

SQUASH AUSTRALIA

'Activating Squash'

WHY THE CHANGE?

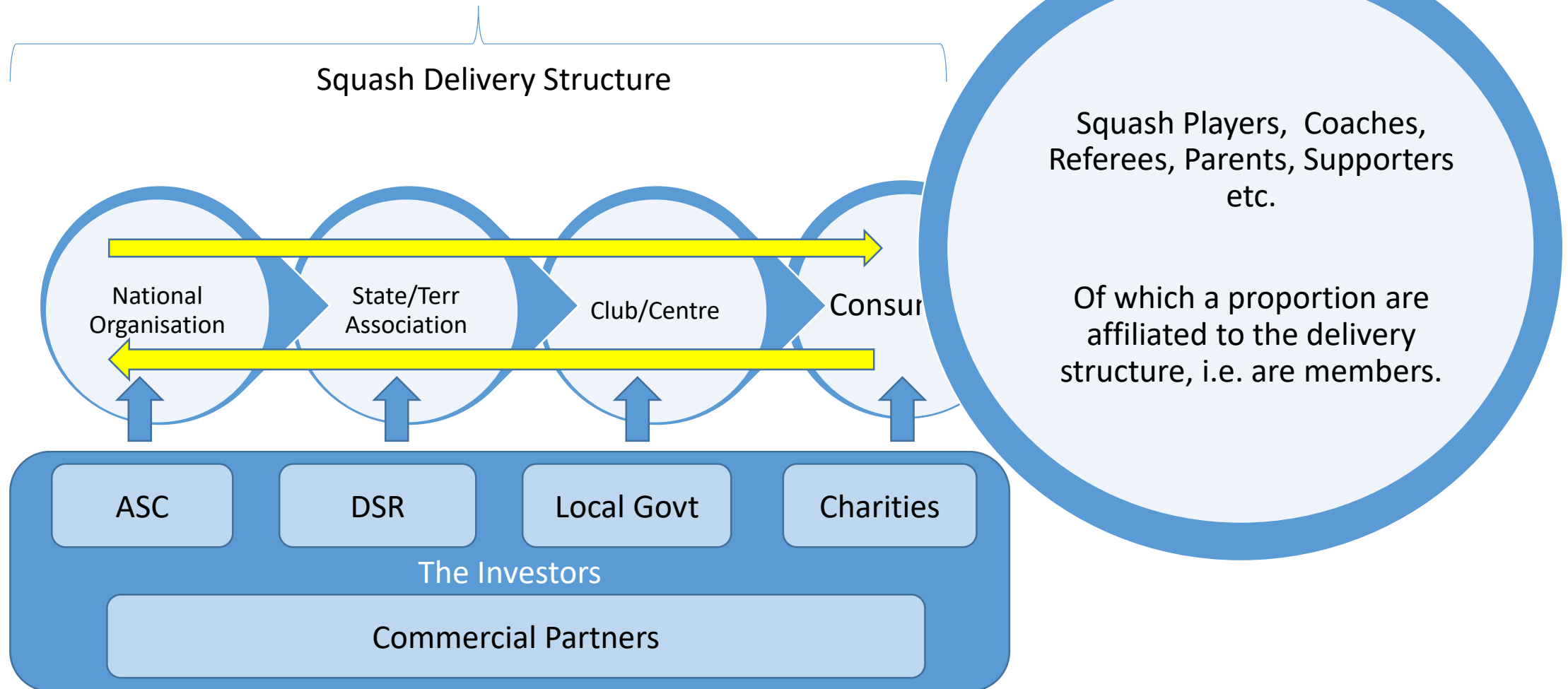
2016 Annual General Meeting



What makes a sport successful?

- 1. Seeking an understanding of current sport investment priorities*
- 2. Seeking an understanding of changes needed to 'future-proof' squash in Australia*

Some Definitions

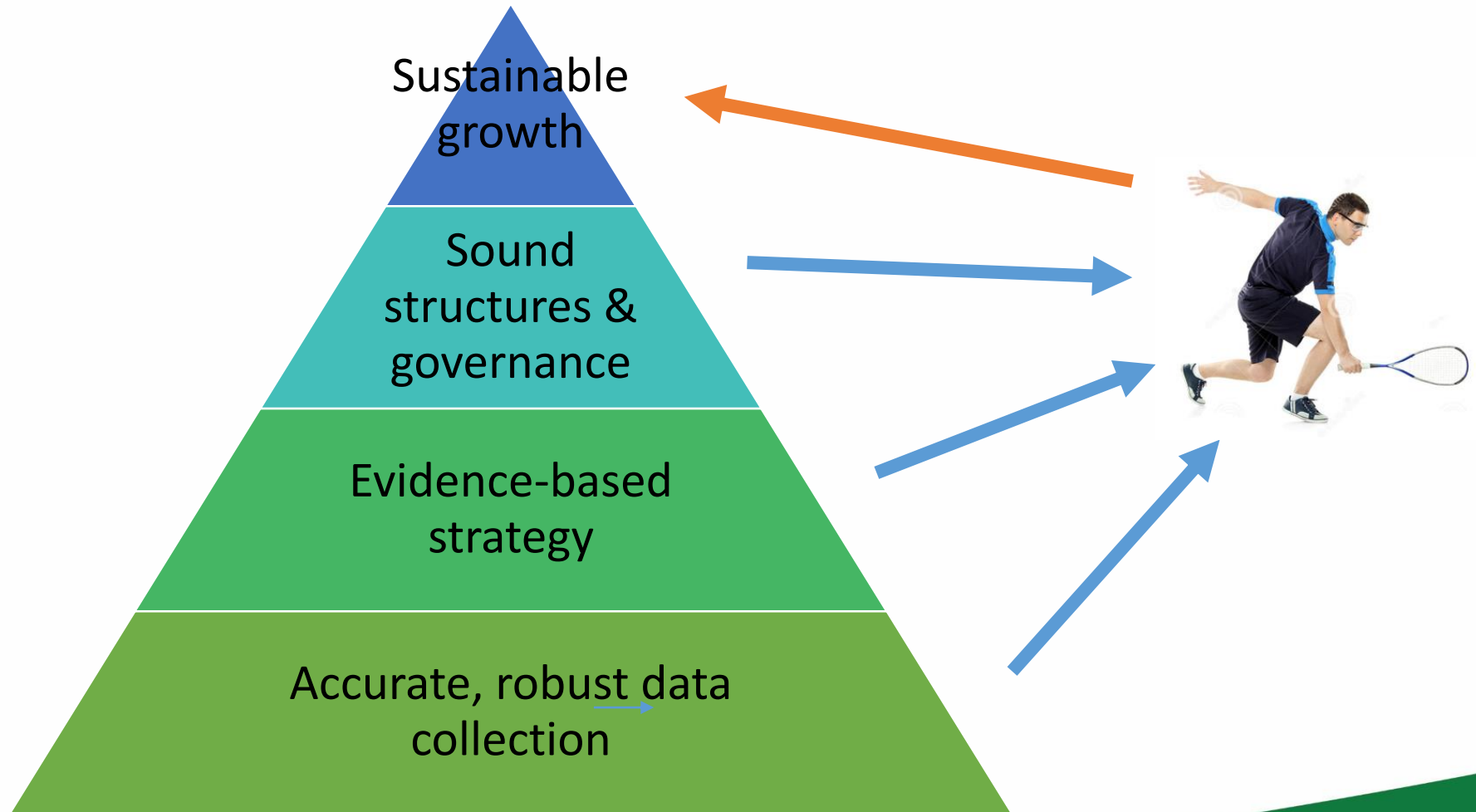


Global Sport Investment Trends

- Greater emphasis on **performance-based investment**
 - Greater expectations of **accountability**



Global Sport Investment Trends



WHAT MAKES A SPORT SUCCESSFUL?

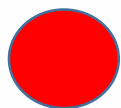
(An investor's view)

1. Growth in **OVERALL PARTICIPATION** rates
2. A high '**REACH**' into the sport's overall audience i.e. proportion of membership relative to overall participation
3. Offering cumulatively high **VALUE** to each member i.e. a worthy impact at all stages of the delivery structure
4. Impact upon critical **TARGET MARKETS** (e.g. high growth or hard-to-reach markets)
5. Must be **UNDERPINNED BY CAPABLE DELIVERY MODELS AND SOUND GOVERNANCE** i.e. be a 'safe' investment

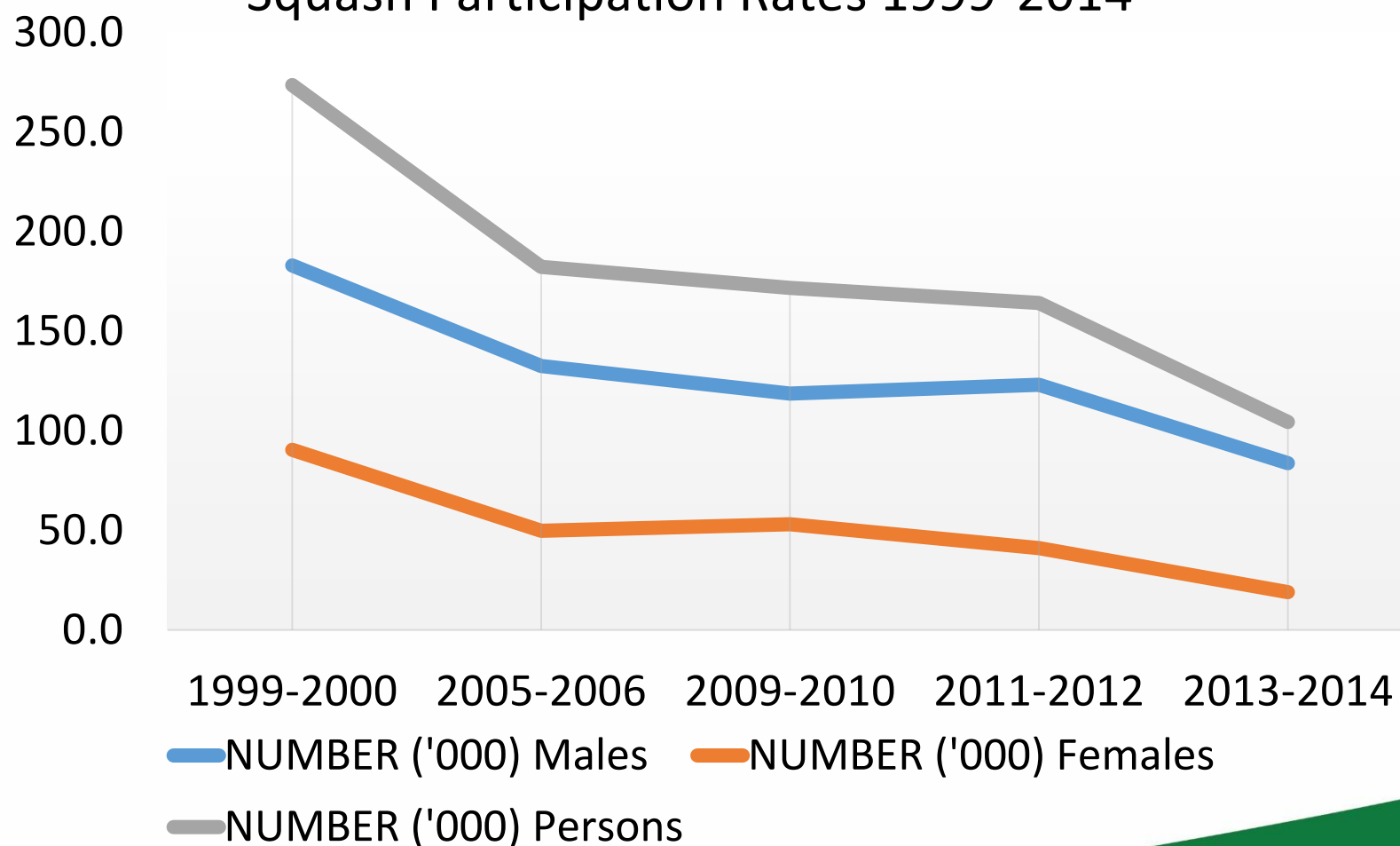
1. OVERALL PARTICIPATION RATES

Why is it important? All governments aligned in objective of increasing participation in sport and physical activity

Squash Rating:



Squash Participation Rates 1999-2014



2. REACH

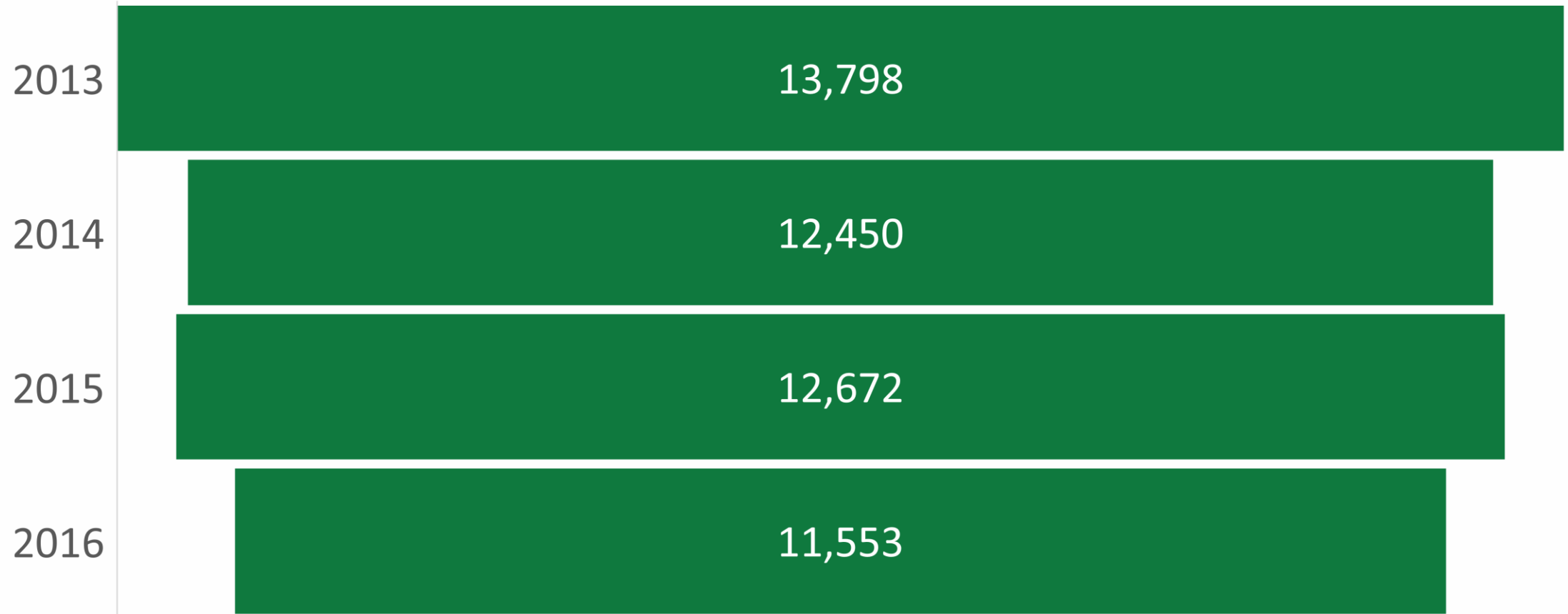
Why is it important? A measure of the success of the cumulative delivery system, typically measured by 'membership'.

Squash Performance: In 2013 our cumulative reach of our membership product into the Squash Community was less than **13% of all squash players**.

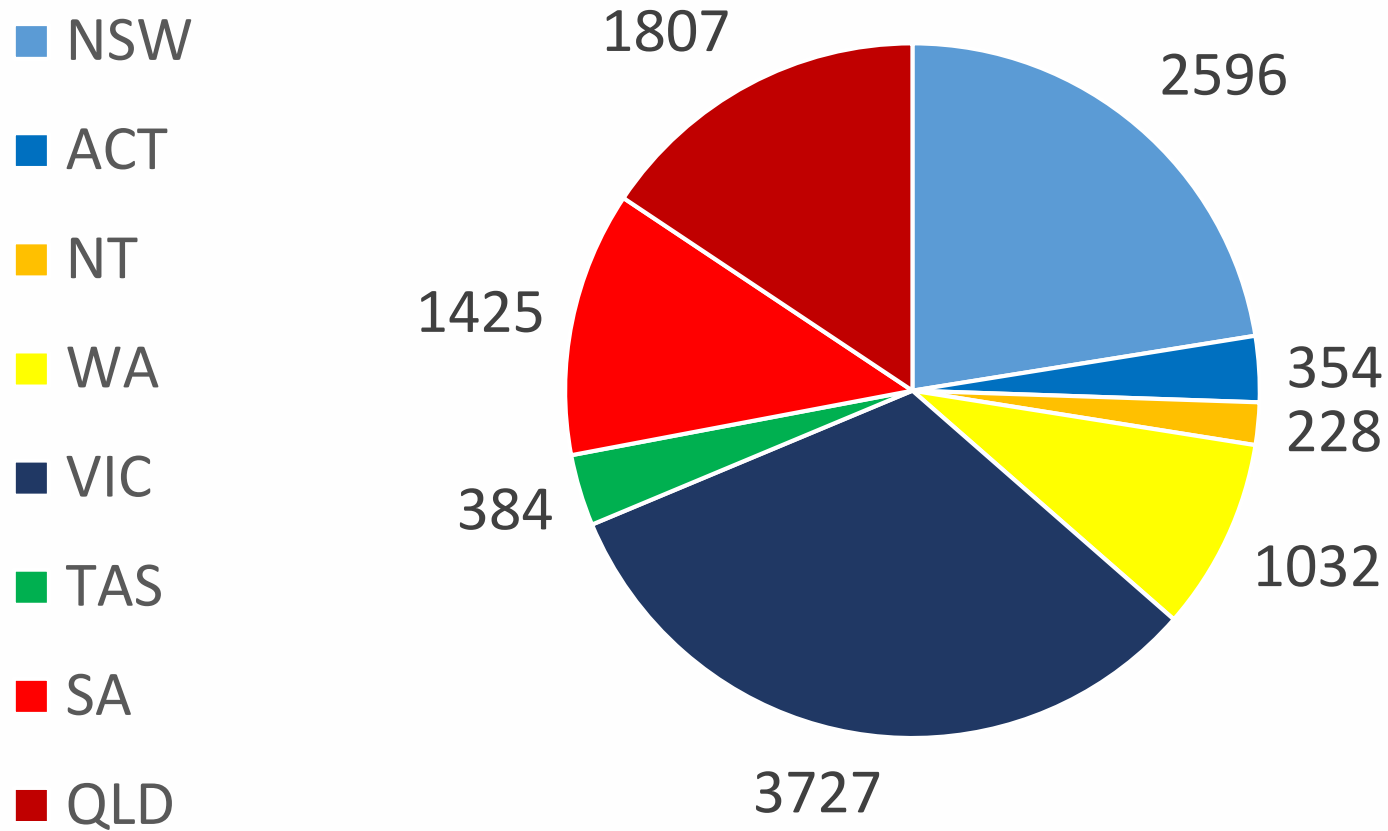


Squash Rating: 

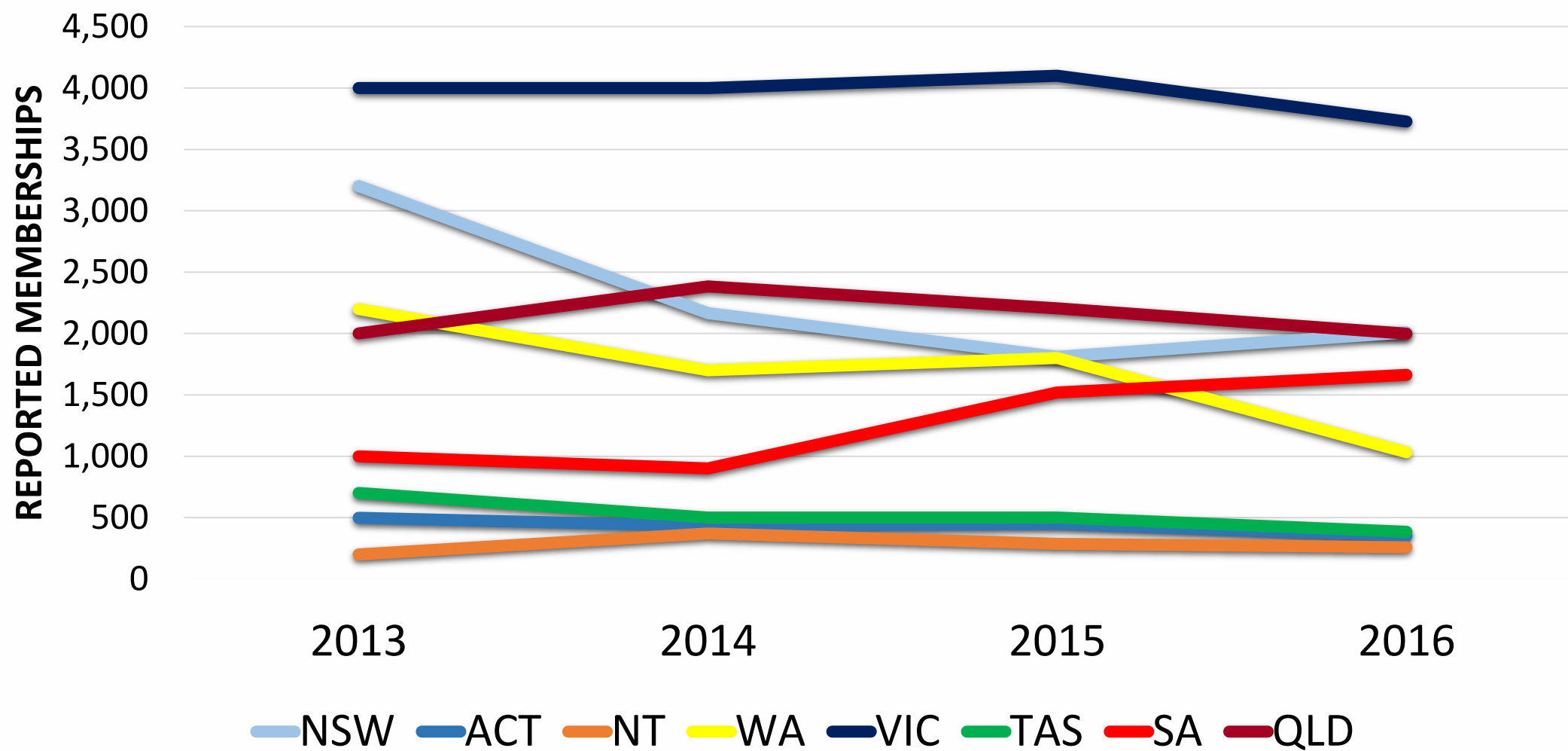
Reported Memberships 2013-16



2. REACH: MEMBERSHIP BY STATE



Change in Memberships By State



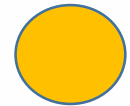
3. VALUE

Why is it important? This is another measure of the impact of the delivery system. What value are they offering to the existing customer base?

Squash Performance: Collectively, the delivery system offers-

- Insurance
- Access to ranking systems (Matrix)
- Access to tournaments and interclub competitions
- Discounts- equipment, courts hire and more
- Emphasis on competitive players

Squash Rating:



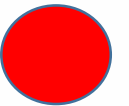
4. TARGET MARKETS

Why is it important? Government aims to ensure 'hard to reach' communities are offered equal access to sporting products.

Squash Performance:

- Currently no 'natural' target market for the Sport (in rough analysis of existing data)
- No agreed approach to targeting outside focusing on areas of high delivery (supply led, geographical targeting)

Squash Rating:



5. UNDERPINNED BY SOUND GOVERNANCE

Why is it important? Investors align themselves with safe partners to limit risk. Consider matters such as:

- Constitutional strength;
- Board performance;
- Reporting strength & data reliability;
- Commercial sustainability.

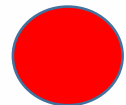
Squash Rating: Variable

5. UNDERPINNED BY CAPABLE DELIVERY MODELS

Why is it important? Investors want to minimise disruption and inefficiencies in the delivery of services to the sporting participant. Consider matters such as:

- Alignment of planning efforts;
- Efficiency in operations i.e. minimal duplication of effort;
- Direct line of sight to the consumer at all levels of the sport;
- Common vision, leading to collaboration throughout delivery structure.

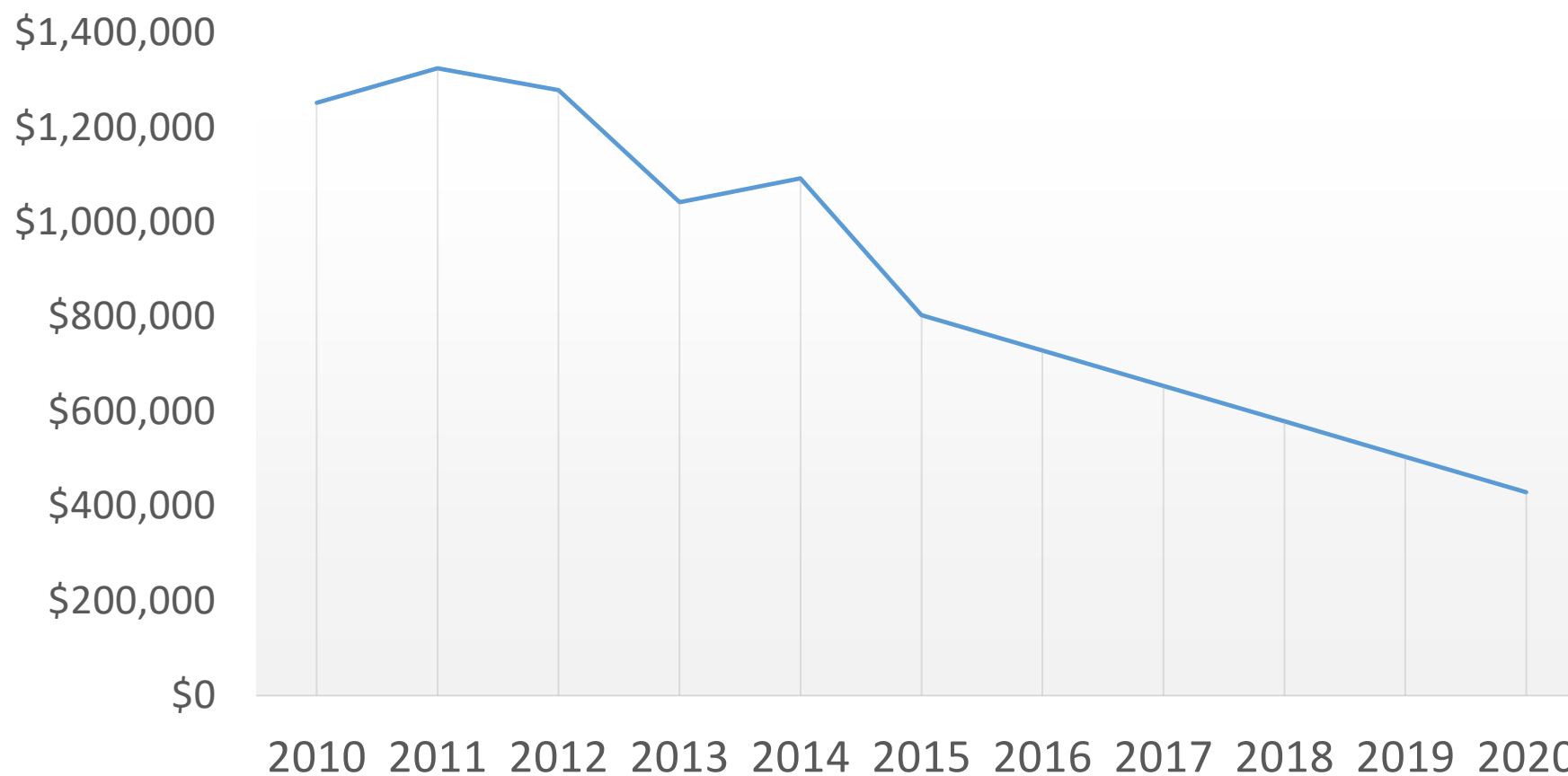
Squash Rating:



What does this mean for stakeholders of squash?

- Declining resources from all levels of government
- Ability to be proactive in response to new initiatives/opportunities hindered
- Traditional form of the game will continue to serve the core group of members and social participants but will not be connected to a pathway or won't access any additional benefits

ASC Investment Forecast

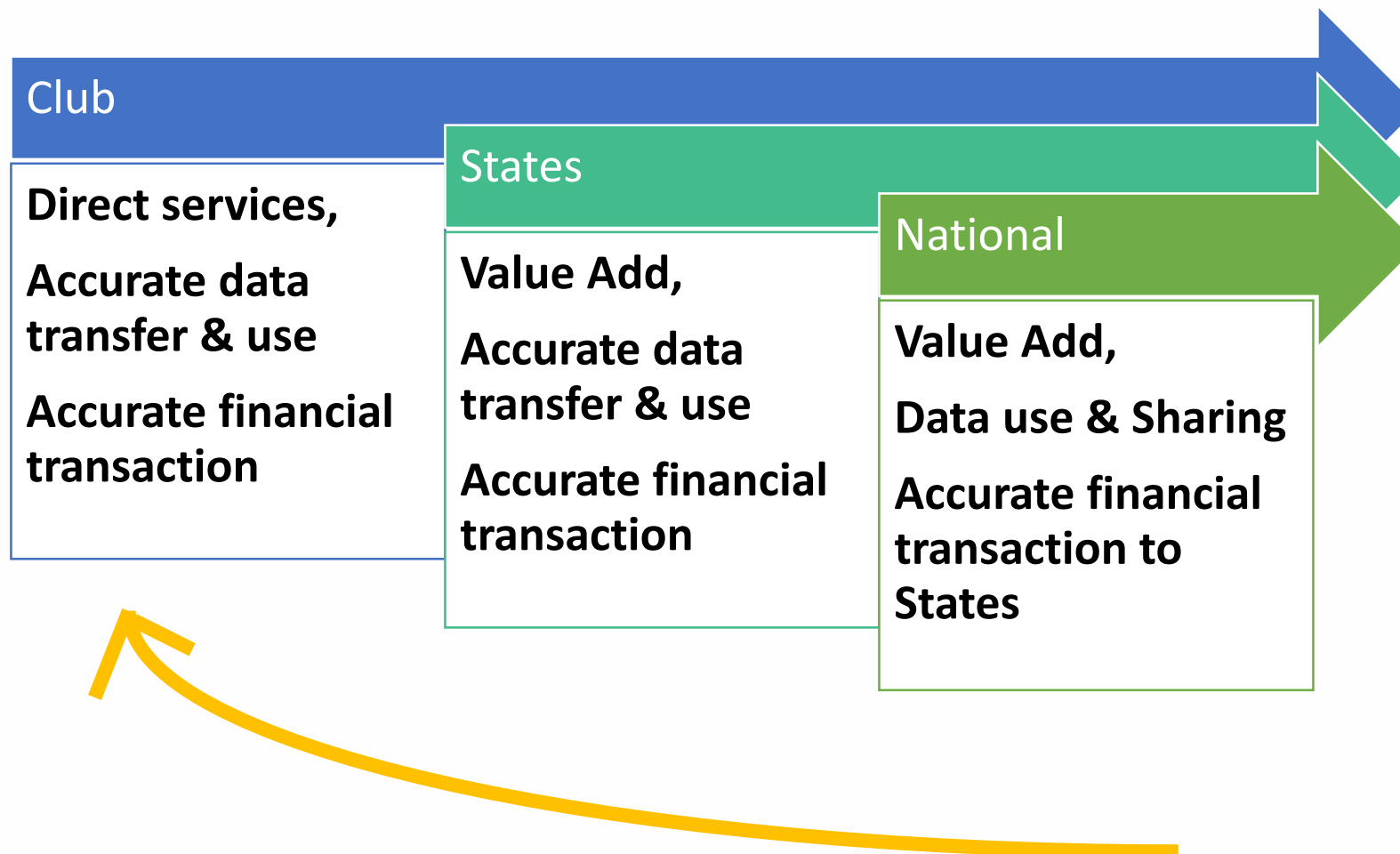


New State Investment Framework

- OzSquash: Up to \$5,000 available to States
- Events: Up to \$5000 per event
- Talent ID Camps: Up to \$1000
- State Coaches Workshop: Up to \$1000
- Membership Increases: Up to \$6000
- New levels of support in all areas of the business

Despite declines in federal funding, and membership income there is more funding available to states/territories from SA.

What can we impact?



Greater, cumulative value for the player



Better, more evidence-based strategy



More resources at every level

SQUASH

A SPORT FOR LIFE