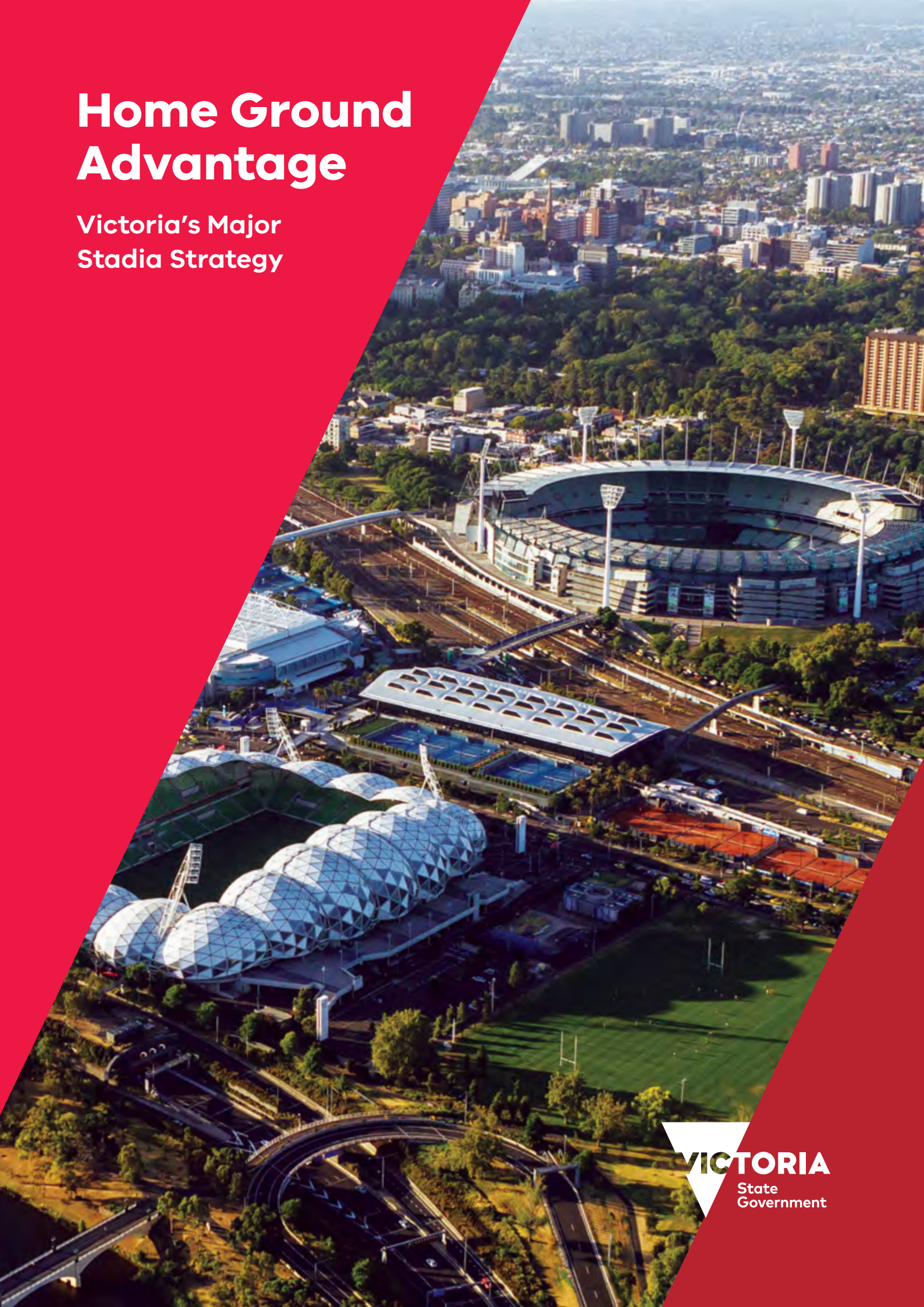


Home Ground Advantage

Victoria's Major Stadia Strategy



VICTORIA
State
Government

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AUSTRALIAN FOOTBALL LEAGUE
2018

Melbourne

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Minister for Sport's foreword



Hon John Eren MP
Minister for Sport

John Eren

Sport is central to our way of life. From the MCG to Kardinia Park, Victoria's major stadia are the envy of the world and the Government wants to keep it that way.

A key foundation of Victoria's reputation as Australia's sporting capital is its network of major sporting and events infrastructure. It's a key reason why Melbourne was recognised as the Ultimate Sports City of the decade in 2016.

Victorians are right to feel proud of our capacity to attract major events that showcase the best of the best in our own backyard.

They inspire a whole new generation of athletes and sports lovers, and put the international spotlight on Victoria and our ability to deliver again and again.

Victoria's passion for major events is reflected in the fact that nine million spectators attend them every year. Our events put the soul into our state and are a key contributor to our state's outstanding liveability.

With an increasing number and variety of events and crowd attendances; as well as the rise of major female competitions including W-League soccer, the Women's Big Bash League cricket and the AFLW competition, the Victorian Government is getting on with securing the future of the state's major stadia and arenas to ensure no one misses out on the benefits only major events can deliver.

I look forward to seeing the positive impact this strategy will provide to Victorians.





01



Purpose of the strategy

PURPOSE OF VICTORIA'S MAJOR STADIA STRATEGY

Victoria's Major Stadia Strategy focuses on major oval and rectangular field based stadia and indoor arenas which host national and international men's and women's sporting competitions and entertainment events. The strategy identifies what we should be doing over the next 30 years to ensure Victoria remains the premier state in sport and major events.



ETIHAD STADIUM

Promotional elements

Victoria has long been Australia's capital for sport and entertainment. We are home to the best sporting events and attract world class entertainment. Our capital city, Melbourne, is rated as the world's most liveable city and the Ultimate Sports City of the Decade.

THE LEADER IN SPORT AND ENTERTAINMENT

SPORT AND ENTERTAINMENT HELPS DEFINE WHO WE ARE

Victoria is Australia's premier destination for major sports and entertainment events. These major events help define who we are by enhancing liveability, attracting visitors and boosting our economy.

Our world class venues help make Victoria the preferred choice for men's and women's national sporting competitions and supports the attraction of large, international events.

In 2016, Melbourne was awarded the 'Ultimate Sport City of the Decade'. This prestigious award recognises that our venues are of world class standard and well located to engage the Victorian public and its many interstate and international visitors. Overall, Victoria's venues are a source of pride and inspiration for sporting excellence, cultural expression, talent attraction and a pillar of liveability.

Victoria's sporting and entertainment venues host marquee events including the AFL Grand Final, the Australian Open tennis tournament and the Boxing Day cricket test match. Our major venues' events calendar attracts approximately seven million patrons every year and contribute significantly to the state's \$21 billion visitor economy and makes Melbourne an international

destination. Our events and the venues that stage them are also fundamental to Melbourne being recognised as the world's most liveable city for seven consecutive years from 2011 to 2017.¹

Our network of major sporting and entertainment venues also boasts some of the best regional venues in the country like Kardinia Park in Geelong and Eureka Stadium in Ballarat. These venues provide regional Victorians with access to national and international events which contribute to local tourism, liveability and encourages community participation.

OUR WORLD CLASS VENUES HELP MAKE VICTORIA THE PREFERRED CHOICE FOR MEN'S AND WOMEN'S NATIONAL SPORTING COMPETITIONS AND SUPPORTS THE ATTRACTION OF LARGE, INTERNATIONAL EVENTS.

STRENGTHS OF OUR MAJOR VENUES

Our major venue network is recognised as one of the world's best. It sets the benchmark for operational standards and responding to user needs. The network's most powerful advantage is the diversity of venue types and sizes which allows for close matching with the events that they are hosting.

Quality

Victoria's major venues are maintained to a high quality standard for players, spectators and broadcasters which enables them to attract high profile events.

Capacity

Victoria's major stadia network has the capacity to meet the demand of Victoria's diverse events calendar due to its range of size and configurations, multi-purpose nature and strategic locations to maximise patronage.

Versatility

Victoria's major stadia network has the ability to adapt to varied provider and patron needs and can accommodate multiple event programs, often in close proximity.

Accessibility

Up to 85 per cent of Victorians live within an hour of at least one major sport and entertainment venue.²

¹ The Economist, *Intelligence Unit Index* - <https://www.economist.com/blogs/graphicdetail/2016/08/daily-chart-14>

² Deloitte 2017, *Catchment Population Metrics*, Deloitte, Melbourne.

POLICY CONTEXT

ACTIVE VICTORIA – A STRATEGIC FRAMEWORK

Victorians benefit from sport and recreation through various avenues including physical participation, volunteering, coaching and spectating. *'Active Victoria – A strategic framework for sport and recreation in Victoria'* outlines the key drivers that we seek from sport and recreation, including:

- economic growth and jobs
- community cohesion
- liveability
- healthier Victorians.

ECONOMIC GROWTH AND JOBS

Victoria's major events contribute \$1.8 billion³ to the state's economy and events at our major venues contribute an additional \$753 million to the economy and support more than 2,600 full time-equivalent jobs.⁴

Events attract visitors and generate economic activity via tourism and patronage. Event and venue operations create employment, including for athletes and performers, and people working directly for the venue, the content owner and businesses that support event staging. In 2016, the Australian Open alone delivered 1,109 full time equivalent jobs for Victorians and injected a record \$278.1 million into our economy.⁵

Major events stimulate local economies through visitor activity. Geelong Football Club's home games played at Kardinia Park contribute \$18.5 million per season in local business activity and raise the profile of the city, encouraging tourism visitation.⁶

COMMUNITY COHESION

The network of venues provides places for people to come together, helping strengthen social and community connections. That's why over nine million spectators attend events at Victoria's major venues every year.

Victorians are proud of our events and the venues that host them. Victoria's venues are an essential part of our culture and our status as a global leader in sport and entertainment.

These venues provide a stage for our favourite teams and entertainers to perform and captivate Victorian audiences. Whether it is a Diamonds versus Silver Ferns netball match or the AFL Grand Final, major events have the capacity to draw us in, lift our mood and inspire us long after the experience is over.

LIVEABILITY

Major events engender a sense of civic pride through the provision of quality infrastructure and the staging of world class events. These events and venues encourage people to get together, share and contribute to making their community an even better place to live.

HEALTHIER VICTORIANS

Our major stadia and arenas showcase elite professional sport to encourage Victorians to emulate the athletes they are watching, and help encourage them to get active and improve their health. The success of the inaugural AFL Women's competition in 2017 led to the formation of 327 new teams and 10,000 new community level participants in the sport across the state. Significant investments in infrastructure to support these competitions, will provide a platform for our future athletes, from grassroots to elite, to emulate their heroes and chase their dreams of being the next NBL, W-League or Super Netball star.

³ Ernst & Young/Victorian Major Events Company 2014, *An Eventful Year: Economic Impact of the Victorian Major Events Calendar*, Ernst & Young, Melbourne.

⁴ Marsden Jacob Associates 2017 (unpublished), *Value of Sport – The economic impacts of Sport in Victoria*, Marsden Jacob Associates, Melbourne.

⁵ Australian Open 2016, Australian Open delivers record economic benefits to Victoria [Press Release]. Retrieved https://2017.ausopen.com/en_AU/news/articles/2016-10-09/australian_open_delivers_record_economic_benefits_to_victoria.html?promo=next_article

⁶ Deloitte 2017, *CGE Analysis*, Deloitte, Melbourne.

GOVERNMENT PRIORITIES

The strategy aligns closely with the Victorian Government's policy priorities of gender equality, regional investment, accessibility, transport integration, and safety and security.

GENDER EQUALITY

The state's *'Gender Equality Strategy'* noted sport and recreation as one of the six settings for state-wide action to deliver cultural change. The government-initiated *'Inquiry in Women and Girls in Sport and Active Recreation'* highlights the need to transform our cultural and physical environment for sustainable outcomes to be achieved.

INVESTING IN REGIONAL VICTORIA

Providing regional Victoria with the ability to stage major events to showcase sport at the highest level will strengthen the social, economic and cultural fabric of Victoria and is fundamental to the future direction of the state's major venues network.

BETTER VENUE ACCESS

Ensuring major venues are accessible to people of all abilities is critically important and provides players and spectators regardless of age, ability or gender the ability to utilise and engage with the state's major venues. This will be achieved through the incorporation of the universal design principles into future developments and upgrades to venues and surrounding precincts.

TRANSPORT INTEGRATION

When considering infrastructure upgrades, greater emphasis must be given to creating seamless integration between transport modes and venues, especially on event days to ensure safe and efficient entry and exit.

SAFETY AND SECURITY

People's safety and security is of paramount importance in our venues. Permanent and temporary risk mitigation measures must be taken into account in the planning and upgrading of future major venues.

VISITOR ECONOMY

Victoria cannot rest on its laurels. Visitors to Victoria bring money and support jobs and investment. The visitor economy contributes around \$21 billion to Victoria's Gross State Product each year and generates employment for 206,000 people, which represents five per cent of gross value added and seven per cent of employment.

The Victorian Visitor Economy Strategy sets a goal of increasing visitor spending to \$36.5 billion by 2025 and identifies priorities across nine policy areas, including maximising the benefits of events, and better tourism infrastructure.

PEOPLE'S SAFETY AND SECURITY IS OF PARAMOUNT IMPORTANCE IN OUR VENUES

SUCCESS OF THE INAUGURAL AFL WOMEN'S COMPETITION LED TO THE FORMATION OF

327 NEW TEAMS & 10,000

NEW COMMUNITY LEVEL PARTICIPANTS IN THE SPORT ACROSS THE STATE.

IN 2016 THE AUSTRALIAN OPEN ALONE DELIVERED

1,109 

FULL TIME-EQUIVALENT JOBS FOR VICTORIANS

AND INJECTED A RECORD **\$278.1 MILLION** INTO OUR ECONOMY



03

Victoria's stadia network

Victoria's major stadia network is the backbone of our sports and entertainment industry. Together they host a diverse annual calendar of over 400 major events, and affirm Victoria's status as Australia's capital city for sport and entertainment.

A WORLD CLASS NETWORK

Victoria's venue network infrastructure has been built to meet the increasing requirements of established men's and women's national sporting competitions, new competitions and a burgeoning number of international sporting and touring entertainment events.

Changing preferences and requirements among patrons, venue hirers and athletes have also changed how our venues are designed, operated and presented.

Victoria's major stadia and events network continues to experience pressure from a range of different sources at a faster pace than ever, including evolving content needs, changing consumer expectations, and higher standards set by interstate and international venues. This pressure means venues have shorter lifespans and require ongoing improvements to maintain the quality of their offering and an ability to attract events.

CHANGING PREFERENCES AND REQUIREMENTS AMONG PATRONS, VENUE HIRERS AND ATHLETES HAVE ALSO CHANGED HOW OUR VENUES ARE DESIGNED, OPERATED AND PRESENTED.

THEY HOST A DIVERSE
400 MAJOR
EVENTS
ANNUALLY

THE OPERATING ENVIRONMENT

Sports content

Victoria is one of the most unique sports markets in the world with over 30 professional and semi-professional men's and women's teams, along with international sporting and entertainment events such as concerts, family shows, music festivals and cultural events.

Changing preferences and requirements among patrons, venue hirers and athletes have also changed how our venues are designed, operated and presented.

Venue ecosystem

Venues form an important part of the sport and event 'eco-system' that includes venue managers, venue hirers, professional clubs, sporting bodies, event promoters and patrons (or consumers).

Achieving sustainability requires venues to get enough content hirers and sporting codes to generate a return from staging events.

Our stadia and arenas are part of an interdependent venue network

Our major stadia and arenas are at the top of an interdependent hierarchy of sporting and entertainment venues that enables participants to progress from community level participation, as the base level, through the athlete pathway to competing in major events.

The power of regional venues

Opportunities to stage events outside metropolitan areas are increasing due to improved infrastructure, growing population and technology that is more transportable.

In 2014, the Australian Diamonds netball team played a Test Match at Bendigo Stadium and in 2017, Eureka Stadium in Ballarat hosted its first AFL Premiership Season match.

Current provision and future considerations

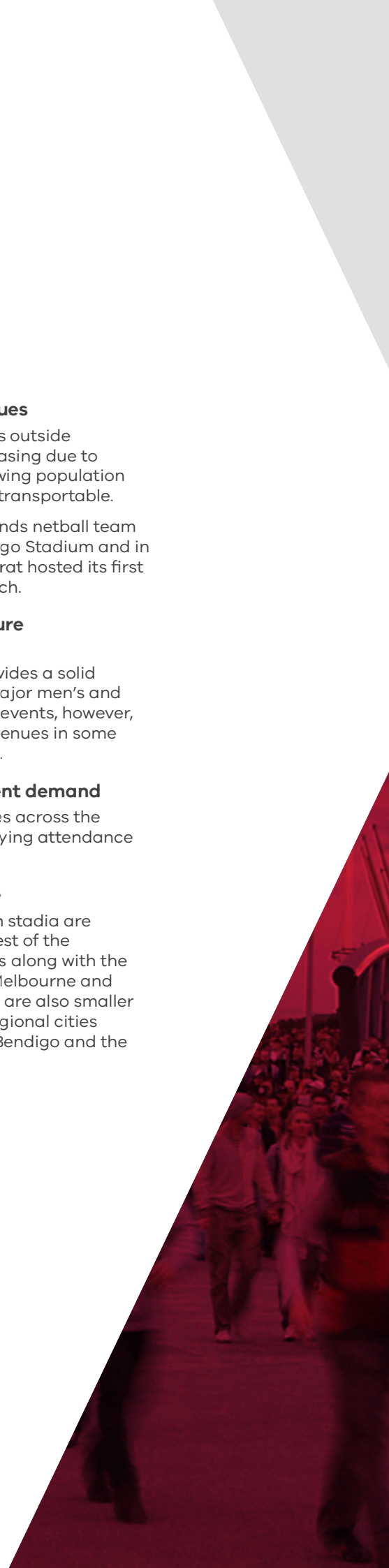
Victoria's venue network provides a solid foundation to cater for the major men's and women's sporting codes and events, however, the quality and standard of venues in some cases needs to be addressed.


Venues able to meet current demand

The different venue capacities across the network are able to meet varying attendance and growth demands.

Location around the state

The major inner metropolitan stadia are centrally located east and west of the Melbourne CBD near rail hubs along with the major arenas in the central Melbourne and Olympic Park precinct. There are also smaller scale stadia and arenas in regional cities including Geelong, Ballarat, Bendigo and the Latrobe Valley.





**Victoria's venue network
provides a solid foundation
for men's and women's major
sporting codes and events**



The need to invest

To stay ahead of the competition and retain our status as Australia’s sporting and events capital, we must deliver a well-targeted, sustainable strategy.

INTERNATIONAL AND INTERSTATE COMPETITION

The Victorian Government is already investing to build and maintain a network of major facilities to secure our status as a world class sporting and events state. This investment is evident through projects such as the Melbourne and Olympic Parks redevelopment, Stage 4 of Kardinia Park and Junction Oval.

But international competition for major events is increasing continually and other Australian states are undergoing significant change to keep pace. For example, new developments are planned, underway or recently completed in Perth, Adelaide, Sydney and Townsville that will compete directly with our venues.

To stay ahead of the competition and retain our status as Australia’s sporting and events capital, we must deliver a well-targeted and sustainable strategy. Even more importantly, investing in the quality of our major venues will provide greater amenity for the people who use them – the Victorian public and visitors alike.

Impact of global trends

Global trends in stadia design, development and operation are driven by changing market demands such as audience expectations, technology requirements, funding availability, broadcast against the gate and security requirements.

INVESTING IN THE QUALITY OF OUR MAJOR VENUES WILL PROVIDE GREATER AMENITY FOR THE PEOPLE WHO USE THEM – THE VICTORIAN PUBLIC AND VISITORS ALIKE.

COMPETING IN A RAPIDLY CHANGING MARKETPLACE

It is important that Victoria's network keep pace with changes taking place domestically and internationally.

Providing state of the art infrastructure will enhance the overall network and strengthen our status as Australia's major events capital.

Availability of content

Attracting and keeping sport and entertainment events is becoming increasingly competitive. This competition is likely to increase as more quality venues continue to come online around the country.

Expectations of consumers and content owners

Patrons and content owners have increasingly high expectations of service quality and amenity offered by sporting and entertainment venues.

Key users are seeking opportunities to socialise and engage with events well beyond the boundaries of the venue. Globally, this has seen the growing popularity of live sites which showcase events.

Rapidly evolving design and functionality standards

New stadium and arena developments in Australia and overseas are providing modern venue offerings that demonstrate what is possible in stadium and arena provision, while directly competing with Victorian venues.

Stadium and arena design is constantly evolving with contemporary venue design now focused on the 'fan experience' to maximise ongoing patronage among younger generations.

Central to worldwide evolving customer expectations is the need for:

- precinct integration and activation
- enhanced technology capability
- improved player facilities
- better spectator amenities
- more food and beverage choices
- more social spaces.

New content like eSports and more diverse entertainment will require venues that are as versatile as possible to allow for purpose built overlay infrastructure to be used.

Greater security

International incidents have prompted government, venue owners, content owners and patrons to put much greater emphasis on security and safety, both inside and outside venues.

Reliance on venues

In Victoria, the sport and entertainment sectors have come to rely on financial returns from events and venues to support their core business and pathway development. This is particularly the case for sports with lower profiles and less capacity to generate revenue from media rights, and the entertainment sector which now relies on live events as its main source of revenue.

Competition from home and other discretionary activities

Competition for a person's discretionary time and money has never been greater. The choices available on how to spend leisure time are extensive. Consequently, staged events and the overall experience of those events must be especially compelling.

KEY USERS INCREASINGLY ARE SEEKING OPPORTUNITIES TO SOCIALISE AND ENGAGE WITH EVENTS WELL BEYOND THE BOUNDARIES OF THE VENUE.





05

Priorities

The strategy considers policy, major development and renewal projects that will ensure Victoria remains Australia’s major sports and entertainment destination.

POLICY PRIORITIES

Key policy considerations are central to strategy development and will shape and inform the overall priorities for the venue network. The following policy priorities are integral to enabling infrastructure and future investment:

- professional women’s sport
- regional event attraction
- transport integration around major venues
- safety and security
- universal design.

Professional women’s sport

To cater for the growing profile and popularity of professional women’s sporting competitions, there is a need to provide venues that have suitable facilities for female athletes, provide an inviting atmosphere for spectators to attend games, and provide broadcast support infrastructure to ensure matches are professionally presented through the television broadcast.

Regional event attraction

Support more sport and entertainment venue and events in regional Victoria through infrastructure and event funding to enhance liveability and amenity for regional Victorians.

Transport integration

Improve accessibility to the major venues network by better integrating transport and venues on event days through more effective stakeholder communication, and investment targeted at transport infrastructure and services.

Safety and security

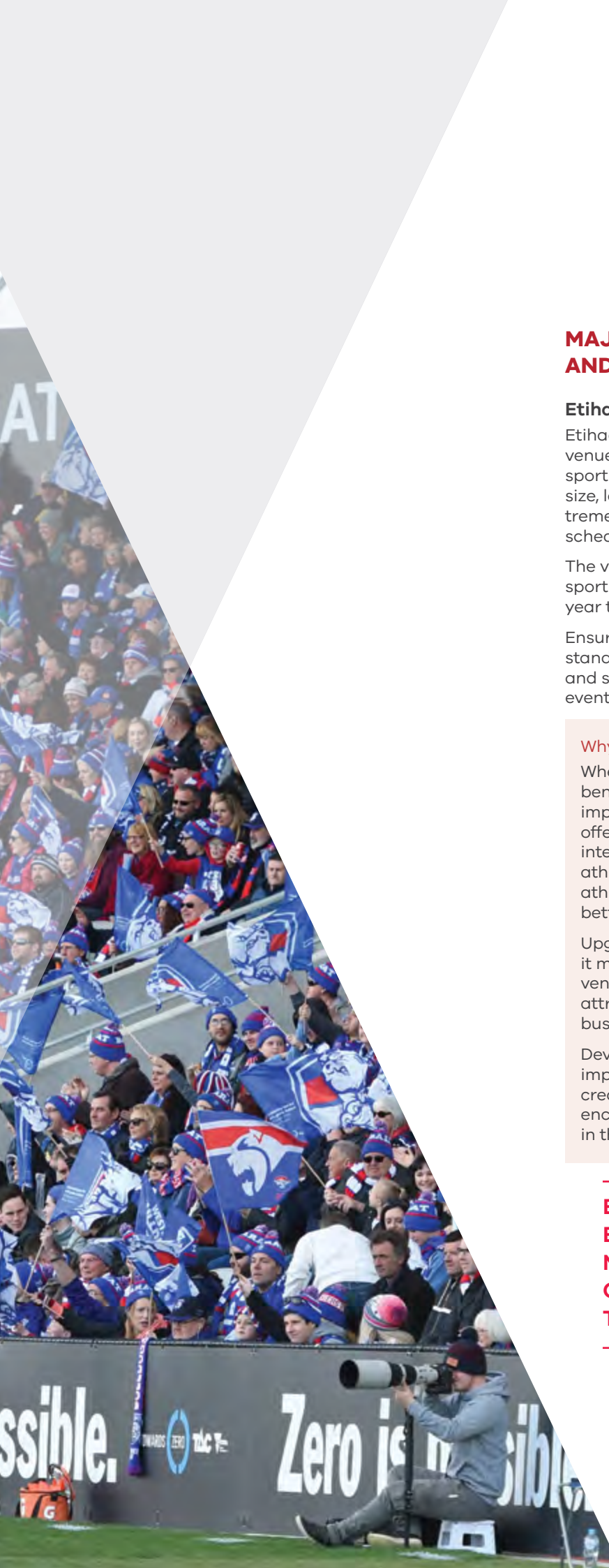
Ensure security and safety of all venue users by using best practise approaches including using guidance from *Australia’s Strategy for Protecting Crowded Places from Terrorism*.⁷ This may also include venue managers adopting similar approaches to risk mitigation whilst taking into account the different scale of venues and events.

Universal design

Ensure all new investments incorporate universal design principles in accordance with Victorian Government policies, such as *Design For Everyone: A Guide To Sport And Recreation Settings*.

IMPROVE ACCESSIBILITY TO THE MAJOR VENUES NETWORK BY BETTER INTEGRATING TRANSPORT AND VENUES ON EVENT DAYS THROUGH MORE EFFECTIVE STAKEHOLDER COMMUNICATION, AND INVESTMENT TARGETED AT TRANSPORT INFRASTRUCTURE AND SERVICES.

⁷ Commonwealth of Australia 2017, *Australia’s Strategy for Protecting Crowded Places from Terrorism*, Canberra.



MAJOR DEVELOPMENT AND RENEWAL PRIORITIES

Etihad Stadium

Etihad Stadium is an essential part of Victoria's major venues network and is critical to support Victoria's annual sporting and entertainment events calendar. The venue's size, location and multi-purpose capability provides tremendous flexibility to accommodate a diverse schedule of events and activities.

The venue supports the scheduling requirements of many sporting codes and attracts millions of attendees each year to sport, entertainment and cultural events.

Ensuring the stadium is maintained at a world class standard is vital to ensure it captures maximum value, and strengthens Victoria's status as the sporting and events capital of Australia.

Why develop?

When it was first built, the stadium set a world benchmark but is now almost 20 years old and needs improvements to provide a modern contemporary offering for players and spectators. These include internal and external amenity upgrades, better athlete services, improved facilities for our female athletes, wider internal concourses and access, and better connections to the surrounding precinct.

Upgrading Etihad Stadium is essential to ensuring it maintains its standard against other stadium venues around the country, continues to be an attractive place for fans, and supports the many local businesses which benefit from its regular patronage.

Developing Etihad Stadium is an opportunity to improve the surrounding precinct by capturing and creating additional value through incentives that encourage appropriate private sector investment in the precinct.

**ENHANCING ETIHAD STADIUM IS
ESSENTIAL TO ENSURE THE VENUE
MAINTAINS ITS STANDARD AGAINST
OTHER STADIUM VENUES AROUND
THE COUNTRY.**

Professional women's sport

Professional women's sport is growing, with many codes either considering the women's competition as a 'double header' event with the men's competition or holding standalone events in 'prime time' time periods. Victoria's mix of venues enables 'right size' venues to be used in order to maximise atmosphere and provide a solid base for competitions to grow, such as Whitten Oval playing host to AFLW matches and Junction Oval for WBBL matches.

PROFESSIONAL WOMEN'S SPORT IS GROWING, WITH MANY CODES CONSIDERING THE WOMEN'S COMPETITION AS A 'DOUBLE HEADER' EVENT.

Why develop?

It is a priority to ensure venue facilities are appropriate to stage professional women's sport. These include better athlete amenities, upgrades to changing room, medical, recovery and media facilities, lighting, operational infrastructure and spectator amenities.

The standard of venues earmarked to host professional women's sport need to enable the further growth of competitions. Venues must provide appropriate facilities to support athlete preparation and an environment that attracts spectators.

Major and minor venues across the network currently need capital upgrades because they don't have facilities necessary to stage women's professional sport, such as the State Netball and Hockey Centre and other training, competition and administration facilities across our State.

Such improvements will enhance Victoria's sporting reputation, provide appropriate conditions for professional women's sport to be staged, increase their following, and encourage greater female cross-sport participation – especially among children.

Eureka Stadium

Eureka Stadium in Ballarat has recently been upgraded following the completion of Stage 1 works were completed in 2017. The venue now has 5,000 seats and a total capacity of 11,000, with opportunities for further development. Eureka Stadium provides Victoria with a second regional stadium that can attract state, national and international events, including regular AFL games. The venue also helps with scheduling growth, including that of women's sport.

Why develop?

Providing quality infrastructure in regional Victoria is essential to the ongoing economic development of our regions and to make them even more appealing places to live and work.

Eureka Stadium's Stage 1 works provide a foundation for further development. Such ongoing improvements are necessary to attract more diverse and larger content to the venue.

IMPROVEMENTS ARE NECESSARY TO ATTRACT MORE DIVERSE AND LARGER CONTENT TO THE VENUE.

Kardinia Park redevelopment

Kardinia Park in Geelong is arguably Australia's premier regional stadium. The venue is home to the Geelong Football Club and regularly hosts cricket and soccer.

Over the past decade, the venue has had several redevelopments to expand its capacity and improve spectator amenity. Most recently, \$3.9 million was provided to deliver a business case and design development for a Stage 5 redevelopment. The delivery of this final stage is required to complete the venue, increase capacity to 40,000 and provide a premium venue option for regional Victoria.

**INCREASE CAPACITY TO 40,000
AND PROVIDE A PREMIUM VENUE
OPTION FOR REGIONAL VICTORIA.**

Why develop?

The venue's completion gives Victorians another venue of approximately 40,000 capacity to enhance regional Victoria's reputation as an events destination.

This will improve the venue's status as a multipurpose venue and ensures all attendees have access to world class facilities usually only available at metropolitan venues.

Development works, a bigger events calendar and a larger venue will generate economic benefits for the Geelong region such as the Matilda's game against China in 2017.

MCG and precinct works

The internationally renowned MCG is the premier stadium in Victoria's major venues network, hosting marquee events such as the AFL Grand Final and Boxing Day Test Match.

The largest venue in the network, it hosts more than 60 major events a year and is essential to Victoria's capacity to stage major events.

The MCG has continually evolved to secure its position as a world class venue. The next phase of works to maintain the venue aims to improve pedestrian connections to transport hubs and around the precinct, and redevelop the Great Southern Stand.

Why develop?

The MCG's status as one of the world's great sporting stadia must be supported by facilities that are equivalently world class. The lifespan of major venues is becoming shorter due to the increasing pressures of consumer demands and technological advances. For example, while the Great Southern Stand has undergone refurbishment in the last 10 years it will be almost 40 years old in 2030 and without further improvement, will lack the contemporary facilities that athletes and spectators require.

A greater number of larger events puts increasing pressure on the surrounding precinct to manage pedestrian traffic. Long term solutions are required to better integrate all venues in major sporting precincts and increase public transport access.

**LONG TERM SOLUTIONS ARE
REQUIRED TO BETTER INTEGRATE
ALL VENUES IN MAJOR SPORTING
PRECINCTS AND INCREASE PUBLIC
TRANSPORT ACCESS.**



TO SUPPORT MAJOR DEVELOPMENT PRIORITIES, ONGOING VENUE RENEWALS, SUCH AS SMALLER SCALE UPGRADES, WILL BE NEEDED ACROSS THE NETWORK SO ALL FACILITIES CONTINUE TO RESPOND TO CHANGING DEMANDS.

VENUE RENEWALS

To support major development priorities, ongoing venue renewals, such as smaller scale upgrades, will be needed across the network so all facilities continue to respond to changing demands. The timing of venue renewals will be determined by factors that include venue age and changing user requirements, although it is expected that renewals generally take place in the middle of a venue's lifecycle.

PIPELINE PROJECTS UNDER INVESTIGATION

In addition to the Major Development and Renewal Priorities outlined in the strategy, it is recognised that a long term view of potential pipeline projects needs to be considered to compliment the venue network. These pipeline projects are largely determined by appropriate content models to support investment. These projects could include:

- redeveloped and new arenas in metro and regional Victoria capable of hosting national and international competition
- redeveloped and new rectangular stadiums.





