# SPORTAUS AUSPLAY

# **Netball** State of Play Report

**Driving Participation & Engagement** 

April 2019



### **About this Report**

The State of Play Report has been designed to deliver a single sport snapshot, to help identify trends and opportunities to maximise participation and engagement.

### **AusPlay Data**

The nationwide AusPlay survey has been running since October 2015, using Computer Assisted Telephone Interviewing (CATI).

The core aim of AusPlay data is to provide accurate and reliable information on trends in participation and physical activities among Australian residents, including Children Aged Under 15 and Adults 15+.

Annually, a total of about 20,000 interviews are conducted with Adults Aged 15+ and about 3,500 interviews with parents/guardians of Children Under 15.

AusPlay is carried out in compliance with ISO 20252 and membership requirements for the Association of Market and Social Research Organisations (AMSRO) and the Australian Market and Social Research Society (AMSRS).

### Data within this report

This report contains data collected up to December 2018.

Data within this report has been prepared by Sport Australia and may vary from other published AusPlay data due to differences in definitions and/or data classifications.





### Netball: State of Play Report Key Take Outs



### **Overall Participation**

The annual population estimate for Adults 15+ participating in Netball was 570,871 (or 2.8% of the Adult 15+ population).

Adult participation was heavily skewed towards females (507,150 or 5.0% of the female population), with females accounting for 89% of participation.

A very high proportion of Adult 15+ Netball participation was organised (90%), with more than two thirds of organised participation (69%) in sport clubs.

AusPlay estimates that 331,031 Children 0-14 participated in organised Netball out-of-school. The overwhelming majority of participation was from girls, as they represented 97% of all Children's out-of-school organised Netball participation.

Peak participation rates were among Children 12-14 and then participation steadily declined with age. However, compared to other team sports, Netball retained players for longer with strong female participation into adulthood up to 18-24 years of age.

### **Frequency & Duration**

Adults 15+ who participated in Netball had a median frequency of 52 sessions per annum (about once per week) and the median session duration was 60 minutes.

### Sport Most Strongly Associated With (loyalty)

A total of one million Adults 15+ nominated Netball as the sport they most strongly associate with, providing a good platform for community



engagement, sponsorship appeal and growth in participation.

#### **Spend**

A total of \$114 million per annum was spent on Adult 15+ Netball participation. Median annual spend was \$180 per Adult participant.

A total of \$67 million per annum was spent on Children's 0-14 participation in Netball, with a median annual spend of \$180 per Child participant.

# Motivations for Participation (Adults 15+)

The top three motivations to participate in Netball were 'Social reasons' (52%), 'Fun & enjoyment (50%) and 'Physical health or fitness' (45%).

# Reasons For Dropping Out of Participation

The dominant reason for dropping out of Netball participation was 'Not enough time/too many other commitments' (32%), followed by 'Poor health or injury' (22%).

### **Growth & Opportunities**

There is an opportunity to address the age related decline in participation rates among females, potentially through new products aimed at women aged 24+.

There is also an opportunity to build deeper emotional connection with and advocacy from females aged 15-17. This age group had high participation but relatively low 'loyalty'.



### Netball (Adults 15+) Snapshot



AusPlay data, Adult and Netball Participant Population 15+: January 2016 to December 2018 Adult 15+ n=61,579; Netball Participants 15+ n=1,179



Information on this page provides a snapshot of the Adult 15+ population, at total national level and by gender.

Participation figures are shown as total volume among the Adult 15+ population and the % who have participated.

This provides a read on participation levels, along with the market size when it comes to sports wear and apparel.

Engagement & Participation	Total	Male	Female
Is Most Strongly Associated Sport (%)	5.0%	0.3%	9.6%
Is Most Strongly Associated Sport (People)	1,005,955	28,151	977,804
Participation (%)	2.8%	0.6%	5.0%
Participation (People)	570,871	63,721	507,150
Average Frequency Per Annum	64	41	67

Conversion to Organised & Club	Total	Male	Female
Participation (People)	570,871	63,721	507,150
Organised Participation (People)	516,583	55,642	460,941
Conversion to organised (%)	90%	87%	91%
Club Participation (People)	357,950	28,399	329,551
Conversion to club – from Overall Participation (%)	63%	45%	65%
Conversion to club – from Organised Participation (%)	69%	51%	71%



### Netball (Adults 15+) Snapshot by State



AusPlay data, Adult and Netball Participant Population 15+: January 2016 to December 2018 Adult 15+ n=61,579; Netball Participants 15+ n=1,179



Information on this page provides a snapshot of the Adult 15+ population, at total national level and by state.

Participation figures are shown as total volume among the Adult 15+ population in each state and the % who have participated.

This provides a snapshot to help identify state level strengths and weaknesses.

Engagement & Participation	Total	NSW	VIC	QLD	SA
Is Most Strongly Associated Sport (%)	5.0%	4.3%	5.3%	4.5%	8.3%
Is Most Strongly Associated Sport (People)	1,005,955	270,216	264,043	181,355	119,205
Participation (%)	2.8%	2.3%	3.0%	3.0%	3.9%
Participation (People)	570,871	147,603	152,169	120,528	56,428
Average Frequency Per Annum	64	60	70	53	68

Conversion to Organised & Club	Total	NSW	VIC	QLD	SA
Participation (People)	570,871	147,603	152,169	120,528	56,428
Organised Participation (People)	516,583	138,007	138,960	107,336	51,442
Conversion to organised (%)	90.5%	93.5%	91.3%	89.1%	91.2%
Club Participation (People)	357,950	97,826	100,807	74,739	35,925
Conversion to club – from Overall Participation (%)	62.7%	66.3%	66.2%	62.0%	63.7%
Conversion to club – from Organised Participation (%)	69.3%	70.9%	72.5%	69.6%	69.8%





### Netball (Adults 15+) Snapshot by State



AusPlay data, Adult and Netball Participant Population 15+: January 2016 to December 2018 Adult 15+ n=61,579; Netball Participants 15+ n=1,179



Information on this page provides a snapshot of the Adult 15+ population, at total national level and by state.

Participation figures are shown as total volume among the Adult 15+ population in each state and the % who have participated.

This provides a snapshot to help identify state level strengths and weaknesses.

Engagement & Participation	Total	WA	ACT	NT	TAS
Is Most Strongly Associated Sport (%)	5.0%	5.5%	3.5%	3.3%	6.0%
Is Most Strongly Associated Sport (People)	1,005,955	127,156	11,716	6,547	25,717
Participation (%)	2.8%	3.1%	2.6%	1.8%	2.6%
Participation (People)	570,871	70,436	8,861	3,665	11,182
Average Frequency Per Annum	64	71	48	87	76

Conversion to Organised & Club	Total	WA	ACT	NT	TAS
Participation (People)	570,871	70,436	8,861	3,665	11,182
Organised Participation (People)	516,583	60,357	6,520	3,006	10,953
Conversion to organised (%)	90.5%	85.7%	73.6%	82.0%	98.0%
Club Participation (People)	357,950	31,227	4,925	2,729	9,772
Conversion to club – from Overall Participation (%)	62.7%	44.3%	55.6%	74.4%	87.4%
Conversion to club – from Organised Participation (%)	69.3%	51.7%	75.5%	90.8%	89.2%





### Netball (Adults 15+) Trends





Information on this page provides overall participation and organised participation trends among the Adult 15+ population.

As more data becomes available in subsequent report releases, time series data will be expanded.

This provides a read on participation trends to identify if a sport is gaining or contracting when it comes to participation metrics.





Loyalty among Participants - Trend





### Netball (Children Aged Under 15) Snapshot & Trends



AusPlay data, Children and Netball Participant Population 0-14: January 2016 to December 2018 Children 0-14 n=10,285; Netball Participants 0-14 n=876



Information on this page provides a snapshot of Children Aged Under 15, at total national level and by gender.

Participation figures are shown as total volume and the % who have participated, as well as frequency and club participation.

This provides a snapshot to help identify participation levels among Children Aged Under 15, along with highlighting differences at gender level.

Participation & Conversion to Club	Total	Boys	Girls
Organised Outside of School Hours Participation (People)	331,031	9,219	321,812
Club Participation (People)	284,256	8,062	276,195
Conversion to Club Participation (%)	85.9%	87.4%	85.8%
Average Frequency Per Annum	74	27	75







### Netball Participation by Life Stage



AusPlay data, Adult and Netball Participant Population 15+: January 2016 to December 2018 Adult 15+ n=61,579; Netball Participants 15+ n=1,179

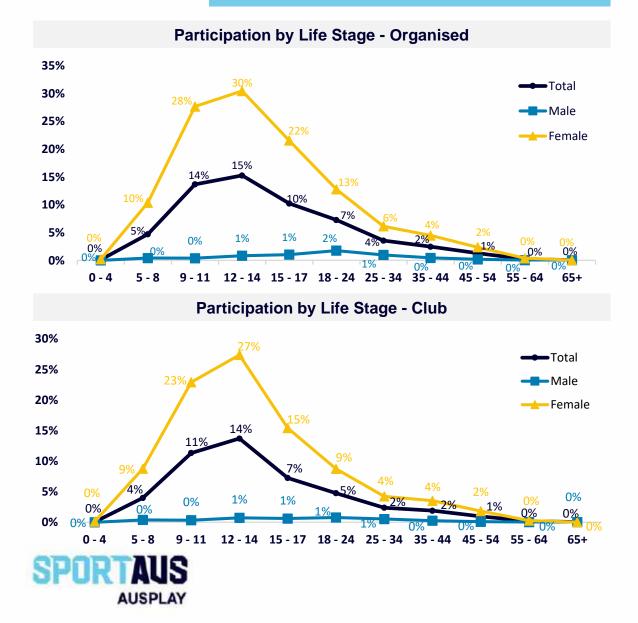
AusPlay data, Children and Netball Participant Population 0-14: January 2016 to December 2018 Children 0-14 n=10,285; Netball Participants 0-14 n=876



Information on this page provides a snapshot of participation at national level, by age and by gender.

Figures are shown as the % of each age who have participated.

This provides a read of peak participation rates by age, to help identify opportunities to develop targeted initiatives aimed at boosting participation among specific age and gender groups.





# **Netball** State of Play Report

Adults 15+





### Netball (Adults 15+) Participation Levels



AusPlay data, Adult and Netball Participant Population 15+: January 2016 to December 2018 Adult 15+ n=61,579; Netball Participants 15+ n=1,179

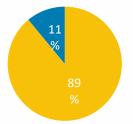


Information on this page provides a snapshot of the Adult 15+ population, at total national level and by gender.

Gender split shows the contribution each gender makes when it comes to total participation. Participation levels are shown as total volume among the Adult 15+ population and the % who have participated.

This provides a snapshot to help identify the age and gender groups that are driving current participation volume, whilst also helping to identify potential growth opportunities.

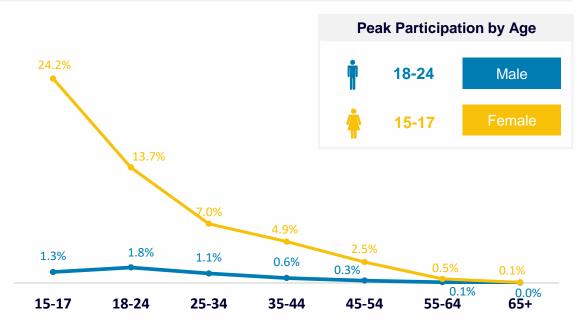
### Gender Split



#### Participation Levels

	Total Participation	Male Participation	Female Participation
%	2.8%	0.6%	5.0%
000's	570.9	63.7	507.2

#### Participation Levels by Age and Gender





### Netball (Adults 15+) Participation by Location



AusPlay data, Adult Population 15+: January 2016 to December 2018 Adult 15+ n=61,579

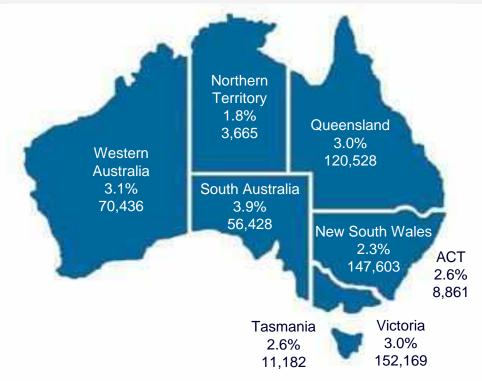


Information on this page provides a snapshot of the Adult 15+ population, based on state and geography.

Participation levels are shown as total volume among the Adult 15+ population and the % who have participated.

This provides a snapshot to help identify state level participation, as well as differences across metro, regional and remote areas.

#### **Participation Levels by State**



	Total National Participation	Major Cities	Inner & Outer Regional	Remote & Very Remote
%	2.8%	2.7%	3.2%	4.6%
000's	570.9	383.6	161.5	13.9



### Netball (Adults 15+) **Player Profile**



AusPlay data, Adult and Netball Participant Population 15+: January 2016 to December 2018 Adult 15+ n=61,579; Netball Participants 15+ n=1,179

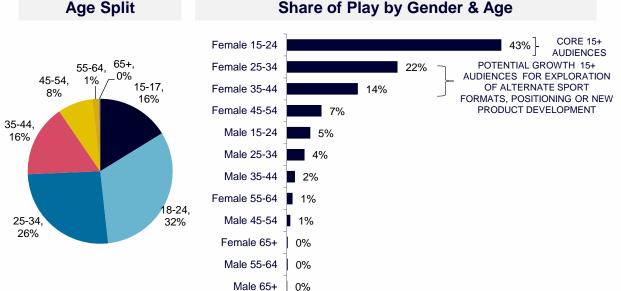


Information on this page provides a snapshot of the Adult 15+ population, based on age and gender, as well as LOTE, People with Disability and Indigenous.

Share of Play by Gender and Age shows the contribution of each group when it comes to overall participation.

This helps identify the specific age and gender groups that are having the greatest impact on overall participation levels, whilst also highlighting growth opportunities when it comes to sport formats that extend beyond traditional demographic audience needs.

#### Player Profile by Gender and Age



#### Share of Play by Gender & Age

#### Participation Levels by Population Group

_	Total National Participation	LOTE (Speak language other than English at home)	People with Disability	Indigenous
%	2.8%	1.1%	0.7%	4.3%
000's	570.9	38.4	20.1	18.6



### Netball (Adults 15+) Frequency & Duration



AusPlay data, Adult and Netball Participant Population 15+: January 2016 to December 2018 Adult 15+ n=61,579; Netball Participants 15+ n=1,179



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Information on this page provides a snapshot of the Adult 15+ Participant Population, in terms of frequency and duration of participation.

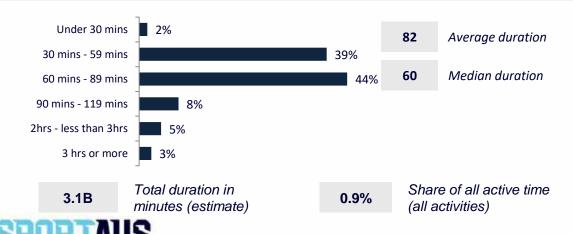
Frequency of participation provides a read on how often participation occurs. Duration provides a read of how long is spent each time participation takes place.

This helps identify opportunities among the Participant Population, in terms of initiatives aimed at boosting the total number of sessions per year by increasing frequency of participation.



#### Participation Levels by Age and Gender







### Netball (Adults 15+) Participation



AusPlay data, Adult and Netball Participant Population 15+: January 2016 to December 2018 Adult 15+ n=61,579; Netball Participants 15+ n=1,179

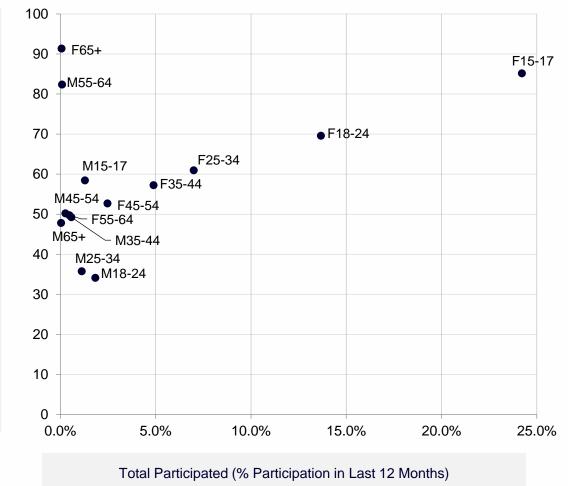


Information on this page provides a snapshot of the Adult 15+ Population in terms of participation and number of times participated in the last 12 months.

Figures are shown by age and gender groups, with those in the top right section being the most active on both measures.

This illustrates the participation profile across different age and gender groups, to identify key opportunities at age and gender level.

### Participation & Frequency by Age





Participation Frequency (Average # of Times Last 12 Months)

### Netball (Adults 15+) Current Market Position



AusPlay data, Adult Population 15+: January 2016 to December 2018 Adult 15+ n=61,579

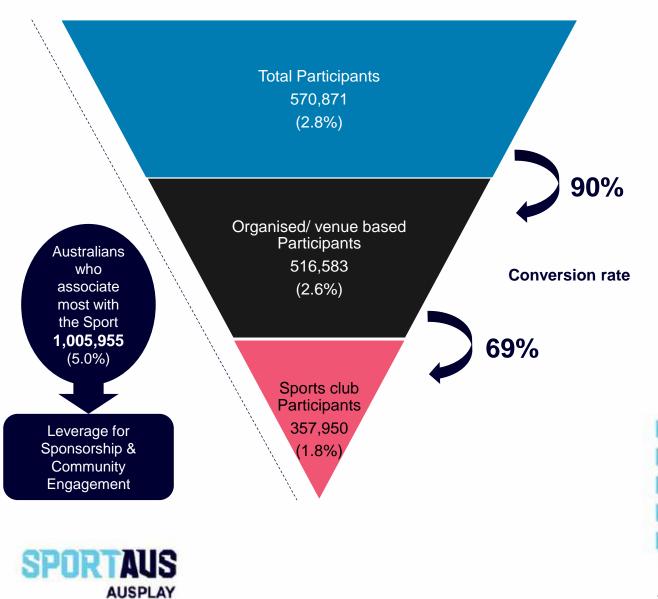


Information on this page provides a snapshot of the Adult 15+ Population, in terms of total participation, organised/ venue based participation and sports club participation.

Conversion figures show the conversion from one level to the next.

This highlights opportunities to build on the total participation base to drive increased organised/ venue based participation and sports club participation.

#### **Netball Association & Participation Levels**



### Netball (Adults 15+) Engagement



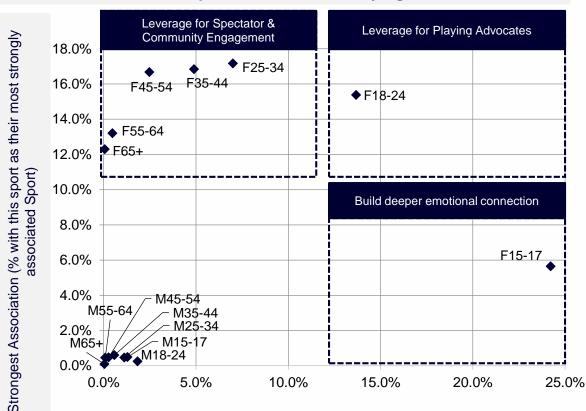
AusPlay data, Adult and Netball Participant Population 15+: January 2016 to December 2018 Adult 15+ n=61,579; Netball Participants 15+ n=1,179



Information on this page provides a snapshot of the Adult 15+ Population in terms of participation and the % of the Adult 15+ Population who have nominated this as the sport they most strongly associate with.

Figures are shown by age and gender groups, with those in the top right section being the most active on both measures.

This highlights opportunities to leverage demographic groups that have a strong association with a sport and those who participate.



#### Participation & Association by Age

Total Participated (% Participation in Last 12 Months)



### Netball (Adults 15+) Spend Profile



AusPlay data, Netball Participant 15+: January 2016 to December 2018 n=1,179



Information on this page provides a snapshot of the Adult 15+ Population in terms of paid participation.

Figures shown are based on annual spend.

Median and average annual spend figures illustrate the incremental annual uplift in expenditure on participation that can be attributed to each additional person who pays to participate in this sport.

#### **Netball Overall Spend Levels**

700/		All	Club
79%	Median annual spend	\$180	\$200
of participants paid to	Average annual spend	\$277	\$276
participate	Share of total spend (Share of all activities participated in)	1.3%	2.9%

Total expenditure on all participation **\$114,109,095** 

Total expenditure on **club** participation

\$82,861,588

Participation Spend by Gender	Total	Male	Female
Paid to Participate (%)	78.8%	72.3%	79.6%
Paid to Participate (People)	449,987	46,051	403,936
Average annual spend per participant	\$277	\$234	\$282
Total national annual spend	\$114.1M	\$10.5M	\$103.6M



### Netball (Adults 15+) Market Outlook & Opportunity



AusPlay data, Adult Population 15+: January 2016 to December 2018 Adult 15+ n=61,579



Information on this page provides a snapshot of the Adult 15+ Population in terms of market opportunity.

Figures shown represent volume of Adults 15+.

The gap between those considering this sport and those at risk of dropping out/ have already dropped out represents the net increase in total market opportunity.

#### **Netball Market Opportunity**







### Netball (Adults 15+) Market Outlook & Opportunity



AusPlay data, Adult Population 15+: January 2016 to December 2018 Adult 15+ n=61,579



Information on this page provides a snapshot of the Adult 15+ Population by gender and age in terms of market opportunity.

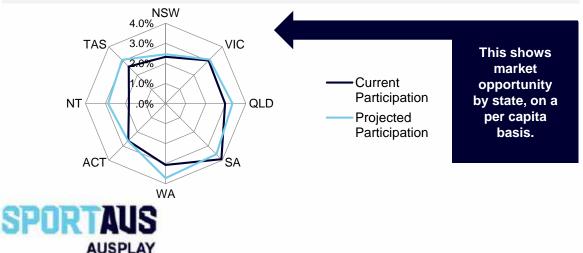
Figures shown represent the volume of people and %'s.

This highlights the strongest opportunities by gender and age, with the gap between those considering this sport and those at risk of dropping out/ have already dropped out representing the net increase in market opportunity among each group.

#### Netball Market Opportunity by Gender & Age

	TOTAL	5	9	15-24	25-44	45-64	65+
Participants – last 12 months (%)	2.8%	0.6%	5.0%	8.7%	3.4%	0.9%	0.0%
Participants – last 12 months (People)	570,871	63,721	507,150	275,514	240,826	52,658	1,874
Considering Next 12 Months (%)	0.9%	0.1%	1.6%	2.2%	1.3%	0.2%	0.0%
Considering Next 12 Months (People)	174,595	14,610	159,985	70,243	90,125	12,566	1,660
At Risk of Dropping Out or Have Already Dropped Out (%)	23.5%	22.2%	23.7%	22.8%	24.6%	22.7%	22.1%
At Risk of Dropping Out or Have Already Dropped Out	104.044	44474	100 170	60 770	50.007	11.040	A 4 F
(People)	134,344	14,171	120,173	62,779	59,207	11,943	415
Net Gain/ Loss (People)	40,251	439	39,812	7,464	30,917	624	1,246
Projected (People)	611,122	64,160	546,962	282,977	271,744	53,281	3,120

#### Netball Market Opportunity by State



### Netball (Adults 15+) Motivations for Participation



AusPlay data, Netball Participant 15+: January 2016 to December 2018 n=1,179



Information on this page provides a snapshot of the Adult 15+ Population as well as by gender and age in terms of motivations to participate.

Adult 15+ motivations are shown to the left and gender and age specific motivations are shown to the right.

This highlights the dominant overall motivations as well as similarities and differences at age and gender level. When designing strategies, products or messaging to engage with specific demographic groups, these should be built around the core motivations of that audience.

#### **Top 10 Motivations to Participate\***

#### Adults 15+

- Social reasons		52%
Fun/enjoyment		50%
Physical health or fitness		45%
Hobby	6%	
Performance or competition	5%	
Psychological/mental health/therapy	3%	
To lose weight/keep weight off/tone	2%	
Professional/Part of my job	1%	
To be outdoors/to enjoy nature	1%	
To be a good role model/to encourage others to participate	1%	

\* Multiple response question



	2nd	3rd
isons F	-un/ enjoyment	Physical health/ fitness
isons f	-un/ enjoyment	Physical health/ fitness
By	Age	
	2nd	3rd
rment F	Physical health/ fitness	Social reasons
rment	Social reasons	Physical health/ fitness
isons F	-un/ enjoyment	Physical health/ fitness
ealth/ s	Social reasons	Fun/ enjoyment
sons	Physical health/ fitness	Fun/ enjoyment
ealth/ s	-un/ enjoyment	Social reasons
rment	Social reasons	To be a good role model/ to encourage others to participate
	S 1	s Fun/ enjoyment

#### By Gender

### Netball (Adults 15+) Top 10 Reasons for Drop Out or Consideration



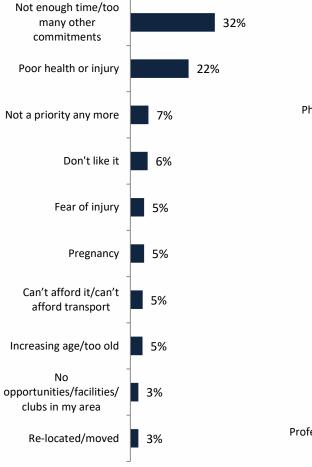
AusPlay data, Adult Netball Participants 15+, that are dropping out of participation in the next 12 months: January 2016 to December 2018 n=258; Adult Population 15+: n=61,579;



Information on this page provides a snapshot the top 10 reasons for dropping out as well as the top 10 reasons for considering this sport.

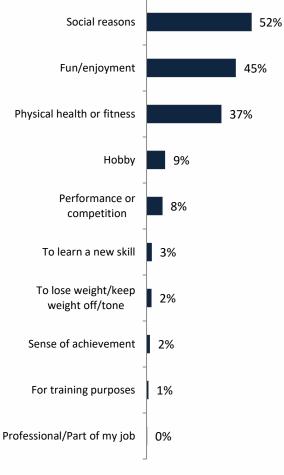
Responses are multiple response, meaning more than one reason can be given.

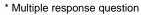
Identifying reasons for dropping out can play a role in identifying opportunities for innovations in product portfolio or alternate sport formats. Identifying reasons for consideration can play a role in optimising messaging, communications and advertising.



#### Top 10 Reasons for Drop Out

#### **Top 10 Reasons for Consideration**







# Netball - organised outside of school hours State of Play Report

Children Aged Under 15





### Netball (Children Aged Under 15) Participation Levels



AusPlay data, Children Under 15: January 2016 to December 2018 Children 0-14 n=10,285

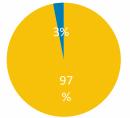


Information on this page provides a snapshot of Children Aged Under 15, at total national level and by gender.

Gender split shows the contribution each gender makes when it comes to total participation. Participation levels are shown as total volume among the Children Under 15 population and the % who have participated.

This provides a snapshot to help identify the age and gender groups that are driving current participation volume, whilst also helping to identify potential growth opportunities.

### Gender Split

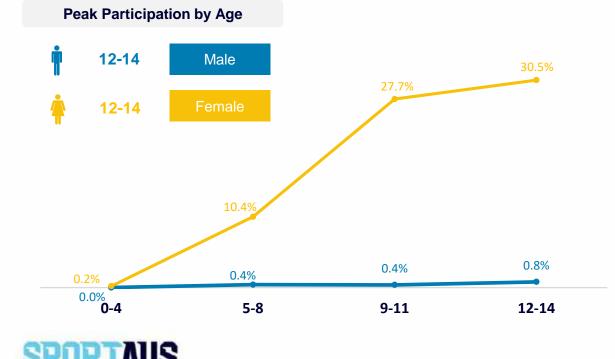


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#### **Participation Levels**

	Total Participation	Male Participation	Female Participation
%	7.0%	0.4%	14.0%
000's	331.0	9.2	321.8

#### Participation Levels by Age and Gender





### Netball (Children Aged Under 15) Participation by Location



AusPlay data, Children Under 15: January 2016 to December 2018 Children 0-14 n=10,285

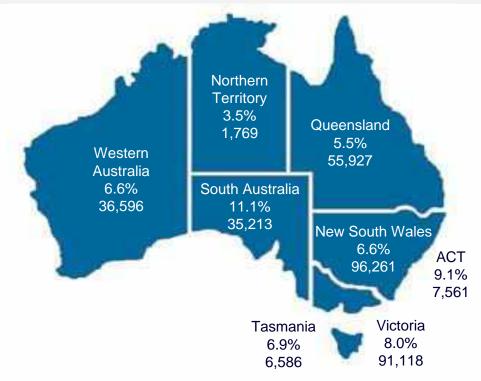


Information on this page provides a snapshot of Children Aged Under 15, based on state and geography.

Participation levels are shown as total volume among Children Aged Under 15 and the % who have participated.

This provides a snapshot to help identify state level participation, as well as differences across metro, regional and remote areas.

#### **Participation Levels by State**



	Total National Participation	Major Cities	Inner & Outer Regional	Remote & Very Remote
%	7.0%	6.7%	8.3%	4.9%
000's	331.0	216.1	108.3	4.7



### Netball (Children Aged Under 15) Participation



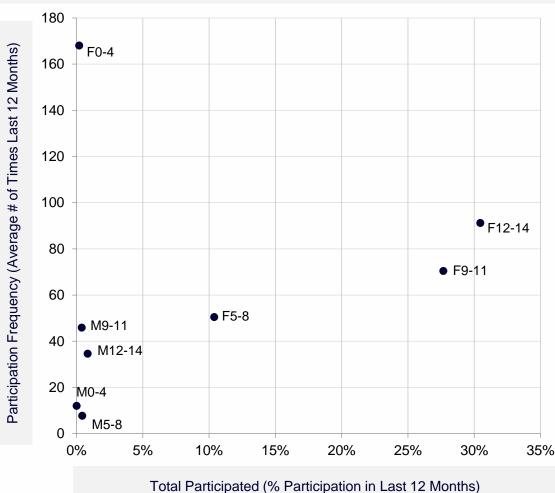
AusPlay data, Children Under 15: January 2016 to December 2018 Children 0-14 n=10,285; Netball Participants 0-14 n=876



Information on this page provides a snapshot of Children Aged Under 15 in terms of participation and number of times participated in the last 12 months.

Figures are shown by age and gender groups, with those closest to the top right section being the most active on both measures.

This illustrates the participation profile across different age and gender groups, to identify key opportunities at age and gender level.







### Netball (Children Aged Under 15) Current Market Position



AusPlay data, Children Under 15: January 2016 to December 2018 Children 0-14 n=10,285

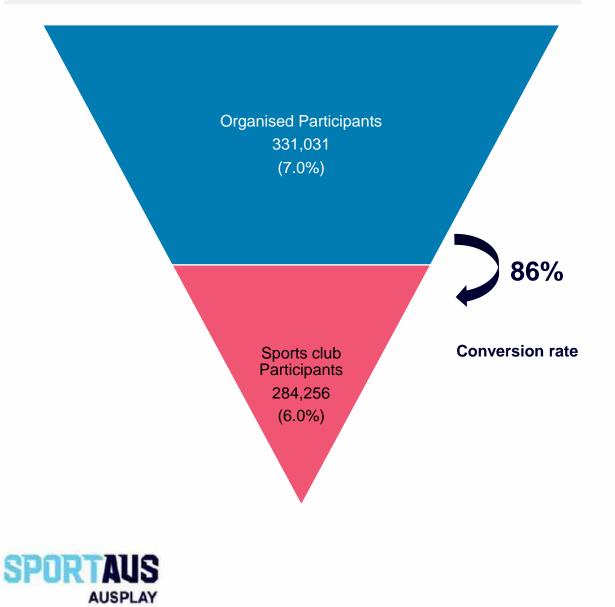


Information on this page provides a snapshot of Children Aged Under 15 in terms of organised participation and sports club participation.

Conversion figures show the conversion from one level to the next.

This highlights opportunities to build on sports club participation through increasing the volume of organised participation.

#### **Netball Association & Participation Levels**



### Netball (Children Aged Under 15) Spend Profile



AusPlay data, Netball Participant Children 0-14: January 2016 to December 2018 n=876



Information on this page provides a snapshot of the Children Under 15 Population in terms of paid participation.

Figures shown are based on annual spend.

Median and average annual spend figures illustrate the incremental annual uplift in expenditure on participation that can be attributed to each additional person who pays to participate in this sport.

#### **Netball Overall Spend Levels**

94%		All	Club
	Median annual spend	\$180	\$180
of participants paid to participate	Average annual spend	\$237	\$244
	Share of total spend (Share of all activities participated in)	2.9%	6.4%

 Total expenditure on all participation

 \$66,990,572

 Total expenditure on club participation

\$61,355,986

Participation Spend by Gender	Total	Male	Female
Paid to Participate (%)	94.4%	76.7%	94.9%
Paid to Participate (People)	312,391	7,070	305,322
Average annual spend per participant	\$237	\$77	\$241
Total national annual spend	\$67.0M	\$0.5M	\$66.5M



### Netball (Children Aged Under 15) Market Outlook & Opportunity



AusPlay data, Children Under 15: January 2016 to December 2018 Children 0-14 n=10,285



Information on this page provides a snapshot of the Children Under 15 Population in terms of market opportunity.

Figures shown represent volume of Children Aged Under 15.

The gap between those considering this sport and those at risk of dropping out/ have already dropped out represents the net increase in total market opportunity.

#### **Netball Market Opportunity**





### Netball (Children Aged Under 15) Market Outlook & Opportunity



AusPlay data, Children Under 15: January 2016 to December 2018 Children 0-14 n=10,285



Information on this page provides a snapshot of the Children Under 15 Population by gender and age in terms of market opportunity.

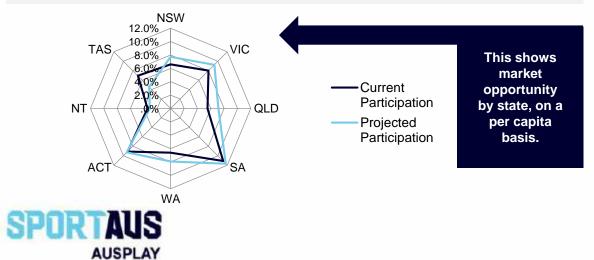
Figures shown represent the volume of people and %'s.

This highlights the strongest opportunities by gender and age, with the gap between those considering this sport and those at risk of dropping out/ have already dropped out representing the net increase in market opportunity among each group.

#### Netball Market Opportunity by Gender & Age

	TOTAL	8	<b>P</b>	0-4	5-8	9-11	12-14
Participants – last 12 months (%)	7.0%	0.4%	14.0%	0.1%	4.7%	13.7%	15.3%
Participants – last 12 months (People)	331,031	9,219	321,812	1,659	67,601	126,822	134,949
Considering Next 12 Months (%)	1.9%	0.0%	3.8%	0.2%	3.3%	2.6%	1.4%
Considering Next 12 Months (People)	87,644	1,060	86,584	3,127	48,050	23,936	12,531
At Risk of Dropping Out or Have Already Dropped Out (%)	10.3%	10.2%	10.3%	51.2%	8.8%	6.3%	14.3%
At Risk of Dropping Out or Have Already Dropped Out (People)	34,065	940	33,125	850	5,964	7,962	19,289
Net Gain/ Loss (People)	53,579	120	53,459	2,276	42,086	15,975	-6,758
Projected (People)	384,610	9,339	375,271	3,935	109,687	142,796	128,191

#### Netball Market Opportunity by State





### Where to from here?

More information about AusPlay, including the methodology summary, survey questions, key terms and definitions, national tables etc., can be accessed via Sport Australia's Sport Market Insights on the Clearinghouse for Sport website (with direct access through <u>researchinsport.com.au</u>). Please use your Clearinghouse for Sport login for full access.

Any further questions about AusPlay (or queries for additional customised reporting/further analysis of the dataset) can be directed to Sport Australia via: <u>AusPlay@sportaus.gov.au</u>.









Australian Government

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