



Barwon Tennis Strategy 2024 - 2034

POWERED BY KINETICA





Introduction

In 2015, the G21 Tennis Strategy was developed to provide strategic direction for facility planning for the Barwon Region. Since this time, the region and the tennis industry has evolved and grown considerably. Geelong has continued its emergence as one of Australia's major cities by attracting major employers to the regions, improved transport links between Geelong and Melbourne, and an increasingly appealing lifestyle option.

The Barwon Tennis Strategy 2024 has been designed to provide a blueprint for growth to all stakeholders who have a vested interest

in seeing tennis thrive; in particular Tennis Victoria, local tennis clubs and associations, residents and local government.

From a tennis perspective, Tennis Victoria (and Tennis Australia) have invested considerably in its data and analytics capability, and have made advances in better understanding of the club network and how it performs. This coupled with unique insight into the local area demand for tennis (beyond just membership), provides the sport with the critical insight to determine now and into the future how best to serve each community with a bespoke, tailored offer.

Executive Summary



Increased participants

Increased growth in Tennis across the Barwon Region. Supporting existing participation in schools, events, internal club competition, inter-club competition, tennis coaching and other complimentary tennis formats.



Increased events / improved player pathways

Increase in events in the region catering for all standards from local to high level events.

A public access regional facilities which have the capacity to host higher level events, association finals, larger competitions, and provide facility that aids the regional talented player pathway. This venue has been identified in Armstrong Creek and is critical to the sports success in the region.



Improved facilities

Increasing the capacity of existing facilities through implementation of recommendations identified. The installation of sporting lighting is critical to ensure the sport cater for participation growth and future demand.



Increased access to facilities

Increased access and transparency around access to facilities making playing easier at all times of the day. Assisting venues with digital solutions, clear and transparent communication, and the ability for lights to be accessed by the entire community.



Increased sustainability of venues

The commitment to work with Tennis clubs to ensure they remain sustainable. With use of the Health in Tennis Tool (HiT) and providing insights as to the club's health. This analysis ensures clubs maximising participation, understand the requirements to maintain and update assets and are financially viable.



Increased access to coaching

Increasing the amount of quality coaches in the region. Through increasing training courses, regular re-skilling and access to online coaching resources will provide the region with access to coaching.

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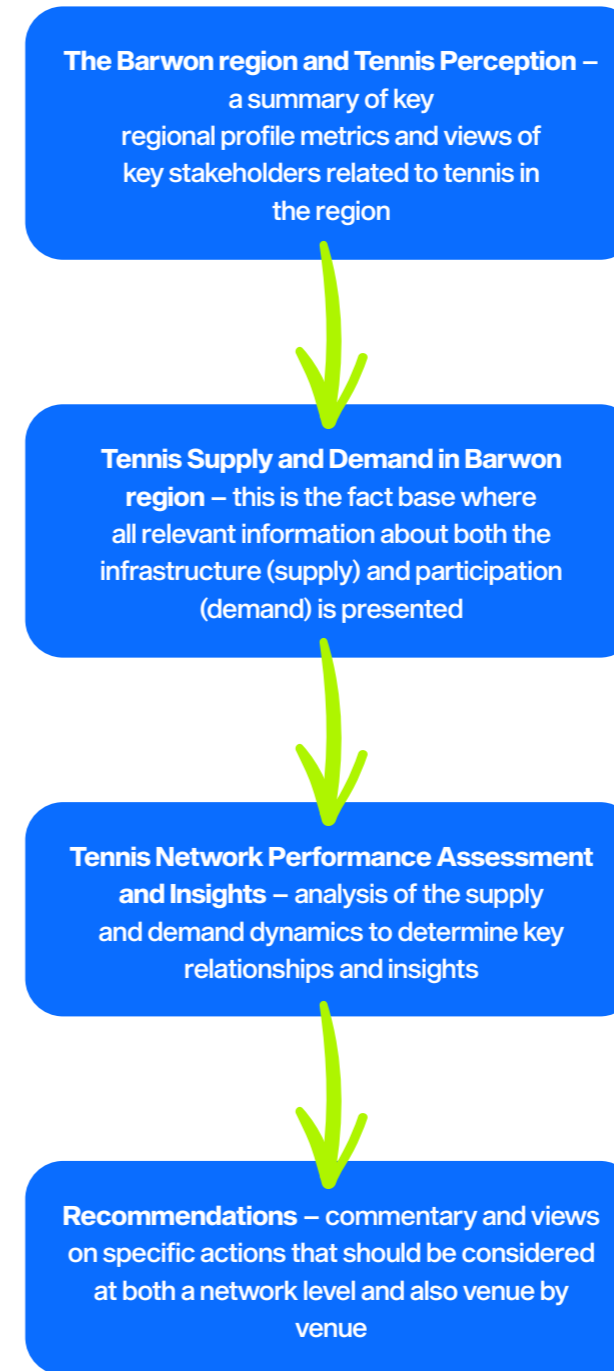
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Our Approach

The document is structured as follows:



This document provides each of these stakeholders with a clear plan on how to optimise of the club/venue network by understanding and identifying:

- ① The network coverage (by venue type)
- ② The distribution of people and demand/latent demand to play tennis across the region (down to the suburb level)
- ③ The performance of the network (where data is available)
- ④ Drivers for performance differentials based on a combination of venue attributes and local catchment demographic and socio-economic profiles

Each of these key inputs is combined to provide both regional and venue by venue recommendations.

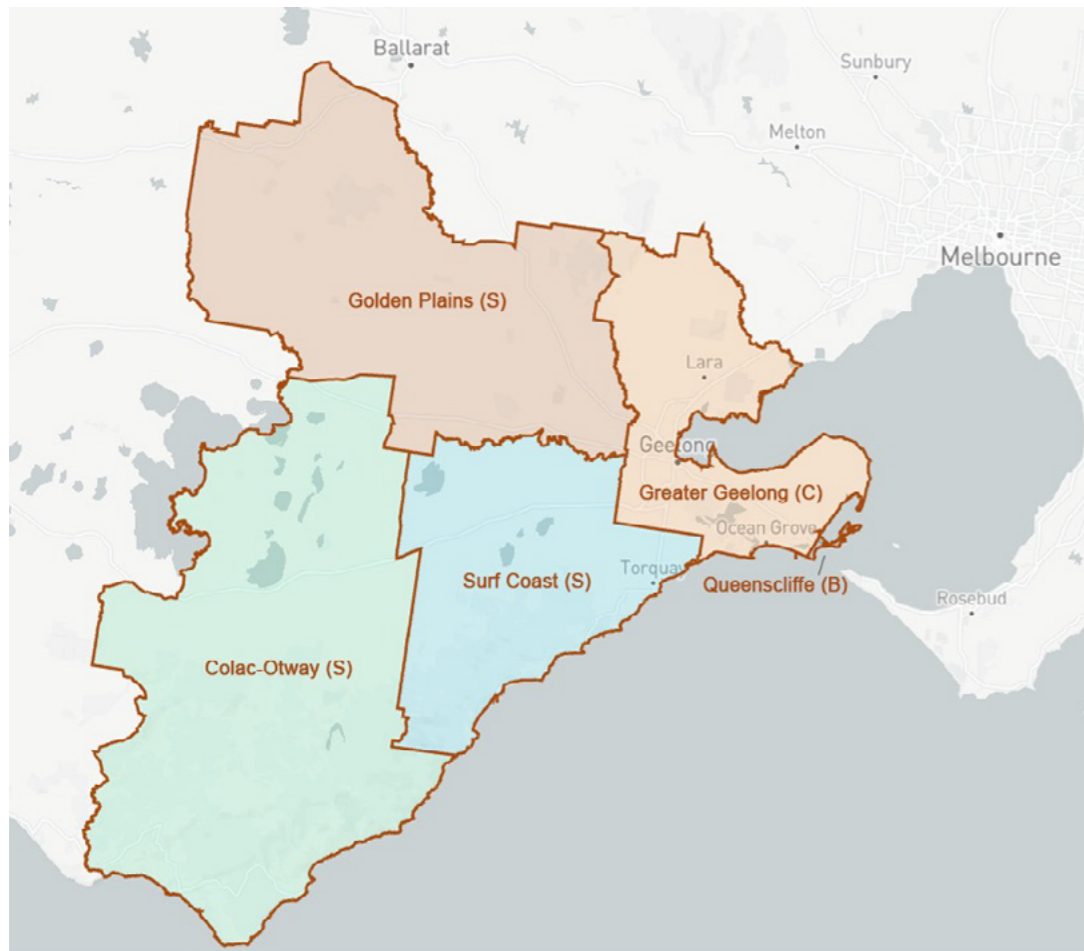
Tennis in Barwon

‘The Barwon Region offers the best of regional, rural and coastal lifestyles and will see strong population growth between 2024 and 2034’

The Barwon (G21) Region has a population in excess of 360,000 people and covers an area of almost 9,000 square kilometres. The region is set to increase by approx. 85,000 people in the next 10 Years.

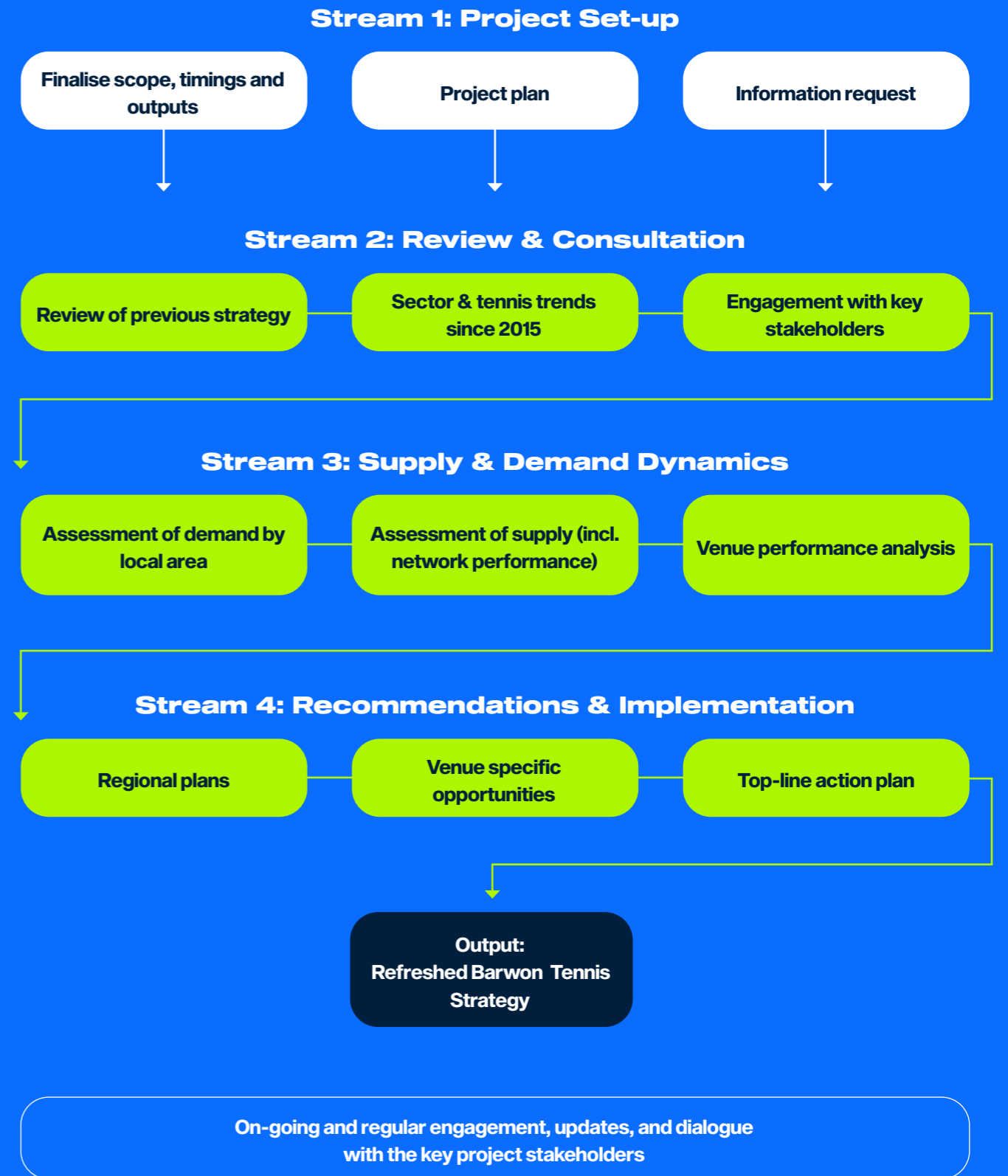
The Barwon (G21) Region consists of the following LGAs:

- 📍 City of Greater Geelong
- 📍 Surf Coast Shire
- 📍 Golden Plains Shire
- 📍 Colac Otway Shire
- 📍 Borough of Queenscliff



Project Overview

The strategic planning process employed to complete this project is summarised below.



Key Stakeholder engagement findings

Opportunities:



More coaching/coaches in the area



More social programs to engage and connect people



More diversified offering – competition, social play, different days and times



Improve the narrative and tell Tennis' story better



Publicly accessible regional facility and potential for multi-purpose facilities



Better understanding of where club members are travelling from to play

Challenges:



Lack of coaching/coaches in the area



Year-round access to facilities (lack of lit venues)



Utilisation of venues



Data capture for council venues



Clubs business models



Demonstrating the value of tennis

Key Stakeholder engagement key topics

Infrastructure

- ⦿ Sustained investment in tennis infrastructure.
- ⦿ Strategic direction for facility provision.
- ⦿ Equitable distribution.
- ⦿ Well maintained public courts.
- ⦿ Contemporary delivery model.

Participation

- ⦿ Participation across ages and abilities.
- ⦿ Community use and access to facilities.
- ⦿ Remaining affordable.

Governance

- ⦿ United front, priorities and strong partnerships.
- ⦿ Strong governance at all levels.
- ⦿ Alignment with city policies and strategies.
- ⦿ Safe & inclusive, well governed, provide clear pathway, sustainable facilities.

Volunteers / Coaches

- ⦿ Established succession/development plan and program for volunteers.

Club Support

- ⦿ Support and direction for local clubs to be able to grow and maintain participation.

Investment / Sustainability

- ⦿ Co-investment – How can we consider co-investment opportunities such as CORA.
- ⦿ Advocacy – How can we as a sport benefit from the Commonwealth Games Legacy fund.
- ⦿ Hockey a sport that is working well on co-investing on delivery models and advocacy.
- ⦿ Story telling
- ⦿ Data, data, data, social ROI and storytelling on the benefits of Tennis participation.
- ⦿ Where are club members travelling from to participate in Tennis?
- ⦿ Rationale and data behind the opportunity analysis.
- ⦿ Surf Coast Shire venues are performing well from a capacity and participation benchmarking perspective.
- ⦿ Colac Otway Shire– smaller shire, challenges in meeting investment and budget requirements given limited resources and finances.
- ⦿ Difficult for smaller councils to find budget.







Strategic Framework

Ambition				
Tennis thriving in the Barwon Region				
Strategic Pillars	Places	People	Play	Sustainability & Growth
		A network of clubs/venues that are highly accessible to the vast majority of residents and provide a diverse range of offers	Diverse skilled coaches and a strong volunteer network	Provide a range of offers that meets the needs of the different playing cohorts
Primary Activity	<ul style="list-style-type: none"> Identify opportunities to improve/enhance the club network Extend availability of court access through lighting Improve access through technology (e.g. book a court) 	<ul style="list-style-type: none"> Attract and train coaches to the region through increased employment opportunities Attract, recognise and reward volunteers 	<ul style="list-style-type: none"> Ensure tennis can be played in a variety of formats/offering in the region – pennant, social competition, programs, coaching, social play Ensure offers are available at flexible times of the week 	<ul style="list-style-type: none"> Work with clubs/venues to optimise their business models to ensure they're self sustaining Develop/enhance a culture of growth through improved utilisation Use data to track network performance and iterate
	Success Indicators	Every person in the Barwon region lives with 15 minutes of a tennis venue with lights	All clubs/venues with 4 courts or more have a qualified coach at least part time	Every person in the Barwon region can access (within 15 minutes) at least 2 different types of formats

Please note in regional / rural communities of Golden Plains Shire and Colac Otway Shire, travel time success indicators may not be able to be achieved.

Current State of Play

The following insights have been garnered from key stakeholder feedback and network planning gap analysis:

-  Barwon region has broadly enough courts, and they are generally located in the areas where there is a density of tennis interest and participation.
-  The vast majority of tennis venues have less than 6 courts or less (92%) and almost half have only 1 or 2 courts. These types of venues typically don't/can't provide a suite of services.
-  In the areas expecting the most population growth (Armstrong Creek) there are currently no venues with at least 5 courts within 5km of where a significant number of people will reside in the next decade (and extending down to Torquay).
-  One-third of tennis venues in the Barwon region have lights. They perform significantly better than venues without lights.
-  Only two venues in the region have more than 13 courts (Colac Lawn Tennis Club and Geelong Lawn Tennis Club). This provides significant limitations to the regional events and tournaments.
-  Less than 5% of the population live further than 5km from a tennis venue. The 'gaps' in the network are in low density population areas. Proximity to venues with 5 or more courts (those more likely that offer a suite of tennis offerings) is more limited.

Summary based on network assessment:

-  Improvements can be made to the venue 'mix' and distribution of the network to ensure improved proximity to a range of venue types/offerings. Opportunities have been highlighted within recommendations.
-  Tennis Victoria and Tennis Australia believe there is significant opportunity for a venue to service all elements of tennis including regional pathways and professional events. There is a significant gap in provision in Barwon region and specifically Geelong. This is best positioned to be in Armstrong Creek growth area.
-  Access in the growth area around Armstrong Creek (and further south) should be considered, with a venue size of at least 6 courts (and more likely a minimum of 8) to service local needs.
-  Thriving Tennis Communities framework and reporting is incredibly important to both clubs and council. It's imperative that all clubs within the Barwon region complete assessments.

Supporting information

- 1) Appendix 5
- 2) Appendix 4 & 12
- 3) Slide 18 & Appendix 9
- 4) Appendix 6, 10, 11, 12, 13
- 5) Appendix 5
- 6) Appendix 6 & 8
- 7) Appendix 5
- 8) Appendix 4 & 12
- 9) Appendix 9
- 10) Appendix 10

Tennis Network performance assessments and insights



Venue Performance

Tennis Victoria and Australia have embarked on an ambitious data project to better understand the performance and sustainability of their venue network. To date, over 1250 venues Australia-wide have been 'audited' with detailed data collected on:

- ① The physical attributes of the venue (no. courts, court type, lighting etc)
- ② Venue operating model
- ③ Venue offering (competition, coaching, social play, programs)
- ④ Utilisation (no. visits per annum by type of visit)
- ⑤ Financial sustainability
- ⑥ Communication and marketing channels (book online, website)

In total, Kinetica was able to analyse the performance data of the venues that had been participated in the Health in Tennis audit process. When combining the rich information collected through the venue audit process with the local area demand profiles, a number of unique, compelling insights are unearthed that provide robust rationale for the recommendations provided to optimise the tennis venue network across the region.

A strong recommendation is to continue to complete Health in Tennis Assessments using the Thriving Tennis Communities framework and report back to councils on their performance.

Venue Performance Summary

Metrics	Explanation	Alignment to Strategic Framework
Number of courts	There is a 'sweet spot' in terms of the number of courts that optimise participation/utlisation (5-8 courts). Small venues (1-2 courts) play a role in providing cheap/free access, while large venues (12+) can accommodate larger scale competition and tournaments	<p>Play – access to a range of formats/ tennis options</p> <p>Sustainability & Growth – venue size is correlated to financial performance/sustainability for both small and large venues</p>
Lights	Sustainability & Growth – for venues to be sustainable and grow, data demonstrates venues with lights are more likely to perform.	Places – not only access to a court but access at high demand times which lights provide
Competition (venue) quantum and proximity	Venues with a number of other venues nearby arguably aren't as strategically important to the network (holding all else equal) as those that have limited nearby venues, especially if they are the same type of venues	Sustainability & Growth – a key consideration ensuring supply and demand are close to equilibrium
Population in catchment	More people living within the catchment area of a club provides a greater opportunity to engage people in the sport (holding all else equal)	<p>Sustainability & Growth – for venues to be sustainable and grow there needs to be a critical mass of people (and demand) now and in the future</p> <p>Places – ensuring equitable access in the future requires understanding of likely future population movement, and therefore future demand</p>
Population in catchment in the future	Population growth can/will change the supply/demand dynamics over time and regions with significant population growth need to consider how to cater for increased demand.	
Demand	Regions with higher demand require greater access/provision	
Latent demand	Regions with a higher latent demand have greater potential for growth if the can convert interest to participation	
Competition play	Venues that ensure a mix of visit types (competition play, social play, coaching and programming) will perform better. Venues with either very little or a lot of competition play won't generally be optimising visitation	
		<p>People – a diverse offering will require a combination of skilled coaches and volunteers to deliver what's required by the community</p> <p>Play – access to different formats is nearly as important as access to courts (for some user groups)</p>

Venue Classification

The following variables have been used to create a venue classification:

1. Venue size
2. Lighting
3. Demand in catchment
4. Competition (venue numbers) in catchment

A further variable, population size (to reflect critical mass has also been used as a broad overlay to inform actions.

In total, there are 29 different venue categorisations which in turn require one of 11 actions, each of which are outlined on the following pages.



Venue Classification

‘Using four critical data points, each venue has been classified and a strategic action developed’

Each of the 11 actions are explained below. It’s important to note that in some instances the action could be contradictory (e.g. alternate use or expansion potential). In these instances, the action for the venue will be dependent on actions for the collection of venues within close proximity (as should be the case when undertaking network planning).

Categorisation	Action explanation
Maintain	Retain the venue in its current form
Maintain or alternate use	Retain or consider an option where this venue is potentially changed to a different use but increased investment occurs at a nearby venue (consolidation and an improved offer)
Optimise	Ensure the venue is operating to its full potential
Alternate use potential	Could be considered for an alternate or complementary use to tennis
Activate and develop	Opportunity to improve the offering and increase utilisation and better service local demand
Lights or expansion potential	Opportunity to increase the number of courts and/or add lights to better service local demand
Optimise or Potential for expansion	Opportunity to increase the number of courts and/or improve/enhance offering
Lights or alternate use	Potential to add lights or could be considered for an alternate use
Expansion required	The venue requires greater capacity (more courts)
Optimise and Lights	Ensure the venue is operating to its full potential and add lights
Alternate use or expansion potential	Potential to increase the capacity of the venue or could be considered for an alternate use

Venue Classification, Explanation and Action

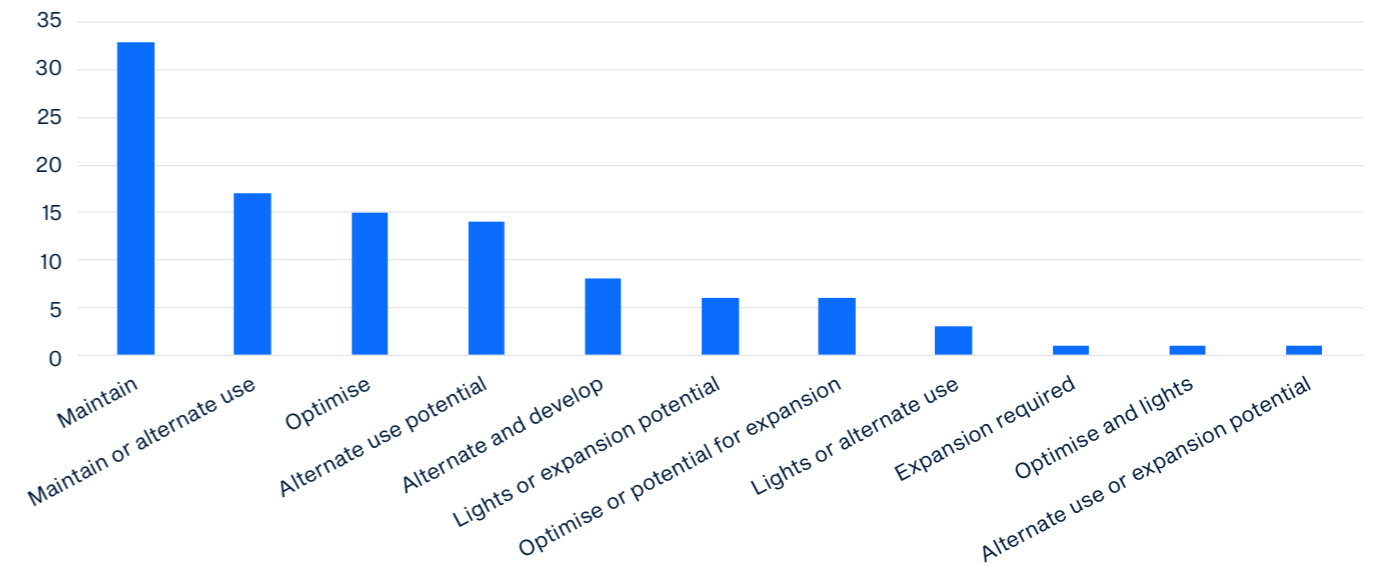
In total, 29 different categorisations with explanations and actions. In some instances, the explanation or action may change based on additional qualitative information provided about the venue or the community that has not/cannot be captured in the data (this is the case for only a handful of venues and are denoted with an *).

Venue classification	Explanation	Action
Small venue, Not Lit, Moderate nearby competition, Medium demand	Potential to service local social play	Maintain
Small venue, Not Lit, Moderate nearby competition, Low demand	Not of significant strategic value to the network	Maintain or alternate use
Small venue, Not Lit, Moderate nearby competition, High demand	Priority to add lights and/or expansion potential	Lights or expansion potential
Small venue, Not Lit, Limited nearby competition, Medium demand	Potential to service local social play and expansion potential	Activate and develop
Small venue, Not Lit, Limited nearby competition, Low demand	Service local demand only	Maintain
Small venue, Not Lit, Limited nearby competition, High demand	Priority to add lights and/or expansion potential	Lights or expansion potential
Small venue, Not Lit, Highly competitive, Medium demand	Moderate value to the network - potential to aggregate 2 or more venues	Alternate use potential
Small venue, Not Lit, Highly competitive, High demand	Potential to include lights	Alternate use or expansion potential
Small venue, Lit, Moderate nearby competition, Medium demand	Service local demand	Maintain
Small venue, Lit, Moderate nearby competition, High demand	Important to the network but requires expansion to optimise	Optimise or Potential for expansion
Small venue, Lit, Limited nearby competition, Medium demand	Important to the network but requires expansion to optimise	Optimise or Potential for expansion
Small venue, Lit, Limited nearby competition, Low demand	Valuable to the local community	Maintain
Small venue, Lit, Limited nearby competition, High demand	Critical part of the network	Optimise or Potential expansion required
Small venue, Lit, Highly competitive, Medium demand	Not of significant strategic value to the network	Maintain

Venue classification	Explanation	Action
Medium sized venue, Not Lit, Moderate nearby competition, Medium demand	Potential to play a more important role in the network	Lights or expansion potential
Medium sized venue, Not Lit, Limited nearby competition, Medium demand	Strong potential to play a more important role in the network	Lights or expansion potential
Medium sized venue, Not Lit, Highly competitive, Medium demand	Role in local area dependent on surrounding venue mix	Lights or alternate use
Medium sized venue, Lit, Moderate nearby competition, Medium demand	Important to the network	Optimise
Medium sized venue, Lit, Moderate nearby competition, Low demand	Important to the network	Maintain
Medium sized venue, Lit, Moderate nearby competition, High demand	Priority venues	Optimise
Medium sized venue, Lit, Limited nearby competition, Medium demand	Critical to the network	Optimise
Medium sized venue, Lit, Limited nearby competition, High demand	Absolutley priority venues	Optimise
Medium sized venue, Lit, Highly competitive, Medium demand	Role in local area dependent on surrounding venue mix	Maintain
Large venue, Not Lit, Moderate nearby competition, Low demand	Strategic importance given its size	Optimise and Lights
Large venue, Lit, Highly competitive, Medium demand	Strategic importance given its size	Optimise

Venue Classification

In total, there are 29 different venue categorisations which in turn require one of 11 actions, which can then be applied to each of the venues in the Barwon region. The chart below shows the number of venues that require each of the different actions (mindful there is some overlap in the descriptions).



Recommendations

Colac Otway Shire – Venue Categorisation and Future considerations

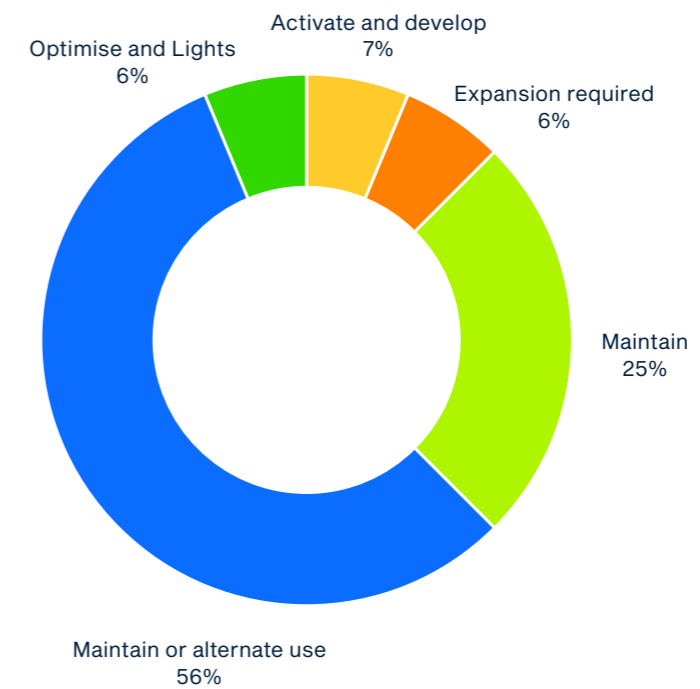
Of the 15 venues in Colac Otway Shire, the majority (56%) have been identified as being required in their current form or could be considered as an option to convert to another use if additional investment can then be made into a nearby venue. It's apparent there is a lack of lighting at facilities and this is a major focus of the recommendations.

A review of tennis assets in the Colac Otway Shire indicates that there has been a shift in the tennis landscape, with there being less teams in rural areas than there has been in years past. This has resulted in less demand for competition-standard courts in rural areas. Parallel to this has been a decline in the condition of some rural tennis courts in the Colac Otway Shire as the assets reach the end of their serviceable lives. With finite investment and maintenance support for tennis infrastructure, a considered approach toward facility investment is required.

A notable infrastructure gap within Colac itself is the access to floodlit courts. A redevelopment of the Colac Lawn Tennis Club venue would cater for the needs of the residents of Colac and provide a pathway for players from within the municipality. Further analysis is required to identify the size of the facility, surface type and associated amenities required to support this need.

Venue Categorisation and information below:

Colac Otway Shire Action Summary



Colac Otway Shire – Venue Categorisation and Actions

Reserve Name	Club Name	Action	Categorisation	Explanation	Future Considerations
Apollo Bay Recreation Reserve	Apollo Bay Tennis Club	Small venue, Lit, Limited nearby competition, High demand	Optimise or Expansion required	Critical part of the network	Optimise, expansion not an option due to court location. Not Council owned/managed
Barongarook Hall Tennis Courts	Barongarook Community Tennis Club	Small venue, Not Lit, Moderate nearby competition, Low demand	Maintain or alternate use	Not of significant strategic value to the network	Decomission (court surface unplayable)
Barwon Downs Tennis Courts	Barwon Downs Tennis Club	Small venue, Not Lit, Moderate nearby competition, Low demand	Maintain or alternate use	Not of significant strategic value to the network	Maintain
Beeac Tennis Club	Beeac Tennis Club	Small venue, Not Lit, Moderate nearby competition, Low demand	Maintain	Service local demand only	Maintain
Birregurra Recreation Reserve	Birregurra Tennis Club	Small venue, Lit, Moderate nearby competition, Low demand	Maintain	Valuable to the local community	Maintain. Not Council owned/managed
Central Reserve Tennis Courts	Colac Lawn Tennis Club Polwarth & District Tennis Association	Small venue, Not Lit, Moderate nearby competition, Low demand	Maintain or alternate use	Not of significant strategic value to the network	Maintain court for local and overflow use
Colac Lawn Tennis Club	Colac Lawn Tennis Club	Small venue, Not Lit, Moderate nearby competition, Low demand	Optimise and Lights	Strategic importance given its size	Consider broader redevelopment of site
Cororooke Open Space Tennis Courts	Cororooke Tennis Club	Small venue, Not Lit, Moderate nearby competition, Low demand	Maintain or alternate use	Services local demand*	Maintain
Elliminyt Recreation Reserve Tennis Courts	Elliminyt Tennis Club	Small venue, Not Lit, Moderate nearby competition, Low demand	Maintain or alternate use	Services local demand*	Maintain and consider lights for optimisation
Forrest Common Tennis Courts	Forrest Tennis Club	Small venue, Not Lit, Limited nearby competition, Medium demand	Maintain	Services local demand*	Maintain
Gerangamete Tennis Courts		Small venue, Not Lit, Moderate nearby competition, Low demand	Maintain or alternate use	Not of significant strategic value to the network	Alternate use. Not Council owned/managed.
Kawarren Tennis Courts	Kawarren Tennis Club	Small venue, Not Lit, Limited nearby competition, Medium demand	Activate and develop	Potential to service local social play and expansion potential	Maintain or consider future activation or optimisation. Not Council owned/managed.
Kennett River Tennis Courts		Small venue, Not Lit, Limited nearby competition, Low demand	Maintain	Service local demand only	Maintain
Pennyroyal Tennis Club	Pennyroyal Tennis Club	Small venue, Not Lit, Moderate nearby competition, Low demand	Maintain or alternate use	Service local demand only	Maintain. Not Council owned/managed.
Warcoort Reserve Tennis Courts	Warcoort Tennis Club	Small venue, Not Lit, Moderate nearby competition, Low demand	Maintain or alternate use	Service local demand only	Maintain

See Appendix 16 for list of venues no longer considered part of the Tennis Network in the Colac Otway Shire.

* as provided on page 17



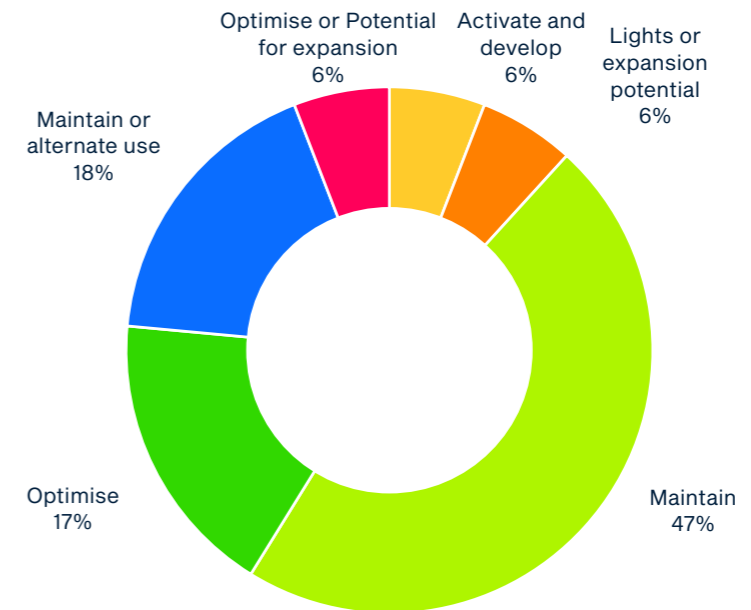
Golden Plains Shire – Venue Categorisation and Future considerations

Of the 17 venues in Golden Plains Shire, a large proportion (47%) have been identified as being required in their current form while there is significant opportunity to improve and expand the network through additional courts, lighting and/or ensuring venues are performing optimally given their physical and geographic attributes.

A review of tennis assets in the Golden Plains Shire indicates that the courts adequately support tennis in the region. Since initial investment in the development of tennis infrastructure, there has been a shift in population and the tennis landscape. With finite investment and maintenance support for tennis infrastructure, a considered approach toward facility investment is required.

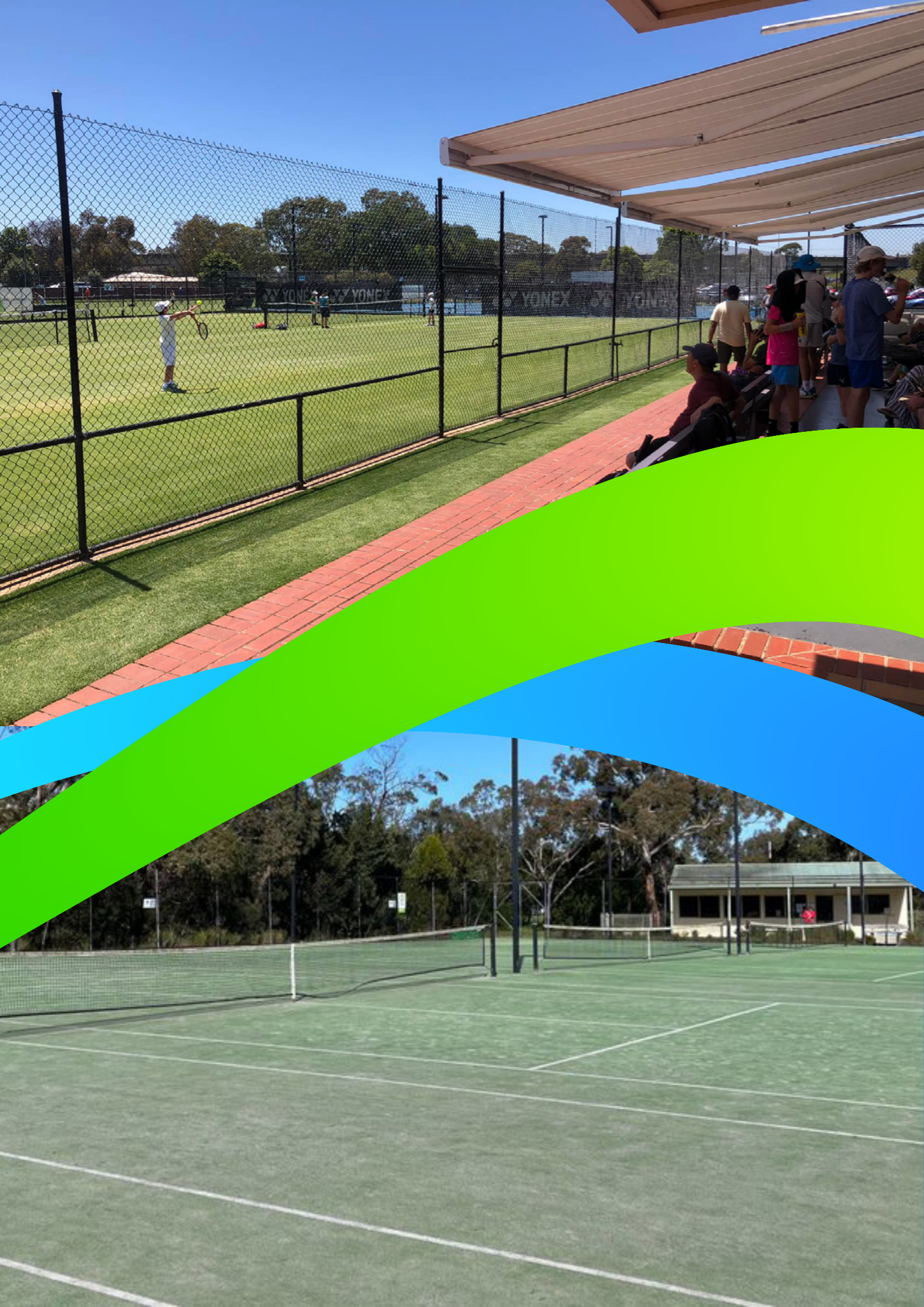
Population continues to grow within Bannockburn the optimisation of the facilities a to cater for that community and provide a pathway the players from within the municipality.

Golden Plains Shire Action Summary



Golden Plains Shire – Venue Categorisation and Actions

Reserve Name	Club Name	Action	Categorisation	Explanation	Future Considerations
Bannockburn Recreation Reserve	Bannockburn Tennis Club	Medium sized venue, Lit, Limited nearby competition, Medium demand	Optimise	Critical to the network	Critical facility, optimise courts with lights
Barunah Park Tennis Courts	Barunah Park Tennis Courts	Small venue, Not Lit, Moderate nearby competition, Low demand	Maintain or alternate use	Not of significant strategic value to the network	Alternative use
Cape Clear Tennis Court	Cape Clear Tennis Court	Small venue, Not Lit, Limited nearby competition, Low demand	Maintain	Service local demand only	Service local demand only
Enfield Tennis Club	Enfield Tennis Club	Small venue, Not Lit, Moderate nearby competition, Medium demand	Maintain	Potential to service local social play	Maintain
Grenville Tennis Club	Grenville Tennis Club	Small venue, Not Lit, Limited nearby competition, High demand	Lights or expansion potential	Priority to add lights and/or expansion potential	Optimise courts with lights
Haddon Tennis Club	Haddon Tennis Club	Small venue, Not Lit, Moderate nearby competition, Low demand	Maintain or alternate use	Not of significant strategic value to the network	Maintain
Inverleigh Recreation Reserve	Inverleigh Tennis Club	Small venue, Not Lit, Limited nearby competition, Medium demand	Activate and develop	Potential to service local social play and expansion potential	Optimise courts with lights
Lethbridge Tennis Club	Lethbridge Tennis Club	Small venue, Lit, Limited nearby competition, Medium demand	Optimise or Potential for expansion	Important to the network but requires expansion to optimize	Optimise courts
Mannibadar Tennis Courts	Mannibadar Tennis Courts	Small venue, Not Lit, Moderate nearby competition, Low demand	Maintain or alternate use	Not of significant strategic value to the network	Maintain
Maude Tennis Club	Maude Tennis Club	Small venue, Not Lit, Moderate nearby competition, Medium demand	Maintain	Potential to service local social play	Maintain
Meredith Tennis Club	Meredith Tennis Club	Medium sized venue, Lit, Limited nearby competition, Medium demand	Optimise	Critical to the network	Maintain
Napoleons Tennis Courts	Napoleons Tennis Courts	Small venue, Not Lit, Moderate nearby competition, Low demand	Maintain or alternate use	Not of significant strategic value to the network	Maintain
Rokewood Tennis Club	Rokewood Tennis Club	Small venue, Lit, Limited nearby competition, Low demand	Maintain	Service local demand only	Maintain
Ross Creek Tennis Club	Ross Creek Tennis Club	Small venue, Not Lit, Moderate nearby competition, Medium demand	Activate and develop*	Potential to service local social play and expansion potential	Maintain
Shelford Tennis Club	Shelford Tennis Club	Small venue, Not Lit, Limited nearby competition, Medium demand	Maintain	Primarily service local social play	Maintain
Smythesdale Tennis Club	Smythesdale Tennis Club	Small venue, Not Lit, Limited nearby competition, Low demand	Maintain	Service local demand only	Maintain
Sutherlands Creek Tennis Club	Sutherlands Creek Tennis Club	Small venue, Not Lit, Limited nearby competition, Low demand	Maintain	Service local demand only	Maintain
Teesdale Tennis Club	Teesdale Tennis Club	Medium sized venue, Lit, Limited nearby competition, Medium demand	Optimise	Critical to the network	Optimise courts

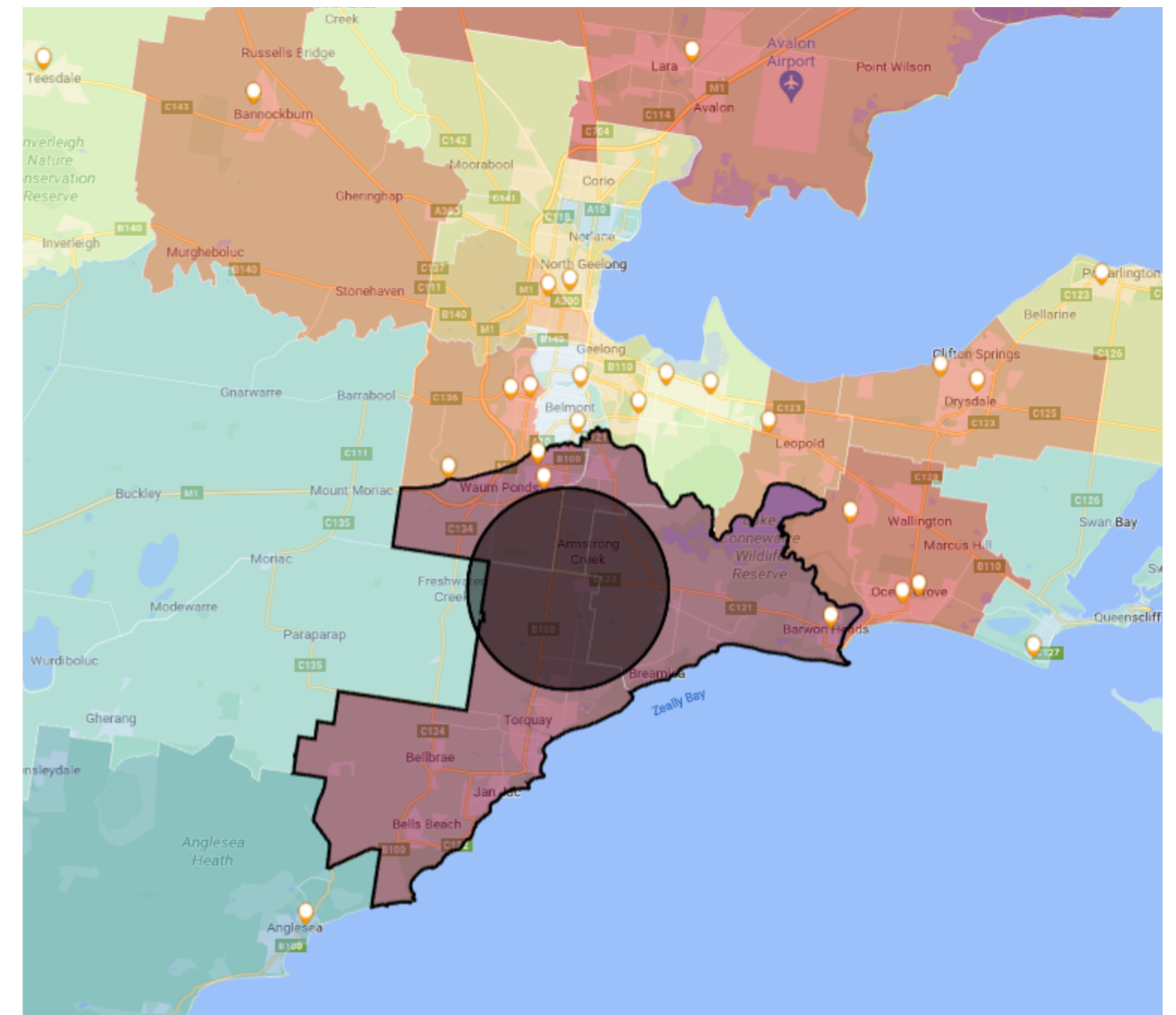


Greater Geelong – Future Considerations

There is a significant gap in tennis infrastructure in the fastest growing area within the Barwon (G21) region, around Armstrong creek. The map to the right shows a 5km radius where is currently no tennis infrastructure (not one venue). Further, there are very few venues that service the region that have 5 courts or more (venues shown on the map are only those with 5+ courts).

The region highlighted (black outline) is forecast to grow by over 30,000 people over the next 10 years. This combination of a lack of venues, and specifically a lack of larger venues that typically provide a range of services, coupled with the significant growth in population and demand to play tennis means there is a strong business case for at least one significant venue to service future demand.

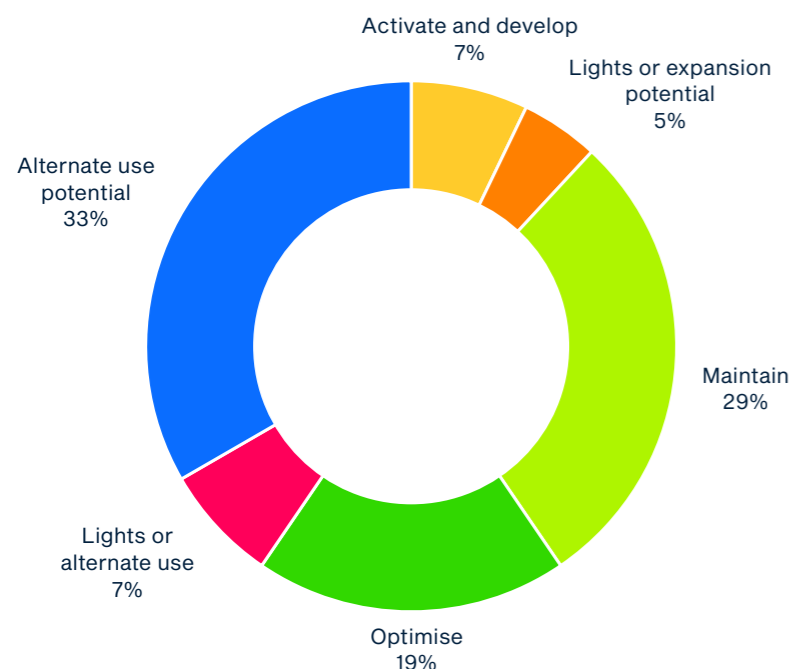
The two pins located in red are sites that have been earmarked for large tennis facilities into the future (2026 and 2030+ respectively) and as part of a range of decisions to optimise the network, at least one and potentially both will be important to service residents in the region in the future.



Greater Geelong – Venue Categorisations

Of the 42 venues in Greater Geelong, one-third (33%) could be considered for an alternate or complementary use. This is due to the glut of similar type venues within close proximity of each other. These would require careful consideration and would be dependent on the collective set of actions (i.e. if a number of these venues were removed there would then there would be a shortage of venues in the region). Almost 20% should be optimised as they have the attributes of a venue that should be high performing.

Greater Geelong Action Summary



Reserve Name	Club Name	Action	Categorisation	Explanation	Future Considerations
All Saints Newtown Tennis Club	All Saints Newtown Tennis Club	Small venue, Lit, Highly competitive, Medium demand	Maintain	Services local demand*	Non Council land. Maintain
Anakie Recreation Reserve	Anakie Tennis Club	Small venue, Not Lit, Limited nearby competition, Medium demand	Activate and develop	Potential to service local social play and expansion potential	Activate facility
Barwon Heads Village Park	Barwon Heads Tennis Club	Medium sized venue, Lit, Limited nearby competition, Medium demand	Optimise	Critical to the network	Optimise with lights
Myers Reserve	Bell Post Hill Tennis Courts	Small venue, Not Lit, Highly competitive, Medium demand	Alternate use potential	Moderate value to the network - potential to aggregate 2 or more venues	Maintain. Activate club
Belmont Uniting Church	Belmont Uniting Tennis Club	Small venue, Not Lit, Highly competitive, Medium demand	Alternate use potential	Moderate value to the network - potential to aggregate 2 or more venues	Non Council land. Consider venue viability
Frank Mann Reserve	Ceres Tennis Club	Small venue, Not Lit, Highly competitive, Medium demand	Maintain*	Service local demand	Maintain
Jetty Road Reserve	Clifton Springs Tennis Club	Medium sized venue, Lit, Limited nearby competition, Medium demand	Optimise	Critical to the network	Optimise with lights
Corio Community Reserve	Corio Community Reserve	Small venue, Not Lit, Moderate nearby competition, Medium demand	Maintain	Potential to service local social play	Maintain as local level facility
Drysdale Recreation Reserve	Drysdale Recreation Reserve	Small venue, Not Lit, Moderate nearby competition, Medium demand	Maintain	Potential to service local social play	Maintain to service local casual participation
Wathaurong Reserve	Drysdale Tennis Club	Medium sized venue, Lit, Moderate nearby competition, Medium demand	Optimise	Critical to the network	Optimise

Greater Geelong – Venue Categorisation and Actions

Reserve Name	Club Name	Action	Categorisation	Explanation	Future Considerations
East Geelong Tennis Club	East Geelong Tennis Club	Small venue, Not Lit, Highly competitive, Medium demand	Alternate use potential	Moderate value to the network - potential to aggregate 2 or more venues	Non Council land. Consider venue viability
Howard Glover Reserve	Eastern Districts Tennis Club	Small venue, Not Lit, Highly competitive, Medium demand	Alternate use potential	Moderate value to the network - potential to aggregate 2 or more venues	Maintain
Fyans Park Primary School	Fyans Park Tennis Club	Small venue, Not Lit, Highly competitive, Medium demand	Alternate use potential	Moderate value to the network - potential to aggregate 2 or more venues	Non Council land. Consider venue viability
Geelong East Uniting Church	Geelong East Uniting Church Tennis Club	Small venue, Not Lit, Highly competitive, Medium demand	Alternate use potential	Moderate value to the network - potential to aggregate 2 or more venues	Maintain
Geelong Lawn Tennis Club	Geelong Lawn Tennis Club	Large venue, Lit, Highly competitive, Medium demand	Optimise	Strategic importance given its size	Non Council venue. Optimise
Geelong West Tennis Club	Geelong West Tennis Club	Small venue, Not Lit, Highly competitive, Medium demand	Maintain*	Service local demand	Maintain
Burdoo Reserve	Grovedale Tennis Club	Medium sized venue, Lit, Highly competitive, Medium demand	Maintain	Role in local area dependent on surrounding venue mix	Maintain
Hamlyn Park Reserve	Hamlyn Park Tennis Club	Medium sized venue, Lit, Highly competitive, Medium demand	Maintain	Role in local area dependent on surrounding venue mix	Maintain
Highton Reserve	Highton Tennis Club	Medium sized venue, Lit, Highly competitive, Medium demand	Maintain	Role in local area dependent on surrounding venue mix	Maintain
Pioneer Park	Highton Tennis Club	Medium sized venue, Lit, Highly competitive, Medium demand	Maintain	Role in local area dependent on surrounding venue mix	Maintain
Kenwith Park	All Saints Newtown Tennis Club	Small venue, Not Lit, Highly competitive, Medium demand	Maintain*	Service local demand	Maintain
Lara Recreation Reserve	Lara Tennis Club	Medium sized venue, Lit, Moderate nearby competition, Low demand	Maintain	Important to the network	Maintain
Leopold Memorial Park	Leopold Tennis Club	Medium sized venue, Lit, Moderate nearby competition, Medium demand	Optimise	Important to the network	Optimise with lights
Lunan Reserve	Lunan Tennis Club	Small venue, Not Lit, Highly competitive, Medium demand	Maintain*	Service local demand	Maintain
Marcus Hill Reserve	Marcus Hill Reserve	Small venue, Not Lit, Moderate nearby competition, Medium demand	Maintain	Potential to service local social play	Maintain
Marshall Reserve	Marshall Reserve	Small venue, Not Lit, Highly competitive, Medium demand	Alternate use potential	Moderate value to the network - potential to aggregate 2 or more venues	Maintain to service local casual play
Moolap Reserve	Moolap Tennis Club	Medium sized venue, Lit, Moderate nearby competition, Medium demand	Optimise	Important to the network	Optimise with lights
Ervin Reserve	Newcomb Tennis Club	Medium sized venue, Not Lit, Highly competitive, Medium demand	Lights or alternate use	Role in local area dependent on surrounding venue mix	Optimise with lights, Consider viability of venue size
Arthur Powell Reserve	Ocean Grove Tennis Club	Medium sized venue, Lit, Moderate nearby competition, Medium demand	Optimise	Important to the network	Optimise with lights

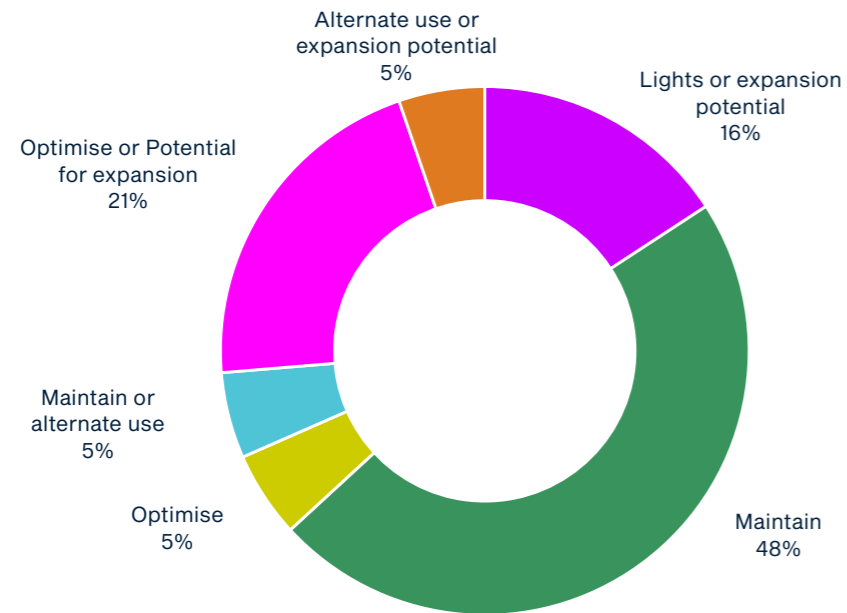
Greater Geelong – Venue Categorisation and Actions

Reserve Name	Club Name	Action	Categorisation	Explanation	Future Considerations
Shell Rd Reserve	Ocean Grove Tennis Club	Medium sized venue, Lit, Moderate nearby competition, Medium demand	Optimise	Important to the network	Optimise with lights
Portarlington Recreation Reserve	Portarlington Tennis Club	Medium sized venue, Lit, Limited nearby competition, Medium demand	Optimise	Critical to the network	Optimise with lights
St Albans Reserve	St Albans Tennis Club	Medium sized venue, Lit, Highly competitive, Medium demand	Maintain	Role in local area dependent on surrounding venue mix	Consider viability of venue size
Lake Reserve	St Leonards - Lake Reserve	Small venue, Not Lit, Limited nearby competition, Medium demand	Maintain*	Service local demand	Maintain
Harvey Park	St Leonards Tennis Club	Small venue, Not Lit, Limited nearby competition, Medium demand	Activate and develop	Potential to service local social play and expansion potential	Non Council land, consider optimise with lights.
St Lukes Uniting Church	St Lukes Uniting Tennis Club	Small venue, Not Lit, Highly competitive, Medium demand	Alternate use potential	Moderate value to the network - potential to aggregate 2 or more venues	Non Council land. Consider venue viability
Thomson Reserve	St Marys (Geelong) Tennis Club	Small venue, Lit, Highly competitive, Medium demand	Maintain	Services local demand*	Maintain
Francis St Reserve	St Stephens (Geelong) Tennis Club	Medium sized venue, Not Lit, Highly competitive, Medium demand	Lights or alternate use	Role in local area dependent on surrounding venue mix	Consider activation of a club
Wallington Reserve	Wallington Reserve	Medium sized venue, Not Lit, Moderate nearby competition, Medium demand	Lights or expansion potential	Potential to play a more important role in the network	Consider activation of a club
Tim Hill Reserve	Wandana Heights Tennis Club	Medium sized venue, Lit, Highly competitive, Medium demand	Maintain	Role in local area dependent on surrounding venue mix	Maintain
Waurm Ponds Reserve	Waurm Ponds Tennis Club	Medium sized venue, Not Lit, Highly competitive, Medium demand	Lights or alternate use	Role in local area dependent on surrounding venue mix	Optimise with lights
Western Heights Uniting Church	Western Heights Uniting Tennis Club	Small venue, Not Lit, Highly competitive, Medium demand	Alternate use potential	Moderate value to the network - potential to aggregate 2 or more venues	Non Council land. Consider venue viability

Surf Coast Shire – Venue Categorisation and Future considerations

Of the 17 venues in the Surf Coast Shire, a large proportion (42%) have been identified as being required in their current form while there is significant opportunity to improve and expand the network through additional courts, lighting and/or ensuring venues are performing optimally given their physical and geographic attributes. Given the relatively sparse distribution of venues in the region, most venues play an important role in servicing the needs of a local catchment.

Surf Coast Shire Action Summary



Surf Coast Shire – Venue Categorisation and Actions

Reserve Name	Club Name	Action	Categorisation	Explanation	Future Considerations
Airey's Inlet & District Tennis Courts	Airey's Inlet & District Tennis Club	Small venue, Lit, Limited nearby competition, Medium demand	Optimise or Potential for expansion	Important to the network but requires expansion to optimise	Land locked, Optimise with LED lights & BAC
Anglesea Tennis Courts	Anglesea Tennis Club	Medium sized venue, Lit, Limited nearby competition, High demand	Optimise	Absolute priority venues	Priority site
Bambra Tennis Courts	Bambra Tennis Club	Small venue, Lit, Limited nearby competition, Medium demand	Maintain	Primarily service local social play	Maintain
Bellbrae Tennis Courts - Lower		Small venue, Not Lit, Moderate nearby competition, Medium demand	Maintain or alternate use	Not of significant strategic value to the network	Consider venue viability. Alternate use.
Buckley South Tennis Courts		Small venue, Not Lit, Moderate nearby competition, Low demand	Maintain or alternate use	Not of significant strategic value to the network	Consider venue viability. Alternate use.
Connewarre Tennis Courts		Small venue, Not Lit, Moderate nearby competition, Medium demand	Maintain	Potential to service local social play	Maintain to service local casual participation
Deans Marsh Tennis Courts		Small venue, Not Lit, Limited nearby competition, Low demand	Maintain	Service local demand only	Optimise with lights and booking potential
Deep Creek Tennis Courts	Deep Creek Tennis Club	Small venue, Not Lit, Moderate nearby competition, High demand	Lights or expansion potential	Priority to add lights and/or expansion potential	Optimise with lights
Freshwater Creek Recreation Reserve		Small venue, Not Lit, Highly competitive, High demand	Alternate use or expansion potential	Potential to include lights	Alternate use. Maintain one court for local play
Gnarwarre Recreation Reserve		Small venue, Not Lit, Moderate nearby competition, Medium demand	Maintain	Potential to service local social play	Maintain
Lorne Country Club	Lorne Country Club	Medium sized venue, Not Lit, Limited nearby competition, Medium demand	Lights or expansion potential	Strong potential to play a more important role in the network	Not Council land. Optimise with lights
Mirnee Tennis Courts		Small venue, Not Lit, Limited nearby competition, Low demand	Maintain or alternate use	Not of significant strategic value to the network	Consider venue viability. Alternate use.
Modewarre Memorial Hall		Small venue, Not Lit, Moderate nearby competition, Medium demand	Maintain	Potential to service local social play	Maintain
Newling Reserve	Moriac Tennis Club	Small venue, Lit, Moderate nearby competition, Medium demand	Maintain	Service local demand	Maintain
Mt Moriac Recreation Reserve	Mt Moriac Tennis Club	Small venue, Not Lit, Moderate nearby competition, Medium demand	Maintain	Potential to service local social play	Maintain
Spring Creek Reserve	Surf Coast Tennis Club - Torquay	Medium sized venue, Lit, Moderate nearby competition, High demand	Optimise or Potential for expansion	Critical to the network	Priority for expansion
Bellbrae Recreation Reserve	Surf Coast Tennis Club - Bellbrae	Small venue, Lit, Moderate nearby competition, Medium demand	Optimise	Important to the network but requires optimisation	Optimise
Bob Pettit Reserve	Surf Coast Tennis Club - Jan Juc	Medium sized venue, Lit, Moderate nearby competition, High demand	Optimise	Critical to the network	Optimise
Winchelsea Tennis Club	Winchelsea Tennis Club	Small venue, Not Lit, Limited nearby competition, High demand	Maintain	Service local demand only	Maintain

Borough of Queenscliff – Venue Categorisation and Future considerations

Reserve Name	Club Name	Action	Categorisation	Explanation	Future Considerations
Point Lonsdale Tennis Courts	Point Lonsdale Tennis Club	Medium sized venue, Lit, Moderate nearby competition, Medium demand	Optimise	Important to the network	Maintain
Queenscliff Bowling, Tennis & Croquet Club	Queenscliff Tennis Club	Small venue, Lit, Limited nearby competition, Medium demand	Optimise or Potential for expansion	Important to the network but requires expansion to optimise	Maintain

Appendix

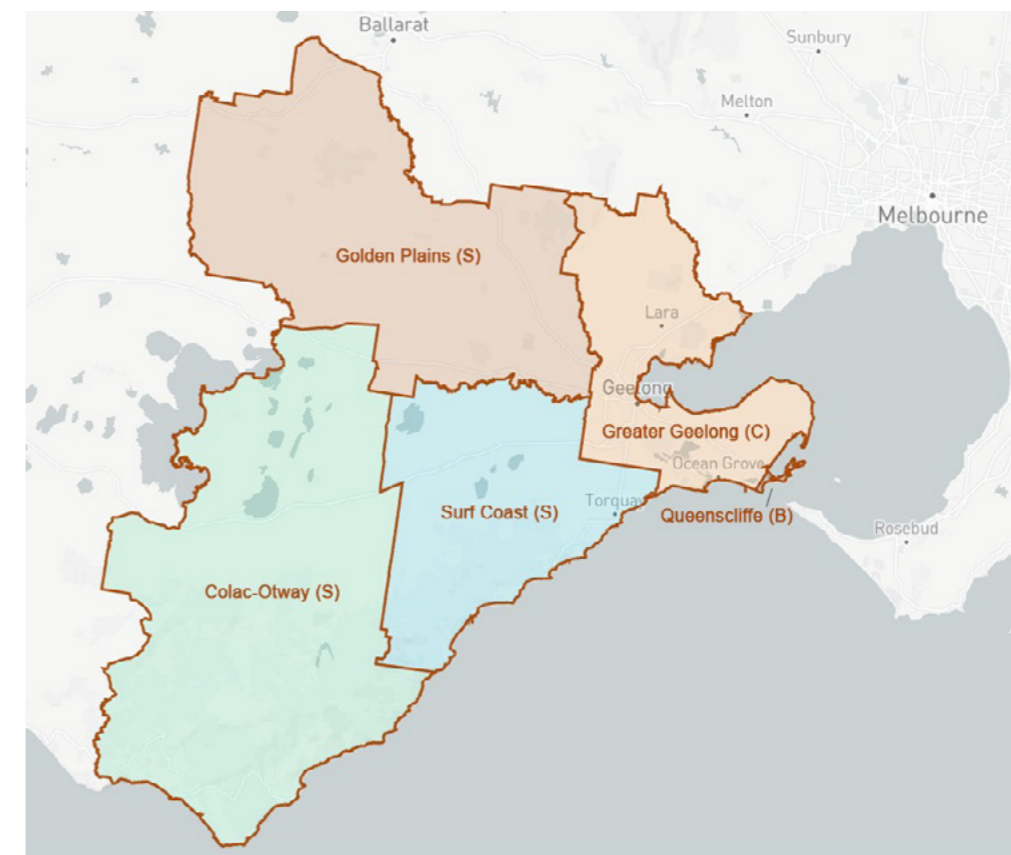
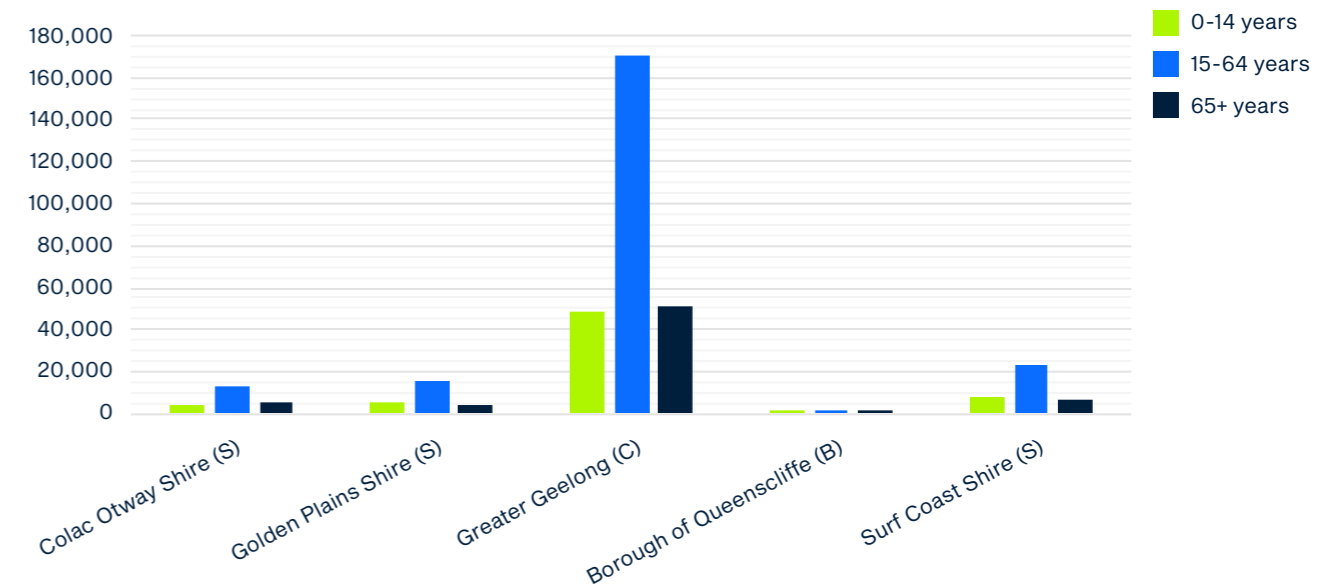
1. Population forecast
2. Demographic Profile
3. Demographic Profile – Sub-regions
4. Venue locations
5. Venues Sizes
6. Venue Gap Analysis
7. Venues with lights Gap Analysis
8. Participation and Interest
9. Demand vs Court provision
10. Future growth of Tennis
11. Venue Performance
12. Venue performance by model
13. Venues with lights
14. Best performing venue locations
15. Venue Optimisation
16. Colac Otway Shire Venue List

1. Population Forecast

The Barwon (G21) region has a population in excess of 350,000 people and covers an area of almost 9,000 square kilometres.

It consists of five local government areas (LGA's) – Colac Otway Shire, Golden Plains Shire, Greater Geelong, Borough of Queenscliffe and Surf Coast Shire. The vast majority of the population in the region is in Greater Geelong (circa 75%).

2021 LGA Population by Age Cohort



Tennis Victoria - G21 Regions

Prepared by The Kinetic Group © Mapbox © OpenStreetMap



2. Demographic Profile

The table below provides an insight into the different demographic profile of each LGA within the Barwon region. Figures highlighted in green show a higher than average proportion of this population in the region when compared to the Victorian average, while the orange shows a lower than average number (+/-3%). The most significant differences to the State average are:

- The region has more people aged over 65, with Golden Plains Shire the exception
- The region has a very low proportion of non-Australian born
- Golden Plains Shire and the Surf Coast Shire have a high proportion of family households
- Colac Otway Shire has a high proportion of low income families while Golden Plains and the Surf Coast have a higher proportion of high income
- Surf Coast Shire and Borough of Queenscliffe have a high proportion of residents with a university educated

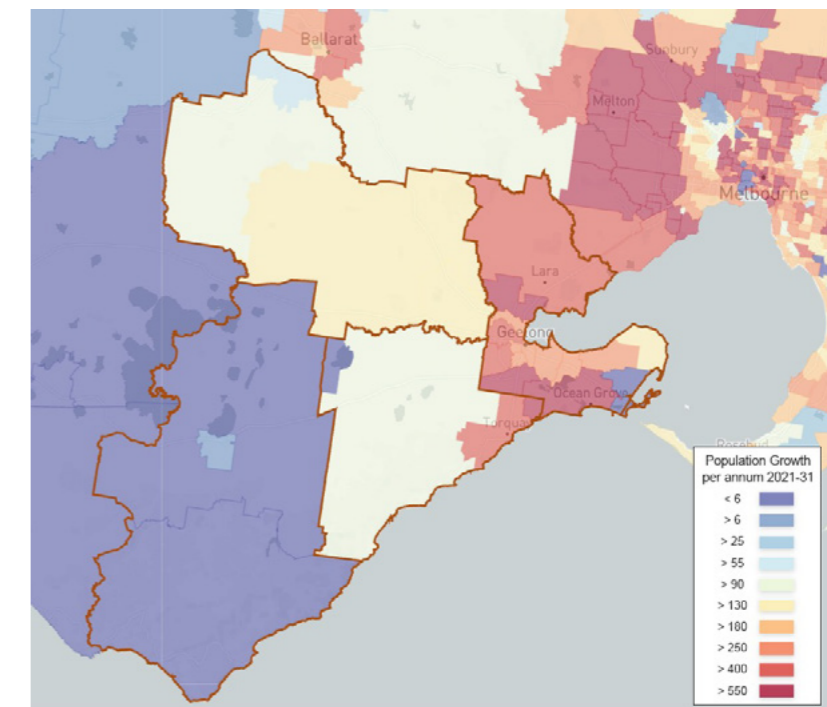
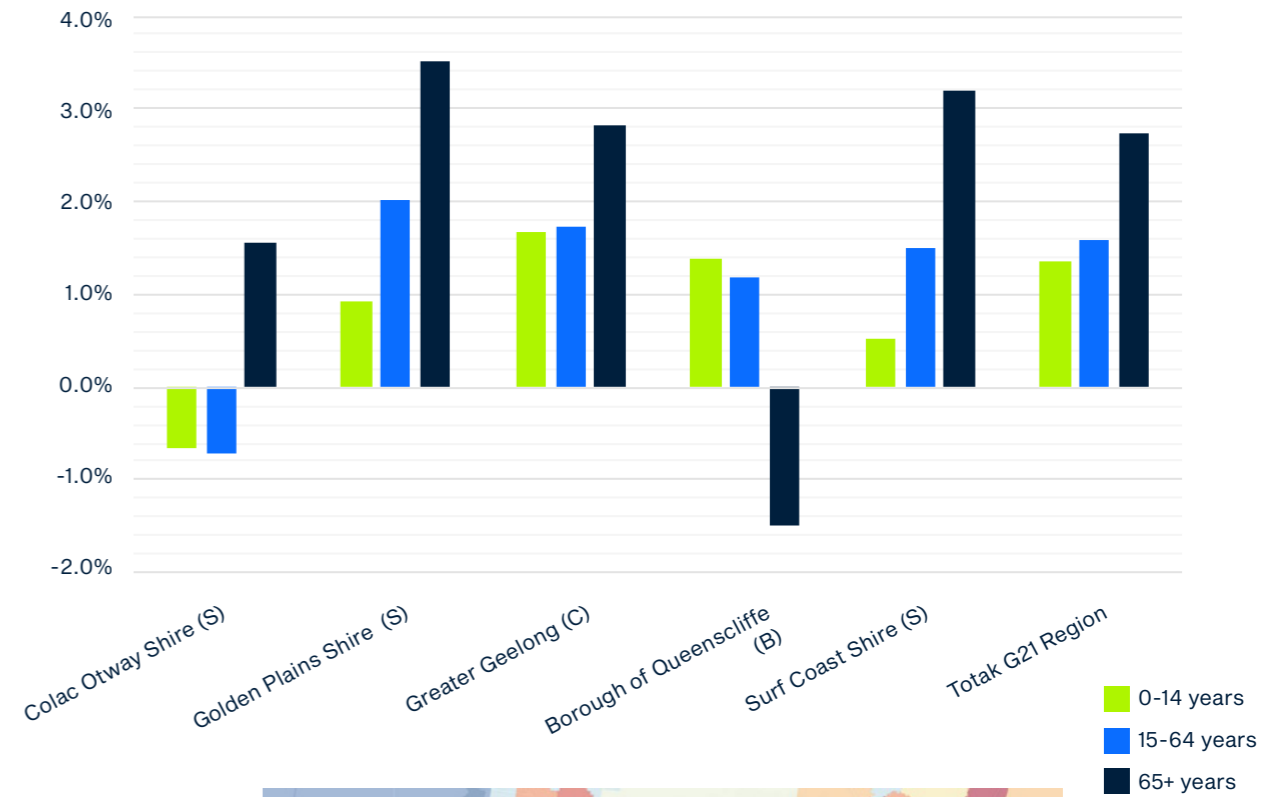
Region	Population (no.)		Population (%)		% indigenous	%Aus born
	Kids 0-14 years	Adults 15+ years	Kids 0-14 years	Adults 65+ years		
Victoria Average			18.0%	16.8%	1.0%	68.4%
Barwon Region	65,608	293,209	18.0%	19.9%	1.2%	83.2%
Colac-Otway (S)	3,773	18,531	16.6%	24.0%	1.4%	88.9%
Golden Plains (S)	5,581	19,298	22.1%	15.4%	1.4%	90.3%
Greater Geelong (C)	48,429	222,347	17.6%	19.6%	1.2%	81.5%
Queenscliff (B)	286	2,949	9.5%	45.1%	0.3%	88.4%
Surf Coast (S)	7,539	30,084	19.7%	19.8%	0.6%	87.6%

Region	% disability	%Family household	%English only lang.	% low income	%high income	% Uni education	% Unemployment
Victoria Average	5.8%	70.1%	67.2%	12.2%	44.3%	22.2%	6.6%
Barwon Region	6.2%	69.7%	84.9%	12.4%	41.3%	21.5%	3.9%
Colac-Otway (S)	6.8%	64.3%	87.7%	16.9%	30.1%	15.7%	2.9%
Golden Plains (S)	5.3%	82.0%	92.3%	9.7%	47.3%	16.6%	3.1%
Greater Geelong (C)	6.5%	68.5%	83.1%	12.7%	40.5%	21.6%	4.4%
Queenscliff (B)	5.4%	65.1%	89.8%	11.3%	37.3%	30.3%	3.0%
Surf Coast (S)	3.7%	75.6%	90.7%	9.1%	52.0%	26.7%	2.8%

3. Demographic Profile, Sub-regions

The heat map to the right shows where population growth is forecast to occur within the Barwon region by SA2. The population within the Barwon region is forecast to increase by circa 70,000 people to 428,000 people in the ten years to 2031.

Average Annual LGA population Change by Age Cohort - 2021 to 2031



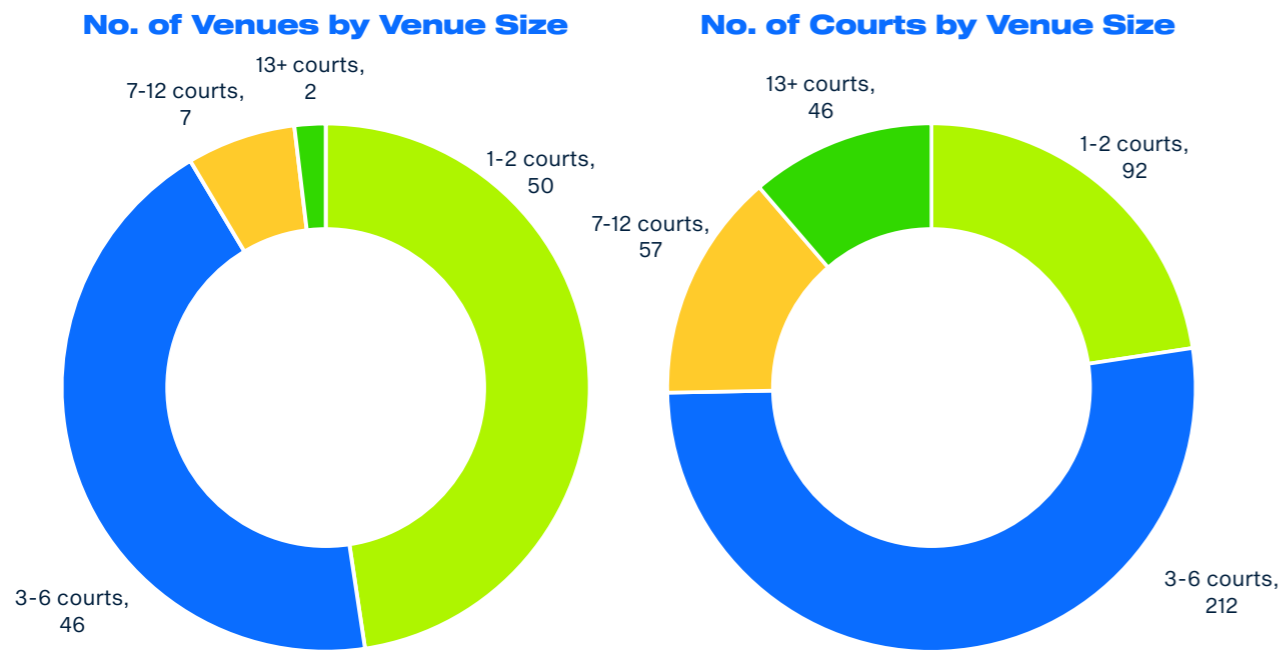
Population Growth by SA2 2021-31 - G21 Regions
Prepared by The Kinetics Group © Mapbox © OpenStreetMap

4. Venue sizes

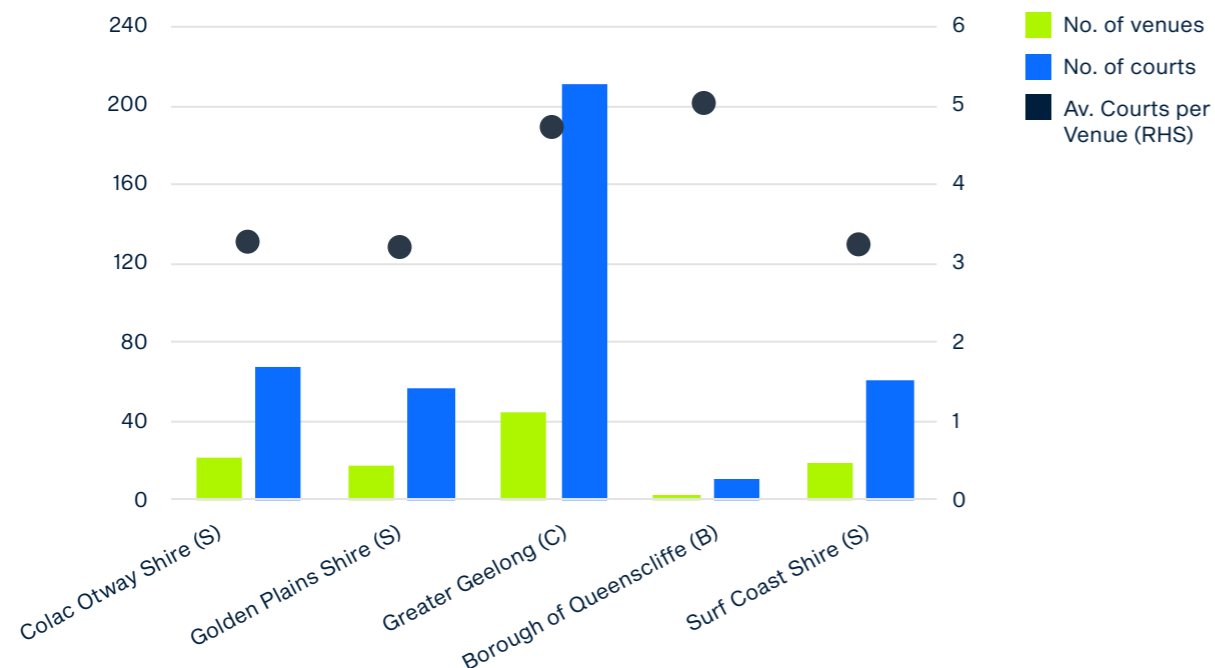
1-2 Courts is the most common venue size and the region only has two venues with the capacity to hold events (13+ courts).

The size of a venue is a key metric as it is a key determining factor for service provision, utilisation and sustainability. From a service provision perspective, 1-2 court venues are difficult to activate with a range of services (e.g. coaching, programs etc) due to limited space and the unit economics. These venues serve as a valuable community asset with typically a greater focus on social play

- 75% of courts are housed in venues with 1-6 courts
- Geelong has 43% of all venues and 52% of all courts in the region. Aside from Borough of Queenscliffe, it has the largest average venue size (at 4.7 courts per venue)



No. of Venues and Courts by LGA



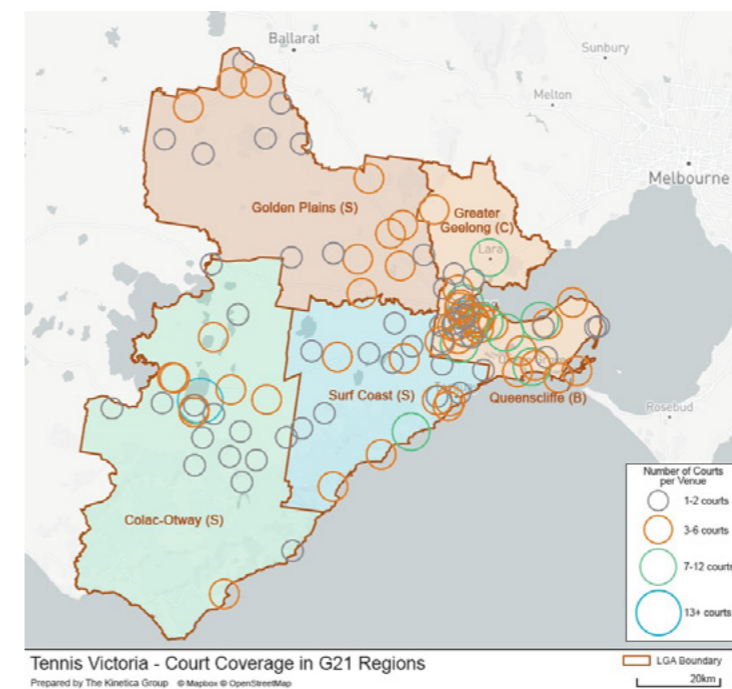
5. Venue locations

There are 94 Tennis Clubs/Venues in the Barwon Region and 382 Courts

Understanding the geographic coverage by venue size is key to determining how to optimise access and venue performance (utilisation):

- The vast majority of venues are either 1-2 courts (39%) or 3-6 courts (44%)
- Only 2 venues of the 94 have more than 13 courts (one in Colac Otway Shire and the other in Greater Geelong)
- Greater Geelong has the lowest proportion of 1-2 court venues of the 5 LGA's and the highest with 3 or more courts (excluding Borough of Queenscliffe)
- One-third of all venues in the region have lighting (not necessarily every court at the venue but at least some)

LGA	No. of Venues in LGA by Court per Venue									
	1 - 2 courts		3 - 6 courts		7 - 12 courts		13+ courts		Total	
	No.	% of size	No.	% of size	No.	% of size	No.	% of size	No.	% of size
Colac Otway Shire (S)	9	61%	5	32%	0	0%	1	7%	15	16%
Golden Plains Shire (S)	9	50%	9	50%	0	0%	0	0%	18	19%
Greater Geelong (C)	14	33%	21	50%	6	14%	1	3%	42	45%
Borough of Queenscliffe (B)	0	0%	2	100%	0	0%	0	0%	2	2%
Surf Coast Shire (S)	9	53%	7	41%	1	6%	0	0%	17	18%
Barwon Total	41	44%	44	47%	7	7%	2	2%	94	100%

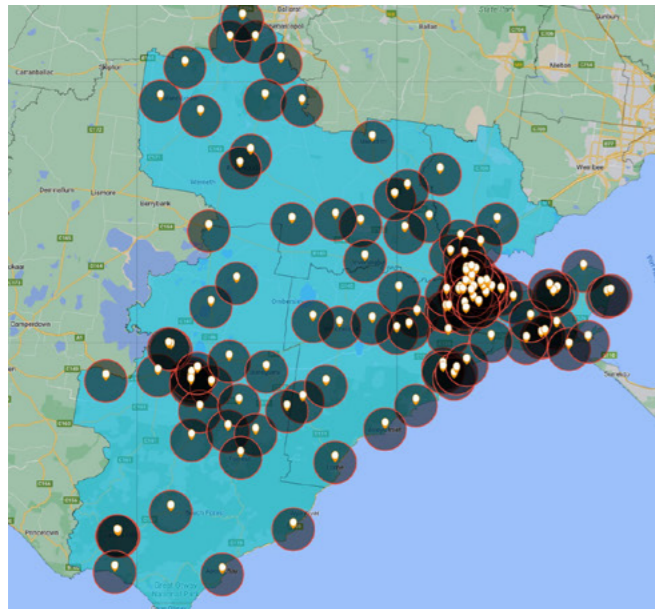


6. Venue gap analysis

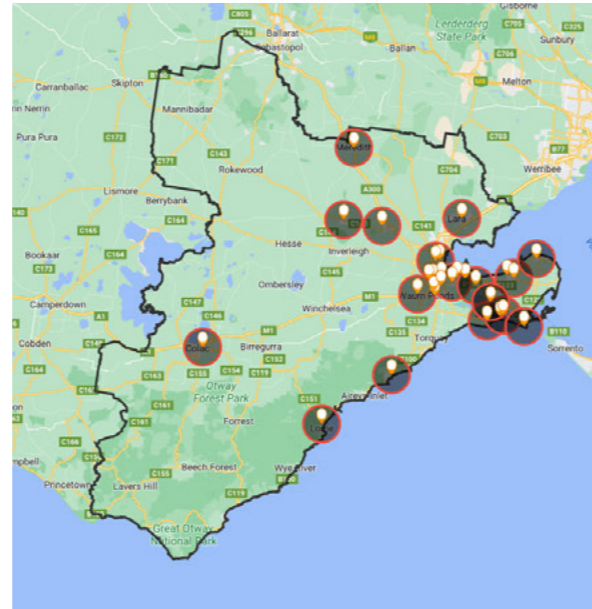
This analysis is based on the proxy that living with 5km of a venue broadly provides good access to tennis (noting there are many more factors such as type of venue, service provision etc not accounted for). The analysis further in the report uses travel times to understand in detail the coverage of each venue, which is aligned to the ambition stated in the Strategic Framework.

- ☉ The majority of venues are located around the population hubs of Geelong (and surrounds), Colac Otway Shire and in the northern part of the Golden Plains Shire to the south of Ballarat
- ☉ As such, regions where there is no coverage within 5km of a venue account for less than 5% of the entire population (i.e. there are relatively low population densities where there are no courts). An assumption can be made there is a good provision of courts.
- ☉ Relative to the entire tennis provision, outside of Greater Geelong very few 5+ court venues exist and significant gaps appear throughout the region

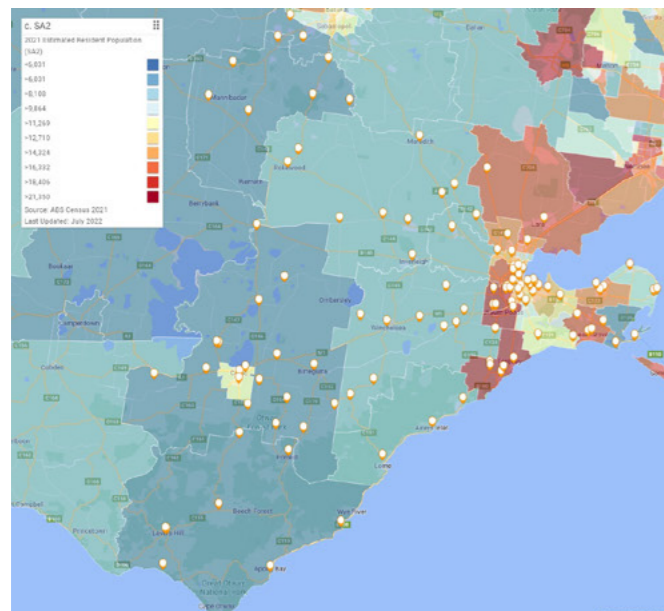
5km radius



5km radius – 5 court + venues



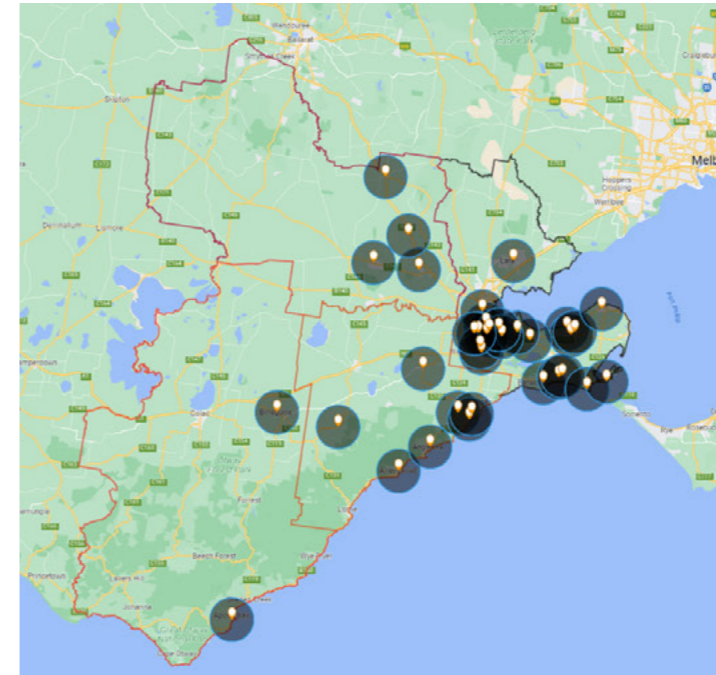
Population Density by SA2



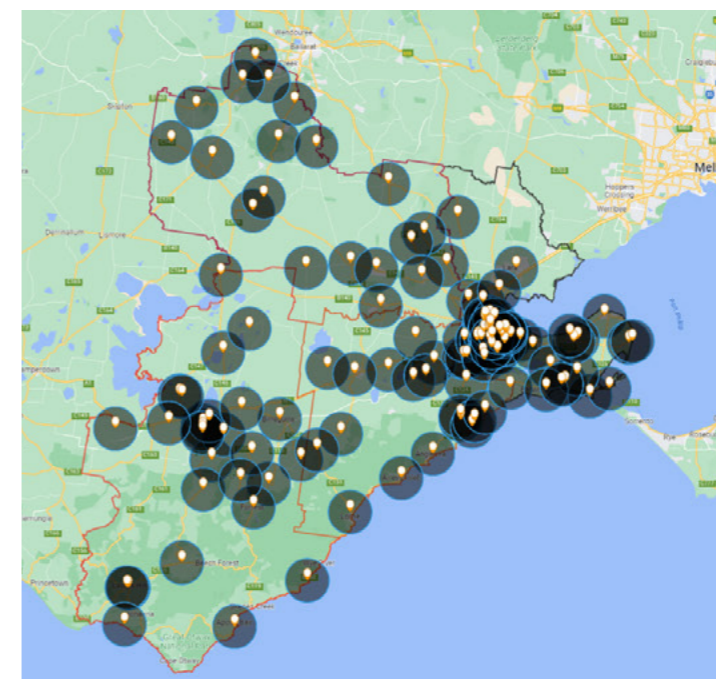
7. Venues with lights gap analysis

- ☉ Lights at tennis venues are important because they increase the carrying capacity (operating hours) of the venue. When thinking about how to increase the total hours of playing time available in a region, lights provide the greatest return on investment because the significant capital outlay has already been made (i.e. land, courts etc)
- ☉ Similar to the larger venue network, the lit venue network skews significantly to the Greater Geelong region and significant gaps appear in the other LGA's in the Barwon Region.

Lit venues



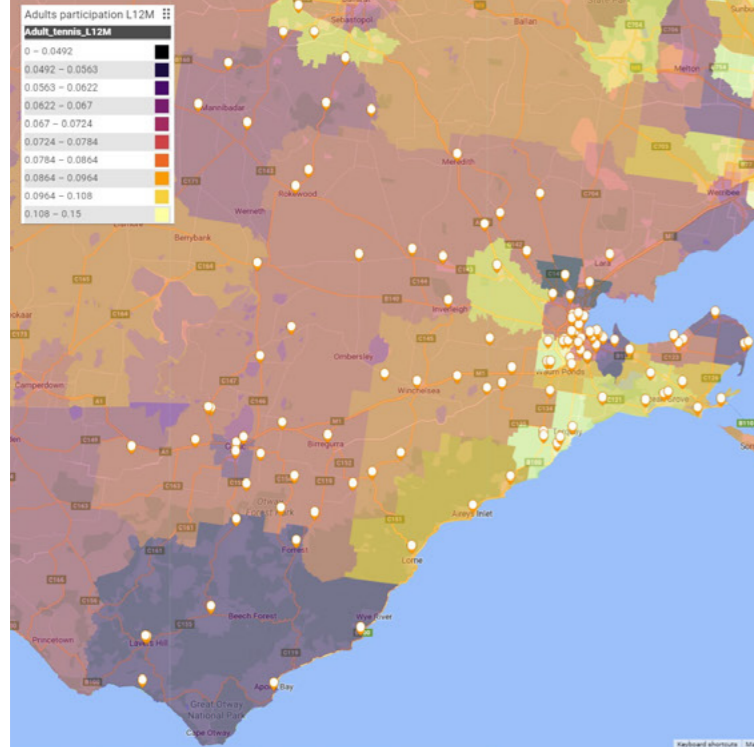
All venues



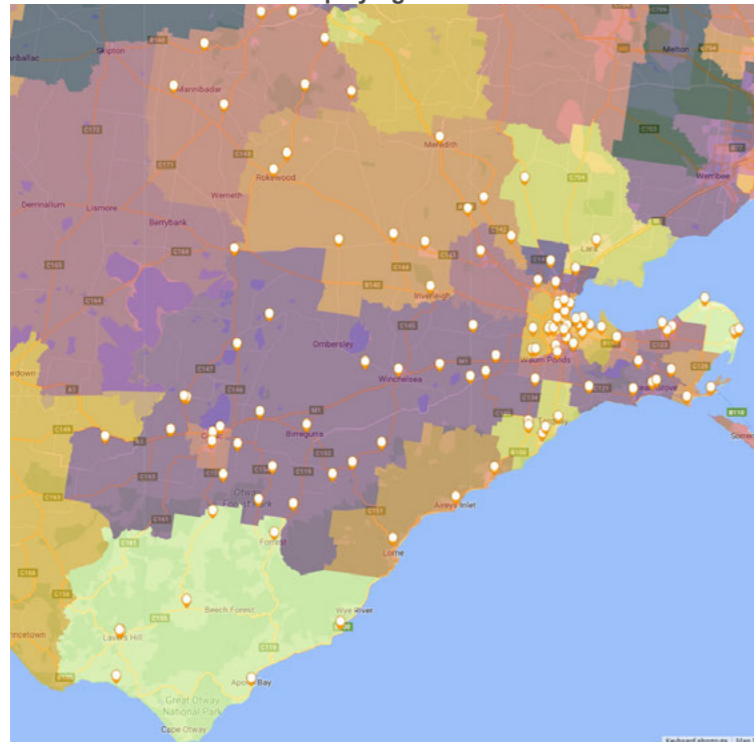
8. Participation and Interest

- Geelong has the highest tennis participation in the Barwon Region. However, there are high areas of interest around Torquay and the Otways.
- The areas with the highest current participation are to the west and south of Geelong around the suburbs of Highton, Newtown and Grovedale and further south to Barwon Heads and Torquay while interest to play strong in these areas as well around Lara and Colac Otway.

Tennis Participation – Played last 12 months



Latent Demand – Interest in playing Tennis

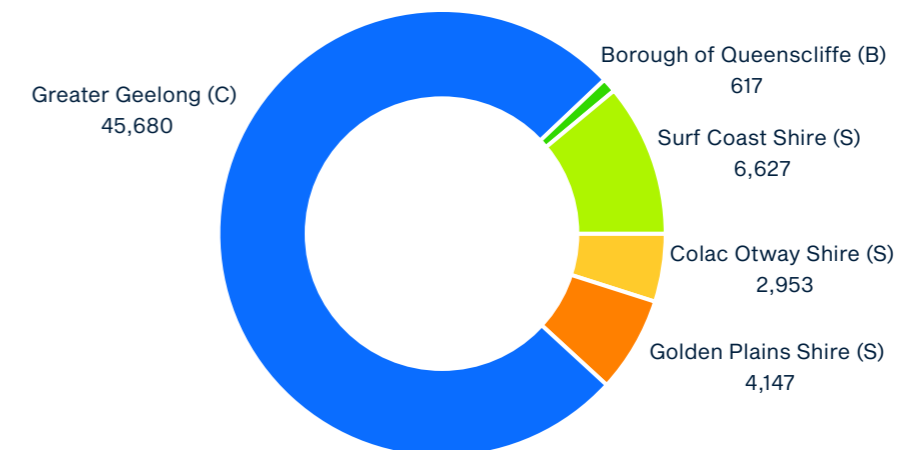


9. Demand vs Court provision

- Despite Greater Geelong having more than half the courts in the region, it has three quarters of the demand in the region.
- Of the 60,000 people estimated to currently play, or interested in playing tennis in the Barwon region, three-quarters of them are in the LGA of Greater Geelong
- The lowest combined demand/interest to play is in Colac Otway Shire, although this still represents a significant proportion of the population (13.25)
- Although Geelong has the most courts, it has by far the highest population to court ratio (i.e. compared to other regions within the Barwon region, there is relatively less courts). This is further exacerbated when looking at the ratio of tennis courts to tennis players/interested to play
- This information should be used as a topline benchmark to understand at a macro level relative provision. In our view these metrics alone don't provide enough insight, nuance or understanding of the supply and demand dynamics to determine an appropriate response. As such, all the information presented in this report will be critical in determining how best to maximise the tennis venue network.

LGA	Venues	Courts	Tennis players and interested	Total Population	% Tennis Player/ Interested to Play	Pop: Court ratio	Player/ Interest: Court ratio
Colac Otway Shire (S)	15	51	2953	22304	13.2	398	52
Golden Plains Shire (S)	18	57	4147	24879	16.7	436	73
Greater Geelong (C)	42	208	45680	270776	16.9	1314	221
Borough of Queenscliffe (B)	2	10	617	3235	19.1	324	62
Surf Coast Shire (S)	17	59	6626	37623	17.6	660	116
Barwon Total	94	385	60,025	358,817	16.70%	920	154

Participation and Interest by LGA

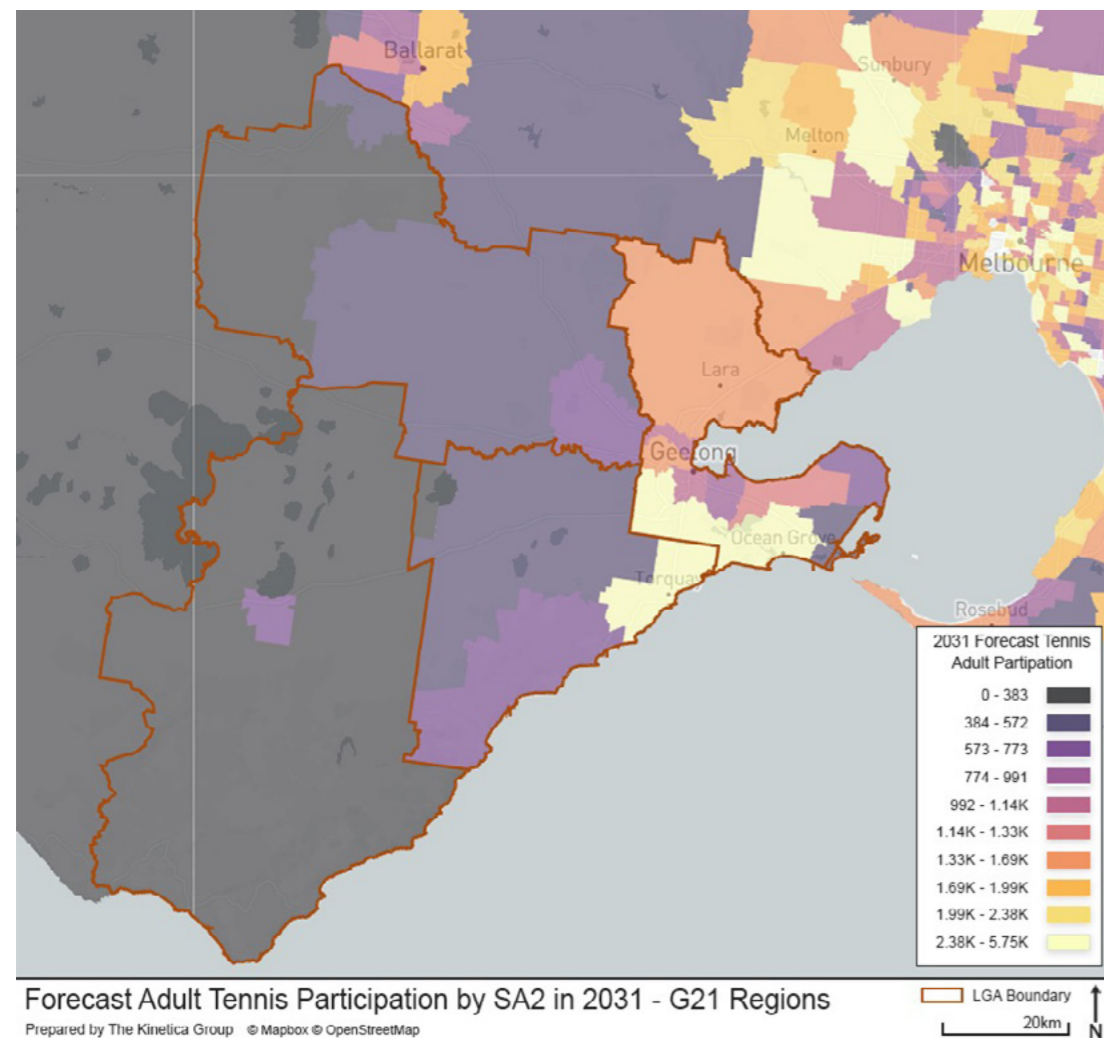


10. Future growth of Tennis

The vast majority of additional tennis players in the region in 2031 will be to the south of Geelong.

By 2031, there is predicted to be in excess of 5,000 more tennis players in the region, of which almost 80% will reside in Greater Geelong. The majority of the growth will be in the southern part of Geelong around Grovedale, Armstrong Creek and then further south towards Torquay.

Adult Tennis Participation by LGA	2021		2031		21-31 Change
	No.	%	No.	%	
Colac Otway Shire (S)	1,253	6.8%	1,233	6.7%	-20
Golden Plains Shire (S)	1,614	8.4%	2,033	8.4%	+419
Greater Geelong (C)	17,920	8.1%	21,871	8.1%	+3,951
Borough of Queenscliffe (B)	273	9.3%	301	10.3%	28
Surf Coast Shire (S)	3,259	10.8%	3,914	10.7%	+655
Barwon Total	24,320	8.3%	29,353	8.3%	+5,033



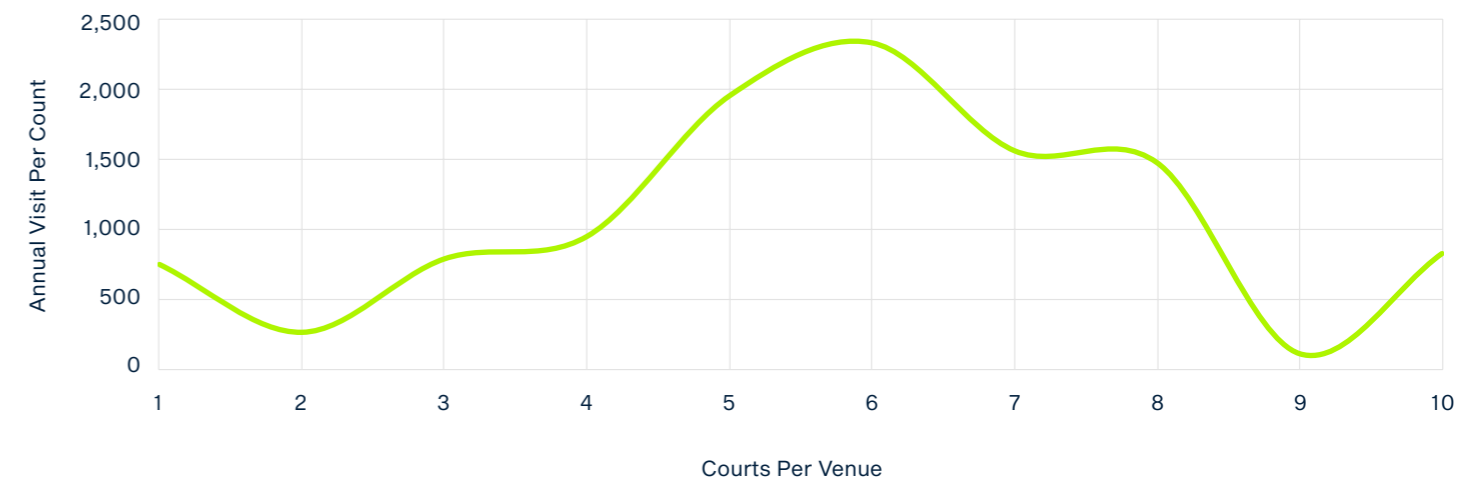
11. Best performing venues

Visitation at venues with 4 or less courts is significantly lower than venues with 5 to 8 courts. This is typically due to a range of factors including:

- ⌚ Less likely to have lights (which limits playing time and access at high demand time (6pm-10pm))
- 👨 Less likely to have a coach (which limits the offering)
- 🌐 Less likely to promote their offering/be present online

A key consideration for venue size (number of courts) is commercial sustainability. Small venues are harder to activate given limited space to offer a range of services (which also makes them hard to attract a coach). Based on Tennis Australia benchmarks, these venues underperform other venue types. On the other hand, large venues also need to be managed carefully as the costs related to build, operate and maintain these venues requires strong, regular, on-going utilisation (which is balanced by the fact that it should be able to offer a range of services that appeal to the entire spectrum of tennis players). It's important for all stakeholders to consider the long-term sustainability of venues as part of the long-term investment strategy (note, Kinetica did not have access to financial performance of the venues in the Barwon (G21) region and as such we can only reference this in generalisations).

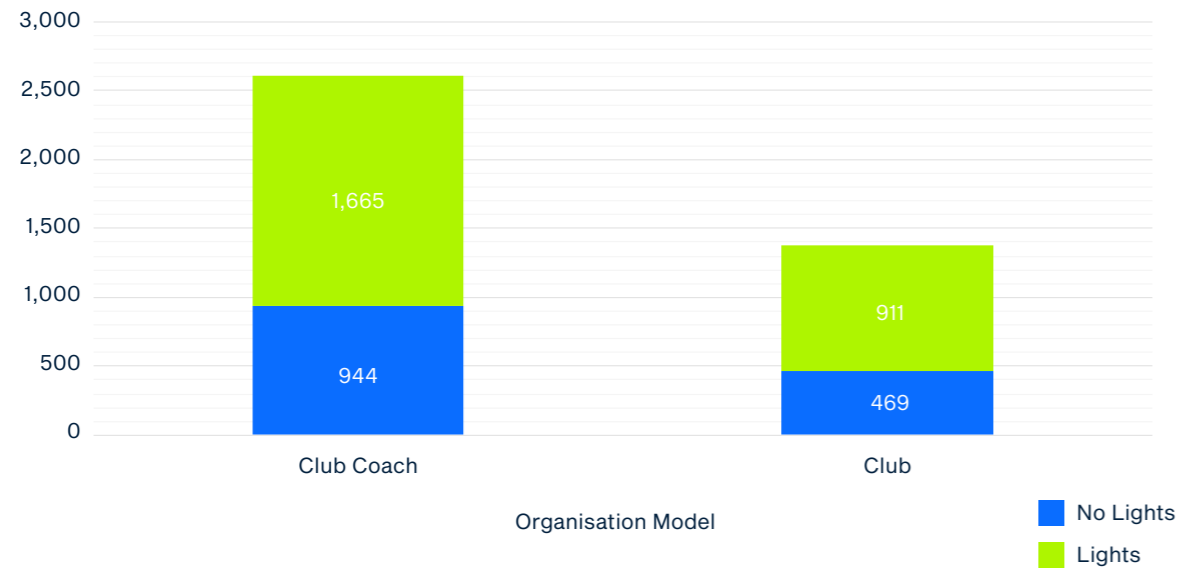
Visitation by Court by Number of Courts Per Venue



12. Best performing models

- Venues with coaches have on average twice as many visitors per court per annum compared to those without a coach (944 vs 469)
- When you include lights, utilisation at venues all increases by circa 2.5 times

Club Organisation Model and Lights



13. Venue with lights

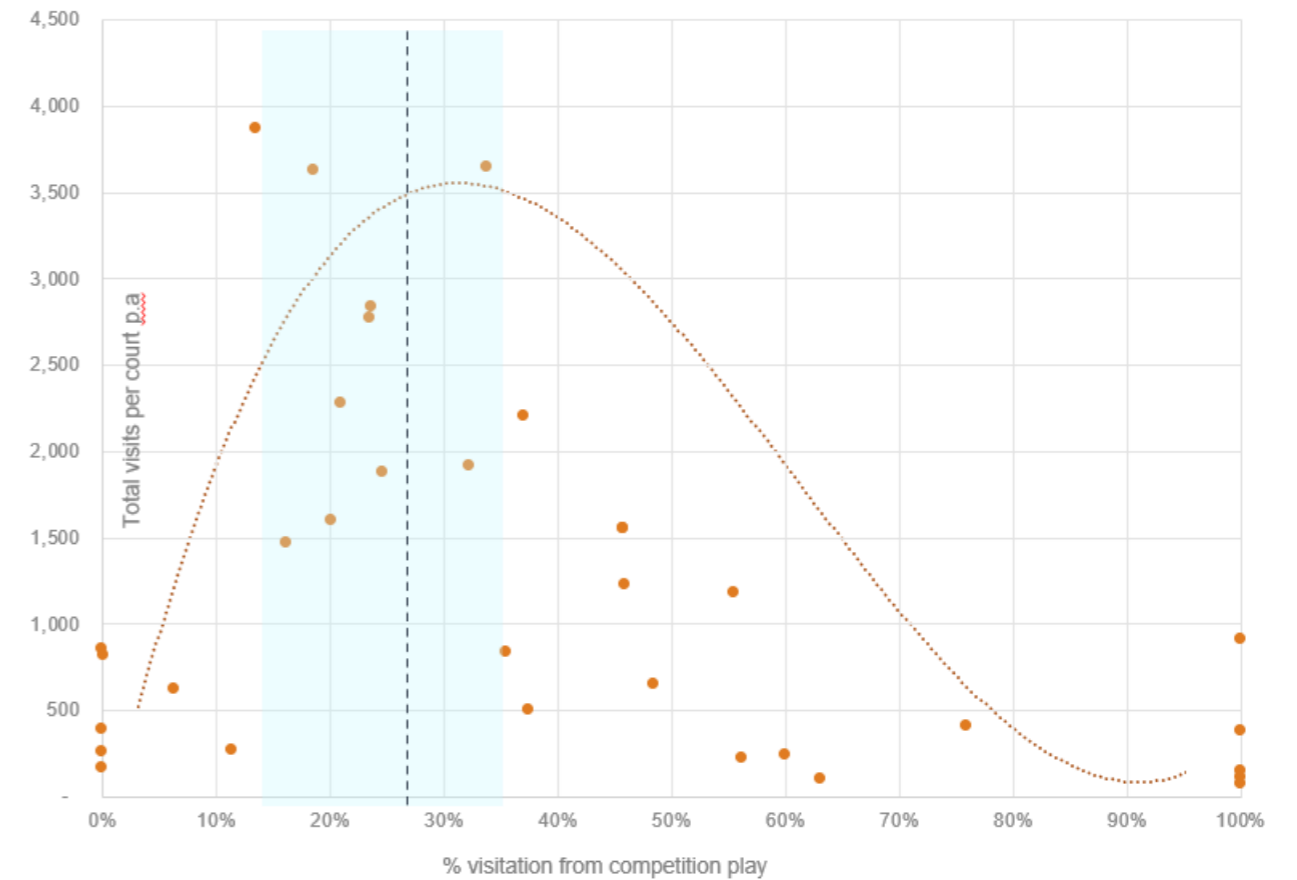
The chart shows the proportion of competition visits (x-axis) as a share of total visits per court per annum (y-axis). The critical insight from this analysis shows that very little competition (<10%) and a high proportion of competition (over 40%) significantly impacts total visitation. There is a sweet spot in between 15% and 35% of all play at a venue coming through competition. The rationale for this result is as follows:

For low level competition venues – little or no competition offer will not provide for the full suite of services sought after by tennis players and as such people will seek alternative options

For high competition venues – these venues may prioritise competition over social play, hence limiting access for some player types, they may be considered/perceived as being exclusive or requiring a certain skill level, or they may not optimise access to other forms of play and therefore not accommodate the needs of different player types.

The need for a balanced offer is critical in optimising visitation.

Share of visitation by competition

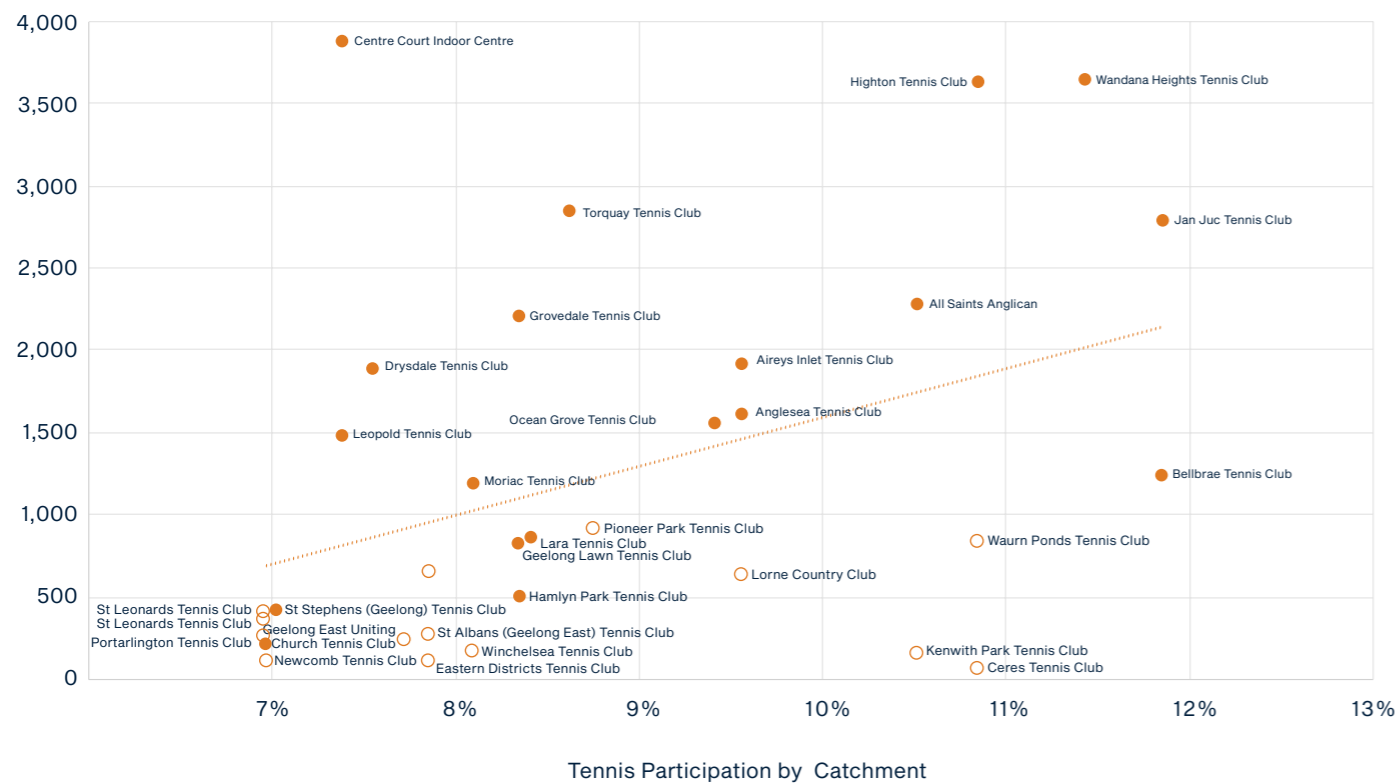


14. Best performing venue locations

VENUES IN HIGH DEMAND REGIONS PERFORM BETTER

This is seemingly an obvious insight, however prior to access to Aura data, local area demand information did not exist. As such, this should provide Tennis Victoria and the Barwon Region Council's substantive confidence in using local demand data as a critical input for infrastructure and venue activation planning. In the Barwon region, a 1% increase in demand in the catchment area of a venue translates to an additional 300 visits per court per annum. Every venue that is above the trendline (expected performance) is lit, further reiterating the importance of lights to venue utilisation.

Annual Visits Per Court by SA2 Tennis Participation



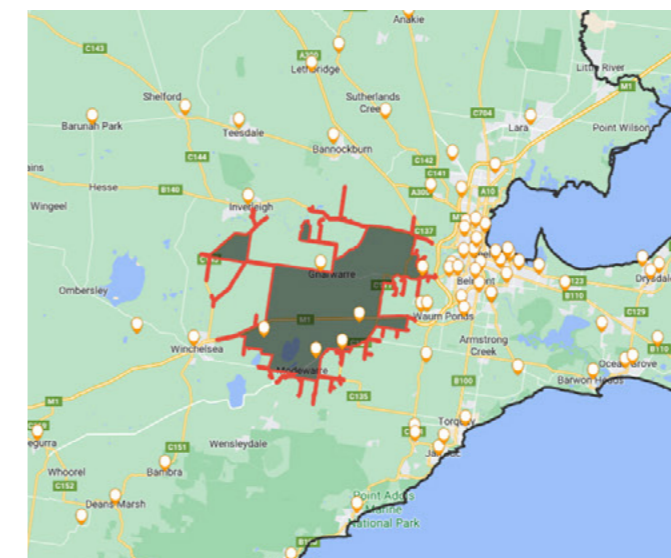
At the time of this audit, only SCS and COGG completed.

15. Venue Optimisation

UNDERSTANDING THE AMOUNT OF 'COMPETITION' AROUND A VENUE IS CRITICAL IN DETERMINING HOW TO OPTIMISE THE NETWORK

Analysis has been undertaken on the amount of competition (other tennis venues) within a 10 minute drive-time catchment area of each venue. The map below shows an example of a 10-minute drive time around a venue and shows there are 4 other venues within the catchment. This determines the relative competition (or provision) within an area and across the region. Venues in low demand areas (i.e. with fewer venues around them) are, holding all else equal, more important to the network given there are less options for the local community. The table below categorises venues based on their size and whether they sit in a low, medium or highly competitive catchment, and whether their catchment has low, medium or high demand for tennis. This, combined with the other analysis, provides the basis for both network and venue by venue recommendations.

Classification	Small (1-4 courts)	Medium (5-8 courts)	Large (10+ courts)	Total
Low Competition, Low Demand (<9% adult participation)	5	1	-	6
Low Competition, Mid Demand (<13% adult participation)	14	8	-	22
Low Competition, High Demand (13%+ adult participation)	4	2	-	6
Medium Competition, Low Demand	11	-	1	12
Medium Competition, Medium Demand	6	5	-	11
Medium Competition, High Demand	7	2	-	9
High Competition, Low Demand	-	-	-	-
High Competition, Medium Demand	14	5	1	20
High Competition, High Demand	4	4	-	8
Total	65	27	2	94



16. Colac Otway Shire Venue List

VENUES NO LONGER CONSIDERED PART OF THE TENNIS NETWORK

The Venue Categorisation and Actions table within this strategy is not a complete list of tennis courts in the Colac Otway Shire. The following courts have been removed from the table because they have no active teams and/or have deteriorated to an unusable condition for tennis activities:

- 📍 Carlisle River Tennis Courts
- 📍 Colac Indoor Tennis Centre (privately owned)
- 📍 Cressy Recreation Reserve Tennis Courts (not Council-owned)
- 📍 Eurack Tennis Courts
- 📍 Ferguson (Beech Forest) Tennis Courts (not Council-owned)
- 📍 Gellibrand Recreation Reserve Tennis Courts (not Council-owned – courts reconstructed for netball only – courts could be line marked for tennis if demand required)
- 📍 Johanna Tennis Courts (not Council-owned)
- 📍 Larpent Tennis Courts
- 📍 Lavers Hill Tennis Courts
- 📍 Swan Marsh Tennis Courts
- 📍 Yeo Tennis Courts



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