tennis Australia, the NSW Office of Sport and local Councils to ensure the framework and overall strategy aligns with the needs of key stakeholders.

To address the challenges in the Greater Sydney region, Tennis NSW has identified that it needs to:

- Stimulate investment in Metro Performance Hubs that will service the Greater Sydney area;
- Stimulate investment in Premier Community Venues that will service each geographic area of Greater Sydney;
- Influence improvements to the asset funding model, tenure arrangements, management and service offerings (programming) to create a more resilient and sustainable network of venues that can better meet current and future demand; and
- Inform, partner and advocate for the planning and development of new tennis venues or expand tennis venues in-line with population growth and participation, performance and competitive play opportunities.





### Investment opportunities and prioritisation

An analysis of the current network of venues identifies eight regionally significant venues (Tiers 1 to 3) within Greater Sydney. To align with the Sydney Tennis Review and National Competitive Play Review, and to satisfy the targeted level of ITF and premier event content, Tennis NSW has identified that additional Metro Performance Hubs (Tier 2) and Premier Community Venues (Tier 3) venues are required.

These venues will complement the wider network of tennis venues which will continue to host appropriate tournament and competition opportunities.

Venue Type	Current Provision	Future Provision Target	Venue Description (See full Details in Appendix)	Competitive Play Pathway
International Venues (Tier 1)	1 - State Tennis Centre (SOPTC)	1 - State Tennis Centre	Tennis showpiece – Large economic driver through hosting large National and International events and the top high-performance coaching and player pathways	National and State significant events in addition to T2, T3 functionality Serves - State, metro and district catchments
Metro Performance Hubs (Tier 2)	0	3 to 5 to service Greater Sydney	ITF Professional event hosting capability which also serves as a hub for community through to high level events and competition (Centre of Excellence); high quality coaching/pathways for the local area and region; diverse community programming; and is a financially sustainable and professionally run venue	ITF specification venue (grand slam court surface) Supports higher level premier and performance events in addition to T3 functionality Serves - whole of metro as well as district catchment
Premier Community Venues (Tier 3)	7 – Blacktown, Penrith, Macarthur, Parramatta, Rockdale, Pennant Hills and Willoughby	6 to 9 in addition to the T1 and T2 venues (together serving the proposed TNSW Metro Competition Regions)	Premium competition venue that focuses on club level to inter-district and lower level state significant events and competition; as well as servicing the local catchment to provide a full mix of recreational play, competition play, coaching and programming.	Generally, will be a Hard Court or Synthetic Grass venue that supports large drawing premier and participation level events and inter-district competition in addition to local club and inter-club play. Serves - metro or regionally significant district catchment
<b>TOTAL</b>	<b>8</b>	<b>10-15 in Greater Sydney</b>		

To best position the sport to attract the requisite investment and develop an accessible network of venues that will serve the Greater Sydney area, priorities for investment should align with where the sport’s best opportunities to grow exist, where funding is available / can be leveraged, and where there is the available space to build new venues and/or expand existing venue footprints.

This “network solution” recognises the opportunities and challenges of:

- Limited opportunities to alter the current footprint in the Northern and Eastern districts despite the traditional strength of participation numbers from these areas
- Significant current and future population growth in the South West and North West of Sydney accompanied by availability of land and infrastructure funding

- Extension of Greater Sydney to the Wollongong and Central Coast areas
- Spreading the benefits of investment across Greater Sydney

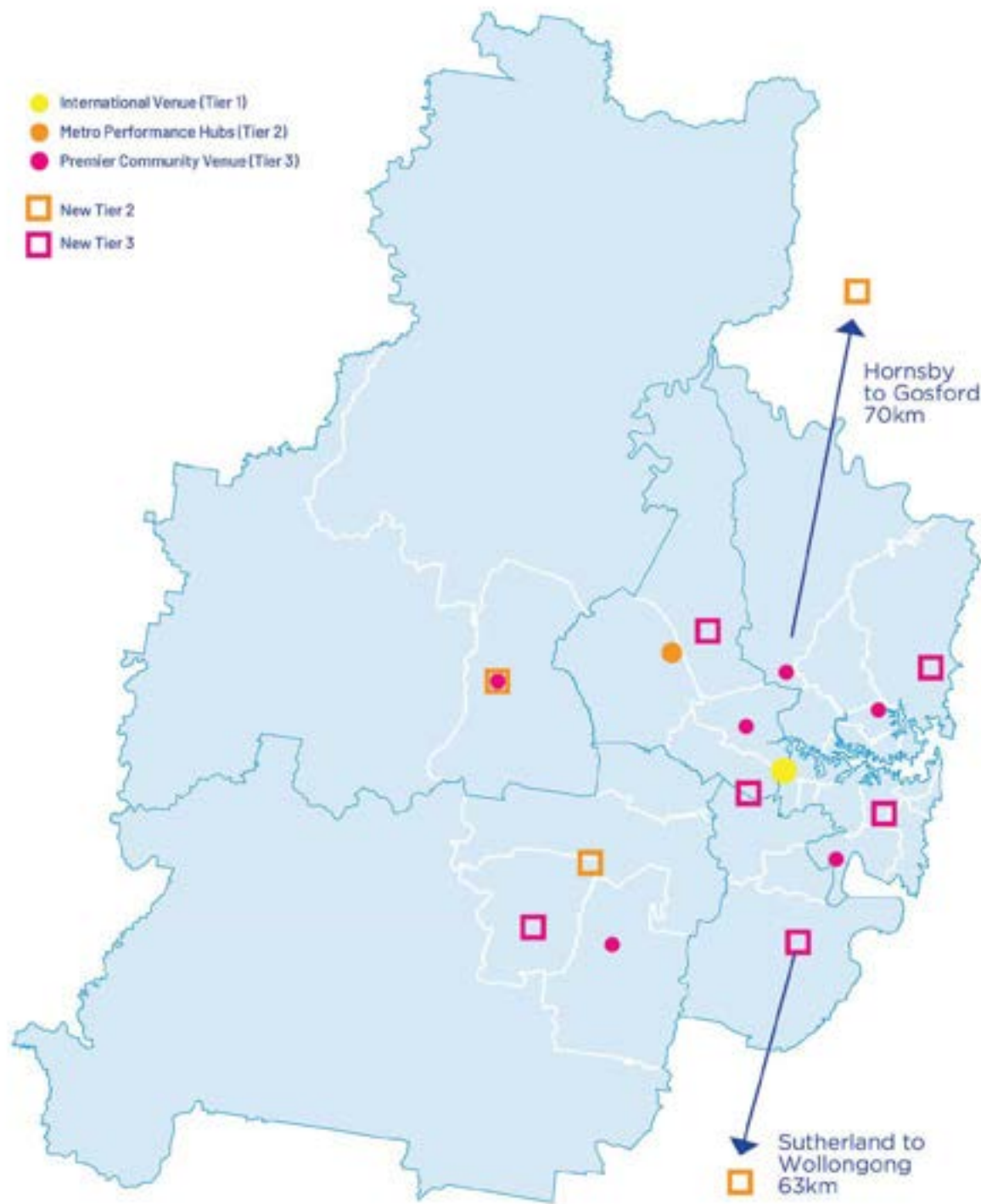
The following investment priorities have therefore been identified:

Venue Type	Current Provision
Metro Performance Hubs (Tier 2)	In addition to the State Tennis Centre: <ul style="list-style-type: none"> <li>• Blacktown (Stanhope Gardens) - subject to completion of court rectification works</li> <li>• New or existing venue – Location yet to be determined (Note: Penrith has previously been identified as a potential upgrade from a current Tier 3 venue)</li> <li>• South Western Sydney - new venue Location yet to be determined</li> </ul> and <ul style="list-style-type: none"> <li>• Wollongong - upgrade</li> <li>• Gosford - upgrade</li> </ul> Both Wollongong and Gosford are locations identified in the Regional NSW Infrastructure Investment Strategy and are readily accessible from Greater Sydney.
Premier Community Venues (Tier 3)	Investment in upgrading existing Premier Community Venues: <ul style="list-style-type: none"> <li>• Central - Parramatta</li> <li>• Northern - Willis Park</li> <li>• Northern - Pennant Hills</li> <li>• South West - Macarthur</li> <li>• Southern - Rockdale</li> </ul> And investment to elevate existing venues or develop new Premier Community Venues: <ul style="list-style-type: none"> <li>• Central - Location yet to be determined</li> <li>• South West - Camden LGA</li> <li>• Northern / North West - Hills LGA</li> <li>• North East - Location yet to be determined</li> <li>• Eastern – Location yet to be determined</li> <li>• Southern - Location yet to be determined</li> </ul>





### Proposed Tiers 1-3 Venue Network



Another potential outcome of the National Competitive Play Review may be more flexible hosting arrangements for lower-level events to be hosted on a mixture of playing surfaces. This will allow a greater portion of Tier 4 and Tier 5 venues as well as combinations of venues to share appropriate district and inter-district level play, complemented by the network of Tier 1 to 3 venues hosting the larger and higher-level events where playing surface type is more important.

Together, these prospective changes and investment will assist in developing a justifiable network of sustainable tennis venues that best fits the needs of the sport for competitive play as well as local demand for recreational tennis and programs/coaching.

#### Potential funding opportunities

To support tennis stakeholders fund the renewal, upgrade or development of new tennis venues, the following key funding opportunities have been identified:

- ATP Cup Tennis Legacy Fund; or replacement Tennis Investment Program
- Tennis NSW and Tennis Australia - infrastructure investment and through commitment to hosting premier and ITF events
- Tennis Stakeholder Investment - clubs and/or operators' co-contributions
- Major Sports Infrastructure Funding Programs - State Government
- Major Sports Infrastructure Funding Programs - Federal Government
- General Sports and Community Facility Funding Programs - State and Federal Government
- Non-sporting Infrastructure Funding Programs - State and Federal Government (e.g. health, economic, employment, other focus)
- Local Government - developer contributions, state infrastructure contributions, and general revenue raised from fees, charges, rates, levies, leases and licenses.
- Investment / Development Partnerships with public and private entities where alignment exists (including, schools, universities, and leisure providers)

#### Next Steps

A detailed Action List is provided in Section 6.2.

To achieve the targeted outcomes of this Strategy over the next 5 to 10 years, Tennis NSW will focus on continued engagement with local councils, Tennis Australia and NSW Office of Sport to ensure funding is committed and the individual projects are secured and delivered. Where possible, Tennis NSW will work to stimulate the acceleration of funding and delivery of projects.

This Strategy may be refined from time to time to reflect changing priorities and opportunities as the environment continues to evolve.

Together with the *Regional NSW Infrastructure Investment Strategy*, these documents form the *Tennis NSW State Infrastructure Investment Strategy*.





# Introduction

## Background

The key objective of the *Tennis NSW State Infrastructure Investment Strategy* is to identify and prioritise where investment by the sport and Government should be focused moving forward.

The *Tennis NSW State Infrastructure Investment Strategy* is delivered in two companion documents - the *Regional NSW Infrastructure Investment Strategy* and the *Greater Sydney Infrastructure Investment Strategy* (this document).

Tennis NSW is the body responsible for the promotion and development of participation in tennis across NSW (State Sporting Organisation).

The *Tennis NSW State Infrastructure Investment Strategy* supports three key pillars of the Tennis NSW Strategic Plan - Vision 2025:

- Play - to assist our Clubs, Coaches, Operators and Councils in getting more people playing tennis more often
- Places - to assist our Clubs, Coaches, Operators and Councils to invest in and operate sustainable tennis facilities
- Pathways - to build a performance pathway that will support the development of NSW's best talent at State, National and International level

The two strategies have been informed by:

- Key principles and findings arising from concurrent strategic work including:
  - Tennis Restart and engagement with all key stakeholders, using data led insights and collaboration on planning; and
  - Various reviews into the player pathway and how competition is structured - including the Sydney Tennis Review and national Competitive Play review.
- Alignment with Government approach to planning, managing and funding infrastructure
- Utilising both Tennis NSW internal and external data sets such as venue audit data and data on population, population growth, tourism and socio-economic factors

Tennis NSW has engaged with Tennis Australia, the NSW Office of Sport and local councils to ensure the framework and overall strategy aligns with the needs of key stakeholders.

## Tennis NSW Venue Hierarchy

Tennis NSW has developed a new venue hierarchy that aligns partially to the NSW Office of Sport Facility planning framework and focuses on the physical elements of its venues as well as its operations, coaching and other programming, and event suitability.

It should be noted that tier numbers do not reflect a difference in quality, but rather important functional differences to distinguish how a network of venues serves the sport.



# Section 1:

## Introduction



Hierarchy	Description
<b>International Venue (Tier 1)</b>	Tennis showpiece – Large economic driver through hosting large National and International events and the top high-performance coaching and player pathways.
<b>Regional and Metro Performance Hubs (Tier 2)</b>	ITF Professional event hosting capability and serves as a hub for community through to high level events and competition (Centre of Excellence); high quality coaching/pathways for the local area and region; diverse community programming; and is a financially sustainable and professionally run venue.
<b>Premier Community Venue (Tier 3)</b>	Premium competition venue that focuses on club level to inter-district and lower-level state significant events and competition; as well as servicing the local catchment to provide a full mix of recreational play, competition play, coaching and programming.
<b>Full-service Community Venue (Tier 4)</b>	Serves the local catchment to provide a full mix of recreational play, competition play (participation level), coaching and programming.
<b>Community Venue (Tier 5)</b>	Public facilities servicing local suburbs delivering health and social opportunities and community objectives. Will have some program offerings such as coaching and competition play.
<b>Community Access Venue (Tier 6)</b>	Community access facility which provides opportunities for casual play and likely to have no or limited coaching/programming and competitive play.

This hierarchy is detailed further in the appendix of this document.

### Emerging threats and challenges

Through its extensive engagement with Clubs, Coaches and Councils comprising of 400+ venue audits, forums, visits, working with councils on local government strategies, the Sydney Tennis Review, and the National Competitive Play Review (2022), Tennis NSW has identified 4 critical challenges to be addressed by this Strategy:

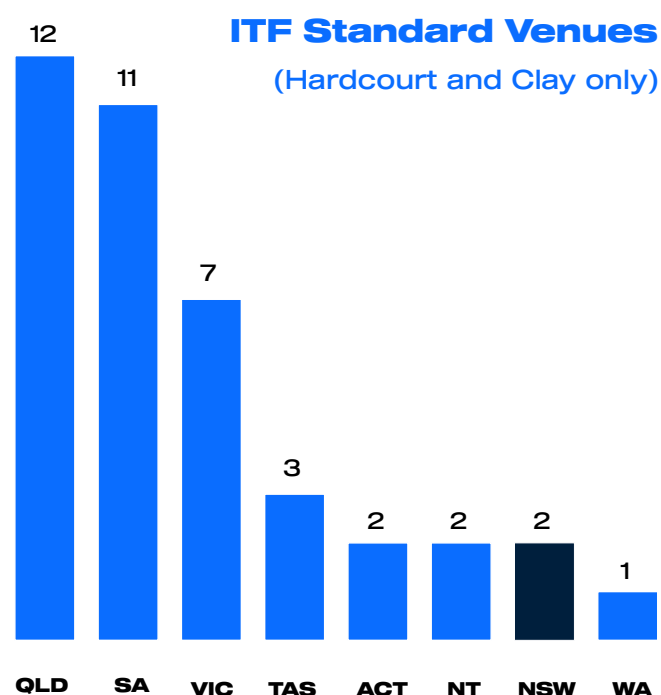
1. Undersupply of ITF Standard Venues (Regional and Metro Performance Hubs)
2. Ongoing threat to existing Premier Community Venues
3. Lack of Grand Slam surfaces for the performance pathway
4. Inadequate provision and management of venues to meet community demand

### Undersupply of ITF Venues (Regional and Metro Performance Hubs)

Regional and Metro Performance Hubs act as the sport's centres of excellence - venues which have ITF tournament level event hosting capability in addition to serving local and district levels of competition.

Currently, NSW has just one International venue at Sydney Olympic Park (hard court), and two other venues at Albury (grass) and Tweed Heads (hard court) with grand slam surfaces and ancillary facilities necessary to host International Tennis Federation (ITF) level events.

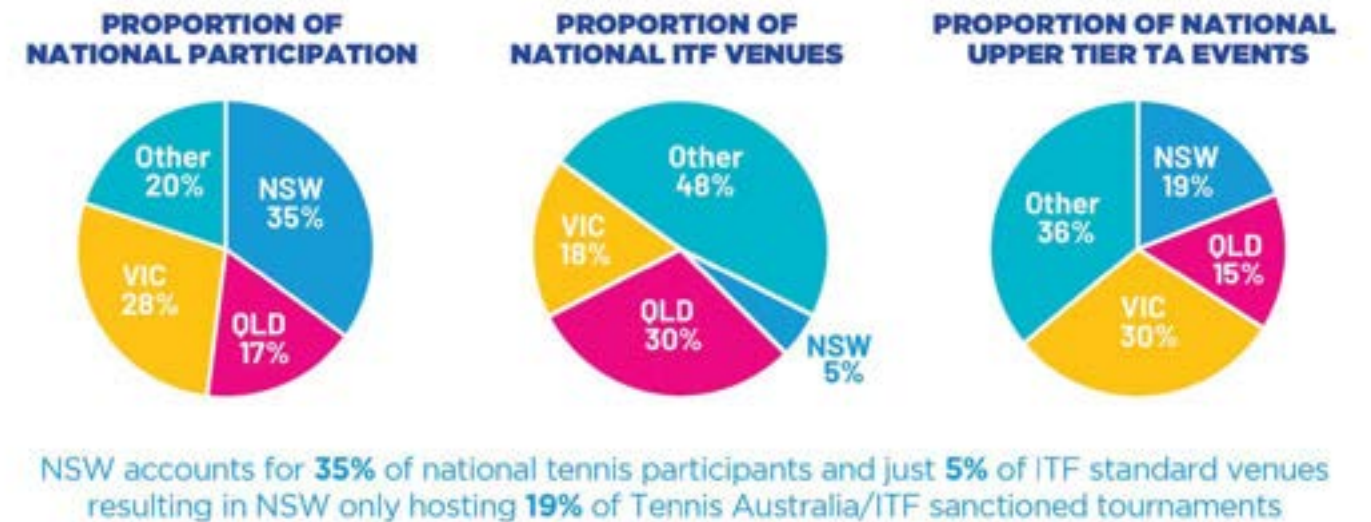
When benchmarked against other States, NSW exhibits significant undersupply of ITF approved venues – the same as Northern Territory and ACT, one fewer than Tasmania and significantly fewer than Queensland, South Australia and Victoria.



The State Tennis Centre at Sydney Olympic Park is currently the only Metro Performance Hub within the Greater Sydney area.

NSW accounts for just 5% of ITF standard venues despite accounting for 32% of the national population and 35% of participants across Australia. NSW's two ITF venues account for less than 0.25% of all its venues across the state.

This correlates to NSW only hosting 19% of Tennis Australia / ITF sanctioned tournaments that cater for the Performance level players.



### Ongoing threat to existing Premier Community Venues

Premier Community Venues are larger community venues, generally 12 or more courts. They support larger drawing participation events which serve premier and aspiring performance level players within their own districts, inter-district and state-significant competition and tournaments.

Such venues are under increasing threat in Greater Sydney due to:

- An increasing deficit in space and facilities for other sporting, community and other uses - meaning there is competition for the space that these venues occupy
- Unsustainable leases/licensing arrangements and facility funding models
- Non-optimal venue management and poor facility maintenance causing venues to be in poor condition and needing investment to meet requisite standards
- The emergence of professional operators and tender processes with a focus on profitability rather than the development of tennis holistically.

To ensure that the sport is attractive for those who aspire to play at the premier and performance levels, it is important that each geographic part of Greater Sydney has access to high quality Regional and Premier Community venues.





Given approximately 75% of NSW based premier, aspiring performance and performance players reside in Greater Sydney, Tennis NSW has identified the need to host more content within NSW (regional or metropolitan) and in particular a greater number of events in Sydney for emerging and lower-level premier play participants whom will benefit from greater opportunities to play in their local districts and within Sydney itself.

**Lack of Grand Slam surfaces for the performance player pathway**

Emerging talent needs to be exposed to training and match play on Grand Slam playing surfaces such as hard courts to successfully develop into international level players who can regularly compete on the world stage.

Synthetic grass courts account for 73% of all courts in Greater Sydney and of those that are not synthetic grass, only a small proportion are relevant or suitable for this purpose. This has a potential to significantly impact the development of State, National and International quality players.

Over the past 20 plus years:

- The sport and its stakeholders have failed to adequately plan for facilities and the right types of tennis facilities to be located where the incoming and future population will be;
- The condition of the network is ageing and requires substantial investment;
- The management of the network is not optimising the many opportunities to better engage new tennis participants and strengthen the sustainability of the sport; and
- The sport of Tennis is continually growing in NSW, underpinned by its safety and incredible inclusivity, which provides opportunities for people of all ages, gender, abilities, physical capabilities (including those with disabilities), cultural and socio-economic backgrounds.

**Tennis NSW Greater Sydney Infrastructure Vision**

To address the challenges that tennis faces in the Greater Sydney region, Tennis NSW has identified that it needs to:

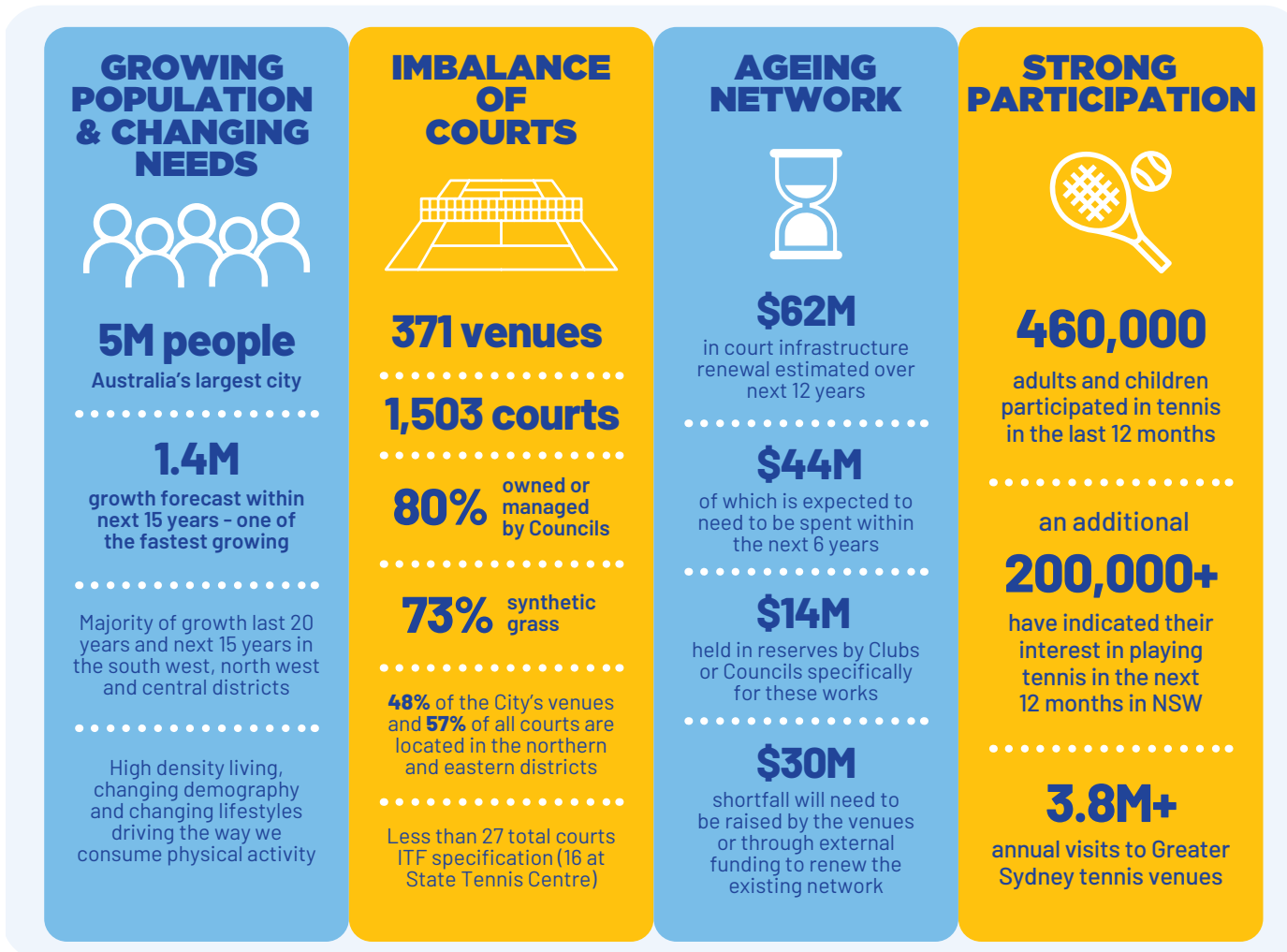
- Stimulate investment in Metro Performance Hubs that will service the Greater Sydney area;
- Stimulate investment in Premier Community Venues that will service each geographic area of Greater Sydney;
- Influence improvements to the asset funding model, tenure arrangements, management and service offerings (programming) to create a more resilient and sustainable network of venues that can better meet current and future demand; and
- Advocate for the planning and development of new tennis venues or expand tennis venues in-line with population growth and participation-performance opportunities.

**Alignment with Government**

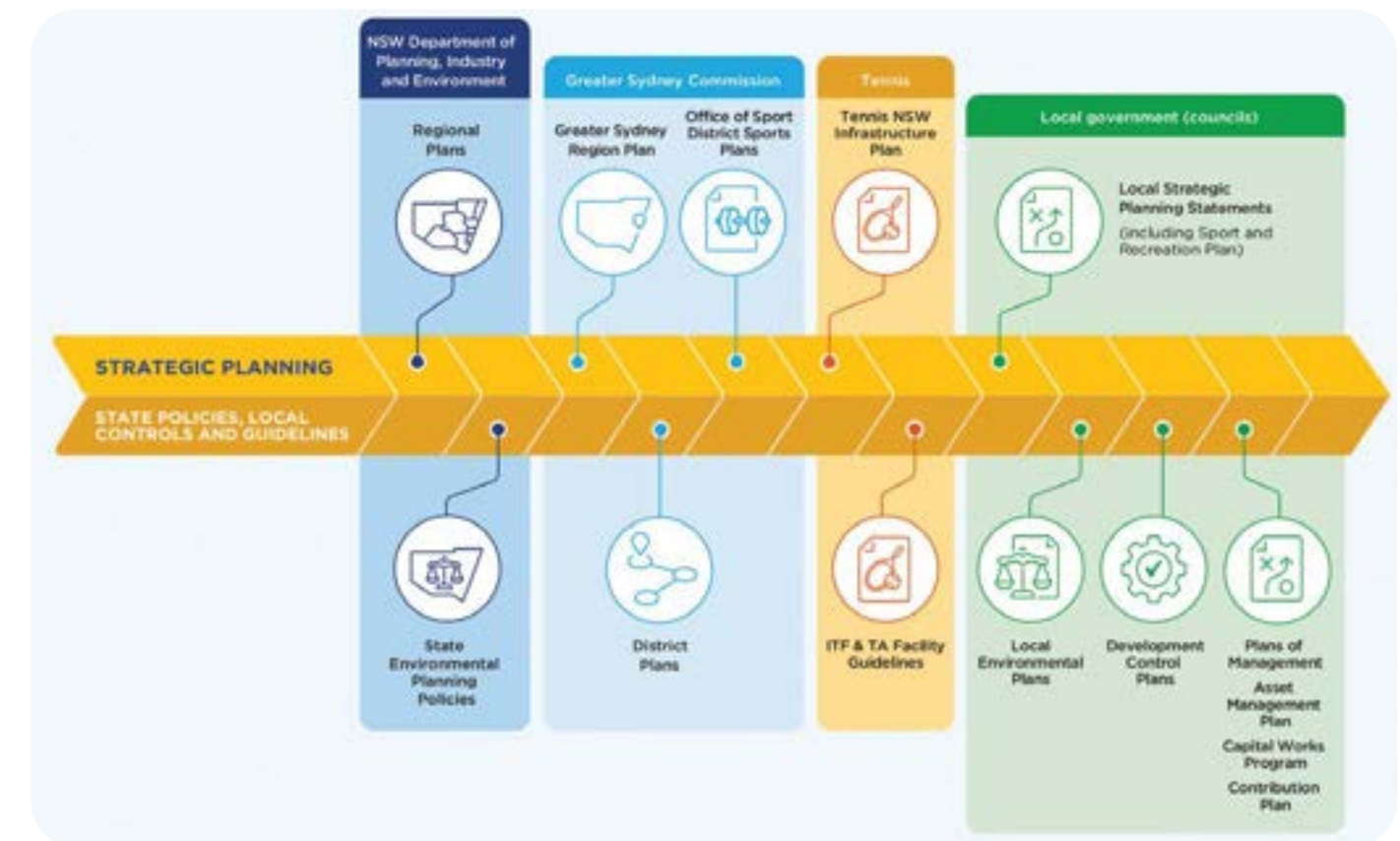
Given the significant influence and control that planning authorities within Local and State Government exert over the planning and investment into infrastructure broadly, the Greater Sydney Infrastructure Investment Strategy acknowledges that to successfully leverage these identified outcomes it should align its planning with that of Government priorities.

This includes aligning with the *Greater Sydney Region (GSR) Plan, A Metropolis of Three Cities, Office of Sports Strategic Plan, Future Needs of Sport Infrastructure (FNOSI) and their District and Regional Sport Plans* and Local Council Sport and Recreation Plans.

**Tennis Landscape in NSW**

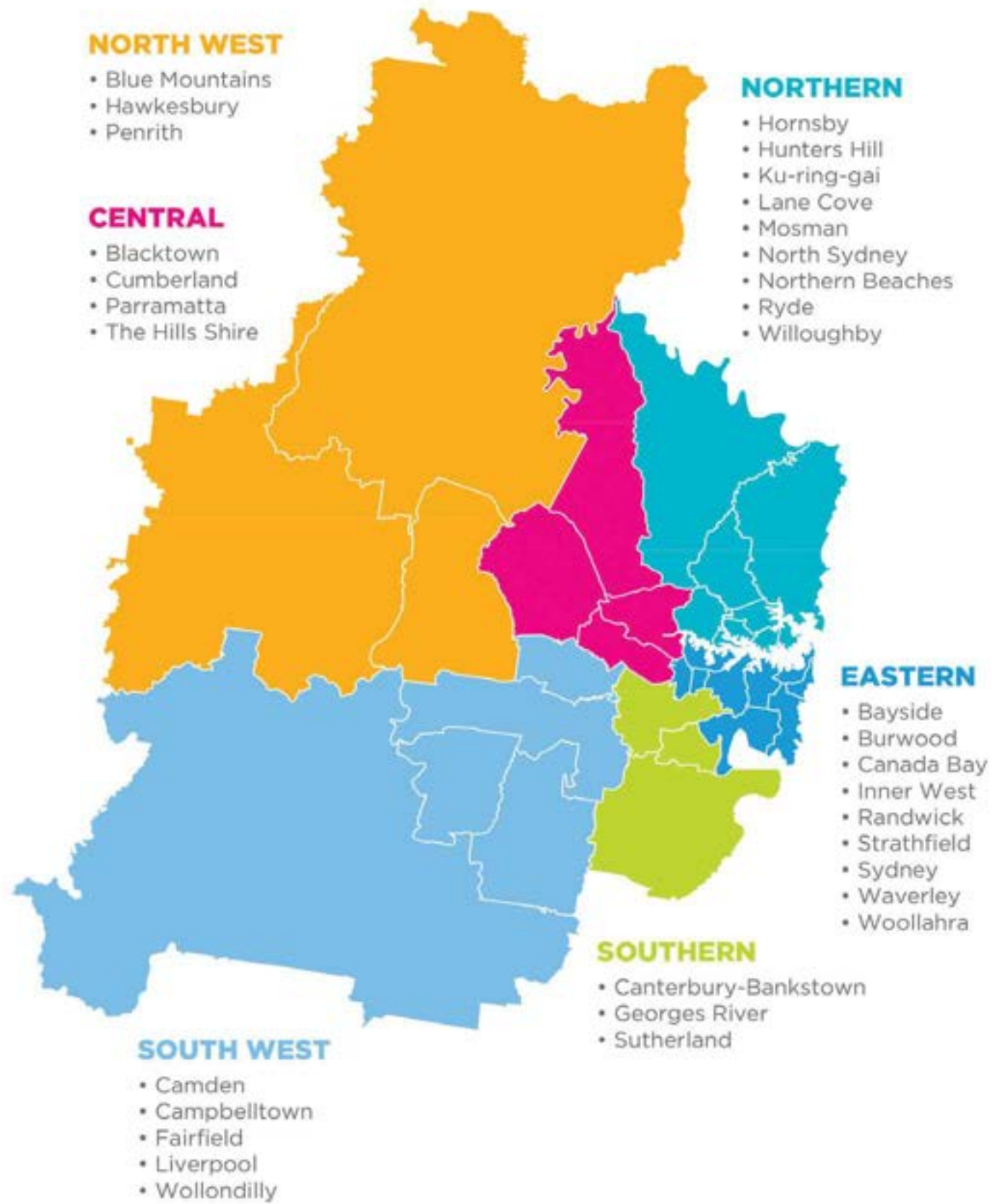


**Planning Framework**





### Sydney Metro Planning Districts



# Benefits of investing in Community Tennis

The value of community sport infrastructure can be categorised across three key benefits – economic, health and social.



## Tennis annual contribution to the NSW Economy

Community Tennis delivers a significant amount to the NSW economy each year. It is estimated the sport contributes \$146 million to NSW's GDP through coaching, school programs, social play, club membership, competition and events.

### Tennis Contribution to NSW GDP



## Section 2: Benefits of investing in Community Tennis

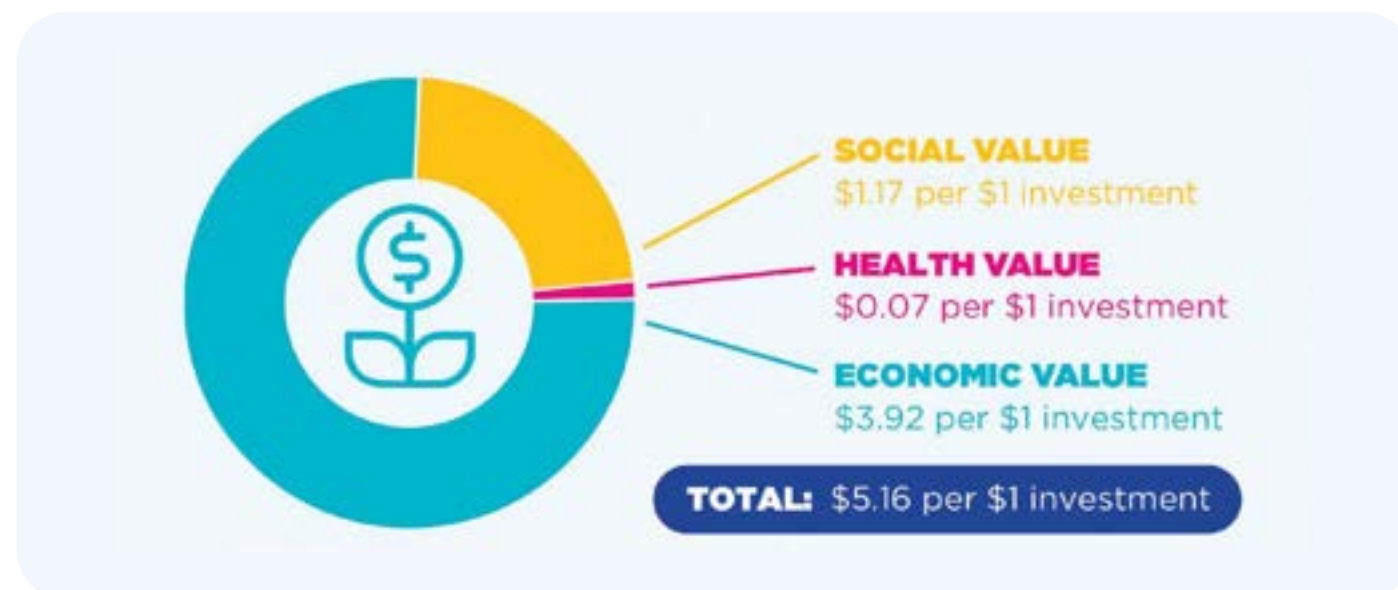


## Investment in Tennis Infrastructure

Acquiring Government funding to assist with the implementation of the Strategy will require Tennis NSW to demonstrate this economic value, but also the return on their investment by articulating the additional social and health benefits that investing in tennis infrastructure will deliver to the State and local community.

Tennis Australia and Victoria University's Institute of Sport and Health have recently conducted research on the return communities receive from investing in tennis infrastructure. This study estimated that **every dollar invested in community tennis delivers a return of up to \$5.16 in economic, health and social benefits.**

### Return on One Dollar Investment



The key messages that articulate the benefits of investing in tennis infrastructure include:

- Investing in tennis infrastructure will create employment opportunities that result from construction and maintenance as well as new venue employment opportunities including coaches, management and operations staff.
- The development of regionally significant venues is an opportunity for NSW to compete on a National and International stage for event content which will drive visitation and direct expenditure to the State and local areas, creating further jobs and opportunities for investment and innovation.
- Improving sport and recreation infrastructure is directly correlated to the level of sport participation.
- Active people are mentally and physically healthier, more productive at work, have enhanced employability and educational attainment which all increases future employment opportunities and delivers further long-term flow on economic activity.
- Physical activity also reduces the risk of chronic disease and mental health issues which improves the quality and length of life.
- By reducing the incidence of these diseases and reducing the mental health related burden on the health system, participation supports savings in the health and social care system.
- Participation in sport encourages young people to stay in school for longer resulting in a longer-term reduction in crime and anti-social behaviour such as substance abuse, suicide, homelessness, unemployment and mental health issues.
- Investment in local sport facilities has also been proven to help increase volunteering levels which can improve employability, lead to the development of social networks and relationships, reduce loneliness and in the longer term foster social connectedness.

Tennis venues can also be used for a variety of purposes outside sport, acting as a space where community organisations can hold meetings and events, and local governments can run community programs and clinics.

# State of Play

## Participation

Tennis is a growing sport in NSW, and provides opportunities for people of all ages, genders, abilities, physical capabilities (including those with disabilities), cultural and socio-economic backgrounds.

Participation in tennis remains strong, with Australia having the highest per capita participation rate in the world and it is currently a top five participation sport in Australia excluding recreation activities.

A decline in formal membership within venues has been regularly reported over the past 20 to 30 years, being replaced by an ever-increasing demand for less structured participation opportunities.

Compared to other traditional sports, Tennis user or market segments are much more diverse and varied, meaning more unique individuals are likely to be participants across the calendar, catering for varying needs and interest.

According to Sport Australia's AusPlay data (April 2021), the following is a summary of the tennis participation landscape in NSW:

- Approximately 460,000 adults and children participated in tennis in the last 12 months
- Tennis is a truly gender diverse activity with over 40% female participation across all age groups
- Tennis stands out as having one of the most evenly distributed age profiles, with participation across all age demographics
- Participation rates increase 50% from the ages 25 to 54
- 1 in 3 participants choose to play tennis in an 'unorganised' setting
- Principal reasons for playing tennis are "fun, fitness and friends"

According to additional insights sourced from the Kinetica Group, participation rates are consistent across all areas of Sydney, ranging from 9.3% in the North West district and 11.8% in the Northern district.

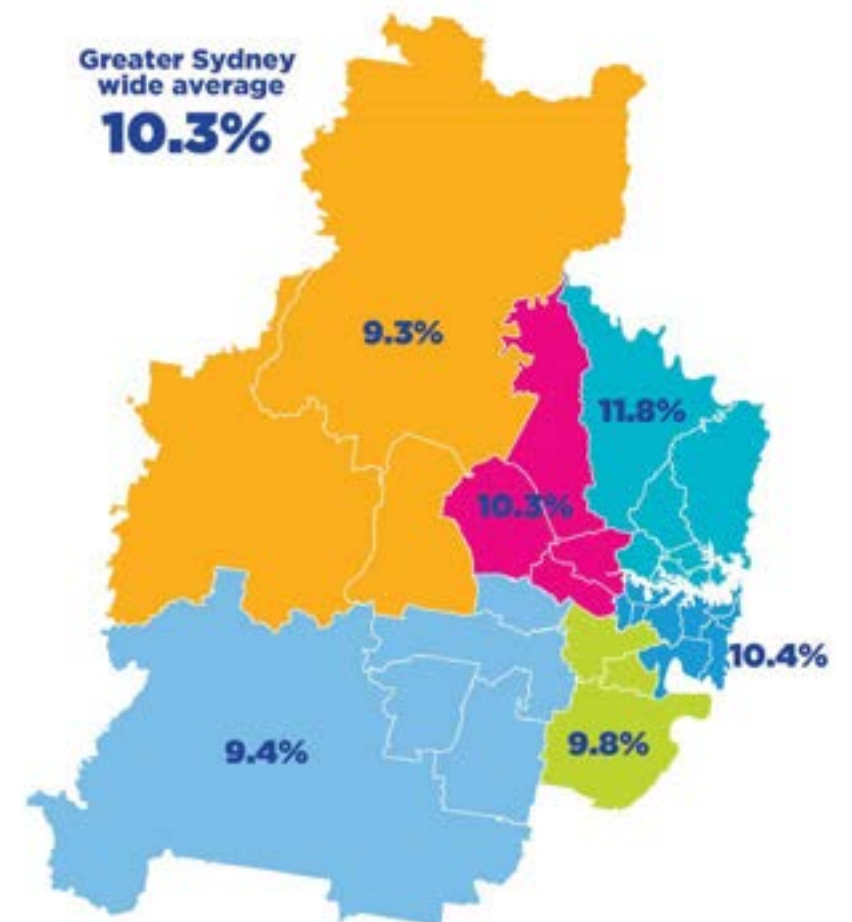
## Participation Opportunity

AusPlay and Kinetica data also suggest that in addition to current participants, a further 200,000 + potential participants have indicated interest in playing tennis in the following 12 months.

The COVID-pandemic highlighted this shift away from traditional participation structures and observed a 230% increase in online bookings over April, May and June 2020. Post lockdown venues are continuing to experience much higher casual and programmed bookings than in the previous year.

To understand more about this uplift Tennis Australia commissioned Nielsen Sport for further research to investigate participation trends and identify long-term growth opportunities for the sport.

## Tennis Participation by District



## Section 3: State of Play



This research showed that the venue has a major impact on where a participant chooses to play. Value for money and quality communication is equally important.

Players want:

- A variety of courts, shaded area, hitting walls,
- A club that offers services such as a bar, water availability as well as a welcoming, relaxed and inclusive environment
- Friendly and welcoming members and patrons, that caters to all playing levels
- Flexible on-line booking systems, automation and affordability.

**Overall Experience**



**VENUE**  
Is of paramount importance to experience



**VALUE FOR MONEY**  
Price is important for under 35s



**COMMUNICATION**  
Improved quality and quantity of communication is needed



**Tennis Participation in NSW (Jan – Dec 2020)**

**PARTICIPATION BY ACTIVITY**

Tennis ranks in the top 10 of most popular participation activities for adults and children.

**ADULTS**

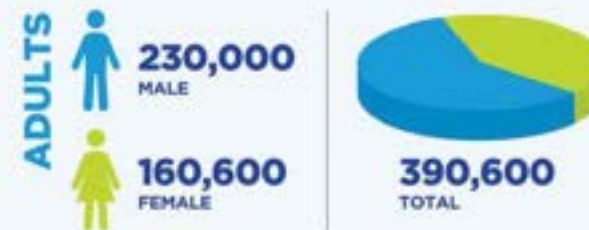
**Tennis - 10**

1. walking. 2. fitness/gym. 3. swimming. 4. athletics (includes track, field, jogging and running). 5. cycling. 6. bush walking. 7. yoga. 8. football/soccer. 9. golf.

**CHILDREN**

**Tennis - 8**

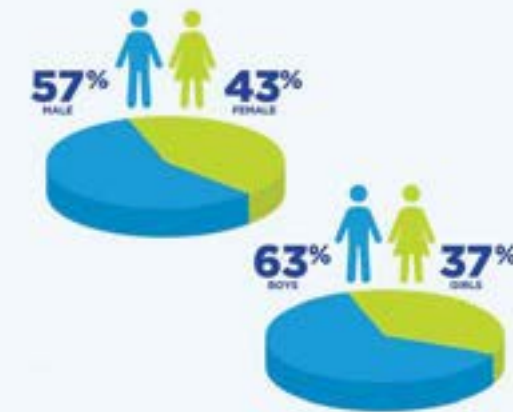
1. swimming. 2. football/soccer. 3. gymnastics. 4. dancing (recreational). 5. athletics (includes track, field, jogging and running). 6. netball. 7. rugby league. 8. basketball. 10. cricket.



Adult participation rates increased by 14%\*  
Tennis was a popular sport of choice for adults during the Covid-19 lockdown.

Children participation rates decreased by 6.5%\*  
Most sports experienced a downturn in children's participation rates, due to Covid-19 lockdowns.

**TENNIS PARTICIPATION IN AUSTRALIA**



**NSW ACCOUNTS FOR 35.8 PERCENT OF TENNIS PARTICIPANTS ACROSS AUSTRALIA**

**TENNIS IS A SPORT FOR LIFE.**

Tennis stands out as having one of the most evenly distributed age profiles, with participants ranging from 15-55+ years of age.

**HOW WE PLAY**

- 64.2% of adult participation is organised
- 45.1% of adult participation is organised through a club or association
- 35.9% of adult 13+ participation is non-organised
- 41% take part at least once per week

**MOTIVATIONS**

- 57% of participants play for fun/enjoyment
- 54% of participants play for social reasons
- 8% of participants play for performance / competition

**THE OPPORTUNITY**

517,665 considering participating in tennis

**THE RISK**

116,313 at risk of dropping out, or having already dropped out

\*since the last reporting period  
Source: Sport Australia, 2021. AusPlay results. <https://www.clearinghouseforsport.gov.au/research/ausplay/results>



## Tennis Network - Greater Sydney

The six districts of Sydney (previously five with the West divided into North West and South West) provides a reasonable starting point to describe at a high level the organisation of common communities and district based organisation of play. This forms a basis for reasonable travel catchments for local and district (sub-regional) travel.

It is also understood that organising infrastructure in this way will assist in determining a network hierarchy and needs which will underpin investment decision making and priorities.

### Distribution of venues

Across these six districts of Greater Sydney there are 371 venues and 1,503 tennis courts.

The network consists primarily of synthetic grass courts (73% of total), while there is a lack of hardcourt courts (22%), grass courts (3%) and clay courts (1%) across Greater Sydney.

The Northern and Eastern District currently account for the provision of 48% of all metropolitan venues and 57% of all courts. There is also only 2 clay courts and no grass courts outside of these two districts.

There are only 27 ITF standard courts which is a standard that is required for State, National and International tournaments, with 16 of these in the Central District (60%) and majority at the State Tennis Centre (SOPTC).

Based on the hierarchy of venues, the State Tennis Centre is the only International Tier 1 Venue servicing the whole of NSW. Blacktown will be re-affirmed in status as a High Performing Regional Venue (Tier 2) upon completion of court rectification works which currently prevents hosting higher level events. There are also only six other Premier Community Venues (Tier 3) across Greater Sydney located in the Penrith, Campbelltown, Parramatta, Rockdale, Pennant Hills and Willoughby.

### Condition of the network

Based on the Venue Sustainability Rating (VSR) facility condition audit data, there is \$62M of court infrastructure renewal required over the next 12 years to maintain the current network, of which \$44M is needed to be invested within the next 6 years on key works such as court resurfacing, lighting upgrades and replacement of court enclosure fencing.

It is estimated that Greater Sydney venues have sinking fund reserves of \$14M, leaving a gap of at least \$30M (68%) to be raised to fund the next 6 years of renewal works. There is a perception that the network will not be able to bridge the gap in revenue without financial assistance from landowners, government grants or through improving venue utilisation and performance.

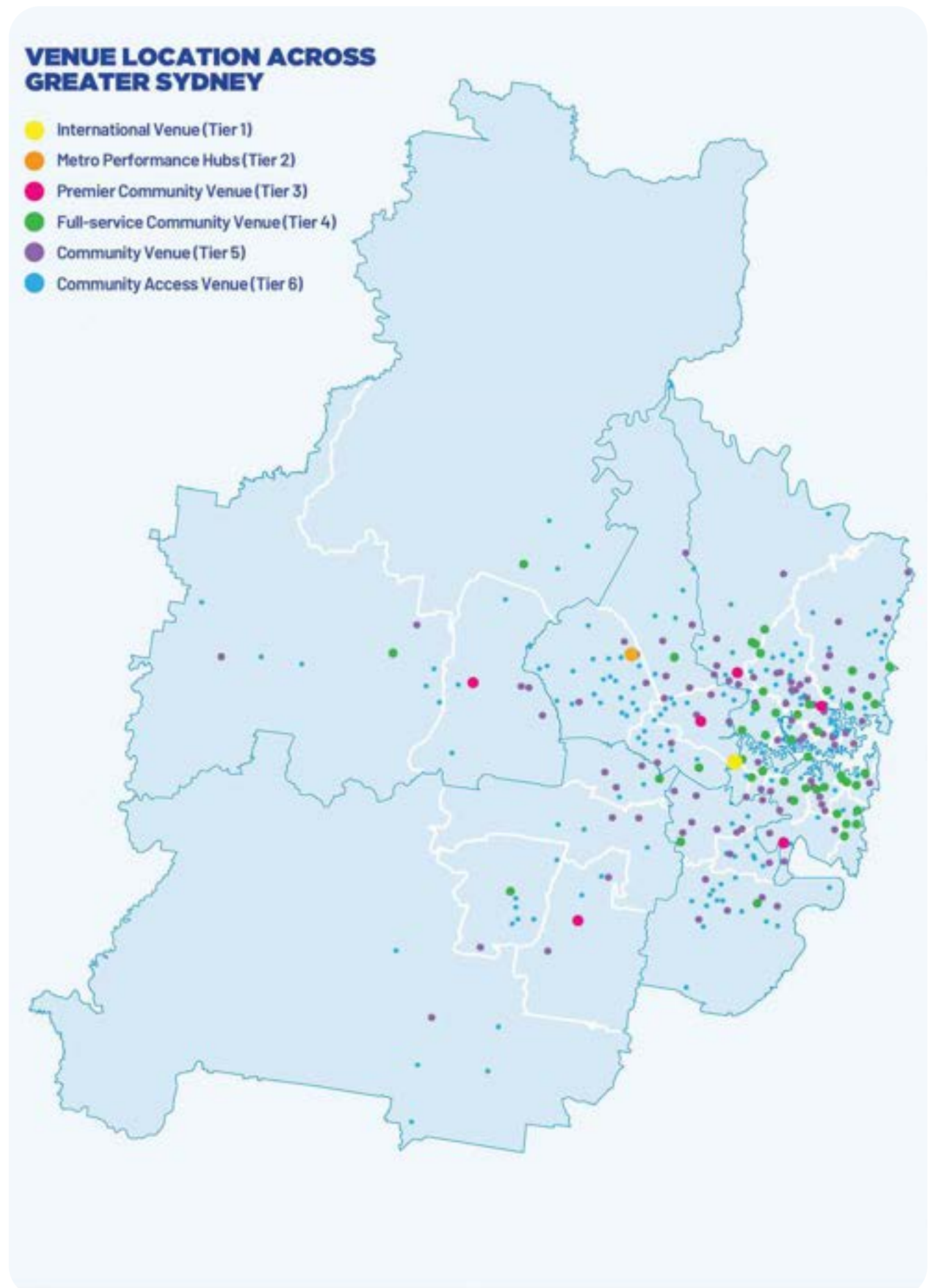
### The role of Local Government

Councils manage over 80% of tennis venues in NSW – either Community Land or Crown Land under Care and Control of Council. As such, councils own and manage the assets in which clubs, coaches and operators are custodians to deliver the activity within those venues.

With council mergers, rate pegging, complexity in development contributions, limited access to grant funding and other challenges to raising general revenue, Councils are under increasing financial pressure to maintain their assets and deliver increasingly diverse and higher quality services to their communities.



## Tennis Network – Greater Sydney





### Changing Sydney

Nearly 50% of venues are based in the Northern and Eastern districts of Greater Sydney which is broadly aligned with Sydney’s historic population footprint prior to the last 20 to 30 years.

However, Sydney has grown significantly since the majority of the City’s venues were originally developed. As depicted by population density maps in 1996 and 2016, the additional 1.2 million population since 1996 has seen density continue to grow in the Eastern and Northern Districts, however population has become more prevalent in the Central district with steady growth in the North and South West areas of Sydney.

Sydney is expected to grow a further 1.4 million people over the next 15 years and the growth is expected to be stronger in the North West and South West Districts as depicted by these maps below. The LGA of Camden for example is projected to increase over 100% by 2036 with Leppington alone seeing 60,000 new residents.

Although participation and interest is strongest in the north and east there is relatively similar levels of interest across Greater Sydney. As Sydney grows rapidly to the South West and North West districts, there will be new and growing communities creating demand for tennis and therefore investment in appropriate tennis facilities is required to match the forecast growth.

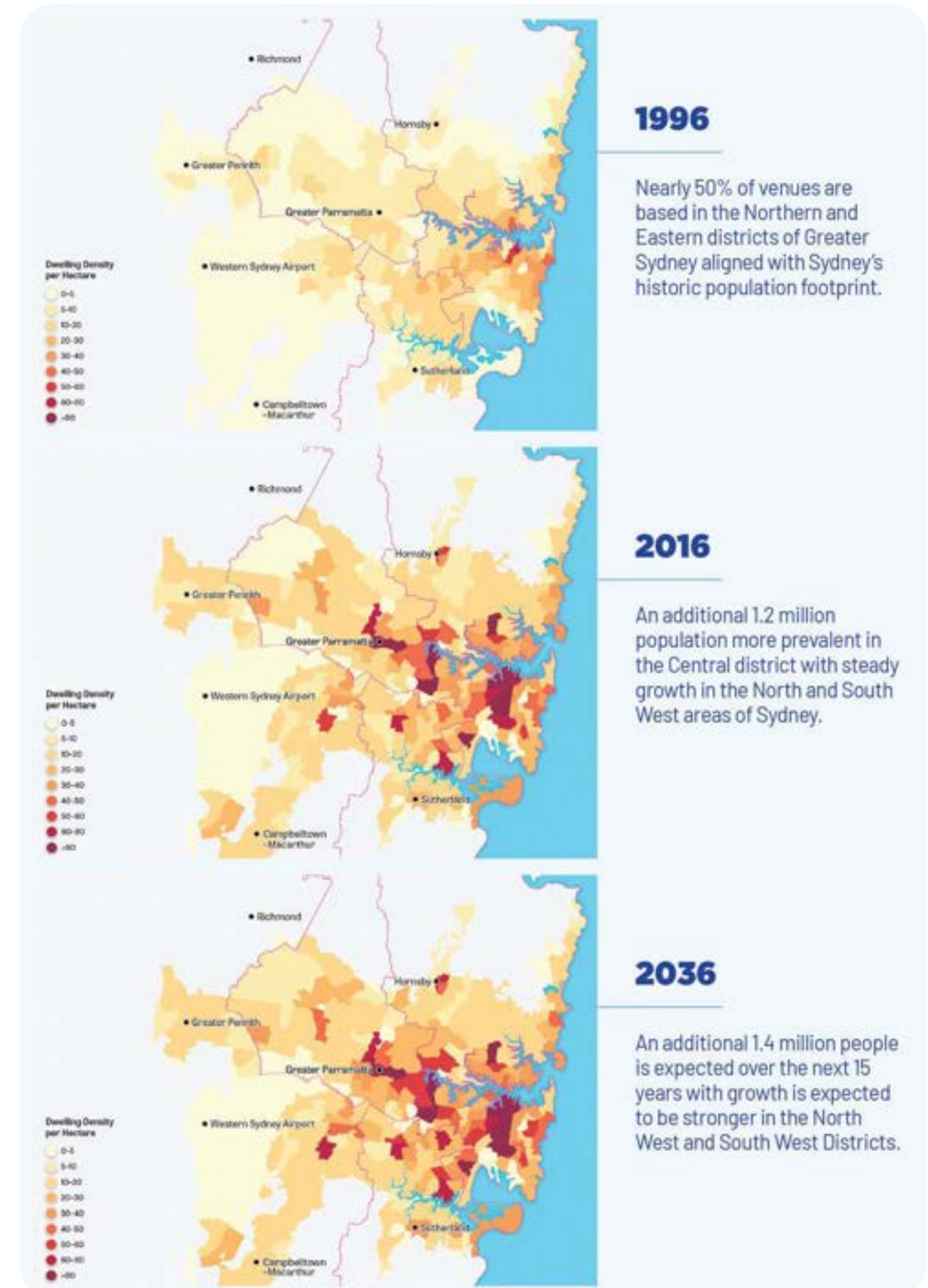
The urban footprint of Greater Sydney is not only marked by its growing population but also by the increase in medium and high density living (most pronounced in the Eastern, Central and Northern districts) and a corresponding lack of available open space and competing priorities for access to and sharing of facilities.

This creates additional challenges for the planning of places and delivery of community sport and recreation offerings. The implications for tennis in these areas has been:

- Multisport venues as a solution and the potential to losing courts to other sports
- Pressure to reduce footprint rather than grow it
- Pressure to better utilise assets - 24/7 not just peak hour periods
- Partnerships and efficiencies in delivery and maintenance/management of community facilities



### Changing Sydney





# Tennis NSW Venue Planning Framework

## Overview

Tennis NSW intends to shape the planning and development of a network of sustainable tennis venues that support the growth and needs of the sport, in particular - player development, the player pathway and event hosting capabilities across Sydney and NSW.

The framework to identify and plan investment priorities in infrastructure is based on key elements:

1. Utilise data led insights and improved engagement between landowners, venues (clubs and operators) and Tennis NSW/Tennis Australia
2. Understand and align the requirements for competitive play arising out of the national Competitive Play Review and consultation with Member Association level
3. Align with NSW and Local Government approach to infrastructure planning to ensure priorities are deliverable and leverage available funding opportunities

## Tennis Restart and Venue Sustainability

Tennis over time has increasingly become both a sport and a leisure activity with increasingly diverse and innovative delivery models and arrangements. As such, traditional analysis of participation and planning for infrastructure needs has arguably not been an effective way to inform what arrangements and facilities will best fit the needs of the sport and its participants into the future.

Where it might be useful when analysing the needs of other sports to look primarily at membership in a given catchment (where traditional club-based play reflects members who train and play as their participants), this proves inadequate for tennis.

This diverse demand for activation through tennis varies from those looking to organise their own hit at a local court (unstructured play), those wanting some additional coaching or a fitness workout (professionally assisted individual or group programs), those seeking structured or organised competitive or social play opportunities that cater for people of different abilities and commitment levels (including juniors to open age, wheelchair and disability, active aging and schools), and those aspiring to and/or pursuing the representative and professional levels of the sport.

The number of courts, the type of courts, the accompanying facilities, the formats and programs offered, the role of professionally delivered or assisted formats and programs, and the viability and scale of operation needed to deliver those varying formats and programming alongside often highly involved roles and responsibilities in managing and maintaining these venues, demonstrates a highly dynamic and diverse context to understand.

To make sense of all of this, a deeper approach is required, including dispensing with over-simplified and poorly performing traditional assessments of service catchment and facility provision, such as number of courts per thousand people.



## Section 4: TNSW Venue

## Planning Framework



Councils, who are the predominant landowner and manager of tennis venues in NSW, have also indicated that they require an increasingly strategic and evidence-based approach to planning the footprint or network of tennis venues within their local government area. They also indicate that they are under increasing pressure to fund all the services and capital works under their remit and when they do invest, they wish to see a clear return on investment and benefit to the community.

In response to the need to better inform venue (network) planning and performance, Tennis NSW has over the past two years developed a venue planning framework (venue hierarchy as described in Section 1.2 and greater detail in the appendix of this document); has built the Venue Sustainability Rating (VSR) and begun engaging with councils, and its clubs, coaches and operators, under a strategy called Tennis Restart.

The Venue Sustainability Rating is provided on a venue-by-venue basis for a local government area using an audit of venue participation (visitation methodology), infrastructure condition, operational and financial performance. Venues of similar type (venue hierarchy) and context are benchmarked and this can inform what some of the key observations and opportunities are to improve venue performance and sustainability.

This works alongside increasingly valuable market insights being delivered through Sport Australia's AusPlay survey and other sources.

This approach is a work in progress and most importantly it encourages the discussion between the key stakeholders to inform local strategies and decisions on how to achieve the aligned interests of all those stakeholders, ultimately for the benefit of the community.

Key insights from the VSR data include:

- A sustainable venue is one which has an asset renewal plan across the 12-year life cycle of the court and ancillary court infrastructure and can afford to contribute annually to a sinking fund which covers 80-100% of this cost. This is in addition to the costs of delivering a range of tennis offerings (services and programs) in demand by the community.
- A highly sustainable venue is one which can also cover a portion of the asset renewal costs of the buildings and peripheral infrastructure (e.g. car parking).
- In 475 audited venues there is an estimated \$78million deficit in funding needed to renew or replace infrastructure approaching end of asset life within the next 12 years. Currently only 15% are in position to meet their ongoing financial obligations including asset renewal responsibilities. This means that the sport is highly reliant on grant and government funding, and/or will need to make their venues more sustainable to generate surplus revenue to meet this gap.

- Venues between 6 and 12 courts combined with a professional operator (either leading or in conjunction with the traditional local club/association) providing high quality coaching and other programs drive significantly higher participation numbers which in turn provides value and opportunity to generate returns to reinvest into infrastructure.
- Venues with an optimal and performing management model have up to 350% increase in participation however only 17% of venues have their optimal or performing management model in place.
- Venues with a complete digital presence deliver a 45% increase in participation compared to those without, and currently only 25% of venues offer both online booking and payment options and less with an integrated court access and light control solution. The latter can significantly uplift venue visitation and revenue in venues which are not suitable to have full-time or significant on-site coach or management present.
- Community tennis clubs (volunteer supported) continue to play an important role in the delivery of tennis in the community, including the organisation and oversight of intra-club, inter-club and inter-district competition and providing the social experiences that creates a vibrant and connected tennis community. Thus, venues which can provide all or many of these opportunities are important and favoured over a proliferation of smaller 1-3 court venues.

If a partnership between Council and Tennis stakeholders is managed well, this could lead to improved participation outcomes whilst striving for full or substantially self-sustainable assets. This reduces the burden on councils and ratepayers whilst representing one of the few sports and community uses that can leverage such return on public investment.

The right size centre, right management model and right programs will lead to greater participation numbers and diversity of programming which better serves community's needs/demand for tennis - the sport and as recreation.





### Competitive play and Sydney Tennis review and alignment

The Sydney Tennis Review, undertaken by Tennis NSW in conjunction with McLaughlin Sports Consultancy, reviewed the commonalities between venues, clubs and participants to introduce reform to the Sydney competition landscape.

Simultaneously, Tennis Australia conducted a Competitive Play review aimed at developing a clear performance player pathway for established and aspiring players.

Observations of the national Competitive Play Review and Sydney Tennis Review (STR), which are directly impacted by facility planning include:

- The delivery of competitive play opportunities is heavily dependent upon an adequate hierarchy of facilities
- The higher level a player aspires to and reaches, the more travel (distance, frequency and associated costs) is accepted.
- Established and aspiring performance athletes require regular access to Gland Slam surfaces for both training and playing opportunities
- There is a need to have more layered opportunities, and therefore facilities, for competitive play across the spectrum, so that those participants can compete at the appropriate level and within an appropriate travel distance.
- NSW is currently underrepresented nationally in hosting sanctioned tournaments due primarily to an undersupply of suitable infrastructure and Tennis NSW is targeting a more equitable share of marquee national, and Pro Tour events
- There are few venues within Greater Sydney that have the capacity to host larger drawing match play events (64 to 128 participants) which require 12 plus courts - Tier 3 Premier Community Venues

### Government Planning Approach

Given the significant influence and control that planning authorities within Local and State Government exert over the planning and investment into infrastructure broadly, the Greater Sydney Infrastructure Investment Strategy acknowledges the benefits in aligning with the Greater Sydney Region (GSR) Plan, A Metropolis of Three Cities and Office of Sports Strategic Plan, Future Needs of Sport Infrastructure (FNOSI) and their District and Regional Sport Plans.

### Greater Sydney Region Plan – A Metropolis of Three Cities

The *Greater Sydney Region Plan, A Metropolis of Three Cities* is built on a vision that the majority of residents live within 30 minutes of their jobs, education and health facilities, services and great places.

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



- The established Eastern Harbour City – building on its recognised economic strength and addressing liveability and sustainability.
- The developing Central River City – investing in a wide variety of infrastructure and services and improving amenity.
- The emerging Western Parkland City – establishing the framework for the development and success of an emerging new city.

As the population of Greater Sydney is projected to grow to 8 million over the next 40 years, and with almost half of that population residing west of Parramatta, rebalancing economic and social opportunities will leverage that growth and deliver the benefits more equally and equitably across Greater Sydney.

The vision brings new thinking to land use and transport patterns to boost Greater Sydney’s liveability, productivity and sustainability by spreading the benefits of growth.

With an increase in high density living, there is a trade-off between the convenience of living in or around urban regions at the cost of private open spaces. Therefore, providing high quality open spaces and sport facilities to their residents has a been a key need identified by local governments and the Greater Sydney Commission.

As certain suburbs in Greater Sydney are expected to experience high population growth over the next decade, a well-developed network of sport and recreational facilities has been identified as an essential aspect of ensuring a high standard of living.

Tennis NSW have considered the following key areas of the GSR plan in developing its metro infrastructure strategy:

- Planning decisions need to be balanced and support new infrastructure in each of the three cities
- However, decisions still need to align with forecast population growth
- Infrastructure planning needs to adapt to meet future needs through flexible designs and agreements for shared use (i.e. multi-purpose facilities)
- Focus needs to be on maximising the utility of existing infrastructure assets
- For facilities to effectively support living in high-density regions, adequate focus must be provided to ensure the facilities are accessible to all residents such as providing female friendly change rooms and ensure due consideration is given to accessibility to persons with disabilities.

### NSW Office of Sport

One of the key focus areas for NSW Office of Sport and its 2020-2024 Strategic Plan is ensuring there is accessibility for everyone in NSW for active recreation. This includes ensuring there is greater consideration in infrastructure planning in fit-for-purpose facilities and the availability and use of multi-purpose facilities.

Facilities constructed on these principles provide higher utilisation rates, lower capital and operational costs and therefore offer a greater return on investment for the community.

NSW Office of Sport recognise greater integration is needed with SSO and local Councils and through this engagement, they are currently developing the District Sport Facility Plans for Greater Sydney which will provide a foundation for future facility provision and has been considered in the recommendations of this report.





### Regional Sports Hub Model

In 2017, NSW Office of Sport established a Regional Sports Hub Model which purpose was to deliver improved outcomes and increased returns on Government investment. This would be achieved by connecting a range of facilities, services and partners within a given region.

NSW Office of Sport defined the Regional Sports Hub as a primary centre of co-located sport and active recreation facilities, sub-elite sport support services, and sport administration offices with the potential to incorporate both Centres of Excellence and community facilities.

Tennis NSW agrees that aligning with the concepts of the NSW Office of Sport’s Regional Hub Strategy for both regional and metropolitan areas, will ensure resources are shared, costs are minimised and benefits and outcomes are maximised.

Also, the NSW Government is investing \$1.3 billion in infrastructure to support regional centres and growing communities, by activating local economies and improving community services. There is therefore an opportunity and justification for Tennis NSW to align with this funds’ priorities and select locations for the hubs that best leverage the external funding available.

#### Regional Sport Hub Model





# Opportunities and Prioritisation

The current network of venues identifies 8 existing regionally significant venues, made up of International (Tier 1), Metro Performance Hubs (Tier 2) and Premier Community Venues (Tier 3), within Greater Sydney. Based on its provision framework including the criteria of providing access and opportunities across the State, Tennis NSW has identified that there should be 10-15 regionally significant venues serving Greater Sydney.

Venue Type	Current Provision	Future Target
International Venue (Tier 1)	1 -State Tennis Centre (SOPTC)	1 -State Tennis Centre
Metro Performance Hubs (Tier 2)	0	3 to 5 to service Greater Sydney
Premier Community Venue (Tier 3)	7 – Blacktown, Penrith, Macarthur, Parramatta, Rockdale, Pennant Hills and Willoughby	6 to 9 in addition to the T1 and T2 venues (together serving the TNSW Metro Competition Regions)
<b>TOTAL</b>	<b>8</b>	<b>10-15 in Greater Sydney</b>

To best position the sport to attract the requisite investment and develop an accessible network of venues that will serve the Greater Sydney area, priorities for investment should align with where the sport's best opportunities to grow exist, where funding is available / can be leveraged, and where there is the available space to build new venues and/or expand existing venue footprints.

This “network solution” recognises the opportunities and challenges of:

- Limited opportunities to alter the current footprint in the Northern and Eastern districts despite the traditional strength of participation numbers from these areas
- Significant current and future population growth in the South West and North West of Sydney accompanied by availability of land and infrastructure funding
- Extension of Greater Sydney to the Wollongong and Central Coast areas
- Spreading the benefits of investment across Greater Sydney

## Metro Performance Hubs (Tier 2)

Therefore, the following investment priorities in Metro Performance Hubs have been identified:

- Blacktown (Stanhope Gardens) - subject to completion of court rectification works
- South Western Sydney - new venue Location TBC
- New or existing venue – Location TBC (Note: Penrith has previously been identified as a potential upgrade from a current Tier 3 venue) and
- Wollongong - upgrade of existing venue
- Gosford - upgrade of existing venue



## Section 5: Opportunities and Prioritisation



Although considered outside the Greater Sydney area, Gosford and Wollongong have been identified through the Regional Infrastructure Investment Strategy for upgrade to a Regional Performance Hub (Tier 2) and will be readily accessible for the North and South West Sydney corridors due to the recommended 90 minute drivetime catchment area.

Together, the planned Tier 1 and 2 venues with appropriate ITF specification facilities would provide sufficient opportunities to host desired ITF and higher-level Australian Tour events, ensuring that local talent is able to play and develop a greater portion of the year in their home city and state, as well as provide more pathway opportunities for the next level of aspiring talent and premier level players competing in local areas.

**Metro Performance Hubs Proposed Network**



**Premier Community Venues (Tier 3)**

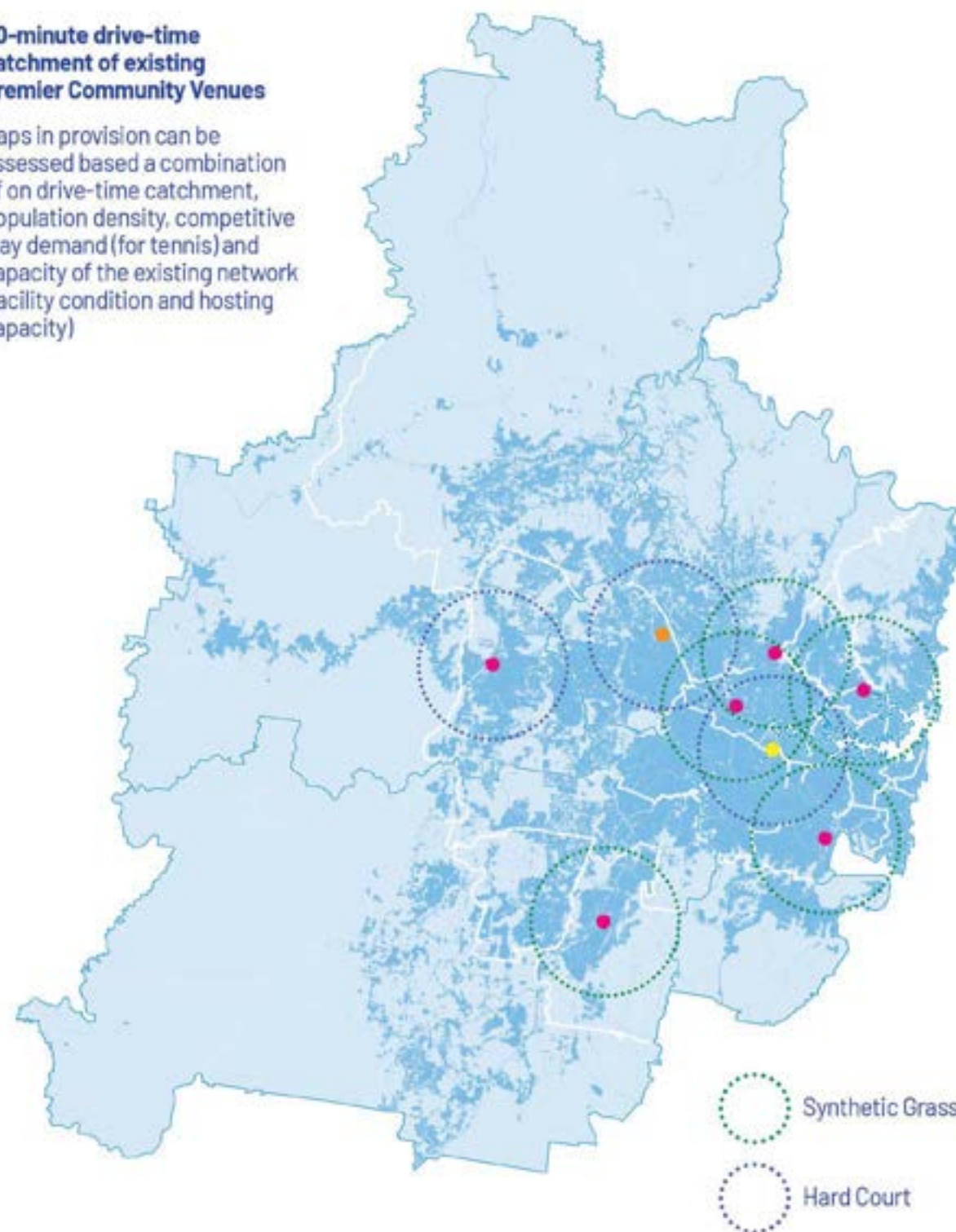
The provision of Premier Community Venues is to ensure that all parts of Greater Sydney have access to venues capable of hosting entry and development events for aspiring performance players as well as local premier players. Tier 1 and 2 venues will likewise support the provision of this need.

This level of play aspires to grand slam surface and ITF specifications but can readily be played in venues with competition level synthetic grass courts with appropriate amenities. This type of event typically reflects inter-district representative level play and warrants participants coming from a number of nearby districts to compete (typically within 30 to 45 minutes) - hosting large draw sizes and draws across junior and open ages and gender.

These venues will complement the wider network of tennis venues who will continue to host appropriate tournament and competition as they do now.

**30-minute drive-time catchment of existing Premier Community Venues**

Gaps in provision can be assessed based a combination of on drive-time catchment, population density, competitive play demand (for tennis) and capacity of the existing network (facility condition and hosting capacity)



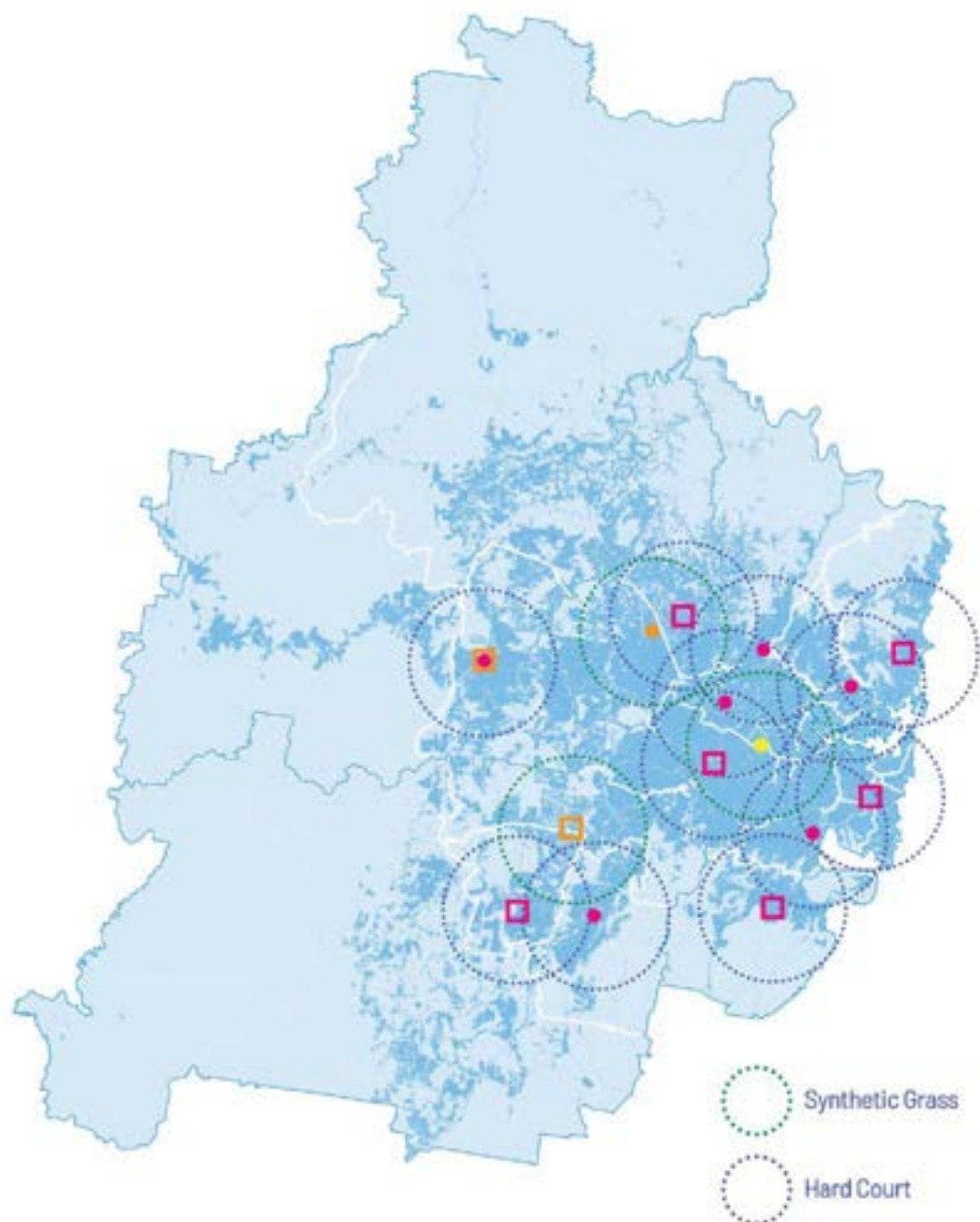


There are gaps in provision of Premier Community Venues (or higher tier venues) identified in the South West, North East and Eastern Suburbs, whilst other population hot spots with large demand for tennis such as the Inner West, Hills-North West, South, Central Sydney and North Shore are served by only one suitably sized venue. All existing Tier 3 venues are considered to require investment to meet the long-term attributes of a Premier Community Venue.

It is recommended to invest in upgrading existing Tier 3 venues in Parramatta, Willoughby, Pennant Hills, Macarthur and Rockdale while elevating or investing in new Tier 3 venues at:

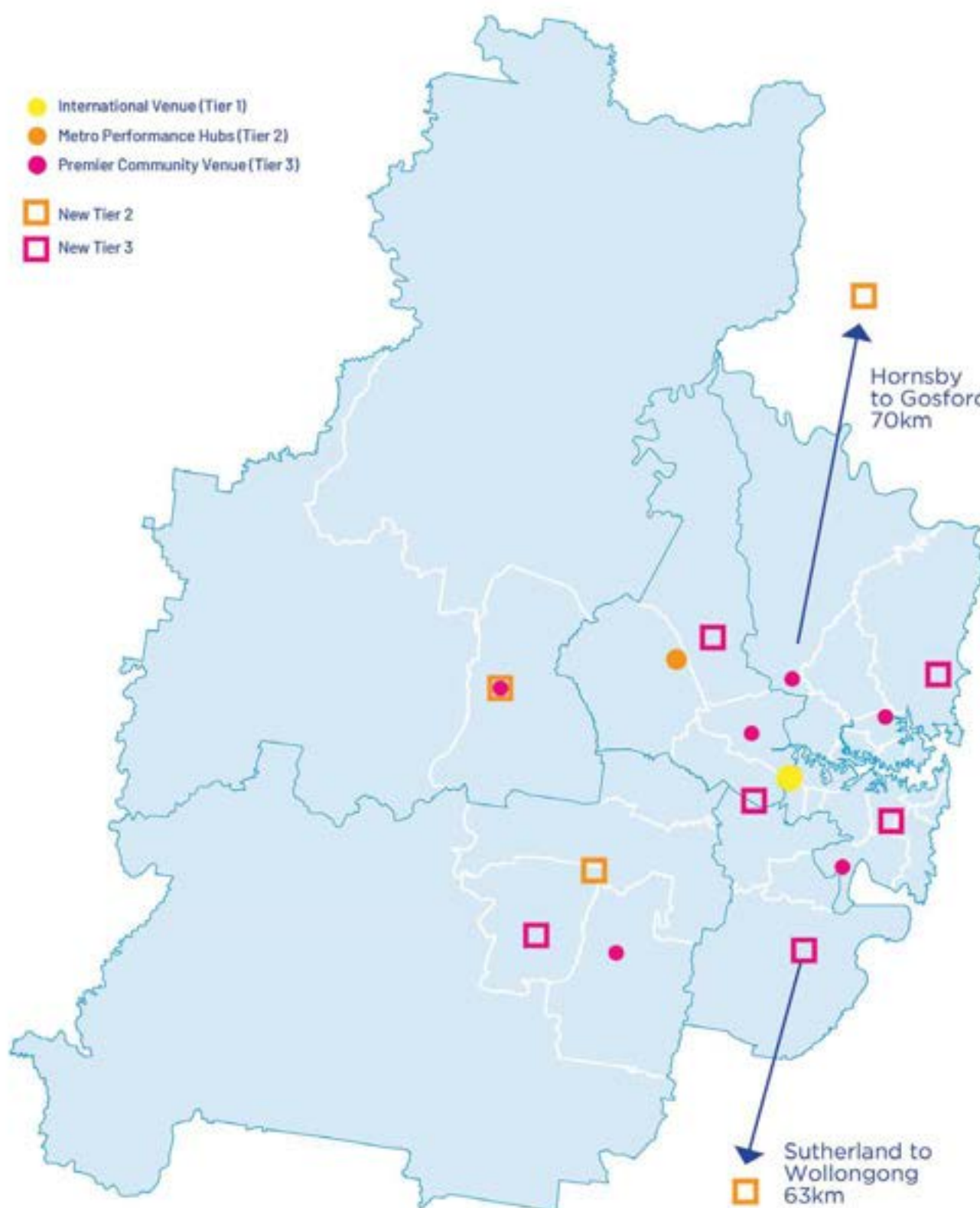
- Central - Location yet to be determined
- South West - Camden LGA
- Northern / North West - Hills LGA
- North East - Location yet to be determined
- Eastern – Location yet to be determined
- Southern - Location yet to be determined

**30 Minute drive-time catchment of proposed Premier Community Venues**



The targeted provision of regionally significant venues is shown on the map below.

**Proposed Tiers 1-3 Venue Network**



Together, these prospective changes and investment will assist to develop a justifiable network of sustainable tennis venues that best fits the needs of the sport for competitive play as well as local demand for recreational tennis and programs/coaching.



# Recommendations and Implementation

## Recommendations

Three key recommendations that have been identified as part of Tennis NSW Greater Sydney Infrastructure Investment Strategy are:

1. Increase the number of regionally significant venues in line with accessibility principles, of the Sydney Tennis Review and national Competitive Play Review
2. Increase access to grand slam surface types for players playing at or aspiring to play at the national and international level.
3. Improve the accessibility, quality, capacity and sustainability of the existing tennis network; and develop new venues in line with population growth.

## Action plan

Below is a high-level action plan to assist with the implementation of the Greater Sydney Infrastructure Investment Strategy and to address the emerging challenge and threats to the sport in NSW.

### Challenge 1: Undersupply of ITF Standard Venues (Regional and Metro Performance Hubs)

TNSW Response	Action
<ul style="list-style-type: none"> <li>Invest in more ITF level competition venues (grand slam surface) otherwise known as Metro Performance Hubs (Tier 2 venues) to attract additional event content and ensure benefits are spread across Greater Sydney</li> </ul>	<ol style="list-style-type: none"> <li>1. Seek funding for identified strategic projects, including potential investment from Tennis NSW and Tennis Australia</li> <li>2. Tennis Funding to be tied to improved tenure, protection of competitive play programming, implementation of optimal management model and focus on venue sustainability</li> <li>3. Councils and Venues (Clubs &amp; Operators) to develop plans relevant to each location/area identified</li> </ol>

### Challenge 2: Ongoing threat to existing Premier Community Venues

TNSW Response	Action
<ul style="list-style-type: none"> <li>Invest in Premier Community Venues (Tier 3) to ensure each geographic part of Sydney has access to quality and competition standard venues for aspiring performance and premier participation play</li> </ul>	<ol style="list-style-type: none"> <li>1. Seek funding for identified strategic projects, including potential investment from Tennis NSW and Tennis Australia</li> <li>2. Tennis Funding to be tied to improved tenure, protection of competitive play programming, implementation of optimal management model and focus on venue sustainability</li> <li>3. Councils and Venues (Clubs &amp; Operators) to develop plans relevant to each location/area identified</li> </ol>

## Section 6: Recommendations and *Implementation*



### Challenge 3: Lack of Grand Slam surfaces for the performance pathway

TNSW Response	Action
<ul style="list-style-type: none"> <li>Identify appropriate venues for investment to expand or convert 2-4 courts to grand slam surface(s) to be made available for TNSW developmental and performance players</li> </ul>	<ol style="list-style-type: none"> <li>Seek funding opportunities to invest in venues that can upgrade and expand to provide these facilities in addition to providing availability to host TNSW developmental and performance player training opportunities</li> </ol>

### Challenge 4: Inadequate provision and management of venues to meet community demand

TNSW Response	Action
<ul style="list-style-type: none"> <li>Using data-led insights to assist Clubs, Operators and Councils to improve the utilisation and sustainability of the network through harnessing management models, tenure arrangements, service offerings (programming) and facility asset funding models</li> <li>Informing infrastructure priorities and plan how works will be funded</li> <li>Improving the digital and online booking footprint to provide greater access and drive revenue for all types of venues</li> <li>Provide access to the sport (particularly in established areas with limited space for standalone tennis facilities) as well as leverage funding opportunities through:                             <ul style="list-style-type: none"> <li>Forming partnerships with other sports, community and commercial offerings;</li> <li>Identify options to work in partnership* with Complementary Tennis Formats such as Pickleball, POP Tennis, Padel, Beach Tennis; and</li> <li>Develop other multi-use options*</li> </ul> </li> <li>Identify opportunities for new venues aligned with population growth</li> </ul> <p><small>* where it complements tennis offerings and venue sustainability whilst maintaining fit-for-purpose functionality and capacity to grow Tennis.</small></p>	<ol style="list-style-type: none"> <li>Provide Action Plans and insights to Councils and Venues through Tennis Restart and VSR audits which aim to identify opportunities to optimise/enhance/improve venue performance through business planning, programming, marketing and identify and prioritise infrastructure needs and projects.</li> <li>Tennis NSW to support stakeholders develop and deliver successful infrastructure projects through Project and Grant Readiness Approach, building resources and capability for tennis stakeholders to successfully plan projects and secure funding.</li> <li>Tennis Australia and Tennis NSW develop ongoing investment programs/vehicle for infrastructure projects which will grow and sustain participation in tennis. Such programs will be designed to leverage or seed funding from other sources such as partnered Government funding.</li> <li>Tennis NSW to develop a Leasing and Licensing (Management Arrangements) Guidelines for Local Government focussed on venue sustainability</li> <li>Through Tennis Restart insights and in combination with other planning data and insights, TNSW to influence and inform Council Recreation Plans and other strategic planning to identify opportunities for new tennis venues</li> <li>Develop guidance to Councils and venues on the best multi-use strategies to employ; including for Complementary Tennis Formats</li> <li>Develop partnerships and pilot projects to develop solutions that increase participation opportunities for high density and established areas with limited opportunities to expand or build new facilities</li> </ol>

### Funding opportunities

It is evident that the sport and its stakeholders cannot fully fund the renewal, upgrade or development of new venues as called out in this strategy. Tennis NSW will look to leverage the required investment in infrastructure through:

- Identifying tennis' priorities,
- Seeding investment funding and non-financial support,
- Articulating the benefits of that investment
- Building the capacity of the sport to access funding opportunities more effectively
- Aligning outcomes to deliver against the target objectives of funding sources, and
- Finding aligned partnership opportunities for investment that leverage identified outcomes

Tennis NSW have also identified a number of funding opportunities to assist in the implementation of this Strategy.

#### ATP Cup Tennis Legacy Fund

The ATP Cup Tennis Legacy Fund is a partnership between the NSW Government, Tennis Australia and Tennis NSW to bring world class content to Sydney through the ATP Cup from 2019 to 2022 (subsequently replaced by the United Cup).

The Fund has seen over \$4.25 million awarded across NSW through four program categories - major infrastructure, medium scale facility upgrades, community programs and Tennis NSW led participation initiatives. This investment so far has resulted in over \$30 million in major infrastructure and facility upgrades being leveraged with co-contributions forthcoming from local government, landowners, tennis venues and other Federal and State Government grant sources.

#### Tennis NSW and Tennis Australia - additional investment and support

Critical to leveraging project funding and delivering a return on investment to communities, is the capacity to deliver event content and stimulate participation outcomes in venues. Tennis NSW and Tennis Australia deliver this by:

- Allocating and providing resources to run major event content at venues which meet the required standards
- Investing in Tennis Development staff that support local deliverers of the sport (volunteer to professionals)
- Providing guidance and expertise to plan the development of and manage those venues more effectively
- Providing marketing and communication support to the sector, generating/stimulating interest in the sport

Tennis Australia also invests in infrastructure projects through the National Court Rebate scheme. The availability of funding and program specifics of infrastructure investment provided by Tennis Australia and Tennis NSW is subject to change going forward.





### Tennis Stakeholder Investment

Tennis venues (clubs and/or operators) may have the capacity to co-contribute and provide seed funding for medium to large sized projects. This may take the form of direct private investment, philanthropic donations and/or fundraising activities.

### Major Sports Infrastructure Funding - State Government

Funding programs may vary over time in what funding is available, what objectives they are seeking to address, and which Agency or Department is responsible.

The NSW Government's primary funding opportunities for major sports infrastructure in recent years has been through the Centre of Excellence Fund, the Greater Cities Sports Infrastructure Program and the Regional Sports Infrastructure Program. Projects most likely to be successful are those which can align with the priorities set out through the NSW Office of Sport District and Regional Plans, Office of Sport's Future Needs of Sport Infrastructure study (ongoing) and match the priorities of the relevant local government authority and state or national sporting body.

Other notable sources for State Government funding in sports infrastructure are Stronger Country Communities (currently a \$100 million program over two years for community sport), The NSW Office of Liquor, Licensing & Gambling's Club Grants programs, Community Building Partnerships as well as many other programs which whilst they may target other outcomes such as in health, employment and energy consumption, they may still be applicable to specific tennis venue projects.

### Major Sports Infrastructure Funding - Federal Government

Sport Australia manages the Community Sports Infrastructure Program, and similar to NSW Government a range of other funding programs may be applicable for a given project - e.g. Building Better Regions Fund in regional NSW where the development of major regional hubs will attract ITF Professional content which

is attributable to interstate and international visitors stimulating valuable local economic benefits.

### General Sports and Community Funding - Federal and State Governments

A wide variety of small and medium sized grant programs are offered on regular and intermittent basis to target outcomes in local communities. These programs offer funding contributions between \$1,000 and \$300,000 to eligible projects such as community sporting infrastructure. The programs are offered from a range of sources such as the NSW Office of Sport, Department of Premier & Cabinet, Office of Liquor & Gaming and more covering not only sport space but also health, education, economic stimulus, community infrastructure and general infrastructure. Most of these programs are best suited to small to medium value facility improvement or upgrade projects.

### Local Government

The funding of new and existing community infrastructure is a dynamic space.

One of the key opportunities to invest in new facilities in areas attracting new or growing population is through developer contributions and related funding mechanisms.

Councils are otherwise constrained to funding infrastructure through their usual rates and levies (community contribution to services and infrastructure), fees and charges (a return from those who use the infrastructure and services including leasing and licensing). Councils plan future infrastructure expenditure through an alignment to their Community Strategy, Operational Plan, and various strategic and other plans such as Sport & Recreation Plan, Capital Works Program, Asset Management Plan, Plans of Management and master plans.

### Partnering

Opportunities exist for partnered investment and developments such as with schools, universities, leisure providers and other public or private entities.







# Appendix



**Appendix A: Tennis NSW Venue Hierarchy (as at 2022)**

		1	2 or 2Lite	3	4	5	6
		International	Regional and Metro Performance Hub	Premier Community Hub	Full-Service Community Venue	Community Venue	Community Access Venue
<b>Profile Description</b>		Tennis showpiece – Large economic driver through large National and International events and the top high-performance coaching and player pathways.	ITF Professional event hosting capability which also serves as a hub for community through to high level events and competition (Centre of Excellence); high quality coaching/pathways for the local area and region; diverse community programming; and is a financially sustainable and professionally run venue.	Premier competition venue that focuses on club level to inter-district and lower level state significant events and competition; as well as servicing the local catchment to provide a full mix of recreational play, competition play, coaching and programming.	Services the local catchment to provide a full mix of recreational play, competition play (participation level), coaching and programming.	Public facilities servicing local suburbs delivering health and social opportunities and community objectives. Will have some program offerings such as coaching and competition play.	Community access facility which provides opportunities for casual play and likely to have no or limited coaching/programming and competitive play.
<b>Planning Attributes</b>	<b>Hierarchy</b> Regional = region of NSW (Tennis ref Zone) District = Municipal and Sub-Region (incl multiple municipal) Local = Suburb/town and sub-municipal	International-National-State significance	State-Regional significance	Regional-District significance	District-local significance	District-local significance	Local Suburb
	<b>Provision Rate</b>	1 per State	Regional - 1 per Country Region/Zone Metro - 3 to 5 within 60 to 90min drive of place of residence	Regional - where population, participation and catchment justifies Metro - 1 Syn Grass per District Assoc 1 Hard Court if no T2 to serve catchment Natural Turf or Clay venues sought after where sustainable	1 to 3 per LGA (pending supply-demand, LGA size and no. T1-3 venues within catchment)	Complementary Network to meet local demand/need	Complementary Network to meet local demand/need
	<b>Courts per Population</b>	Because of the complexity of delivery models and offerings for tennis, we do not recommend applying a courts per population benchmark. More critical is to consider the footprint of scaled facilities matched to the optimal venue management and delivery model to deliver identified tennis outcomes and service offerings.					
	<b>Location</b>	In a major city, in close proximity to an international airport	In a major city, regional city or large rural town with close proximity to an airport (70 km/ < 1hr)	Within 30 min drive of where majority of the District Catchment population resides & in close proximity to transport nodes, community centres and services	In close proximity to transport nodes, community centres and services	No minimum requirements	No minimum requirements
	<b>Catchment Profile</b> <b>Competitive Play</b> <b>Programming &amp; Coaching</b>	Same as Full-Service Events - intra-state, inter-state and international	Same as Full-Service Events - intra-state and inter-state travel, some from international	Same as Full-Service Events - may travel across metro area or up to several hours in rural areas	Less than 20 minute drive (metro) and 90 minutes (regional)	Services those who reside, work or study within a 3 to 5km catchment (metro) or may be up to 30 to 60 minute drive in regional areas	Generally services those who reside within 500m to 3km of venue (metro) and is prevalent in small rural communities
	<b>Typical Court Footprint</b>	Stadium Show Court and 10-20 ITF approved courts (Grand Slam Surface)	Typically consists of 12 to 20 competition level courts See minimum requirements ITF approved courts and may have additional courts (mixed surface types)	Typically consists of 10 to 16 competition level courts (may be more) of the same surface type May have additional courts (mixed surface types)	Typically consists of 6 to 12 courts (may be more) of the same or mixed surface types	Typically consists of 4 to 8 courts (but may be more if rural located)	1 to 2 Courts
	<b>Minimum Requirements (full-size courts)</b>	A show court with adequate seating capacity (5000+) Minimum 10 ITF approved courts (Grand Slam Surface)	Minimum 8 ITF approved courts (Grand Slam surface) plus 2 practice courts Tier 2 Lite - minimum 4 ITF courts plus two practice courts (Grand Slam surface)	At least 10 courts of the same surface type for competition	6 Full-Size Courts	3 Full-Size Courts	1 Full-Size Court
<b>Footprint includes other Court Types</b>	Hot Shots Courts	Desirable	Desirable	Desirable	Desirable	Option	Option
	Hitting Wall	Desirable	Desirable	Desirable	Desirable	Desirable	Desirable
	Multiuse Blended Lines (Tennis + Complementary Format)	Not on ITF courts	Not on ITF courts	Not on Competition Courts	Option	Option	Common
	Multiuse Blended Lines (Tennis + Other Sport)	Not on ITF courts	Not on ITF courts	Not on Competition Courts	Option	Option	Common
	Dedicated Complementary Format - Local/Small Footprint	Option	Option	Desirable	Desirable	Unlikely	Not Applicable
	Dedicated Complementary Format - Larger Competition Footprint	If enough space to co-locate	If enough space to co-locate	If enough space to co-locate	Unlikely	Not applicable	Not Applicable
	Dedicated Other Sport Court (no tennis or complementary format)	Option	Option	Option	Option	Unlikely	Not Applicable



**Tennis NSW Venue Hierarchy (as at 2022) Cont.**

		1	2 or 2Lite	3	4	5	6
		International	Regional and Metro Performance Hub	Premier Community Hub	Full-Service Community Venue	Community Venue	Community Access Venue
	<b>Lighting</b>	750 to 1200 LUX av PPA - Broadcast dependent Stadium - full HD Broadcast levels	Min 500 LUX av PPA (Recommend 500-750 LUX PPA)	Min 350 LUX av PPA (Recommend 500 LUX PPA)	Recommended 350 LUX av PPA Min 250 LUX av PPA	Lighting is Preferred Min 250 LUX av PPA	Lighting is Preferred Min 250 LUX av PPA
	<b>Venue Facilities</b>	Fit-for-purpose (international event) standard player and media facilities	Fit-for-purpose player facilities and clubhouse	Fit for purpose player facilities and clubhouse	Adequate player facilities and clubhouse (compromises on inclusions acceptable)	Basic clubhouse and facilities	May have a shelter and toilet(s)
	<b>Facilities</b>	Same as 'High Performance State Venue' + Modern, international level player & officials facilities including showers, change areas, physio room. Permanent large grand stand and established seating for spectators.	Same as 'Premier Community Venue' + Administration offices. Additional (permanent or temporary) event capacity for additional player & officials change/shower facilities, physio room, small viewing stands or the ability to bump in some seating for spectators	Same as 'Full Service Community Venue' + preferably larger event capacity (tournament office/referee facilities), larger clubhouse and player change/shower facilities and space for spectators)	Pro shop, tournament office capacity, universally designed & accessible facility, kitchen area, customer seating in clubhouse	No minimum requirements	No minimum requirements
<b>Service Offerings</b> (see detailed Programming by Venue Type)	<b>Competitive Play</b> (Leagues and Tournaments)  <b>Open and Junior</b>	International (focus) National (focus) State (focus) Zonal/Regional Local	National (occasional) State (focus) Zonal/Regional (focus) Local (focus)	State (occasional) Zonal/Regional (focus) Local (focus)	Zonal/Regional (occasional) Local (focus)	Local (focus)	Nil Overflow for larger venues (occasional)
	<b>Performance Pathway</b> Zone = Region or District Assoc	National and State Squads	Zone Squads	Zone Squads	Zone / Sub-Zone Squads (if no T2/T3 available)	Where no T2/T3 option	None
	<b>Coaching &amp; Programs</b>	Full-mix Local programs and court hire - including intra-club and social play, Cardio Tennis, Hot Shots programs, schools programs, group and individual coaching, and programs for diverse and inclusive participation				Limited coaching & programs Court Hire	Limited coaching & programs Court Hire
	<b>Wheelchair Tennis</b>	Essential	Essential	Essential / Highly Desirable	Desirable	Desirable	No requirement
<b>Management</b>	<b>Venue Sustainability</b>	<b>Aspires to operational and financial sustainability</b> - sustainability limited somewhat by need to prioritise MA performance programming and events, and maintaining significant assets such as stadia and larger footprints		<b>Aspires to operational and financial sustainability</b> - though larger footprint may reduce capacity to cover asset renewal/replacement of court infrastructure without grant and other funding	<b>Highly operational and financially sustainable</b> - Able to generate the funds to cover most, if not all, of the court infrastructure asset renewal or replacement cost over the court asset life PLUS the venue operation and maintenance expenses. May contribute a portion of the forecast non court and structural asset renewal or replacement cost over the asset life (e.g. building, car park, court base and substrate)	<b>Requires Community Subsidisation</b> - may generate revenue to contribute to the operating costs and asset renewal or replacement over the asset life, but will largely rely on landowner (community) and grant funding	
	<b>Typical Tennis Delivery Model</b>	Professional	Club/Assoc + Professional	Club/Assoc + Professional	Club/Assoc + Professional	No or Limited Professional	No or Highly Limited Professional
	<b>Typical Venue Management Model</b>	Club-Operator Commercial Operator	Club-Operator Commercial Operator	Club-Operator Commercial Operator	Club-Operator Commercial Operator Club-Coach	Club-Coach Club-Volunteer	Internal or Agent managed Club-Volunteer



**Management Model Framework**

There are five main operating (facility management) models applicable to tennis venues. High level explanations for each are below.

		Commercial Operator	Club-Operator	Club-Coach	Club-Volunteer	Internal or Agent Managed
<b>Delivery Model</b>		Full professional delivery	Semi-professional to full professional delivery	Some professional delivery added	No professional delivery at all	No professional delivery at all Some professional delivery of programs
<b>Facility Management Structure</b>		<p>Leased (or management agreement) directly to anyone whom <u>IS NOT</u> a not-for-profit club or association.</p> <p>Lessee has full management rights and secure tenure.</p> <p>Club/Assoc may have access/user rights under a License, User Agreement, MoU or other arrangement with the Landowner which the Commercial Operator must provide for under Head Lease or Facility Management Agreement.</p>	<p>Leased to Club/Assoc (head lessee) and sub-lease, license or management agreement to an operator (delegate) on <b>full-time or near full-time basis</b></p> <p>Club/Assoc as head lessee has full management rights and secure tenure which is delegated in full to the Operator. This does not preclude arrangements where the Club still runs their own competitions - access provided by the Operator to do so (and the Operator may or may not provide support to the Club to administer those competitions)</p>	<p>Leased or Licensed to Club/Assoc (head lessee) and has a coach(es) delivering coaching and tennis programs, but generally not on a full-time basis (via club-coach arrangement or court hire)</p>	<p>Leased or Licensed to Club/Assoc who run the venue entirely on a volunteer basis without any professional coaching or programming.</p>	<p>Council or landowner retain management of the venue overall, but bookings/court hire is managed through one of:</p> <ul style="list-style-type: none"> <li>- Internal booking service / bookings office (e.g. council, school)</li> <li>- On-line/phone booking service vendor (may provide a call-centre option also)</li> <li>- Parks Committee or another local representative or agent</li> <li>- Free access / walk in / no formal booking</li> </ul> <p>Landowner generally will be a council or school</p> <p>A Club/Assoc may use the venue but on a court hire or other access agreement (no management responsibilities)</p>
		Can include where an entity/landowner acts like a commercial operator e.g. Leagues Club, University, Council acts as the operator with an in-house commercial model	Can include where a Club acts in the role as Operator, retaining responsibility for all aspects of the facility management, employing professional support (via salaried internal coaches and administrators) as an extension of the Club. Professional internal staff would oversee or support all or most of the facility management, program management, competition administration, and administrative functions within the venue	Coach(es) are responsible for the entire coaching program and may have some other contracted duties, including delivering some other programs on behalf of the Club.	There may be some volunteer (accredited) coaching taking place within the venue.	Venue Coach(es) (professional coaching via court hire access arrangement). Usually, venue coach would not have substantive or exclusive rights to the venue (otherwise model is Commercial Operator) but may have some limited maintenance and upkeep responsibility Program Provider (other professional programming via court hire access arrangement)
<b>Asset Resp (Generally)</b>	<b>Asset Strategy &amp; Owner</b>	Landowner	Landowner	Landowner	Landowner	Landowner
	<b>Asset Renewal</b>	Landowner; or Head Lessee (Commercial Operator); or Combination	Landowner; or Head Lessee (Club); or Combination	Landowner; or Head Lessee (Club) and Landowner shared	Landowner; or Head Lessee (Club) and Landowner shared	Landowner
	<b>Asset Maintenance</b>	Head Lessee (Commercial Operator)	Head lessee (Club) and their delegate (Operator)	Head lessee (Club), generally some delegation (to Coach)	Head lessee (Club)	Landowner * Part time Coach/Agent - minor upkeep/maintenance only
<b>Venue Type Suitability (Generally)</b>		<ul style="list-style-type: none"> <li>• International</li> <li>• Metro/Regional Performance Hub</li> <li>• Premier Community</li> <li>• Full-Service</li> </ul>	<ul style="list-style-type: none"> <li>• International</li> <li>• Metro/Regional Performance Hub</li> <li>• Premier Community</li> <li>• Full-Service</li> </ul>	<ul style="list-style-type: none"> <li>• Community</li> <li>• Full-Service</li> </ul>	<ul style="list-style-type: none"> <li>• Community</li> <li>• Community Access</li> </ul>	<ul style="list-style-type: none"> <li>• Community Access</li> </ul>
<b>Digital Enablement Support</b>		All venue and management types should be supported by an appropriate Digital Enablement Solution including on-line presence, court and program booking, through to integrated gate access and lighting				
<b>Strengths of Model</b>		<ul style="list-style-type: none"> <li>• Addition of professional delivery improves venue sustainability - both participation outcomes and funding the asset renewal</li> </ul>	<ul style="list-style-type: none"> <li>• Helps community not-for-profit club retain oversight of venue whilst improving venue sustainability through professional delivery model - improving both participation outcomes and funding the asset renewal</li> <li>• Directly eligible for grant funding opportunities</li> </ul>	<ul style="list-style-type: none"> <li>• Provides for introduction of professional delivery which <b>may improve</b> venue sustainability - improving both participation outcomes and funding the asset renewal</li> <li>• Directly eligible for grant funding opportunities</li> <li>• Provides partial professional delivery at venues where Club-Operator or Commercial models are not viable</li> </ul>	<ul style="list-style-type: none"> <li>• Directly eligible for grant funding opportunities</li> </ul>	<ul style="list-style-type: none"> <li>• Provides a model where it not viable for other delivery models</li> <li>• Directly eligible for grant funding opportunities</li> </ul>
<b>Limitations of Model</b>		<ul style="list-style-type: none"> <li>• Can reduce accessibility and affordability of the sport</li> <li>• Associated with for-profit versus for-community outcomes (sometimes unfairly)</li> <li>• Usually ineligible to direct apply for grant funding (but Council often eligible)</li> </ul>	<ul style="list-style-type: none"> <li>• Potential over-reliance on volunteer club management to oversee effective professional operation within the venue</li> <li>• Associated with for-profit versus for-community outcomes (mostly unfairly)</li> </ul>	<ul style="list-style-type: none"> <li>• Over-reliance on volunteer club management to oversee entire venue operations</li> <li>• (Sometime) challenge to align club and coach focus on strategic participation outcomes (e.g. coaching programs to support/foster club membership and participation in club/association based play)</li> </ul>	<ul style="list-style-type: none"> <li>• More limited range of tennis offerings for participants</li> <li>• Venue sustainability requires greater reliance on landowner and grant funding to support facility funding (asset renewal)</li> </ul>	<ul style="list-style-type: none"> <li>• Reduced connectivity between the participants and club/association play</li> <li>• Lack of visibility on actual utilisation/visitation and overall participation outcomes</li> </ul>

- The above is a simplified description for each Model.
- **THE RECOMMENDED METHOD TO DETERMINE THE APPROPRIATE OPERATING MODEL** for any venue should be derived through the completion of the key Roles and Responsibilities as well as alignment to the long-term strategy for sustainable asset management in combination with the participation, service level, operational and financial objectives.
- Landowner is usually a Council; OR a Council with care and control (strategic and ownership responsibilities) over Crown Land
- Other common landowner types are schools (private and public), Govt agencies or delegated trusts that manage Crown Land, and private landowners (including licensed clubs, universities)



**Program Matrix per Venue Tier type** Published Date: 1/11/2022

Offering	Examples	Participant Catchment Attribute	2 Regional / Metro Perf Hub	3 Premier Community Hub	4 Full-Service	5 Community	6 Community Access	Complementary Format Dedicated	Market Segment	
Some ITF and National level events		National/International							Specialising	All Ages
Endorsed Events - State and Zone (Regional) Level		National/State/Zone							Specialising Emerging	All Ages
TNSW - Endorsed Events - Intra-Zone		Intra-Zone							Emerging Developing	All Ages
Inter-Club and Inter-District Leagues and Events		Intra-Zone							Developing Local Representative	All Ages
Intra-Club	Weekday Ladies Comp Junior Intra-Club Adult Social Competitions	Local							All-levels (Seasonal or Year-Round)	All Ages
Adult Social Play	In-house social competitions	Local							Exploring New to Tennis	Adults
Child Learn to Play - Hot Shots Tennis	Introduction to match play & learn to play programs Stages Blue, Red, Orange, Green	Local							Exploring New to Tennis	Juniors
Group and Private Coaching	Adult Learn to Play - group, semi-private or private lessons	Local							Exploring New to Tennis	Adults
	Improve & Develop - group, semi-private or private lessons	Local							Exploring	All Ages
	Local Squads	Local							Developing	Juniors
	High Performance - Private/Academy (local and Non-MA/TA Squads or individuals)	Local to District							Developing Specialising	Juniors
	Fitness e.g. Cardio tennis	Local							Fun/Fitness	Adults Mainly
TNSW / TA High Performance Coaching	Zone and State Squads	State/Zone			Z*	Z*			Specialising Emerging	Juniors Mainly
School Competitions and Programs	In-venue programs and competitions for schools	District/Local							All-levels	Juniors
Inter-Schools Competitions	Todd Woodbridge Cup Inter-school Competitions (larger events)	Regional/District							All-levels	Juniors
Wheelchair Performance Pathway	Performance coaching and events	Regional/District/Local							Wheelchair Performance	All Ages
Adaptive Tennis - All Abilities Programming	Wheelchair, Blind and Low Vision, Deaf or Hard of Hearing, PWII (Intellectual Disability and Autism)	Local							All-Abilities	All Ages
Inclusion & Diversity Programming	Programming for Women and Girls, Culturally and Linguistically Diverse (CALD) communities, First Nations participants, Socioeconomic Status (SES) disadvantaged communities and LGBTQI+	District/Local							All levels Focus on Exploring and New to Tennis	All Ages
Other Programs	e.g. Mums & Bubs	Local							Exploring Fun-Fitness	Targeted e.g. Mums
Community Open Days	e.g. Come & try	Local							New to Tennis	All Ages
Public Court Hire - Peak Times	In-demand casual access	Local							Various	All Ages
Public Court Hire - Off-Peak Times	Affordable access	Local							Various	All Ages
Complementary Formats *Where Appropriate	POP Tennis, Pickleball, Beach Tennis (Local Play offering)	Local	If enough space alongside tennis requirements	If enough space alongside tennis requirements	If enough space alongside tennis requirements				Active Aging New to Tennis Adult Social Play	Adults
	Pickleball (District Competition, Leagues)	Intra-District/Regional	If enough space alongside tennis requirements	If enough space alongside tennis requirements	If enough space alongside tennis requirements				Pickleball Players	Adults
	Padel	Intra-District/Regional							Padel Players	Adults
Multi-sport - other (non-tennis)	Multi/blended-line, multi-sport with tennis or dedicated for other sports (e.g. netball, basketball, futsal, hockey)								Non-tennis	All Ages
Outreach (mobile) Tennis Programs and Coaching	In a park, school or other non-tennis venue setting. A tennis court or modified tennis court may not be required								New to Tennis	Children

**Key:**

Essential Offering
  Offered where appropriate
 Z\* Zone where no T2/T3

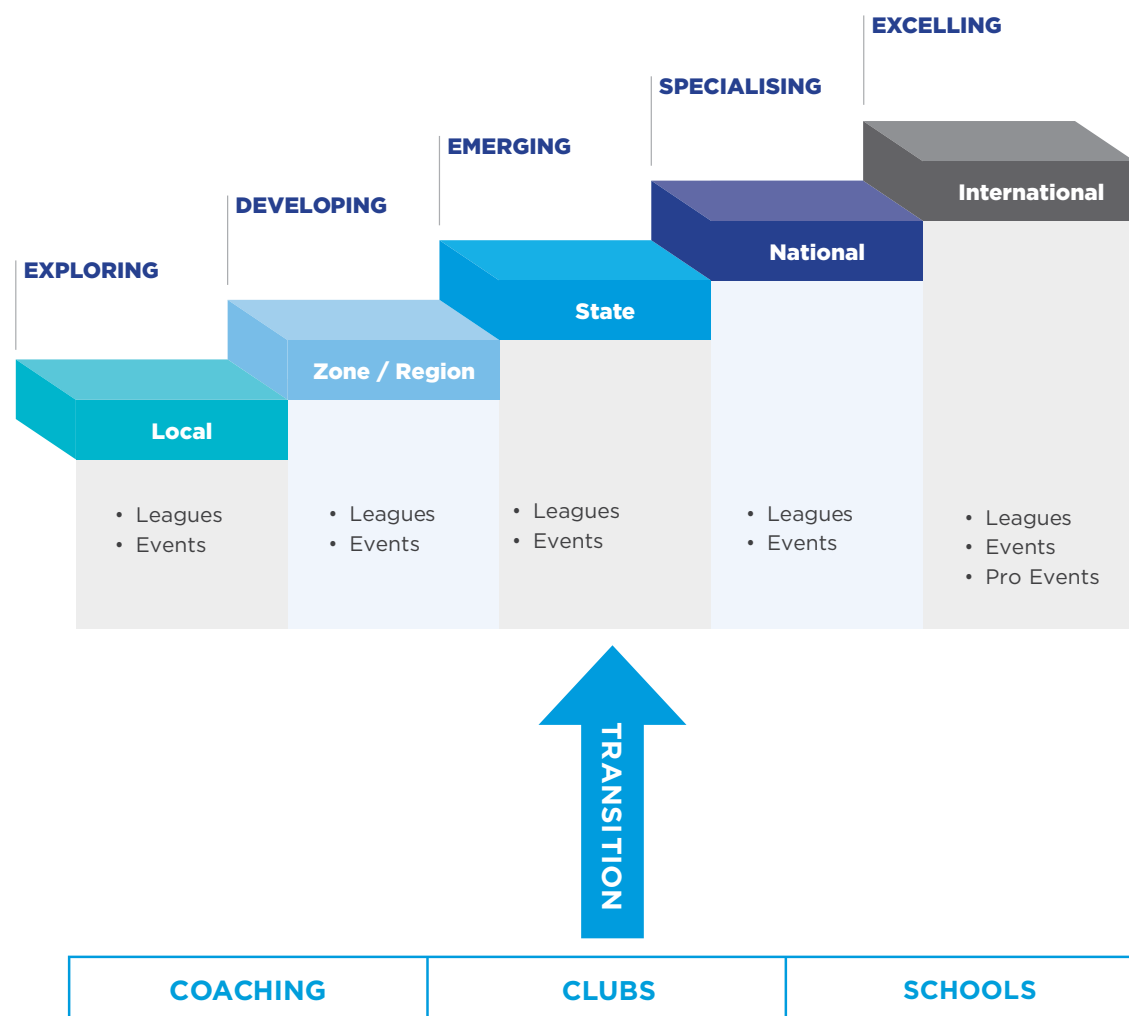
**Tennis Australia Play Pathway Descriptors:**

International = Excelling | National = Specialising | State = Emerging | Zone/Region = Developing | Local = Exploring



Appendix B: Tennis Australia Competitive Play Pathway (2022)

# AUSTRALIAN COMPETITION FRAMEWORK



## JUNIOR COMPETITION MATRIX



LEVEL	LOCAL	ZONE / REGIONAL		STATE		NATIONAL	INTERNATIONAL
	6	5-4		3-2		1	INT.
<b>RECOMMENDED PLAYER RATINGS*</b>							
12 BOYS	Locally set	0-2	1-5	4.5+	5.7+	6.2+	N/A
12 GIRLS	Locally set	0-2	1-4.2	3+	4+	4.8+	N/A
14 BOYS	Locally set	0-2	1-7.5	6+	7.2+	8+	N/A
14 GIRLS	Locally set	0-2	1-6.2	5+	6+	6.8+	N/A
16 BOYS	Locally set	N/A	1-9.2	8+	9+	9.5+	N/A
16 GIRLS	Locally set	N/A	1-7.3	5.5+	7.2+	7.7+	N/A
18 GIRLS	Locally set	N/A	1-8	7+	7.8+	8.5+	N/A
18 BOYS	Locally set	N/A	1-10.5	9+	10.2+	11+	N/A
<b>COMPETITIVE PLAY OPPORTUNITIES</b>							
<b>EVENTS</b>	Community Series	Junior Development Series	Junior Series	Premier Series	Signature Series	Nationals Series	ITF Juniors Junior Grand Slams
<b>LEAGUE</b>	Intra-Club Tennis	Inter-Club Tennis		State/Premier League		TA Premier League	N/A
<b>SCHOOLS</b>	Intra-Schools Tennis	Inter-School Tennis		State Championships		Bruce & Pizzey Cup	N/A
<b>REPRESENTATIVE TENNIS</b>	Club Teams	Regional / Representative Teams		State Teams		Australian Teams	Junior Davis & BJK Cup

## OPEN COMPETITION MATRIX



LEVEL	LOCAL	ZONE / REGIONAL	STATE		NATIONAL	INTERNATIONAL
	5	4	3-2		1	INT.
<b>RECOMMENDED PLAYER RATINGS*</b>						
MEN	Locally set	1-11	10.5+		12.5+	N/A
WOMEN	Locally set	1-8.5	7.5+		9+	N/A
<b>COMPETITIVE PLAY OPPORTUNITIES</b>						
<b>EVENTS</b>	Community Series	Open Series	Premier Series	Signature Series	UT Pro Tennis Tour Pro Tour	ATP/ITF/WTA Events AO Summer Series Pro Tour
<b>LEAGUE</b>	Intra-Club Tennis	Inter-Club Tennis	State/Premier League		TA Premier League	N/A
<b>REPRESENTATIVE TENNIS</b>	Club Teams	Regional / Representative Teams	State Teams		Australian Teams	Davis & BJK Cup





# Tennis NSW

Regional NSW Infrastructure  
Investment Strategy



# Executive Summary

The Tennis NSW State Infrastructure Investment Strategy is delivered in two companion sections (Greater Sydney and Regional NSW) to provide an important investment priority framework which intends to shape the planning and development of a network of sustainable tennis venues that support the growth and needs of the sport in line with the Tennis NSW Strategic Plan - Vision 2025. A key objective is to inform where investment by the sport and Government should be prioritised such that it maximises the opportunities for tennis participants across NSW.

The Regional NSW component has been informed by key principles arising from concurrent strategic work including Tennis Restart, consultation with tennis stakeholders, Tennis Australia, the NSW Office of Sport and local Councils to ensure the framework and overall strategy aligns with the needs of key stakeholders.

Tennis NSW is experiencing a number of challenges including an undersupply of quality infrastructure, particularly in regional NSW, together with declining facility sustainability and participation levels. To address these challenges, Tennis NSW has identified that it needs to:

- Stimulate investment in Regional Performance Hubs (Tier 2) that will service the State and regional NSW;
- Influence improvements to the asset funding model, tenure arrangements, management, and service offerings (programming) to create a more resilient and sustainable network of venues that can better meet current and future demand; and
- Inform, partner and advocate for the planning and development of new tennis venues or expand venues in-line with population growth and participation opportunities.

## Investment opportunities and prioritisation

A major priority for the sport is to increase the number and quality of players, coaches, officials, and administrators within NSW. As part of an overall Tennis Pathway, varying levels of opportunities to play are necessary to facilitate and sustain the sport. Critically, Tennis in NSW faces a number of challenges to grow and retain participants and deliverers with a particular area of focus being access to quality infrastructure and hosting of regionally significant events.



**Executive**  
*Summary*



This is particularly critical in regional NSW where accessibility to the competitive and performance play pathways and strain on the quality of tennis delivery (access to quality coaching, administrators and more sustainable venue management and delivery models) is more pronounced.

Currently, NSW has just one International venue at Sydney Olympic Park, and two other venues at Albury (grass) and Tweed Heads (hard courts) with grand slam surfaces and ancillary facilities necessary to host International Tennis Federal (ITF) level events. The provision of this level of quality infrastructure remains critically less than other States and Territories across Australia, despite NSW having the highest level of participation. Therefore, a greater proportion of these events are allocated interstate than would otherwise be objectively justified.

The impact of this is that it requires those in NSW who are dedicated to the sport to spend significant time and money travelling interstate, making the sport and its pathway less attractive compared to other sports, and missing out on the many complementary benefits of not only a stronger and deeper pool of NSW based players and deliverers, but also the platform to more effectively promote the sport to a wider audience and inspire more people to take up and/or follow tennis (at all levels). Tennis NSW has therefore identified developing more ITF standard venues as well as other regionally significant venues in regional NSW as a key strategic initiative moving forward.

These hubs will also act to strengthen tennis and complement the wider network of tennis venues within their area of NSW, through

- Being a base to support the delivery of courses, training and experiences that increase the numbers and capability of deliverers of tennis in these regions;
- Being of sufficient scale of operation to attract high quality coach and venue operators who may serve as regionally based deliverers and mentors of accredited coaching and other training programs;
- Provide access to grand slam surfaces and quality coaching programs for those in or aspiring to become part of the performance pathway in the regions;
- Provide quality facilities to host district level (inter-club) and inter-regional competitive play opportunities.

A total of nine Regional Performance Hubs (Tier 2) was found to be the optimal number in regional NSW considering event content and player demand taking up pathway opportunities. Strategically, Tennis NSW should focus on increasing the number of these venues to at least one in each of its six regional areas. In regions with multiple venues (i.e. North East and South West), Tennis NSW may consider a variation of surface.

Key locations were identified through the development of an Investment Prioritisation Framework which sourced Tennis NSW internal and external data sets. The framework is based around three key pillars – Demand (Participation and Population), Suitability (Coaching Pathways and Events) and Alignment (Office of Sport Regional Hub Strategy and proximity to other venues).

Based on the output of the framework, the following locations should be considered for development. Further investment should also be considered in a number of complementary regionally significant venues, that are classified as Premier Community Venues (Tier 3) suitable for inter-club and lower State level competition.



TNSW Region	Existing / Committed T1/T2 Venues	Optimal T2 Location	Alternative T2 Location or T3 priorities
North East	Tweed Heads	Coffs Harbour	Port Macquarie-Hastings
North West	Tamworth	-	-
Northumberland	-	Newcastle + Central Coast*	
Central West	-	Dubbo/Bathurst	Bathurst/Dubbo Penrith ***
South East	Wollongong*	-	T3 - Shoalhaven (Ulladulla)
South West	Albury and Wagga Wagga	-	
Metropolitan	Sydney Olympic Park	SW Sydney Blacktown ** + Wollongong Central Coast	Penrith *** T3 – Parramatta, Macarthur, Pennant Hills, Rockdale, Willoughby + up to 6 others

Updated to incorporate Greater Sydney identified T2 and T3 venues.

\* Central Coast and Wollongong have been identified as opportunities to service both regional NSW and Greater Sydney

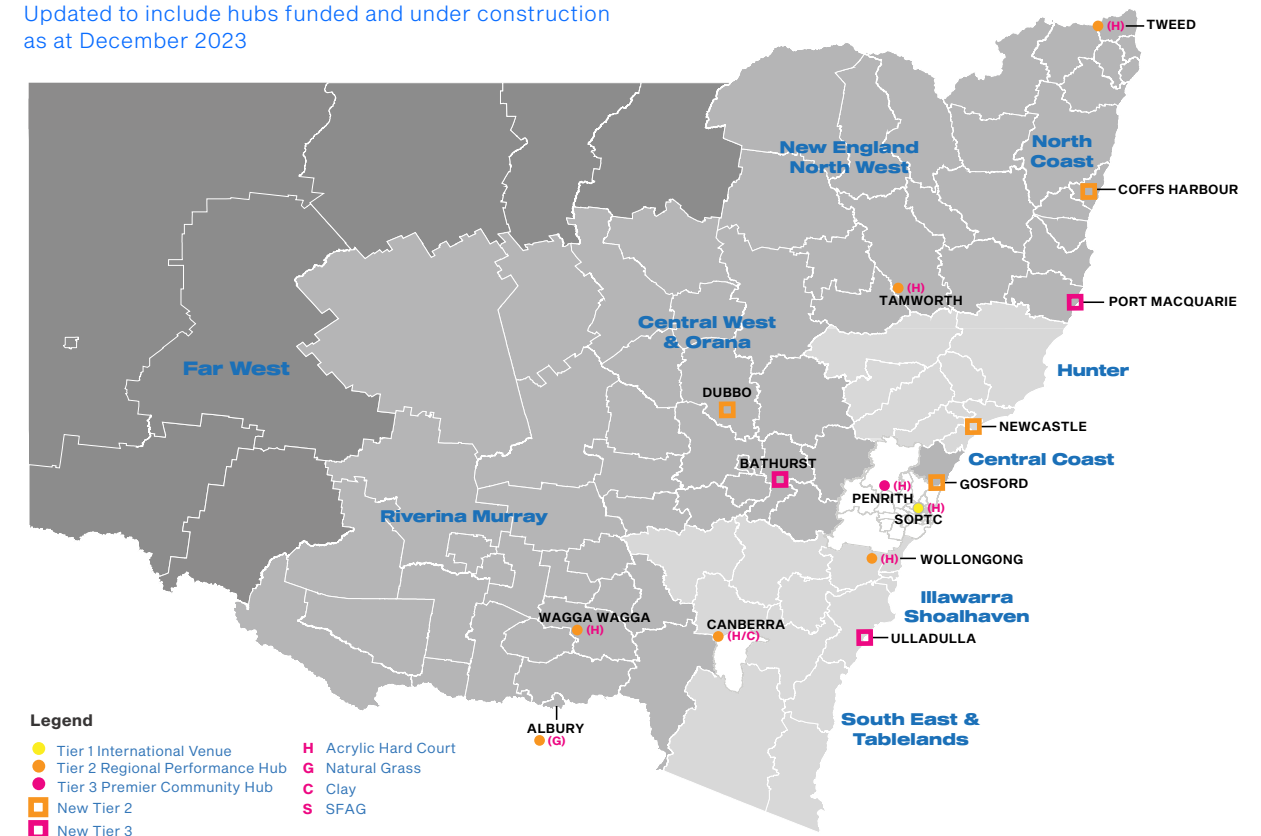
\*\* Blacktown has been identified as an existing Metro Performance Hub (Tier 2) subject to court rectification works

\*\*\* Penrith plays a role in serving both the Central West and Greater Sydney

### Regional Hub Alignment

NSW Office of Sport Region aligned with identified Tennis NSW Regional Performance Hubs

Updated to include hubs funded and under construction as at December 2023

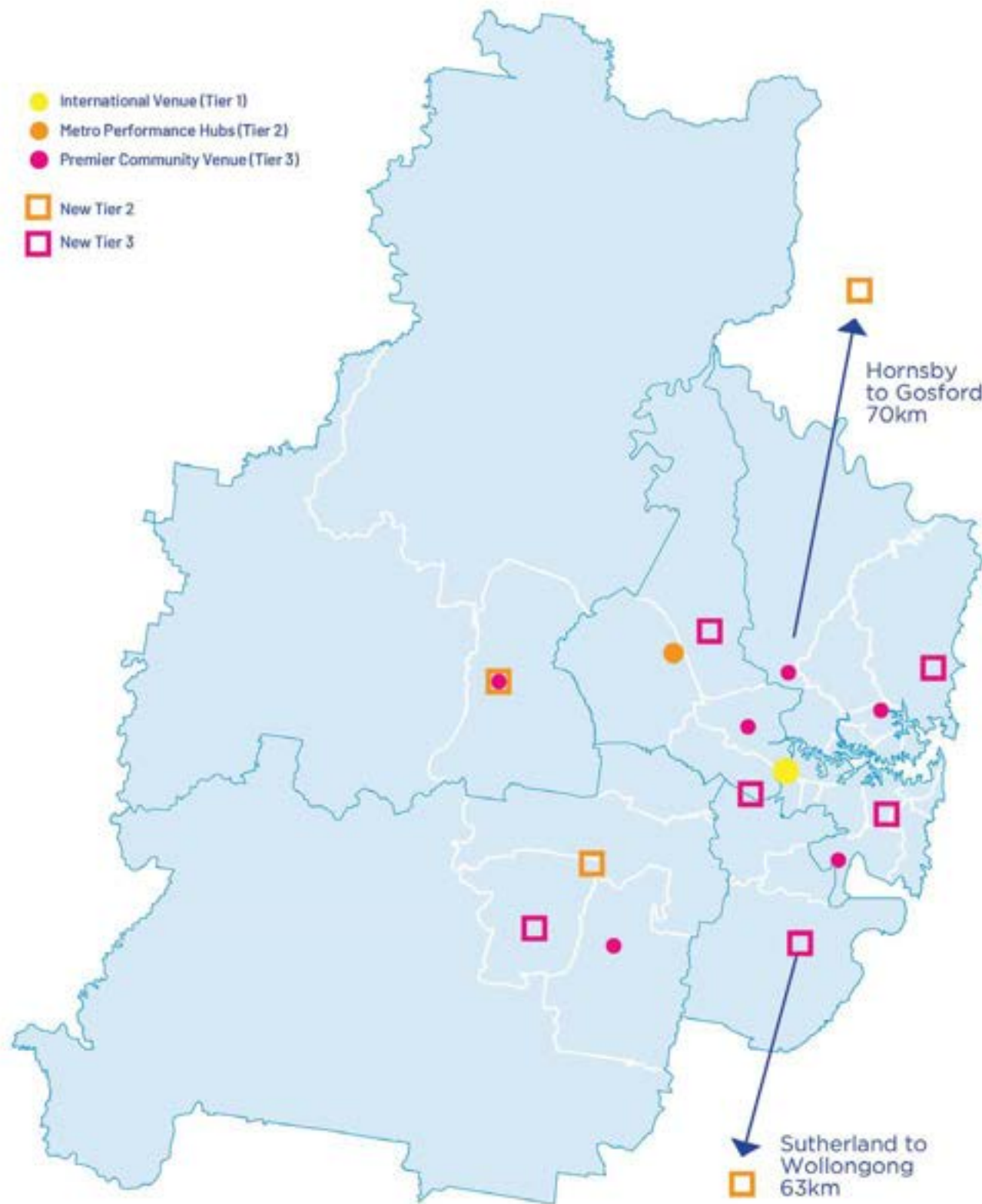




The Greater Sydney Infrastructure Investment Strategy (2021) builds upon this document and identified the following relevant observations to the Regional NSW strategy:

- that the Wollongong and Central Coast areas are considered an extension of Greater Sydney;
- limited opportunities to alter the current footprint in traditional metropolitan areas; and therefore
- the identified priority to upgrade Wollongong and Gosford (Central Coast) into Tier 2 Metro/ Regional Performance Hubs to serve both regional NSW and metropolitan Sydney.

### Proposed Tiers 1-3 Venue Network



**Stage 1: Years 1 - 5**  
(4-8 identified T2 Projects)

Locations to be prioritised: Tamworth, Penrith, Wollongong, Wagga Wagga, Coffs Harbour, Dubbo/ Bathurst, Central Coast and Newcastle.

**Stage 2: Years 6 - 10**  
(Remaining T2 projects + 4-8 identified T3 Projects)

Locations to be prioritised: Shoalhaven (Ulladulla), Port Macquarie, Bathurst / Dubbo then additionally identified projects.

### Priority List and Funding Strategy

The total investment required for Stage 1 has been updated to between \$44.8 million to \$60.8 million (2023 estimate). So far over \$28 million has been secured for 4 of the 8 identified Regional Performance Hubs. It is estimated that another \$18 million to \$34 million will be required to complete Stage 1.

Costs of projects have escalated greatly since the first version of this document (2019/20) and include allowance based on similar recent projects which include the provision of all on-court, off-court, ancillary (e.g. car park) and civil site preparation works.

Stage 1 focuses on leveraging the ATP Cup Legacy Fund (2020-2023) through external funding opportunities. Other than identifying State and Federal funding opportunities throughout the next election cycle, particularly through alignment with Office of Sport’s Regional Hub Strategy, there is also an opportunity to use the Legacy Fund to ensure additional, coordinated tennis funding with the assistance of Tennis Australia.

Should Tennis NSW commit additional funding outside of the Legacy Fund and ensure the projects meet regional objectives, it could prioritise these projects and therefore drive greater support from Councils and other external parties which would ensure completion of these projects in an accelerated timeframe.

### Potential funding opportunities

To support tennis stakeholders fund the renewal, upgrade or development of new tennis venues, the following key funding opportunities have been identified:

- ATP Cup Tennis Legacy Fund; or alternate Tennis investment vehicle
- Tennis NSW and Tennis Australia - infrastructure investment and through commitment to hosting premier and ITF events
- Tennis Stakeholder Investment - clubs and/or operators’ co-contributions
- Major Sports Infrastructure Funding Programs - State Government
- Major Sports Infrastructure Funding Programs - Federal Government
- General Sports and Community Facility Funding Programs - State and Federal Government
- Non-sporting Infrastructure Funding Programs - State and Federal Government (e.g. health, economic, employment, other focus)
- Local Government - developer contributions, state infrastructure contributions, and general revenue raised from fees, charges, rates, levies, leases and licenses.
- Investment / Development Partnerships with public and private entities where alignment exists (including, schools, universities, and leisure providers)

### Next Steps

This document identifies a number of high priority Regional Performance Hub projects that Tennis NSW should prioritise over the next three to five years.

For each of these projects, Tennis NSW should focus on continued engagement with the respective local Councils, Tennis Australia and NSW Office of Sport to ensure funding is committed and the individual master plans are finalised as part of the design and delivery.

While the prioritised regions have been selected in this strategy, the optimal location for the Tier 2 and 3



venues within each of the key regional locations needs further refinement. Tennis NSW need to complete the State-wide venue audit to ensure there is an understanding of where each existing venue sits in the tennis facility hierarchy, its condition assessment, current operating model, and sustainability rating.

This document also acknowledges the need for investment in other regional tennis venues to improve and renew its facilities over the asset life and sustain the sport for the next 50+ years. The implementation of Tennis Restart approach with auditing (Venue Sustainability Rating and Asset Condition), providing resources and support to build a Project and Grant Readiness capability, identifying initiatives to improve venue performance and sustainability, and initiatives to stimulate funding support and secure partnerships is a holistic and evidence-based approach. Key actions are identified in Section 6.3 for implementation by Tennis NSW.

This Strategy may be refined from time to time to reflect changing priorities as the environment continues to evolve.

Together with the *Greater Sydney Infrastructure Investment Strategy*, these documents form the *Tennis NSW State Infrastructure Investment Strategy*.

*Tamworth Regional Tennis Hub Sod Turning- May 2022*





# Introduction

## Background

The key objective of the *Tennis NSW State Infrastructure Investment Strategy* is to identify and prioritise where investment by the sport and Government should be focused moving forward.

The *Tennis NSW State Infrastructure Investment Strategy* is delivered in two companion documents - the *Regional NSW Infrastructure Investment Strategy* (this document) and the *Greater Sydney Infrastructure Investment Strategy*.

Tennis NSW is the body responsible for the promotion and development of participation in tennis across NSW (State Sporting Organisation).

The *Tennis NSW State Infrastructure Investment Strategy* supports three key pillars of the 2021-2025 Tennis NSW Strategic Plan:

- Play - to assist our Clubs, Coaches, Operators and Councils in getting more people playing tennis often
- Places - to assist our Clubs, Coaches, Operators and Councils to invest in and operate sustainable tennis facilities
- Pathways - to build a performance pathway that will support the development of NSW's best talent at State, National and International level

The focus of the Regional NSW Infrastructure Investment Strategy (2020) is to identify and prioritise where Tennis NSW should invest and develop new ITF level tennis venues, defined as a Regional or Metro Performance Hubs (Tier 2 venues), in regional areas of NSW. The strategy also identifies and prioritises a range of potential regionally significant community venues, defined as a Premier Community Venues (Tier 3).

An Investment Prioritisation Framework has been developed sourcing both Tennis NSW internal and external data sets such as population, population growth, tourism data, and socio-economic data to assist identifying optimal locations for investment in tennis infrastructure. Tennis NSW has engaged with Tennis Australia, NSW Office of Sport and local councils to ensure the framework and overall strategy aligns with the needs of key stakeholders. This framework and supporting strategy provides the rationale, budget and short-to medium- term road map for a program of works in Regional NSW.

## Tennis NSW Venue Hierarchy

Tennis NSW has developed a new venue hierarchy that aligns partly to the NSW Office of Sport Facilities planning framework and focuses on the physical elements of its venues as well as its operations, coaching and other programming, and event suitability.

It should be noted that tier numbers do not reflect a difference in quality, but rather important functional differences to distinguish how a network of venues serves the sport.



## Section 1: Introduction



Hierarchy	Description
<b>International Venue (Tier 1)</b>	Tennis showpiece – Large economic driver through hosting large National and International events and the top high-performance coaching and player pathways
<b>Regional and Metro Performance Hubs (Tier 2)</b>	ITF Professional event hosting capability and serves as a hub for community through to high level events and competition (Centre of Excellence); high quality coaching/pathways for the local area and region; diverse community programming; and is a financially sustainable and professionally run venue
<b>Premier Community Venue (Tier 3)</b>	Premium competition venue that focuses on club level to inter-district and lower-level state significant events and competition; as well as servicing the local catchment to provide a full mix of recreational play, competition play, coaching and programming.
<b>Full-service Community Venue (Tier 4)</b>	Serves the local catchment to provide a full mix of recreational play, competition play (participation level), coaching and programming.
<b>Community Venue (Tier 5)</b>	Public facilities servicing local suburbs delivering health and social opportunities and community objectives. Will have some program offerings such as coaching and competition play
<b>Community Access Venue (Tier 6)</b>	Community access facility which provides opportunities for casual play and may have limited coaching

This hierarchy is detailed further in the appendix of this document.

### Tennis NSW Key Challenges

#### Declining Participation Rates Regionally

NSW has the largest tennis playing population for adults and children in Australia with 395,596 participants (AusPlay April 2019), however has the lowest rate of conversion to organised and club participation. It is estimated that there are 160,000 registered players in over 900 venues across the State.

Although Tennis holds the second highest organised participation levels in Australia (AusPlay April 2019), like all sports, it is seeing declining participation rates in structured or organised play. This is particularly prevalent in regional areas compared to metropolitan and larger regional locations. Adult participation in Tennis has fallen significantly over the past decade due to increased competition from other leisure activities, new forms of entertainment, and society becoming increasingly time poor with limited budgets. Child participation rates are also declining, with transition from school to social club tennis becoming more challenging due to changing demographics and cultural diversity, increasing obesity rates and rising adolescent self-esteem and mental health issues.

Another barrier to participation is access to quality infrastructure and venues, particularly in regional and remote areas. This includes local communities not providing welcoming and safe environments, quality courts and facilities and/or quality coaching and pathway opportunities.

#### Venue Sustainability

A significant number of venues across the State are currently volunteer-run and facility financial sustainability is a key challenge for Tennis NSW. The operating model of the venues is an important element to not only ensure facility sustainability, but create venues with quality facilities, programs and pathways that can be offered to members and the local community. This is discussed in greater detail in Section 6.2.

#### Undersupply of ITF Venues (Regional and Metro Performance Hubs)

Regional and Metro Performance Hubs act as the sport’s centres of excellence - venues which have ITF tournament level event hosting capability in addition to serving local and district levels of competition.

Currently, NSW has just one International venue at Sydney Olympic Park (hard court), and two other

venues at Albury (grass) and Tweed Heads (hard court) with grand slam surfaces and ancillary facilities necessary to host International Tennis Federation (ITF) level events.

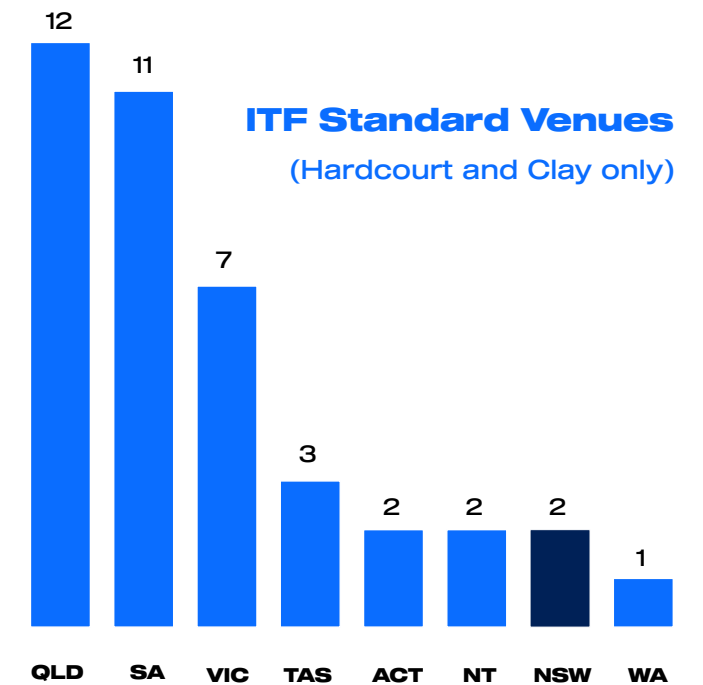
When benchmarked against other States, NSW exhibits significant undersupply of ITF approved venues – the same as Northern Territory and ACT, one fewer than Tasmania and significantly fewer than Queensland, South Australia and Victoria.

The State Tennis Centre at Sydney Olympic Park is currently the only Metro Performance Hub within the Greater Sydney area.

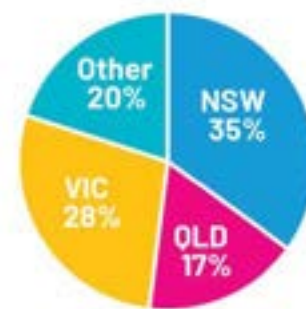
NSW accounts for just 5% of ITF standard venues despite accounting for 32% of the national population and 35% of participants across Australia. NSW’s two ITF venues account for less than 0.25% of all its venues across the state.

This correlates to NSW only hosting 19% of Tennis Australia / ITF sanctioned tournaments that cater for the Performance level players.

The impact of this is that it requires those in NSW who are dedicated to the sport to spend significant time and money travelling interstate, making the sport and its pathway less attractive compared to other sports, and missing out on the many complementary benefits of not only a stronger and deeper pool of NSW based players and deliverers, but also the platform to more effectively promote the sport to a wider audience and inspire more people to take up and/or follow tennis (at all levels). Tennis NSW has therefore identified developing more ITF standard venues as well as other regionally significant venues in regional NSW as a key strategic initiative moving forward.



PROPORTION OF NATIONAL PARTICIPATION



PROPORTION OF NATIONAL ITF VENUES



PROPORTION OF NATIONAL UPPER TIER TA EVENTS



NSW accounts for 35% of national tennis participants and just 5% of ITF standard venues resulting in NSW only hosting 19% of Tennis Australia/ITF sanctioned tournaments



### Tennis NSW Regional Infrastructure Vision

To address the challenges that tennis faces, Tennis NSW has identified that a key strategic initiative is developing more ITF standard venues (Regional Performance Hubs - Tier 2) along with regionally significant (Premier Community – Tier 3) venues in Regional NSW. To ensure Tennis NSW optimally leverages its investment in the development of these venues, they will be selected to align with NSW State Government priorities.

### Alignment with NSW State Government

In 2017, the NSW Office of Sport established a Regional Sports Hub Model which purpose was to deliver improved outcomes and increased returns on Government investment. This would be achieved by connecting a range of facilities, services and partners within a given region.

NSW Office of Sport defined the Regional Sports Hub as a primary centre of co-located sport and active recreation facilities, sub-elite sport support services, and sport administration offices with the potential to incorporate both Centres of Excellence and community facilities.

In the development of concept designs for Tier 2 and Tier 3 Tennis Venues in Regional NSW, Tennis NSW agrees that aligning with the concepts of the NSW Office of Sport’s Regional Hub Strategy will ensure regional resources are shared, costs are minimised and benefits and outcomes are maximised.

Also, the NSW Government is investing \$1.3 billion in regional infrastructure to support regional centres, activate local economies and improve services in communities through the Regional Growth Fund. There is therefore an opportunity and justification for Tennis NSW to align with this funds’ priorities and select locations for the hubs that best leverage the external funding available.

Strategically, Tennis NSW should develop a minimum of one Regional Performance Hub (Tier 2) and up to three Premier Community Venues (Tier 3) in each of its Tennis NSW regions identified above.

### NSW Office of Sport Selected Regional Hubs



Source: NSW Office of Sport

### Regional Sport Hub Model





# Tier 2 and Tier 3 Tennis Venues

## Tennis NSW Regional and Metro Performance Hubs (Tier 2)

Regional Performance Hubs (Tier 2) are identified as professionally managed tennis venues that provide for national and international tournament hosting, and that deliver economic activity as well as quality coaching / pathways across local and regional geographic areas that aim to be or are highly financially sustainable.

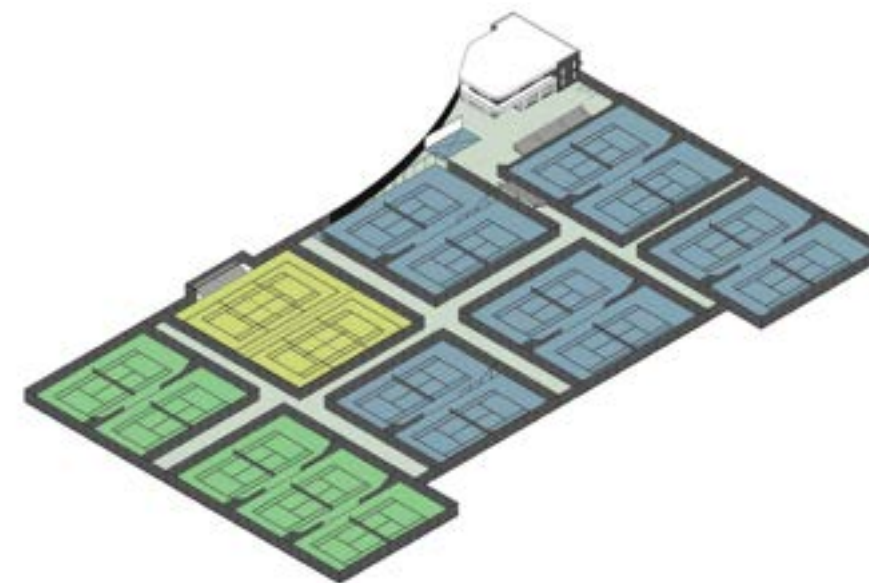
The tennis venue must meet the following criteria:

- Professionally managed;
- A minimum eight ITF approved courts of the same surface with sufficient lighting on all courts;
- A Show Court with adequate seating capacity or the ability to “bump in” in seating;
- Adequate player facilities (i.e. bathrooms, club room, kitchenette etc.);
- A clubhouse that ideally includes licensed social facilities and outdoor shaded areas suitable for events;
- A pro shop and administration / tournament offices;
- Provides a high-performance pathway for players and is home to regional and State training programs;
- Close proximity to a regional airport and transport nodes with sufficient quality accommodation nearby

In regions where it aligns with a NSW Office of Sport Regional Sports Hub, these regional centres could also be connected to, but not necessarily geographically co-located with:

- An outdoor / indoor multi-use facility including potentially an aquatic centre;
- Health and fitness facilities and services such as sports science and other allied health services;
- Education and training facilities and services;
- Additional administration for all sport and other partners.

In addition to sport specific venues and support facilities, a range of other facilities and services would or could be connected to the sports hub. These can further increase the business/financial opportunities associated with the venue and improve sustainability and economic and social impacts. These include commercial services such as food & beverage, retail, and accommodation as well as community facilities such as childcare, education and performing arts.



Regional / Metro Performance Hub Concept Layout

## Section 2: Tier 2 and Tier 3 Tennis Venues



### Regional Performance Hub Key Outcomes

The ability to host International, National and State based tournaments

Be an economic driver for the local community through major events and visitation

Assist with grass roots development, promote player pathway and provide high-performance training

Drive community health and wellbeing objectives through increased local participation

Provide easily accessible, quality facilities that contribute to the liveability of regional communities

Acting as regional centres of excellence, they will act as a hub to help address key strategic barriers and drive outcomes for the wider region by

- Being a base to support the delivery of courses, training and experiences that increase the numbers and capability of deliverers of tennis in these regions;
- Being of sufficient scale of operation to attract high quality coach and venue operators who may serve as regionally based deliverers and mentors of accredited coaching and other training programs;
- Provide access to grand slam surfaces and quality coaching programs for those in or aspiring to become part of the performance pathway within the region; and
- Provide quality facilities to host district level (intra-regional/inter-club) and inter-regional competitive play opportunities.



### Tennis NSW Regional Premier Community Venues (Tier 3)

Regionally located Premier Community Venues (Tier 3) are identified as venues that provide for club and lower level State and regional tournament hosting, delivering economic activity, as well as servicing a local catchment to provide a mix of recreational, competitive and program formats of participation that aim to be or are highly financially sustainable.

The tennis venue must meet the following criteria:

- Professionally or Hybrid (Professional / club / community / volunteer) managed;
- Typically consists of 10-16 community competition standard courts (usually same surface type) and may have additional courts (other surface types) with sufficient lighting on all courts;
- Adequate player facilities (i.e. bathrooms, club room, kitchenette etc.);
- A clubhouse that sometimes includes licensed social facilities and outdoor shaded areas suitable for events;
- A pro shop and tournament office;
- Offers a diverse range of community playing opportunities both structured and unstructured i.e. coaching, competitions and social play;
- Close proximity to transport nodes and community centres and services.
- In regions where it is in close proximity to a NSW Office of Sport Regional Sports Hub, these regional centres could be defined as a Regionally Significant Sport Facility, sharing services and leveraging benefits with the nearest Regional Sports Hub.

These venues could also act as regional centres of excellence, acting as a hub to help address key strategic barriers and drive outcomes for the wider region by

- Being a base to support the delivery of courses, training and experiences that increase the numbers and capability of deliverers of tennis in these regions;
- Being of sufficient scale of operation to attract high quality coach and venue operators who may serve as regionally based deliverers and mentors of accredited coaching and other training programs;
- Provide access to quality coaching programs for those in or aspiring to become part of the performance pathway within the region; and
- Provide quality facilities to host district level (intra-regional/inter-club) and inter-regional competitive play opportunities.

### Regional located Premier Community Venues Key Outcomes

The ability to host State based tournaments

Be an economic driver for the local community through major events and visitation

Assist with grass roots development, promote player pathway and provide high-performance training

Drive community health and wellbeing objectives through increased local participation

Provide easily accessible, quality facilities that contribute to the liveability of regional communities



# Benefits of investing in Community Tennis

The value of community sport infrastructure can be categorised across three key benefits – economic, health and social.



## Tennis annual contribution to the NSW Economy

Community Tennis delivers a significant amount to the NSW economy each year. It is estimated the sport contributes \$146 million to NSW's GDP through coaching, school programs, social play, club membership, competition and events.

### Tennis Contribution to NSW GDP



## Section 3: Benefits of investing in Community Tennis



## Investment in Tennis Infrastructure

Acquiring Government funding to assist with the implementation of the Strategy will require Tennis NSW to demonstrate this economic value, but also the return on their investment by articulating the additional social and health benefits that investing in tennis infrastructure will deliver to the State and local community.

Tennis Australia and Victoria University's Institute of Sport and Health have recently conducted research on the return communities receive from investing in tennis infrastructure. This study estimated that **every dollar invested in community tennis delivers a return of up to \$5.16 in economic, health and social benefits.**

### Return on One Dollar Investment



The key messages that articulate the benefits of investing in tennis infrastructure include:

- Investing in tennis infrastructure will create employment opportunities that result from construction and maintenance as well as new venue employment opportunities including coaches, management and operations staff.
- The development of regionally significant venues is an opportunity for NSW to compete on a National and International stage for event content which will drive visitation and direct expenditure to the State and local areas, creating further jobs and opportunities for investment and innovation.
- Improving sport and recreation infrastructure is directly correlated to the level of sport participation.
- Active people are mentally and physically healthier, more productive at work, have enhanced employability and educational attainment which all increases future employment opportunities and delivers further long-term flow on economic activity.
- Physical activity also reduces the risk of chronic disease and mental health issues which improves the quality and length of life.
- By reducing the incidence of these diseases and reducing the mental health related burden on the health system, participation supports savings in the health and social care system.
- Participation in sport encourages young people to stay in school for longer resulting in a longer-term reduction in crime and anti-social behaviour such as substance abuse, suicide, homelessness, unemployment and mental health issues.
- Investment in local sport facilities has also been proven to help increase volunteering levels which can improve employability, lead to the development of social networks and relationships, reduce loneliness and in the longer term foster social connectedness.

Tennis venues can also be used for a variety of purposes outside sport, acting as a space where community organisations can hold meetings and events, and local governments can run community programs and clinics.



# Investment Prioritisation Framework

## Investment Prioritisation Framework Overview

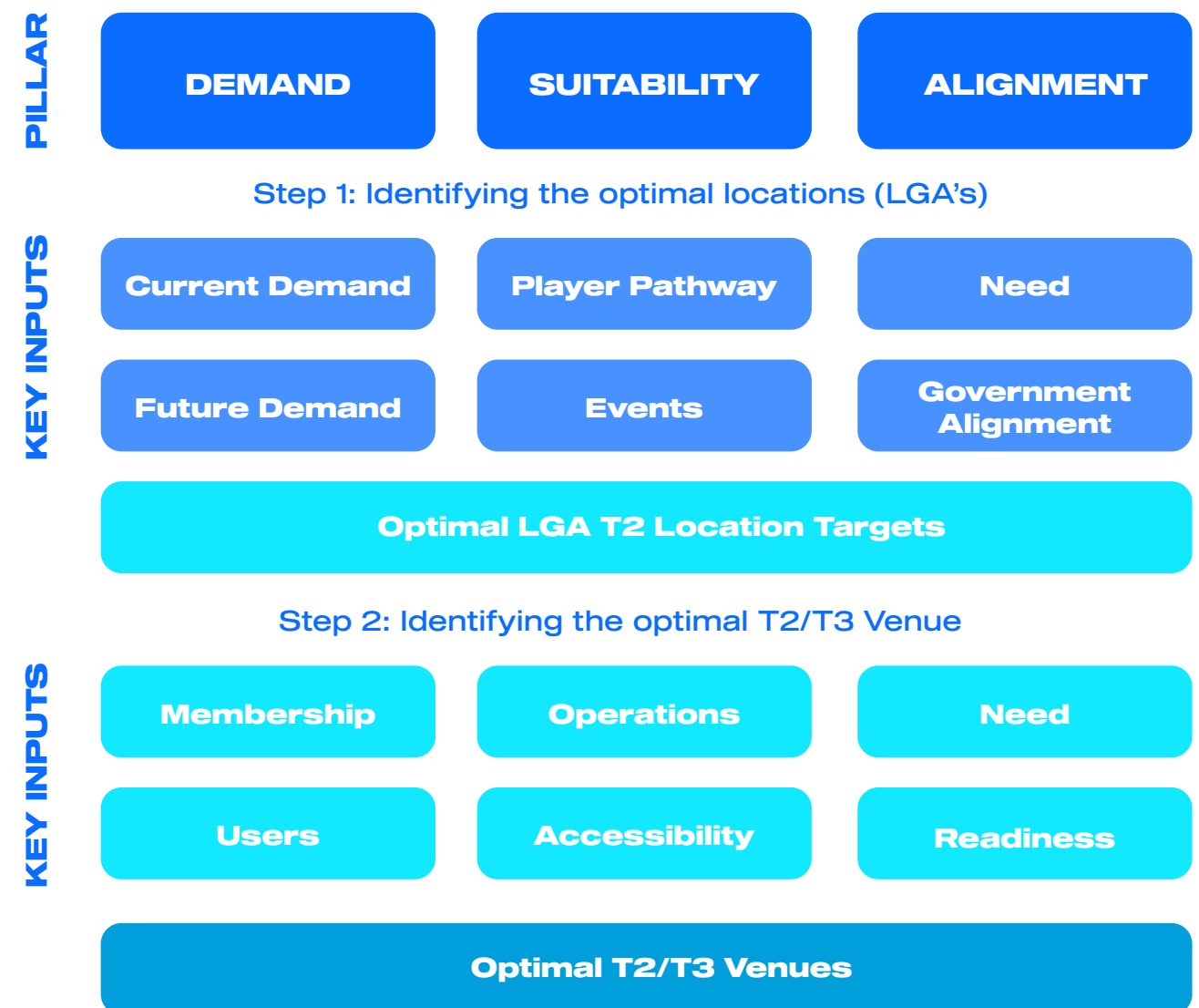
Tennis NSW has developed an Investment Prioritisation Framework to assist decision-making around the development of Regional Performance Hubs and regionally located Premier Community Venues. The framework has been developed in conjunction with the Tennis NSW executive team, Tennis Australia, NSW Office of Sport and local regional Council representatives.

The framework is based around three key pillars – Demand, Suitability and Alignment.

The first step is to establish the optimal local government areas (LGAs) that would benefit most from a Regional Performance Hub. This is followed by a deeper dive into these LGAs, identifying the most appropriate existing tennis venue.

Should a Tennis NSW Region have multiple locations identified through step 1, these are then categorised as alternative Regional Performance Hubs or priority Premier Community Venues.

### Investment Prioritisation Framework



## Section 4: Investment Prioritisation Framework



Below is a table of the key metrics and data sources, by pillar.

**Step 1: Identifying the optimal locations (LGAs)**

Key Input	Metric	Source
Current Demand	Current LGA population	NSW Planning & Environment 2019 Population
Future Demand	15 year LGA population % growth	NSW Planning & Environment 2034 Population
Player Pathway	Commercial appeal of coaching in LGA	Current tennis coaches available in the LGA (Tennis NSW) ABS Socio-Economic Indexes for LGAs (SEIFA)
Events	Appeal of the LGA to host and attend events	Number of LGA nights available (DNSW), Proximity to major transport nodes (airport/train) 2018 total visitor nights to the LGA (TRA)
Need	Need for a T2 venue in the LGA	Proximity (<2hr drive) to existing T1/T2 venue
Government Alignment	Alignment with NSW State Gov't	NSW Office of Sport Regional Hub Strategy

**Step 2: Identifying the optimal existing Tennis NSW Venue**

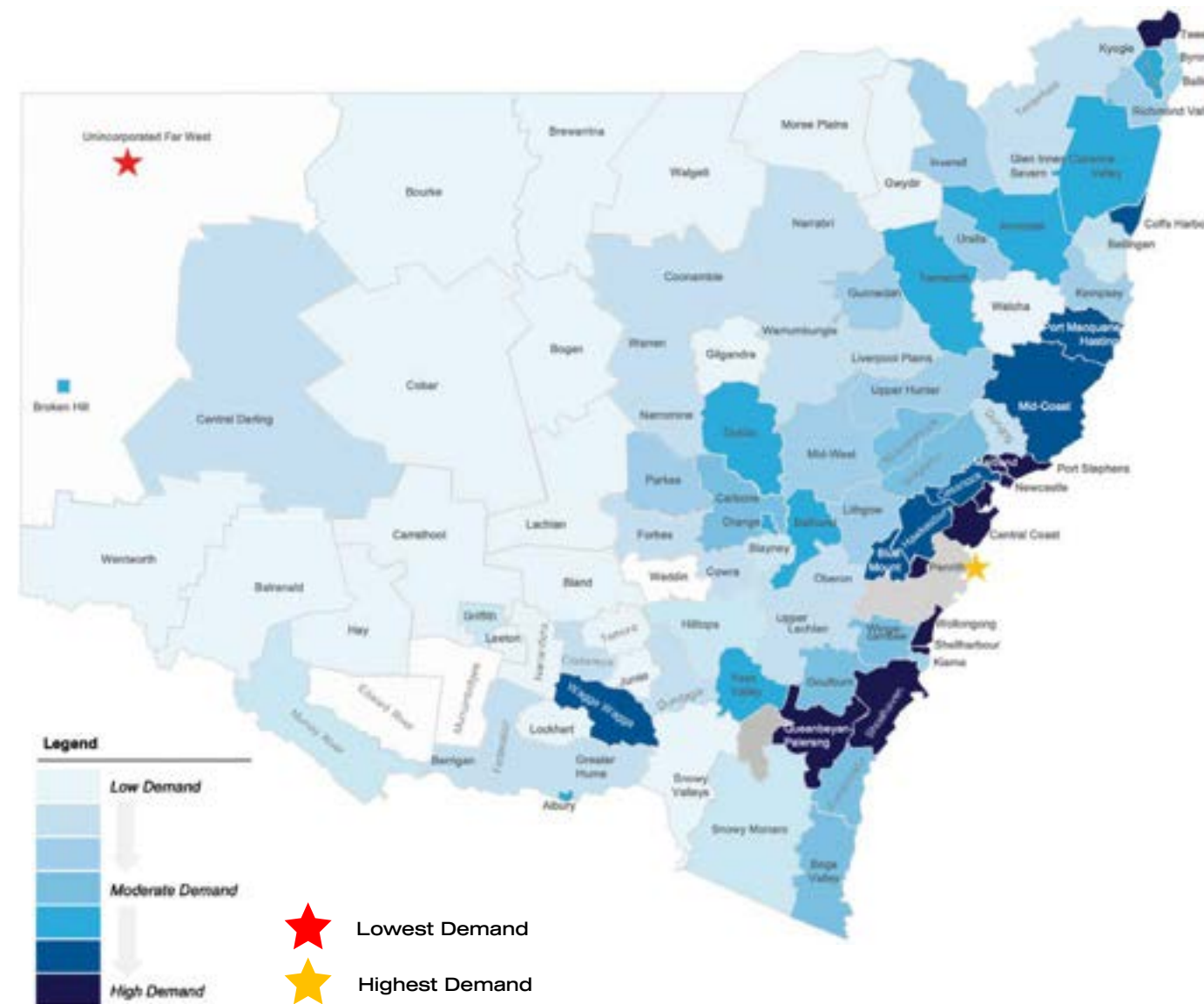
Key Input	Metric	Source
Members	Current Venue Membership	Tennis NSW Venue Membership data
Users	Current Venue Users	Tennis NSW Venue Audit
Operations	Commercial appeal of the Venue	Current venue financials, operating model and affiliation
Accessibility	Proximity to major towns	Drivetime (<1 hour) to major towns/services
Need	The necessary T1/T2 infrastructure and funding required	Tennis NSW Venue Audit
Readiness	Level of Council engagement	Tennis NSW internal data

**Step 1: Identifying the Optimal Tier 2 Regional Locations**

**Demand**

The Demand Pillar identifies which LGAs are best placed to fully utilise a redeveloped Regional Performance Hub from a participation perspective, based on current local LGA population and the projected growth.

The below graphic outlines the demand for tennis infrastructure in Regional NSW by LGA. Although tennis participation varies between LGAs, it has been determined that population is a strong enough indicator of demand for tennis infrastructure in regional areas.



There are 11 regional LGAs that are considered high-demand locations.

These are led by Penrith, which has a current LGA population of 213,350 and projected 15-year growth of 22.9%.

Maitland (82,000 current population) and Queanbeyan-Palerang (64,275 current population) are considered high-demand due to 25%-30% expected 15-year growth, while Central Coast, Newcastle, Port Macquarie, Shoalhaven and Wollongong all have current populations of over 100,000 people and growth projections of over 10%.

The outer regional areas of NSW (i.e. Western Central West, North West and South West Tennis NSW regions) are considered to have low demand for tennis infrastructure with the majority of LGAs currently populated by under 25,000 people, and most regions projected to see negative growth over the next 15 years.



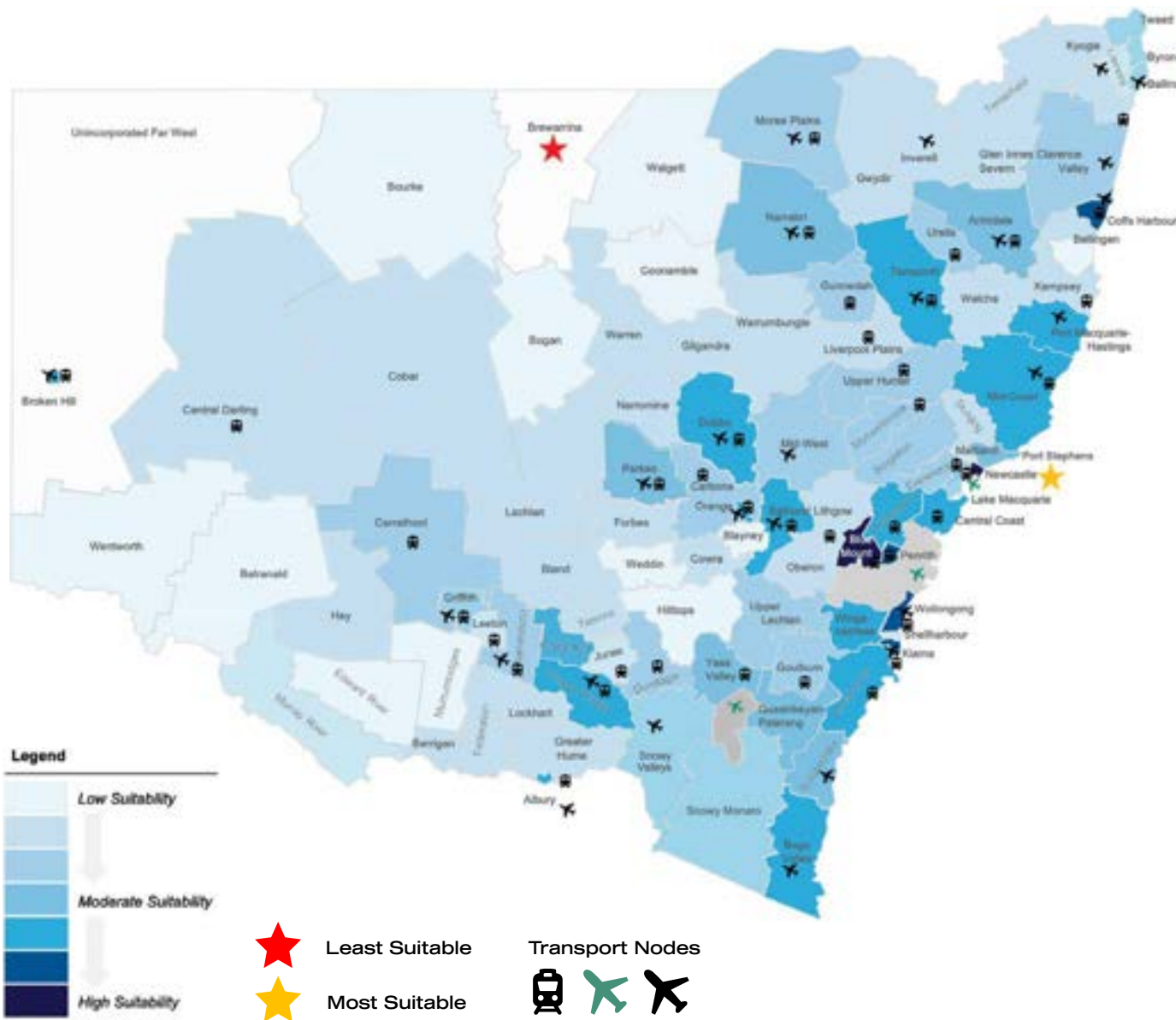


### Suitability

The Suitability Pillar is based on which areas are most suitable for a redeveloped Regional Performance Hub in terms of player pathways and hosting events.

A Regional Performance Hub will provide a high-performance pathway and will be home to regional and State training programs. The level of coaching available in each region currently, and the commercial appeal to attract high level coaches in future, has been used to define which areas are most suitable from a Player Pathway perspective.

Another key element of a Regional Performance Hub is that it will be an ITF approved venue that can host up to National and ITF Pro Tour events. Ideally, these are in regions that have the capacity to host events with adequate accommodation and are in close proximity to regional passenger airports and / or major transport nodes. They should also be in areas that are attractive for visitation to maximise the level of participation and visiting spectators and therefore the level of economic impact to the host regions. This has been determined by the total overnight visitation in 2018 by LGA.



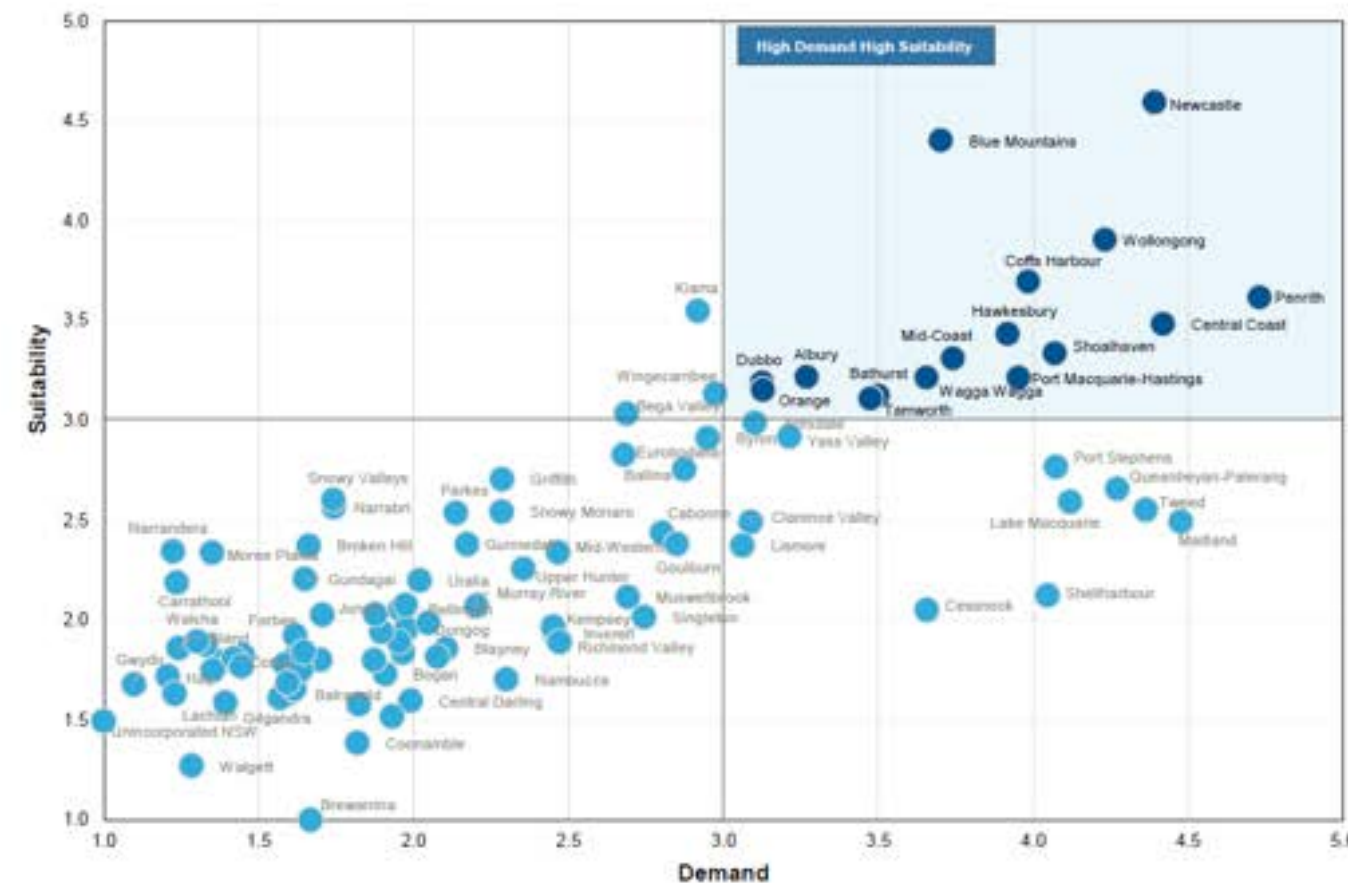
Newcastle has been identified as the most suitable regional location for a Regional Performance Hub. It is in close proximity to major transport nodes including an international airport and it is also the most visited regional location meaning it would be an ideal location for hosting ITF Pro Tour and National events. It also has a strong history of coaching options. As it is a large regional city, it also has high commercial appeal and therefore should not have issues attracting high-performance coaches in the future.

Blue Mountains, Hawkesbury and Penrith are also considered suitable locations in regards to coaching and events due to their close proximity to Sydney. Coffs Harbour, Wollongong, Kiama and the Central Coast are other optimal locations.

As identified in the Greater Sydney Infrastructure Investment Strategy, the Central Coast, Wollongong/ Illawarra and Blue Mountains are increasingly considered an extension of Greater Sydney in terms of proximity and nexus to work, study and services. They also contain local population bases in their own right which are similar or larger in size to regional catchments or major locations in regional NSW with the capacity to support substantial demand for tennis offerings. Further, with the challenges of accessing large enough sites in metropolitan Sydney to locate regionally significant venues to serve metropolitan located catchment, it further strengthens the case to invest in Regional/Metro Performance Hubs and Premier Community Venues in priority locations if conditions align.

### Location Strategy Matrix

A location strategy matrix has been developed based on the prioritisation pillars – Demand and Suitability. This matrix identifies the key Regional Performance Hub location targets which have high demand and high suitability.



### The 16 listed LGA targets based on High Demand and Suitability are as follows:

- Newcastle
- Blue Mountains
- Wollongong
- Port Macquarie-Hastings
- Penrith
- Central Coast (Gosford)
- Shoalhaven
- Wagga Wagga
- Tamworth
- Albury
- Dubbo
- Orange
- Hawkesbury
- Coffs Harbour
- Mid-Coast (Forster)
- Bathurst



### Alignment

The *Alignment Pillar* identifies those locations that are aligned with the NSW Office of Sports *Regional Hubs Strategy* and identified locations as per the *Regional Sport and Active Recreation Plans*. This ensures Tennis NSW will be better placed to leverage State Government funding as well as minimise cost associated with the potential redevelopment of venues through shared resourcing and facilities.

This pillar also takes into account each LGA’s need for a Regional Performance Hub in regards to its proximity to existing Tier 1 and Tier 2 facilities in NSW, QLD, VIC and the ACT. Tennis NSW’s venue strategy must identify key locations while servicing as much of the State’s key geographic catchment areas as possible. Ideally, there is one Regional Performance Hub in each of Tennis NSW’s identified regions and service locations within a 2-hour drivetime proximity. The graphic below identifies that out of the 16 target LGAs, six locations that are also not within an existing 2-hour drivetime catchment area align with NSW Office of Sport’s *Regional Hub Strategy*. These are Coffs Harbour, Newcastle, Dubbo, Orange, Bathurst and Wagga Wagga. Albury and Tamworth are existing, or soon to be existing, Regional Performance Hubs.

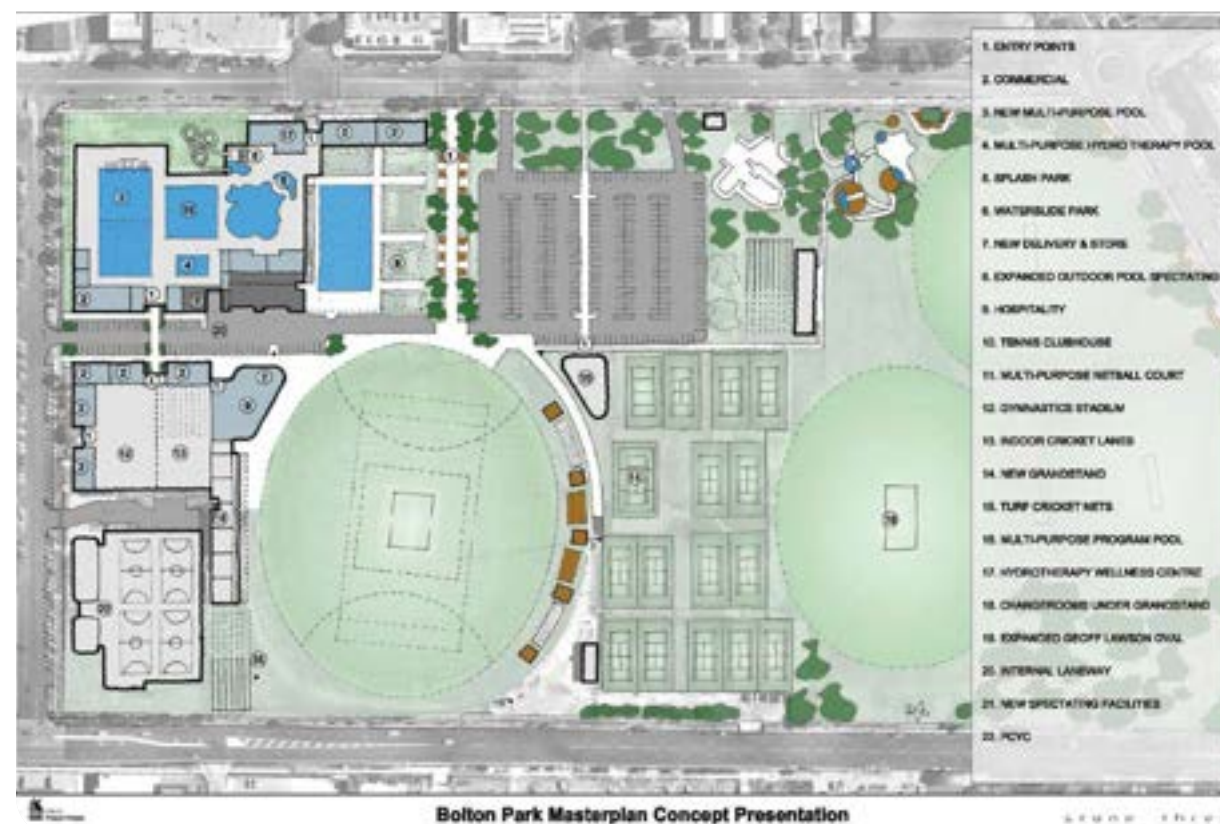
Note that the Canberra Tennis Centre in the ACT acts as an additional Regional Performance Hub that services the surrounding NSW areas of Goulburn, Yass Valleys and the Snowy Mountains area.

Western Sydney LGAs of Penrith, Blue Mountains and Hawkesbury are part of NSW Office of Sport’s Metropolitan area.

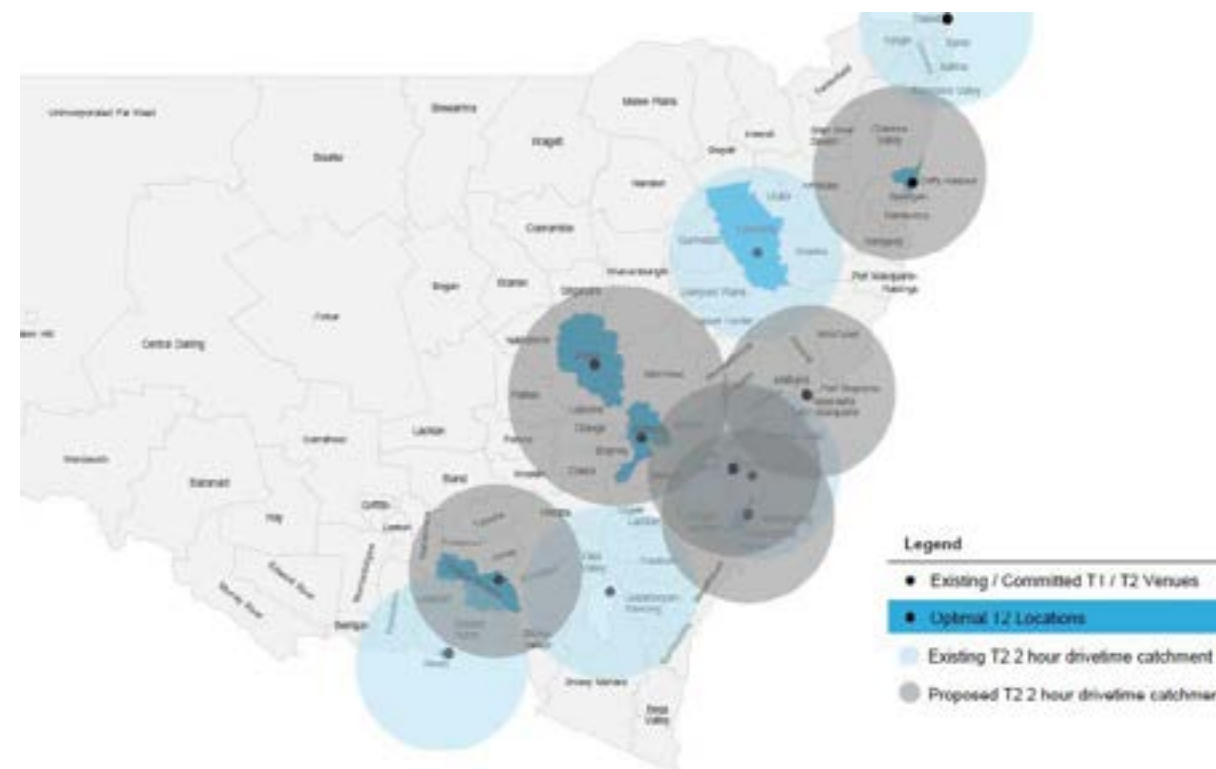
### Priority LGAs for regionally significant tennis venues

Based on the demand, suitability and alignment with NSW Office of Sport and proximity to other key venues, the following locations should be considered for T2 and priority T3 tennis venue development.

TNSW Region	Existing / Committed T1/T2 Venues	Optimal T2 Location	Alternative T2 Location or T3 priorities
North East	Tweed Heads	Coffs Harbour	Port Macquarie-Hastings
North West	Tamworth	-	-
Northumberland	-	Newcastle	Central Coast
Central West	-	Dubbo/Bathurst & Penrith	Bathurst/Dubbo
South East	Wollongong*	-	Shoalhaven (Ulladulla)
South West	Albury and Wagga Wagga	-	
Metropolitan	Sydney Olympic Park	TBC	TBC



Aligned master planning in partnership with Government



Newcastle was initially selected ahead of Central Coast as the proposed optimal Northumberland location due to superior suitability rating. However, further analysis through the Greater Sydney strategy proposed it would be justified to have Central Coast and Newcastle be developed given the former’s own sizable catchment and capacity to service Greater Sydney also.

Dubbo or Bathurst (to be determined by Council engagement) is the proposed Central West location due to a greater potential in a previously un-serviced catchment area, Orange is also a suitable alternative.

Penrith is the proposed ‘Metro’ Central West location ahead of Blue Mountains and Hawkesbury due to the significantly greater demand and future demand growth potential.





### Step 2: Identifying Tier 2 and Tier 3 Venues and Level of Upgrade Required

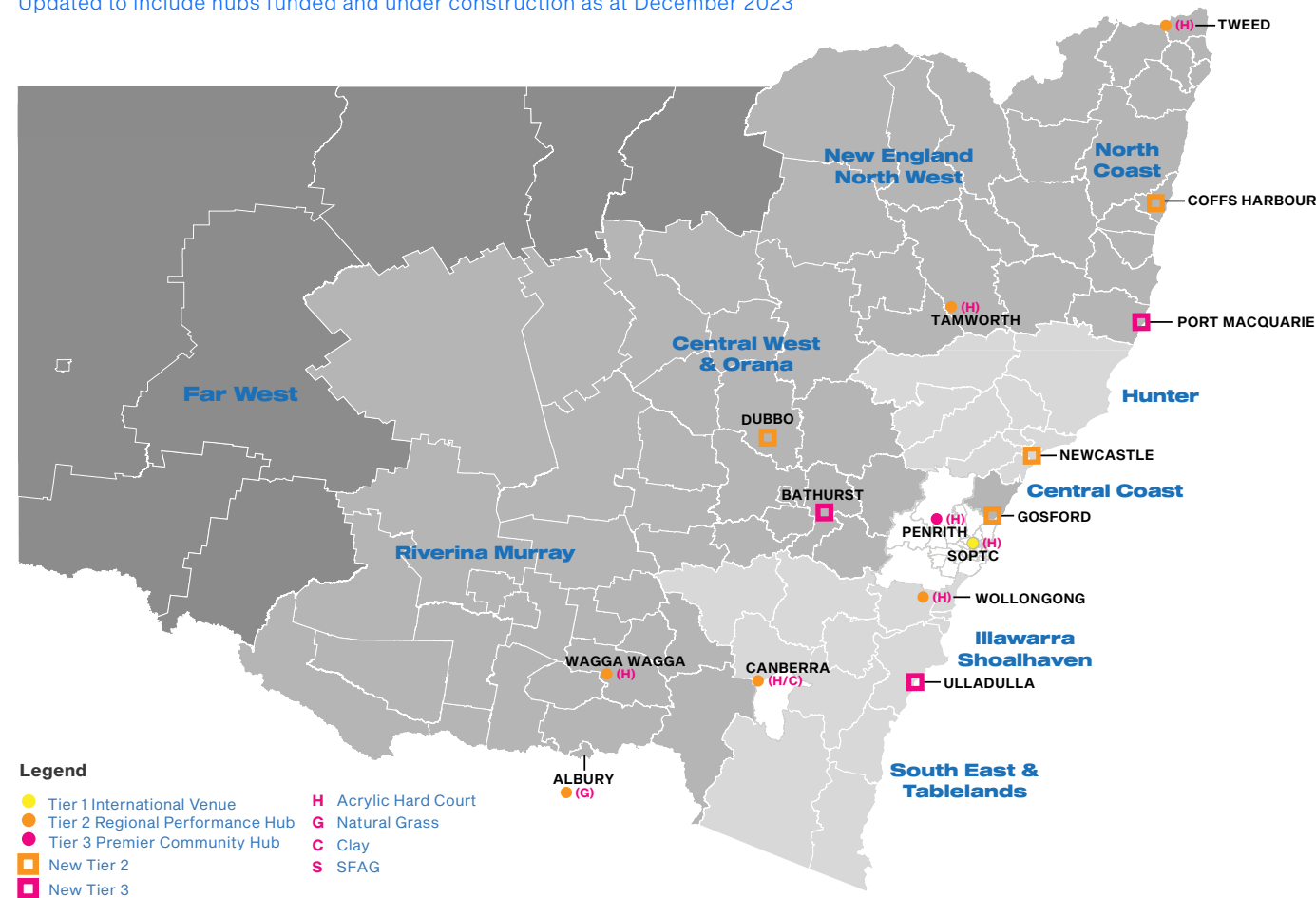
Tennis NSW has conducted venue audits and condition reports in key areas and overlaid its internal membership and utilisation data to identify eight key existing venues. The key venues audited are likely to minimise costs and have the greatest impact in developing into a Regional Performance Hub or Premier Community Venue, leveraging local Council and State Government support and funding mechanisms (via Office of Sport selected Regional Hubs).

Optimal Location	Club/Venue Location	Upgrade Required
Newcastle	Newcastle & District Tennis Ass. / Newcastle District Park	<ul style="list-style-type: none"> <li>14 synthetic grass courts and 10 plexi-cushion hard courts;</li> <li>A newly developed clubhouse facility offering modern amenities.</li> </ul>
Penrith	Nepean and Districts Tennis Ass./Woodriff Gardens	<ul style="list-style-type: none"> <li>Stage 2 development will include an additional six ITF International standard hard courts (to the existing 14 courts).</li> </ul>
Wollongong	Beaton Park Tennis Complex/Beaton Park	<ul style="list-style-type: none"> <li>Reconstructive works to existing courts, refurbishment of clubhouse, amenity and surrounds.</li> </ul>
Wagga Wagga	Wagga Wagga Tennis Ass./Bolton Park - Jim Elphick Reserve	<ul style="list-style-type: none"> <li>10 championship acrylic hard courts with ancillaries, including two show courts;</li> <li>8 championship sand filled artificial grass courts;</li> <li>4 Hot Shots Red Ball courts (modified tennis);</li> <li>2 multi-sport courts (basketball/tennis etc.);</li> <li>Event standard LED Lighting to all courts;</li> <li>Viewing areas, shade structures and recreational play space;</li> <li>New one level Tennis pavilion (600 sq/m) with associated amenities</li> </ul>
Coffs Harbour	To be confirmed	
Dubbo	Charles Sturt University	<ul style="list-style-type: none"> <li>16 championship acrylic hard courts with ancillaries, including two show courts and multi-sport capability;</li> <li>New tennis/netball pavilion co-located in newly developed regional sporting hub;</li> <li>Capacity for indoor play through new multi-sport development;</li> <li>Event standard LED lighting to all courts;</li> <li>Viewing areas, shade structure and recreational play space.</li> </ul>
Bathurst	Bathurst Tennis Centre	<ul style="list-style-type: none"> <li>12 championship acrylic hard courts with ancillaries, including two show courts;</li> <li>Resurfacing of four synthetic grass courts on site;</li> <li>Development of four Hot Shots red ball courts;</li> <li>Event standard LED lighting and new fencing to all courts;</li> <li>Viewing areas, shade structures and recreational play space;</li> <li>Upgrade to clubhouse and amenities.</li> </ul>
Central Coast	Gosford District Tennis Association	<ul style="list-style-type: none"> <li>Upgrade and reconfigure existing court layout;</li> <li>Event standard LED Lighting to all courts;</li> <li>Clubhouse redevelopment and new lighting works.</li> </ul>
Shoalhaven	Milton Ulladulla Tennis Association	<ul style="list-style-type: none"> <li>12 championship courts with ancillaries;</li> <li>Event standard LED lighting to all courts;</li> <li>Viewing areas, shade structures and recreational play space;</li> <li>Redeveloped Tennis pavilion with associated amenities.</li> </ul>
Port Macquarie	To be confirmed	

### Regional Hub Alignment

NSW Office of Sport Region aligned with identified Tennis NSW Regional Performance Hubs

Updated to include hubs funded and under construction as at December 2023





# Investment Summary

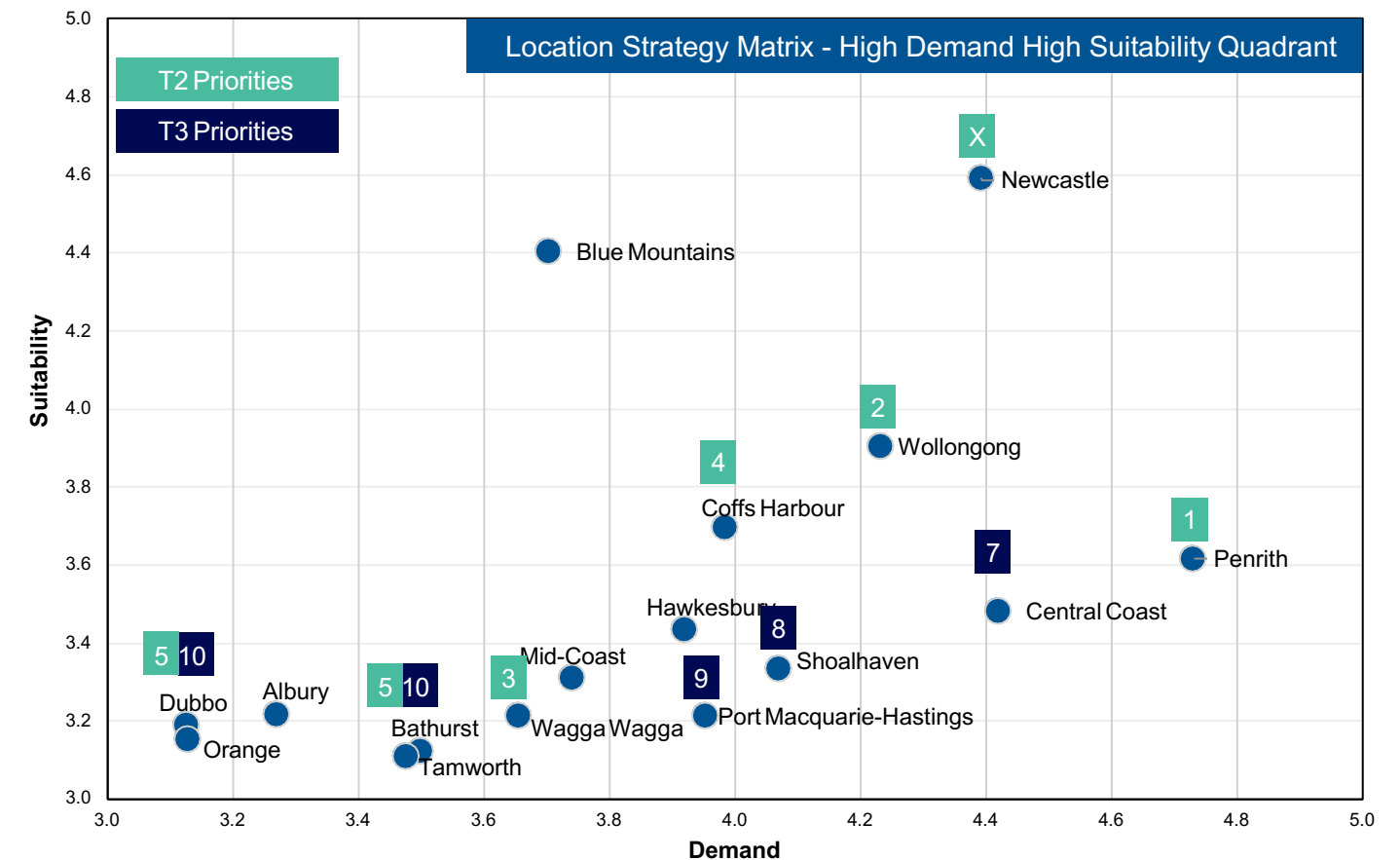
## Infrastructure Priority List

The prioritisation model has identified eight key Regional Performance Hub projects and four key regionally significant Tier 3 Tennis Venue projects.

The Tier 2 projects, to be considered Stage 1 program of works in order of preference are as follows:

1. Tamworth – already identified, strong alignment with potential NSW Office of Sport Regional Hub and potential funding opportunities;
2. Penrith – due to the strongest demand of all regional LGA’s and relatively small investment required;
3. Wollongong – due to existing event portfolio, proximity to Sydney, strong demand and suitability;
4. Wagga Wagga – due to strong alignment with potential NSW Office of Sport Regional Hub and potential funding opportunities;
5. Coffs Harbour – due to strong alignment with potential NSW Office of Sport Regional Hub and potential funding opportunities, further consultation/investigation required;
6. Central West (Dubbo or Bathurst) – lower demand and suitability relative to the above priorities;
7. Newcastle – although Newcastle was identified by the prioritisation model to be of high strategic priority, the pending Venues NSW development of the Hunter Precinct (Broadmeadows) Masterplan and State Significant Business Case process will determine the timeframe and scale of this development;
8. Central Coast (Gosford) – updated as an identified Regional/Metro Performance Hub through the Greater Sydney Infrastructure Investment Strategy due to its capacity to service both significant catchments on the Central Coast and Greater Sydney, and strong alignment with potential NSW Office of Sport Regional Hub;

Investment in potential Premier Community Venues (Stage 2 program of works) should be investigated in Shoalhaven (Ulladulla), Port Macquarie and the other Central West option (i.e. either Bathurst/Dubbo).



## Section 5: Investment Summary



### High Level Budget

The total investment required for Stage 1 has been adjusted to between \$44.8 million to \$60.8 million (2023 estimate). So far over \$28 million has been secured for four of the eight identified Regional Performance Hubs. It is estimated that another \$18 million to \$34 million will be required to complete Stage 1.

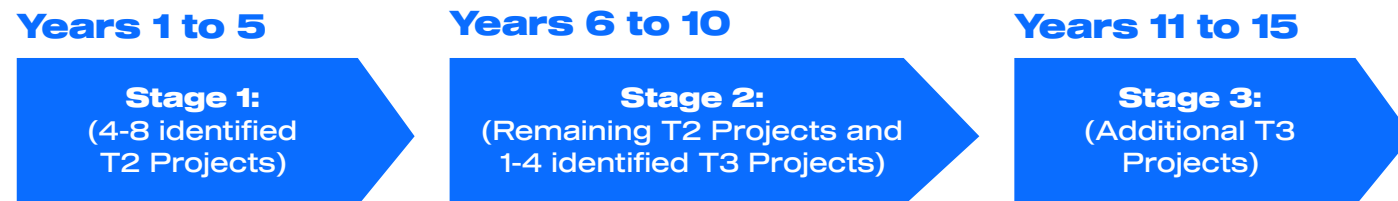
Costs of projects have escalated greatly since the first version of this document (2019/20) and include allowance based on similar recent projects which include the provision of all on-court, off-court, ancillary (e.g. car park) and civil site preparation works.

Location	Venue Type	Total Cost of Upgrade*	Funding Committed	Further Investment Required
Tamworth	Tier 2	\$3.87m	\$3.87m	\$0m
Penrith	Tier 2	\$3.5m	\$3.5m	\$0m
Wollongong 1A	Tier 2	\$10.2m	\$12.3m	\$0m
Wollongong 1B	Tier 2	\$3m	\$0.4m	\$2.6m
Wagga Wagga	Tier 2	\$8.2m	\$8.2m	\$0m
Coffs Harbour	Tier 2	\$4.0m to \$8.0m *	\$0m	\$4.0m to \$8.0m *
Dubbo / Bathurst	Tier 2	\$4.0m to \$8.0m *	\$0m	\$4.0m to \$8.0m *
Newcastle	Tier 2	\$4.0m to \$8.0m *	\$0m	\$4.0m to \$8.0m *
Central Coast	Tier 2	\$4.0m to \$8.0m *	\$0m	\$4.0m to \$8.0m *
<b>TOTAL</b>		<b>\$44.8m to \$60.8m *</b>	<b>\$1.5M</b>	<b>\$18.6m to \$34.6m *</b>

\* Estimated (updated 2023)

### High Level Regional Investment Roadmap

Below is a high-level roadmap of the Tennis NSW investment strategy. This indicates that Stage 1, the development of four to eight key Regional Performance Hubs, should be the priority over the next five years to coincide with the ATP Cup Legacy Fund (2020-2023) and provides an opportunity to lead into the future State and Federal elections with a compelling venue funding strategy. Stage 2 (Years 5-10) should focus on the remaining Tier 2 projects and the upgrade of identified regionally located Premier Community Venues.



The above includes investment in Regional NSW only. The *Greater Sydney Infrastructure Investment Strategy* has identified the necessary investment in Greater Metropolitan Sydney to complement the above.

### Proposed Funding Strategy

It is recommended that Stage 1 focuses on leveraging the ATP Cup Legacy Fund (or alternate Tennis investment vehicle) through external funding opportunities. Other than identifying State and Federal funding opportunities throughout the next election cycle, there is an opportunity to use the Legacy Fund to ensure additional, coordinated tennis funding with the assistance of Tennis Australia.

Should Tennis NSW commit additional funding outside of the Legacy Fund and ensure the projects meet regional objectives, it could prioritise these projects and therefore drive greater support from Councils and other external parties which will ensure completion of these projects in an accelerated timeframe.

The identified external funding programs and opportunities to explore, as well as the key narrative to use during ongoing engagement is detailed below.

External Party	Funding Source	Benefit Focus
Tennis Australia	Direct Investment	Increased Participation, sustainable venues
Local Council	Direct Investment	Economic and Social Impact
Private Operator	Direct Investment	Commercial Impact
NSW Government	Regional Sports Infrastructure Fund	Economic, Social and Health Impacts
NSW Government	My Community Grant Program	Economic, Social and Health Impacts
NSW Government	Greater Sydney Sports Facility Fund	Economic, Social and Health Impacts
Federal Government	Building Better Regions Fund	Economic, Social and Health Impacts

### Next Steps

This document identifies a number of Regional Performance Hub (Tier 2) priority projects that Tennis NSW should prioritise over the next three years. For each of these projects, Tennis NSW should focus on continued engagement with the respective local Councils, Tennis Australia and NSW Office of Sport to ensure funding is committed and the individual master plans are finalised.

To ensure the optimal venues are selected in each of the key regional locations, Tennis NSW should prioritise the completion of a State-wide venue audit and ensure there is an understanding of where each venue sits in the tennis facility hierarchy, its condition assessment, current operating model, and sustainability rating.

This document will form part of the *Tennis NSW State Infrastructure Investment Strategy* and is a companion to the *Greater Sydney Infrastructure Investment Strategy*.



# Tennis NSW Venue Planning Framework

## Overview

Tennis NSW intends to shape the planning and development of a network of sustainable tennis venues that support the growth and needs of the sport, in particular - player development, the player pathway and event hosting capabilities across Sydney and NSW.

The framework to identify and plan investment priorities in infrastructure is based on key elements:

1. Utilise data led insights and improved engagement between landowners, venues (clubs and operators) and Tennis NSW/Tennis Australia
2. Understand and align the requirements for competitive play arising out of the national Competitive Play Review and consultation with Member Association level
3. Align with NSW and Local Government approach to infrastructure planning to ensure priorities are deliverable and leverage available funding opportunities

## Tennis Restart and Venue Sustainability

Tennis over time has increasingly become both a sport and a leisure activity with increasingly diverse and innovative delivery models and arrangements. As such, traditional analysis of participation and planning for infrastructure needs has arguably not been an effective way to inform what arrangements and facilities will best fit the needs of the sport and its participants into the future.

Where it might be useful when analysing the needs of other sports to look primarily at membership in a given catchment (where traditional club-based play reflects members who train and play as their participants), this proves inadequate for tennis.

This diverse demand for activation through tennis varies from those looking to organise their own hit at a local court (unstructured play), those wanting some additional coaching or a fitness workout (professionally assisted individual or group programs), those seeking structured or organised competitive or social play opportunities that cater for people of different abilities and commitment levels (including juniors to open age, wheelchair and disability, active aging and schools), and those aspiring to and/or pursuing the representative and professional levels of the sport.

The number of courts, the type of courts, the accompanying facilities, the formats and programs offered, the role of professionally delivered or assisted formats and programs, and the viability and scale of operation needed to deliver those varying formats and programming alongside often highly involved roles and responsibilities in managing and maintaining these venues, demonstrates a highly dynamic and diverse context to understand.

To make sense of all of this, a deeper approach is required, including dispensing with over-simplified and poorly performing traditional assessments of service catchment and facility provision, such as number of courts per thousand people.



## Section 6: TNSW Venue

## Planning Framework



Councils, who are the predominant landowner and manager of tennis venues in NSW, have also indicated that they require an increasingly strategic and evidence-based approach to planning the footprint or network of tennis venues within their local government area. They also indicate that they are under increasing pressure to fund all the services and capital works under their remit and when they do invest, they wish to see a clear return on investment and benefit to the community.

In response to the need to better inform venue (network) planning and performance, Tennis NSW has over the past two years developed a venue planning framework (venue hierarchy as described in Section 1.2 and greater detail in the appendix of this document); has built the Venue Sustainability Rating (VSR) and begun engaging with councils, and its clubs, coaches and operators, under a strategy called Tennis Restart.

The Venue Sustainability Rating is provided on a venue-by-venue basis for a local government area using an audit of venue participation (visitation methodology), infrastructure condition, operational and financial performance. Venues of similar type (venue hierarchy) and context are benchmarked and this can inform what some of the key observations and opportunities are to improve venue performance and sustainability.

This works alongside increasingly valuable market insights being delivered through Sport Australia's AusPlay survey and other sources.

This approach is a work in progress and most importantly it encourages the discussion between the key stakeholders to inform local strategies and decisions on how to achieve the aligned interests of all those stakeholders, ultimately for the benefit of the community.

Key insights from the VSR data include:

- A sustainable venue is one which has an asset renewal plan across the 12-year life cycle of the court and ancillary court infrastructure and can afford to contribute annually to a sinking fund which covers 80-100% of this cost. This is in addition to the costs of delivering a range of tennis offerings (services and programs) in demand by the community.
- A highly sustainable venue is one which can also cover a portion of the asset renewal costs of the buildings and peripheral infrastructure (e.g. car parking).
- In 475 audited venues there is an estimated \$78million deficit in funding needed to renew or replace infrastructure approaching end of asset life within the next 12 years. Currently only 15% are in position to meet their ongoing financial obligations including asset renewal responsibilities. This means that the sport is highly reliant on grant and government funding, and/or will need to make their venues more sustainable to generate surplus revenue to meet this gap.
- Venues between 6 and 12 courts combined with a professional operator (either leading or in conjunction with the traditional local club/association) providing high quality coaching and other

programs drive significantly higher participation numbers which in turn provides value and opportunity to generate returns to reinvest into infrastructure.

- Venues with an optimal and performing management model have up to 350% increase in participation however only 17% of venues have their optimal or performing management model in place.
- Venues with a complete digital presence deliver a 45% increase in participation compared to those without, and currently only 25% of venues offer both online booking and payment options and less with an integrated court access and light control solution. The latter can significantly uplift venue visitation and revenue in venues which are not suitable to have full-time or significant on-site coach or management present.
- Community tennis clubs (volunteer supported) continue to play an important role in the delivery of tennis in the community, including the organisation and oversight of intra-club, inter-club and inter-district competition and providing the social experiences that creates a vibrant and connected tennis community. Thus, venues which can provide all or many of these opportunities are important and favoured over a proliferation of smaller 1-3 court venues.

If a partnership between Council and Tennis stakeholders is managed well, this could lead to improved participation outcomes whilst striving for full or substantially self-sustainable assets. This reduces the burden on councils and ratepayers whilst representing one of the few sports and community uses that can leverage such return on public investment.

The right size centre, right management model and right programs will lead to greater participation numbers and diversity of programming which better serves community's needs/demand for tennis - the sport and as recreation.





### Actions to support Infrastructure and Venue Sustainability

The following additional actions have been identified as the central strategy to improve venue sustainability and infrastructure and influence the network of tennis facilities to meet future demand.

As additional auditing of venues (collection of infrastructure and venue performance data), further consultation with tennis stakeholders undertaken, and other data and insights become available, Tennis NSW will review and update this strategy and the key actions in alignment with the key opportunities.

Tennis NSW Response	Action
<ul style="list-style-type: none"> <li>Using data-led insights to assist Clubs, Operators and Councils to improve the utilisation and sustainability of the network through harnessing management models, tenure arrangements, service offerings (programming) and facility asset funding models</li> <li>Informing infrastructure priorities and plan how works will be funded</li> <li>Improving the digital and online booking footprint to provide greater access and drive revenue for all types of venues</li> <li>Provide access to the sport (particularly in established areas with limited space for standalone tennis facilities) as well as leverage funding opportunities through:                             <ul style="list-style-type: none"> <li>Forming partnerships with other sports, community and commercial offerings;</li> <li>Identify options to work in partnership* with Complementary Tennis Formats such as Pickleball, POP, Padel, Beach Tennis; and</li> <li>Develop other multi-use options*</li> </ul> </li> <li>Identify opportunities for new venues aligned with population growth</li> </ul> <p><small>* where it complements tennis offerings and venue sustainability whilst maintaining fit-for-purpose functionality and capacity to grow Tennis.</small></p>	<ol style="list-style-type: none"> <li>Provide Action Plans and insights to Councils and Venues through Tennis Restart and VSR audits which aim to identify opportunities to optimise/enhance/improve venue performance through business planning, programming, marketing and identify and prioritise infrastructure needs and projects.</li> <li>Tennis NSW to support stakeholders develop and deliver successful infrastructure projects through Project and Grant Readiness Approach, building resources and capability for tennis stakeholders to successfully plan projects and secure funding.</li> <li>Tennis Australia and Tennis NSW develop ongoing investment programs/vehicle for infrastructure projects which will grow and sustain participation in tennis. Such programs will be designed to leverage or seed funding from other sources such as partnered Government funding.</li> <li>Tennis NSW to develop a Leasing and Licensing (Management Arrangements) Guidelines for Local Government focused on venue sustainability</li> <li>Through Tennis Restart insights and in combination with other planning data and insights, Tennis NSW to influence and inform Council Recreation Plans and other strategic planning to identify opportunities for new tennis venues</li> <li>Develop guidance to Councils and venues on the best multi-use strategies to employ; including for Complementary Tennis Formats</li> <li>Develop partnerships and pilot projects to develop solutions that increase participation opportunities for high density and established areas with limited opportunities to expand or build new facilities</li> </ol>

### Funding opportunities

It is evident that the sport and its stakeholders cannot fully fund the renewal, upgrade or development of new venues as called out in this strategy. Tennis NSW will look to leverage the required investment in infrastructure through:

- Identifying tennis' priorities,
- Seeding investment funding and non-financial support,
- Articulating the benefits of that investment
- Building the capacity of the sport to access funding opportunities more effectively
- Aligning outcomes to deliver against the target objectives of funding sources, and
- Finding aligned partnership opportunities for investment that leverage identified outcomes

Tennis NSW have also identified a number of funding opportunities to assist in the implementation of this Strategy.

#### ATP Cup Tennis Legacy Fund

- The ATP Cup Tennis Legacy Fund is a partnership between the NSW Government, Tennis Australia and Tennis NSW to bring world class content to Sydney through the ATP Cup from 2019 to 2022 (subsequently replaced by the United Cup).
- The Fund has seen over \$4.25 million awarded across NSW through four program categories - major infrastructure, medium scale facility upgrades, community programs and Tennis NSW led participation initiatives. This investment so far has resulted in over \$30 million in major infrastructure and facility upgrades being leveraged with co-contributions forthcoming from local government, landowners, tennis venues and other Federal and State Government grant sources.

#### Tennis NSW and Tennis Australia - additional investment and support

Critical to leveraging project funding and delivering a return on investment to communities, is the capacity to deliver event content and stimulate participation outcomes in venues. Tennis NSW and Tennis Australia deliver this by:

- Allocating and providing resources to run major event content at venues which meet the required standards
- Investing in Tennis Development staff that support local deliverers of the sport (volunteer to professionals)
- Providing guidance and expertise to plan the development of and manage those venues more effectively
- Providing marketing and communication support to the sector, generating/stimulating interest in the sport

Tennis Australia also invests in infrastructure projects through the National Court Rebate scheme. The availability of funding and program specifics of infrastructure investment provided by Tennis Australia and Tennis NSW is subject to change going forward.

#### Tennis Stakeholder Investment

Tennis venues (clubs and/or operators) may have the capacity to co-contribute and provide seed funding for medium to large sized projects. This may take the form of direct private investment, philanthropic donations and/or fundraising activities.

#### Major Sports Infrastructure Funding - State Government

Funding programs may vary over time in what funding is available, what objectives they are seeking to address, and which Agency or Department is responsible.

The NSW Government's primary funding opportunities for major sports infrastructure in recent years has been through the Centre of Excellence Fund, the Greater Cities Sports Infrastructure Program and the Regional Sports Infrastructure Program. Projects most likely to be successful are those which can align with the priorities set out through the NSW Office of Sport District and Regional Plans, Office of Sport's Future Needs of Sport Infrastructure study (ongoing) and match the priorities of the relevant local government authority and state or national sporting body.





Other notable sources for State Government funding in sports infrastructure are Stronger Country Communities (currently a \$100 million program over two years for community sport), The NSW Office of Liquor, Licensing & Gambling's Club Grants programs, Community Building Partnerships as well as many other programs which whilst they may target other outcomes such as in health, employment and energy consumption, they may still be applicable to specific tennis venue projects.

#### **Major Sports Infrastructure Funding - Federal Government**

Sport Australia manages the Community Sports Infrastructure Program, and similar to NSW Government a range of other funding programs may be applicable for a given project - e.g. Building Better Regions Fund in regional NSW where the development of major regional hubs will attract ITF Professional content which is attributable to interstate and international visitors stimulating valuable local economic benefits.

#### **General Sports and Community Funding - Federal and State Governments**

A wide variety of small and medium sized grant programs are offered on regular and intermittent basis to target outcomes in local communities. These programs offer funding contributions between \$1,000 and \$300,000 to eligible projects such as community sporting infrastructure. The programs are offered from a range of sources such as the NSW Office of Sport, Department of Premier & Cabinet, Office of Liquor & Gaming and more covering not only sport space but also health, education, economic stimulus, community infrastructure and general infrastructure. Most of these programs are best suited to small to medium value facility improvement or upgrade projects.

#### **Local Government**

The funding of new and existing community infrastructure is a dynamic space.

One of the key opportunities to invest in new facilities in areas attracting new or growing population is through developer contributions and related funding mechanisms.

Councils are otherwise constrained to funding infrastructure through their usual rates and levies (community contribution to services and infrastructure), fees and charges (a return from those who use the infrastructure and services including leasing and licensing). Councils plan future infrastructure expenditure through an alignment to their Community Strategy, Operational Plan, and various strategic and other plans such as Sport & Recreation Plan, Capital Works Program, Asset Management Plan, Plans of Management and master plans.

#### **Partnering**

Opportunities exist for partnered investment and developments such as with schools, universities, leisure providers and other public or private entities.







# Appendix



**Appendix A: Tennis NSW Venue Hierarchy (as at 2022)**

		1	2 or 2Lite	3	4	5	6
		International	Regional and Metro Performance Hub	Premier Community Hub	Full-Service Community Venue	Community Venue	Community Access Venue
<b>Profile Description</b>		Tennis showpiece – Large economic driver through large National and International events and the top high-performance coaching and player pathways.	ITF Professional event hosting capability which also serves as a hub for community through to high level events and competition (Centre of Excellence); high quality coaching/pathways for the local area and region; diverse community programming; and is a financially sustainable and professionally run venue.	Premier competition venue that focuses on club level to inter-district and lower level state significant events and competition; as well as servicing the local catchment to provide a full mix of recreational play, competition play, coaching and programming.	Services the local catchment to provide a full mix of recreational play, competition play (participation level), coaching and programming.	Public facilities servicing local suburbs delivering health and social opportunities and community objectives. Will have some program offerings such as coaching and competition play.	Community access facility which provides opportunities for casual play and likely to have no or limited coaching/programming and competitive play.
<b>Planning Attributes</b>	<b>Hierarchy</b> Regional = region of NSW (Tennis ref Zone) District = Municipal and Sub-Region (incl multiple municipal) Local = Suburb/town and sub-municipal	International-National-State significance	State-Regional significance	Regional-District significance	District-local significance	District-local significance	Local Suburb
	<b>Provision Rate</b>	1 per State	Regional - 1 per Country Region/Zone Metro - 3 to 5 within 60 to 90min drive of place of residence	Regional - where population, participation and catchment justifies Metro - 1 Syn Grass per District Assoc 1 Hard Court if no T2 to serve catchment Natural Turf or Clay venues sought after where sustainable	1 to 3 per LGA (pending supply-demand, LGA size and no. T1-3 venues within catchment)	Complementary Network to meet local demand/need	Complementary Network to meet local demand/need
	<b>Courts per Population</b>	Because of the complexity of delivery models and offerings for tennis, we do not recommend applying a courts per population benchmark. More critical is to consider the footprint of scaled facilities matched to the optimal venue management and delivery model to deliver identified tennis outcomes and service offerings.					
	<b>Location</b>	In a major city, in close proximity to an international airport	In a major city, regional city or large rural town with close proximity to an airport (70 km/ < 1hr)	Within 30 min drive of where majority of the District Catchment population resides & in close proximity to transport nodes, community centres and services	In close proximity to transport nodes, community centres and services	No minimum requirements	No minimum requirements
	<b>Catchment Profile</b> <b>Competitive Play</b> <b>Programming &amp; Coaching</b>	Same as Full-Service Events - intra-state, inter-state and international	Same as Full-Service Events - intra-state and inter-state travel, some from international	Same as Full-Service Events - may travel across metro area or up to several hours in rural areas	Less than 20 minute drive (metro) and 90 minutes (regional)	Services those who reside, work or study within a 3 to 5km catchment (metro) or may be up to 30 to 60 minute drive in regional areas	Generally services those who reside within 500m to 3km of venue (metro) and is prevalent in small rural communities
<b>Footprint includes other Court Types</b>	<b>Typical Court Footprint</b>	Stadium Show Court and 10-20 ITF approved courts (Grand Slam Surface)	Typically consists of 12 to 20 competition level courts See minimum requirements ITF approved courts and may have additional courts (mixed surface types)	Typically consists of 10 to 16 competition level courts (may be more) of the same surface type May have additional courts (mixed surface types)	Typically consists of 6 to 12 courts (may be more) of the same or mixed surface types	Typically consists of 4 to 8 courts (but may be more if rural located)	1 to 2 Courts
	<b>Minimum Requirements (full-size courts)</b>	A show court with adequate seating capacity (5000+) Minimum 10 ITF approved courts (Grand Slam Surface)	Minimum 8 ITF approved courts (Grand Slam surface) plus 2 practice courts Tier 2 Lite - minimum 4 ITF courts plus two practice courts (Grand Slam surface)	At least 10 courts of the same surface type for competition	6 Full-Size Courts	3 Full-Size Courts	1 Full-Size Court
	Hot Shots Courts	Desirable	Desirable	Desirable	Desirable	Option	Option
	Hitting Wall	Desirable	Desirable	Desirable	Desirable	Desirable	Desirable
	Multiuse Blended Lines (Tennis + Complementary Format)	Not on ITF courts	Not on ITF courts	Not on Competition Courts	Option	Option	Common
	Multiuse Blended Lines (Tennis + Other Sport)	Not on ITF courts	Not on ITF courts	Not on Competition Courts	Option	Option	Common
	Dedicated Complementary Format - Local/Small Footprint	Option	Option	Desirable	Desirable	Unlikely	Not Applicable
Dedicated Complementary Format - Larger Competition Footprint	If enough space to co-locate	If enough space to co-locate	If enough space to co-locate	Unlikely	Not applicable	Not Applicable	
Dedicated Other Sport Court (no tennis or complementary format)	Option	Option	Option	Option	Unlikely	Not Applicable	



**Tennis NSW Venue Hierarchy (as at 2022) Cont.**

		1	2 or 2Lite	3	4	5	6
		International	Regional and Metro Performance Hub	Premier Community Hub	Full-Service Community Venue	Community Venue	Community Access Venue
	<b>Lighting</b>	750 to 1200 LUX av PPA - Broadcast dependent Stadium - full HD Broadcast levels	Min 500 LUX av PPA (Recommend 500-750 LUX PPA)	Min 350 LUX av PPA (Recommend 500 LUX PPA)	Recommended 350 LUX av PPA Min 250 LUX av PPA	Lighting is Preferred Min 250 LUX av PPA	Lighting is Preferred Min 250 LUX av PPA
	<b>Venue Facilities</b>	Fit-for-purpose (international event) standard player and media facilities	Fit-for-purpose player facilities and clubhouse	Fit for purpose player facilities and clubhouse	Adequate player facilities and clubhouse (compromises on inclusions acceptable)	Basic clubhouse and facilities	May have a shelter and toilet(s)
	<b>Facilities</b>	Same as 'High Performance State Venue' + Modern, international level player & officials facilities including showers, change areas, physio room. Permanent large grand stand and established seating for spectators.	Same as 'Premier Community Venue' + Administration offices. Additional (permanent or temporary) event capacity for additional player & officials change/shower facilities, physio room, small viewing stands or the ability to bump in some seating for spectators	Same as 'Full Service Community Venue' + preferably larger event capacity (tournament office/referee facilities), larger clubhouse and player change/shower facilities and space for spectators)	Pro shop, tournament office capacity, universally designed & accessible facility, kitchen area, customer seating in clubhouse	No minimum requirements	No minimum requirements
<b>Service Offerings</b> (see detailed Programming by Venue Type)	<b>Competitive Play</b> (Leagues and Tournaments)  <b>Open and Junior</b>	International (focus) National (focus) State (focus) Zonal/Regional Local	National (occasional) State (focus) Zonal/Regional (focus) Local (focus)	State (occasional) Zonal/Regional (focus) Local (focus)	Zonal/Regional (occasional) Local (focus)	Local (focus)	Nil Overflow for larger venues (occasional)
	<b>Performance Pathway</b> Zone = Region or District Assoc	National and State Squads	Zone Squads	Zone Squads	Zone / Sub-Zone Squads (if no T2/T3 available)	Where no T2/T3 option	None
	<b>Coaching &amp; Programs</b>	Full-mix Local programs and court hire - including intra-club and social play, Cardio Tennis, Hot Shots programs, schools programs, group and individual coaching, and programs for diverse and inclusive participation				Limited coaching & programs Court Hire	Limited coaching & programs Court Hire
	<b>Wheelchair Tennis</b>	Essential	Essential	Essential / Highly Desirable	Desirable	Desirable	No requirement
<b>Management</b>	<b>Venue Sustainability</b>	<b>Aspires to operational and financial sustainability</b> - sustainability limited somewhat by need to prioritise MA performance programming and events, and maintaining significant assets such as stadia and larger footprints		<b>Aspires to operational and financial sustainability</b> - though larger footprint may reduce capacity to cover asset renewal/replacement of court infrastructure without grant and other funding	<b>Highly operational and financially sustainable</b> - Able to generate the funds to cover most, if not all, of the court infrastructure asset renewal or replacement cost over the court asset life PLUS the venue operation and maintenance expenses. May contribute a portion of the forecast non court and structural asset renewal or replacement cost over the asset life (e.g. building, car park, court base and substrate)	<b>Requires Community Subsidisation</b> - may generate revenue to contribute to the operating costs and asset renewal or replacement over the asset life, but will largely rely on landowner (community) and grant funding	
	<b>Typical Tennis Delivery Model</b>	Professional	Club/Assoc + Professional	Club/Assoc + Professional	Club/Assoc + Professional	No or Limited Professional	No or Highly Limited Professional
	<b>Typical Venue Management Model</b>	Club-Operator Commercial Operator	Club-Operator Commercial Operator	Club-Operator Commercial Operator	Club-Operator Commercial Operator Club-Coach	Club-Coach Club-Volunteer	Internal or Agent managed Club-Volunteer



**Management Model Framework**

There are five main operating (facility management) models applicable to tennis venues. High level explanations for each are below.

		Commercial Operator	Club-Operator	Club-Coach	Club-Volunteer	Internal or Agent Managed
<b>Delivery Model</b>		Full professional delivery	Semi-professional to full professional delivery	Some professional delivery added	No professional delivery at all	No professional delivery at all Some professional delivery of programs
<b>Facility Management Structure</b>		<p>Leased (or management agreement) directly to anyone whom <u>IS NOT</u> a not-for-profit club or association.</p> <p>Lessee has full management rights and secure tenure.</p> <p>Club/Assoc may have access/user rights under a License, User Agreement, MoU or other arrangement with the Landowner which the Commercial Operator must provide for under Head Lease or Facility Management Agreement.</p>	<p>Leased to Club/Assoc (head lessee) and sub-lease, license or management agreement to an operator (delegate) on <b>full-time or near full-time basis</b></p> <p>Club/Assoc as head lessee has full management rights and secure tenure which is delegated in full to the Operator. This does not preclude arrangements where the Club still runs their own competitions - access provided by the Operator to do so (and the Operator may or may not provide support to the Club to administer those competitions)</p>	<p>Leased or Licensed to Club/Assoc (head lessee) and has a coach(es) delivering coaching and tennis programs, but generally not on a full-time basis (via club-coach arrangement or court hire)</p>	<p>Leased or Licensed to Club/ Assoc who run the venue entirely on a volunteer basis without any professional coaching or programming.</p>	<p>Council or landowner retain management of the venue overall, but bookings/court hire is managed through one of:</p> <ul style="list-style-type: none"> <li>- Internal booking service / bookings office (e.g. council, school)</li> <li>- On-line/phone booking service vendor (may provide a call-centre option also)</li> <li>- Parks Committee or another local representative or agent</li> <li>- Free access / walk in / no formal booking</li> </ul> <p>Landowner generally will be a council or school</p> <p>A Club/Assoc may use the venue but on a court hire or other access agreement (no management responsibilities)</p>
		Can include where an entity/landowner acts like a commercial operator e.g. Leagues Club, University, Council acts as the operator with an in-house commercial model	Can include where a Club acts in the role as Operator, retaining responsibility for all aspects of the facility management, employing professional support (via salaried internal coaches and administrators) as an extension of the Club. Professional internal staff would oversee or support all or most of the facility management, program management, competition administration, and administrative functions within the venue	Coach(es) are responsible for the entire coaching program and may have some other contracted duties, including delivering some other programs on behalf of the Club.	There may be some volunteer (accredited) coaching taking place within the venue.	Venue Coach(es) (professional coaching via court hire access arrangement). Usually, venue coach would not have substantive or exclusive rights to the venue (otherwise model is Commercial Operator) but may have some limited maintenance and upkeep responsibility Program Provider (other professional programming via court hire access arrangement)
<b>Asset Resp (Generally)</b>	<b>Asset Strategy &amp; Owner</b>	Landowner	Landowner	Landowner	Landowner	Landowner
	<b>Asset Renewal</b>	Landowner; or Head Lessee (Commercial Operator); or Combination	Landowner; or Head Lessee (Club); or Combination	Landowner; or Head Lessee (Club) and Landowner shared	Landowner; or Head Lessee (Club) and Landowner shared	Landowner
	<b>Asset Maintenance</b>	Head Lessee (Commercial Operator)	Head lessee (Club) and their delegate (Operator)	Head lessee (Club), generally some delegation (to Coach)	Head lessee (Club)	Landowner * Part time Coach/Agent - minor upkeep/maintenance only
<b>Venue Type Suitability (Generally)</b>		<ul style="list-style-type: none"> <li>• International</li> <li>• Metro/Regional Performance Hub</li> <li>• Premier Community</li> <li>• Full-Service</li> </ul>	<ul style="list-style-type: none"> <li>• International</li> <li>• Metro/Regional Performance Hub</li> <li>• Premier Community</li> <li>• Full-Service</li> </ul>	<ul style="list-style-type: none"> <li>• Community</li> <li>• Full-Service</li> </ul>	<ul style="list-style-type: none"> <li>• Community</li> <li>• Community Access</li> </ul>	<ul style="list-style-type: none"> <li>• Community Access</li> </ul>
<b>Digital Enablement Support</b>		All venue and management types should be supported by an appropriate Digital Enablement Solution including on-line presence, court and program booking, through to integrated gate access and lighting				
<b>Strengths of Model</b>		<ul style="list-style-type: none"> <li>• Addition of professional delivery improves venue sustainability - both participation outcomes and funding the asset renewal</li> </ul>	<ul style="list-style-type: none"> <li>• Helps community not-for-profit club retain oversight of venue whilst improving venue sustainability through professional delivery model - improving both participation outcomes and funding the asset renewal</li> <li>• Directly eligible for grant funding opportunities</li> </ul>	<ul style="list-style-type: none"> <li>• Provides for introduction of professional delivery which <b>may improve</b> venue sustainability - improving both participation outcomes and funding the asset renewal</li> <li>• Directly eligible for grant funding opportunities</li> <li>• Provides partial professional delivery at venues where Club-Operator or Commercial models are not viable</li> </ul>	<ul style="list-style-type: none"> <li>• Directly eligible for grant funding opportunities</li> </ul>	<ul style="list-style-type: none"> <li>• Provides a model where it not viable for other delivery models</li> <li>• Directly eligible for grant funding opportunities</li> </ul>
<b>Limitations of Model</b>		<ul style="list-style-type: none"> <li>• Can reduce accessibility and affordability of the sport</li> <li>• Associated with for-profit versus for-community outcomes (sometimes unfairly)</li> <li>• Usually ineligible to direct apply for grant funding (but Council often eligible)</li> </ul>	<ul style="list-style-type: none"> <li>• Potential over-reliance on volunteer club management to oversee effective professional operation within the venue</li> <li>• Associated with for-profit versus for-community outcomes (mostly unfairly)</li> </ul>	<ul style="list-style-type: none"> <li>• Over-reliance on volunteer club management to oversee entire venue operations</li> <li>• (Sometime) challenge to align club and coach focus on strategic participation outcomes (e.g. coaching programs to support/foster club membership and participation in club/ association based play)</li> </ul>	<ul style="list-style-type: none"> <li>• More limited range of tennis offerings for participants</li> <li>• Venue sustainability requires greater reliance on landowner and grant funding to support facility funding (asset renewal)</li> </ul>	<ul style="list-style-type: none"> <li>• Reduced connectivity between the participants and club/ association play</li> <li>• Lack of visibility on actual utilisation/visitation and overall participation outcomes</li> </ul>

- The above is a simplified description for each Model.
- **THE RECOMMENDED METHOD TO DETERMINE THE APPROPRIATE OPERATING MODEL** for any venue should be derived through the completion of the key Roles and Responsibilities as well as alignment to the long-term strategy for sustainable asset management in combination with the participation, service level, operational and financial objectives.
- Landowner is usually a Council; OR a Council with care and control (strategic and ownership responsibilities) over Crown Land
- Other common landowner types are schools (private and public), Govt agencies or delegated trusts that manage Crown Land, and private landowners (including licensed clubs, universities)



**Program Matrix per Venue Tier type** Published Date: 1/11/2022

Offering	Examples	Participant Catchment Attribute	2 Regional / Metro Perf Hub	3 Premier Community Hub	4 Full-Service	5 Community	6 Community Access	Complementary Format Dedicated	Market Segment	
Some ITF and National level events		National/International							Specialising	All Ages
Endorsed Events - State and Zone (Regional) Level		National/State/Zone							Specialising Emerging	All Ages
TNSW - Endorsed Events - Intra-Zone		Intra-Zone							Emerging Developing	All Ages
Inter-Club and Inter-District Leagues and Events		Intra-Zone							Developing Local Representative	All Ages
Intra-Club	Weekday Ladies Comp Junior Intra-Club Adult Social Competitions	Local							All-levels (Seasonal or Year-Round)	All Ages
Adult Social Play	In-house social competitions	Local							Exploring New to Tennis	Adults
Child Learn to Play - Hot Shots Tennis	Introduction to match play & learn to play programs Stages Blue, Red, Orange, Green	Local							Exploring New to Tennis	Juniors
Group and Private Coaching	Adult Learn to Play - group, semi-private or private lessons	Local							Exploring New to Tennis	Adults
	Improve & Develop - group, semi-private or private lessons	Local							Exploring	All Ages
	Local Squads	Local							Developing	Juniors
	High Performance - Private/Academy (local and Non-MA/TA Squads or individuals)	Local to District							Developing Specialising	Juniors
	Fitness e.g. Cardio tennis	Local							Fun/Fitness	Adults Mainly
TNSW / TA High Performance Coaching	Zone and State Squads	State/Zone			Z*	Z*		Specialising Emerging	Juniors Mainly	
School Competitions and Programs	In-venue programs and competitions for schools	District/Local							All-levels	Juniors
Inter-Schools Competitions	Todd Woodbridge Cup Inter-school Competitions (larger events)	Regional/District							All-levels	Juniors
Wheelchair Performance Pathway	Performance coaching and events	Regional/District/Local							Wheelchair Performance	All Ages
Adaptive Tennis - All Abilities Programming	Wheelchair, Blind and Low Vision, Deaf or Hard of Hearing, PWII (Intellectual Disability and Autism)	Local							All-Abilities	All Ages
Inclusion & Diversity Programming	Programming for Women and Girls, Culturally and Linguistically Diverse (CALD) communities, First Nations participants, Socioeconomic Status (SES) disadvantaged communities and LGBTQI+	District/Local							All levels Focus on Exploring and New to Tennis	All Ages
Other Programs	e.g. Mums & Bubs	Local							Exploring Fun-Fitness	Targeted e.g. Mums
Community Open Days	e.g. Come & try	Local							New to Tennis	All Ages
Public Court Hire - Peak Times	In-demand casual access	Local							Various	All Ages
Public Court Hire - Off-Peak Times	Affordable access	Local							Various	All Ages
Complementary Formats *Where Appropriate	POP Tennis, Pickleball, Beach Tennis (Local Play offering)	Local	If enough space alongside tennis requirements	If enough space alongside tennis requirements	If enough space alongside tennis requirements				Active Aging New to Tennis Adult Social Play	Adults
	Pickleball (District Competition, Leagues)	Intra-District/Regional	If enough space alongside tennis requirements	If enough space alongside tennis requirements	If enough space alongside tennis requirements				Pickleball Players	Adults
	Padel	Intra-District/Regional							Padel Players	Adults
Multi-sport - other (non-tennis)	Multi/blended-line, multi-sport with tennis or dedicated for other sports (e.g. netball, basketball, futsal, hockey)								Non-tennis	All Ages
Outreach (mobile) Tennis Programs and Coaching	In a park, school or other non-tennis venue setting. A tennis court or modified tennis court may not be required								New to Tennis	Children

**Key:**

Essential Offering
  Offered where appropriate
 Z\* Zone where no T2/T3

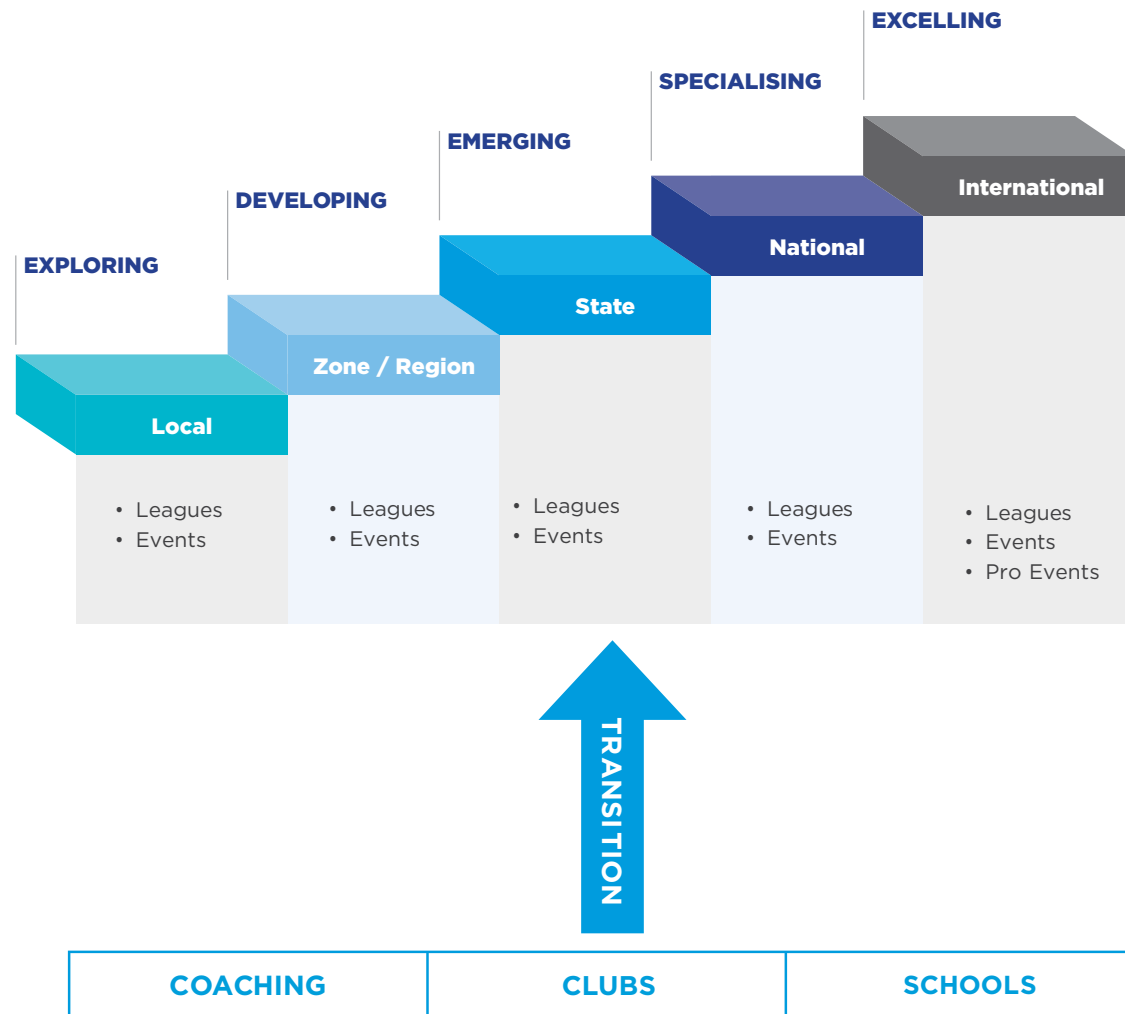
**Tennis Australia Play Pathway Descriptors:**

International = Excelling | National = Specialising | State = Emerging | Zone/Region = Developing | Local = Exploring



Appendix B – Tennis Australia Competitive Pathway

# AUSTRALIAN COMPETITION FRAMEWORK



## JUNIOR COMPETITION MATRIX



LEVEL	LOCAL	ZONE / REGIONAL		STATE		NATIONAL	INTERNATIONAL
	6	5-4		3-2		1	INT.
<b>RECOMMENDED PLAYER RATINGS*</b>							
12 BOYS	Locally set	0-2	1-5	4.5+	5.7+	6.2+	N/A
12 GIRLS	Locally set	0-2	1-4.2	3+	4+	4.8+	N/A
14 BOYS	Locally set	0-2	1-7.5	6+	7.2+	8+	N/A
14 GIRLS	Locally set	0-2	1-6.2	5+	6+	6.8+	N/A
16 BOYS	Locally set	N/A	1-9.2	8+	9+	9.5+	N/A
16 GIRLS	Locally set	N/A	1-7.3	5.5+	7.2+	7.7+	N/A
18 GIRLS	Locally set	N/A	1-8	7+	7.8+	8.5+	N/A
18 BOYS	Locally set	N/A	1-10.5	9+	10.2+	11+	N/A
<b>COMPETITIVE PLAY OPPORTUNITIES</b>							
<b>EVENTS</b>	Community Series	Junior Development Series	Junior Series	Premier Series	Signature Series	Nationals Series	ITF Juniors Junior Grand Slams
<b>LEAGUE</b>	Intra-Club Tennis	Inter-Club Tennis		State/Premier League		TA Premier League	N/A
<b>SCHOOLS</b>	Intra-Schools Tennis	Inter-School Tennis		State Championships		Bruce & Pizzey Cup	N/A
<b>REPRESENTATIVE TENNIS</b>	Club Teams	Regional / Representative Teams		State Teams		Australian Teams	Junior Davis & BJK Cup

## OPEN COMPETITION MATRIX



LEVEL	LOCAL	ZONE / REGIONAL	STATE		NATIONAL	INTERNATIONAL
	5	4	3-2		1	INT.
<b>RECOMMENDED PLAYER RATINGS*</b>						
MEN	Locally set	1-11	10.5+		12.5+	N/A
WOMEN	Locally set	1-8.5	7.5+		9+	N/A
<b>COMPETITIVE PLAY OPPORTUNITIES</b>						
<b>EVENTS</b>	Community Series	Open Series	Premier Series	Signature Series	UT Pro Tennis Tour Pro Tour	ATP/ITF/WTA Events AO Summer Series Pro Tour
<b>LEAGUE</b>	Intra-Club Tennis	Inter-Club Tennis	State/Premier League		TA Premier League	N/A
<b>REPRESENTATIVE TENNIS</b>	Club Teams	Regional / Representative Teams	State Teams		Australian Teams	Davis & BJK Cup



**Appendix C – Demand Pillar Data (1/2)**

Location	Tennis NSW Region	2019 Population	15 yr Pop % Growth	Demand Score
Albury	South West Region	53,300	11.0%	3.3
Armidale	North West Region	32,350	16.7%	3.1
Ballina	North East Region	42,675	6.7%	2.9
Balranald	South West Region	2,225	-4.5%	1.6
Bathurst	Central West Region	44,900	20.2%	3.5
Bega Valley	South East Region	34,375	6.2%	2.7
Bellingen	North East Region	13,050	-1.0%	2.0
Berrigan	South West Region	8,300	-5.4%	1.7
Bland	South West Region	5,800	-14.2%	1.2
Blayney	Central West Region	7,525	5.0%	2.1
Blue Mountains	Central West Region	82,400	7.7%	3.7
Bogan	Central West Region	2,975	2.5%	1.9
Bourke	North West Region	3,000	1.7%	1.9
Brewarrina	North West Region	1,925	-2.6%	1.7
Broken Hill	Central West Region	18,450	-10.3%	1.7
Byron	North East Region	33,100	12.8%	2.9
Cabonne	Central West Region	14,250	18.1%	2.8
Carrathool	South West Region	2,525	-12.9%	1.2
Central Coast	Northumberland Region	348,400	15.7%	4.4
Central Darling	Central West Region	2,075	4.8%	2.0
Cessnock	Northumberland Region	57,925	17.8%	3.7
Clarence Valley	North East Region	53,575	6.7%	3.1
Cobar	Central West Region	4,750	-10.5%	1.4
Coffs Harbour	North East Region	78,175	16.1%	4.0
Coolamon	South West Region	4,200	-4.8%	1.6
Coonamble	North West Region	3,925	0.0%	1.8
Cowra	Central West Region	12,225	-9.2%	1.6
Dubbo	Central West Region	51,850	8.3%	3.1
Dungog	Northumberland Region	8,850	1.4%	2.0
Edward River	South West Region	8,625	-10.7%	1.4
Eurobodalla	South East Region	39,000	3.8%	2.7
Federation	South West Region	12,650	-0.6%	2.0
Forbes	Central West Region	9,400	-7.2%	1.6
Gilgandra	Central West Region	4,450	-10.1%	1.4
Glen Innes Severn	North West Region	8,750	-8.0%	1.6
Goulburn Mulwaree	South West Region	30,350	11.8%	2.8
Greater Hume	South West Region	10,200	0.2%	2.0
Griffith	South West Region	26,075	0.7%	2.3
Gundagai	South West Region	11,100	-7.2%	1.6
Gunnedah	North West Region	12,950	4.1%	2.2
Gwydir	North West Region	4,950	-17.2%	1.1
Hawkesbury	Central West Region	69,300	18.7%	3.9
Hay	South West Region	2,750	-13.6%	1.2
Hilltops	South West Region	19,250	-1.0%	2.1
Inverell	North West Region	17,650	8.5%	2.5
Junee	South West Region	6,175	-3.6%	1.7
Kempsey	North East Region	30,075	2.7%	2.5
Kiama	South East Region	22,650	16.9%	2.9
Kyogle	North East Region	9,575	0.0%	1.9
Lachlan	Central West Region	6,275	-14.7%	1.2

**Appendix C – Demand Pillar Data (2/2)**

Location	Tennis NSW Region	2019 Population	15 yr Pop % Growth	Demand Score
Lake Macquarie	Northumberland Region	205,575	8.8%	4.1
Leeton	South West Region	11,825	0.0%	2.0
Lismore	North East Region	47,050	9.0%	3.1
Lithgow	Central West Region	21,150	-2.6%	2.0
Liverpool Plains	North West Region	7,875	0.0%	1.9
Lockhart	South West Region	2,975	-10.9%	1.3
Maitland	Northumberland Region	82,000	25.8%	4.5
Mid-Coast	North East Region	92,275	4.0%	3.7
Mid-Western	Central West Region	24,350	5.6%	2.5
Moree Plains	North West Region	13,575	-15.3%	1.3
Murray River	South West Region	11,725	5.3%	2.2
Murrumbidgee	South West Region	3,575	-9.1%	1.4
Muswellbrook	Northumberland Region	17,525	14.0%	2.7
Nambucca	North East Region	20,075	3.7%	2.3
Narrabri	North West Region	13,450	-6.1%	1.7
Narrandera	South West Region	5,800	-14.7%	1.2
Narromine	Central West Region	6,700	-6.0%	1.6
Newcastle	Northumberland Region	169,700	15.1%	4.4
Oberon	Central West Region	5,200	-3.4%	1.7
Orange	Central West Region	42,625	12.6%	3.1
Parke	Central West Region	15,375	2.1%	2.1
Penrith	Central West Region	213,350	22.9%	4.7
Port Macquarie-Hastings	North East Region	81,825	13.7%	4.0
Port Stephens	Northumberland Region	76,900	18.8%	4.1
Queanbeyan-Palerang	South East Region	64,275	29.2%	4.3
Richmond Valley	North East Region	23,975	5.9%	2.5
Shellharbour	South East Region	73,700	19.6%	4.0
Shoalhaven	South East Region	101,100	7.6%	4.1
Singleton	Northumberland Region	25,250	11.7%	2.7
Snowy Monaro	South East Region	21,000	3.0%	2.3
Snowy Valleys	South West Region	14,600	-6.7%	1.7
Tamworth Regional	North West Region	62,850	11.4%	3.5
Temora	South West Region	5,775	-9.5%	1.4
Tenterfield	North West Region	7,200	-1.4%	1.8
Tweed	North East Region	97,200	16.2%	4.4
Unincorporated NSW	Central West Region	1,200	0.0%	1.0
Upper Hunter	Northumberland Region	15,000	7.3%	2.4
Upper Lachlan	South West Region	7,550	-0.3%	1.9
Uralla	North West Region	6,325	3.6%	2.0
Wagga Wagga	South West Region	67,700	13.3%	3.7
Walcha	North West Region	3,025	-11.6%	1.3
Walgett	North West Region	6,600	-13.6%	1.3
Warren	Central West Region	2,725	-3.7%	1.6
Warrumbungle	North West Region	9,600	-7.8%	1.6
Weddin	Central West Region	3,525	-10.6%	1.4
Wentworth	South West Region	6,950	-5.4%	1.6
Wingecarribee	South East Region	48,425	6.4%	3.0
Wollongong	South East Region	216,250	11.4%	4.2
Yass Valley	South West Region	17,975	25.9%	3.2



**Appendix D – Suitability Pillar Data (1/2)**

Location	Tennis NSW Region	SEIFA	Coaching Score	2018 Total Bed Nights	Room nights available (000)	Suitability Score
Albury	South West Region	956	9	1,407,306	449	3.2
Armidale	North West Region	976	3	1,262,752	163	3.0
Ballina	North East Region	987	8	1,047,824	146	2.8
Balranald	South West Region	927	0	0		1.6
Bathurst	Central West Region	973	5	1,760,867	212	3.1
Bega Valley	South East Region	951	18	2,460,539	246	3.0
Bellingen	North East Region	954	10	533,401		2.1
Berrigan	South West Region	935	0	0	146	1.8
Bland	South West Region	954	0	182,400	61	1.9
Blayney	Central West Region	965	0	94,773		1.9
Blue Mountains	Central West Region	1,042	20	2,288,532	391	4.4
Bogan	Central West Region	938	0	0	46	1.7
Bourke	North West Region	932	0	876,786	27	1.8
Brewarrina	North West Region	818	0	0		1.0
Broken Hill	Central West Region	887	4	670,348	116	2.4
Byron	North East Region	1,003	3	4,528,092	182	2.9
Cabonne	Central West Region	997	3	0		2.4
Carrathool	South West Region	964	0	0		2.2
Central Coast	Northumberland Region	975	34	4,508,197	231	3.5
Central Darling	Central West Region	855	0	242,361		1.6
Cessnock	Northumberland Region	904	3	1,060,552	476	2.1
Clarence Valley	North East Region	908	5	2,512,867	198	2.5
Cobar	Central West Region	951	0	212,159		1.8
Coffs Harbour	North East Region	954	22	3,355,128	474	3.7
Coolamon	South West Region	960	0	0		1.8
Coonamble	North West Region	883	0	93,315		1.4
Cowra	Central West Region	910	3	639,225	113	1.8
Dubbo	Central West Region	953	7	1,769,492	368	3.2
Dungog	Northumberland Region	973	2	196,957		2.0
Edward River	South West Region	941	0	511,884	54	1.8
Eurobodalla	South East Region	938	10	2,565,802	261	2.8
Federation	South West Region	936	0	420,381	113	1.8
Forbes	Central West Region	937	8	214,932	57	1.9
Gilgandra	Central West Region	906	0	330,480	41	1.6
Glen Innes Severn	North West Region	909	0	290,405	53	1.6
Goulburn Mulwaree	South West Region	946	2	702,005	178	2.4
Greater Hume	South West Region	969	0	0	27	1.9
Griffith	South West Region	943	2	984,132	125	2.7
Gundagai	South West Region	926	5	307,758	105	2.2
Gunnedah	North West Region	943	11	289,015	59	2.4
Gwydir	North West Region	936	0	0		1.7
Hawkesbury	Central West Region	1,014	8	711,726		3.4
Hay	South West Region	922	2	176,902	64	1.7
Hilltops	South West Region	932	3	476,266	41	1.8
Inverell	North West Region	904	0	397,213	38	1.9
Junee	South West Region	927	2	78,923		2.0
Kempsey	North East Region	877	3	1,389,552	29	2.0
Kiama	South East Region	1,056	15	975,845	52	3.5
Kyogle	North East Region	905	0	131,239		1.5
Lachlan	Central West Region	922	0	249,250		1.6

**Appendix D – Suitability Pillar Data (2/2)**

Location	Tennis NSW Region	SEIFA	Coaching Score	2018 Total Bed Nights	Room nights available (000)	Suitability Score
Lake Macquarie	Northumberland Region	979	25	1,317,235	97	2.6
Leeton	South West Region	935	0	121,063	42	2.1
Lismore	North East Region	942	6	770,253	95	2.4
Lithgow	Central West Region	908	2	573,331		2.0
Liverpool Plains	North West Region	906	3	191,202		1.9
Lockhart	South West Region	971	0	0		1.9
Maitland	Northumberland Region	966	6	869,988	60	2.5
Mid-Coast	North East Region	911	14	3,756,662	308	3.3
Mid-Western	Central West Region	942	2	1,024,121	107	2.3
Moree Plains	North West Region	919	0	419,640		2.3
Murray River	South West Region	969	0	177,691	201	2.1
Murrumbidgee	South West Region	947	0	481,731		1.8
Muswellbrook	Northumberland Region	917	4	316,634	83	2.1
Nambucca	North East Region	896	7	579,166	40	1.7
Narrabri	North West Region	938	3	373,463	73	2.6
Narrandera	South West Region	919	0	151,598	48	2.3
Narromine	Central West Region	927	0	66,500	23	1.7
Newcastle	Northumberland Region	996	19	5,772,579	381	4.6
Oberon	Central West Region	951	0	277,445		1.8
Orange	Central West Region	968	9	1,653,893	204	3.2
Parke	Central West Region	927	3	403,063	107	2.5
Penrith	Central West Region	988	19	1,512,301		3.6
Port Macquarie-Hastings	North East Region	958	15	2,956,600	433	3.2
Port Stephens	Northumberland Region	959	11	2,802,282	429	2.8
Queanbeyan-Palerang	South East Region	1,057	2	700,200	166	2.7
Richmond Valley	North East Region	885	3	482,976	31	1.9
Shellharbour	South East Region	958	13	246,556	29	2.1
Shoalhaven	South East Region	944	15	5,283,765	256	3.3
Singleton	Northumberland Region	974	1	718,121		2.0
Snowy Monaro	South East Region	985	10	2,706,740	11	2.5
Snowy Valleys	South West Region	934	6	834,589	546	2.6
Tamworth Regional	North West Region	947	8	1,565,072	326	3.1
Temora	South West Region	943	2	86,954		1.8
Tenterfield	North West Region	902	0	217,300	74	1.6
Tweed	North East Region	956	7	1,953,360	500	2.6
Unincorporated NSW	Central West Region	904	0	0		1.5
Upper Hunter	Northumberland Region	958	0	360,939	60	2.3
Upper Lachlan	South West Region	987	3	0		2.0
Uralla	North West Region	966	0	0		2.2
Wagga Wagga	South West Region	978	2	1,971,993	315	3.2
Walcha	North West Region	970	0	145,301		1.9
Walgett	North West Region	856	0	375,011		1.3
Warren	Central West Region	945	0	160,619		1.8
Warrumbungle	North West Region	912	0	370,882	107	1.7
Weddin	Central West Region	948	0	17,444		1.7
Wentworth	South West Region	943	0	294,958	91	1.8
Wingecarribee	South East Region	1,022	13	1,227,530	204	3.1
Wollongong	South East Region	990	40	3,795,851	325	3.9
Yass Valley	South West Region	1,062	2	583,448	55	2.9



