



VOLLEYBALL VICTORIA STATE FACILITIES STRATEGY VOLUME 1 STRATEGY



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PRESIDENT'S FOREWORD



On behalf of the Board, I take great pride in presenting the first-ever State Facilities Strategy for the sport of volleyball in Victoria.

Volleyball Victoria, working on behalf and in response to affiliates, identified several key issues that required redress through the development of a state-wide plan.

These included:

- Resolving the current lack of access to courts for training and competition in both regional and metropolitan areas.
- Ensuring volleyball has a strategic presence in new facilities.
- Ensuring informed planning for future facilities.

In late 2017, Otium Planning Group was appointed to undertake a study that would provide Volleyball Victoria with a strategic action plan to address the facility requirements for volleyball in Victoria, and an advocacy pitch for key strategic and facilities priorities, both indoor and beach.

Otium Planning Group set about this task undertaking a review of existing research, extensive analysis of Volleyball Victoria membership and participation overlaid with broader population data, and consultation with targeted Volleyball Victoria affiliates.

The culmination of this work is a practical, strategic document that will service volleyball for years to come. Volleyball needs to respond to opportunity through innovation, collaboration, partnership, and when necessary, competition with other sports who seek access to the same facilities.

I would like to thank Sport and Recreation Victoria, this Strategy was supported by the Community Sports Infrastructure Fund from the Victorian Government - vital in bringing this document to fruition, Otium Planning Group for their engagement and efforts, and Dr Peter Hertan, who brought his wealth of experience in providing project management.

This Strategy does not conclude Volleyball Victoria's work on facilities, it in fact provides evidence for and an impetus to a louder volleyball voice advocating greater and more equitable access to community facilities.

A handwritten signature in blue ink that reads "Stephen Conroy".

The Hon Stephen Conroy
President
Volleyball Victoria



2. INTRODUCTION

Volleyball Victoria, together with the State Government (Sport and Recreation Victoria), is pleased to release the Volleyball State Facility Strategy.

This Strategy provides Volleyball Victoria with a strategic action plan to address the facility requirements for volleyball in Victoria.

This document is one of four volumes:

1. **Volume 1** Strategy for providing volleyball facilities in Victoria
2. **Volume 2** Advocacy pitch for key strategic and facility priorities
3. **Volume 3** Facility standards and guidelines
4. **Volume 4** Volleyball facilities audit



What have we done?

The project has involved the following tasks:



3. THE 'STRIKE' PLAN

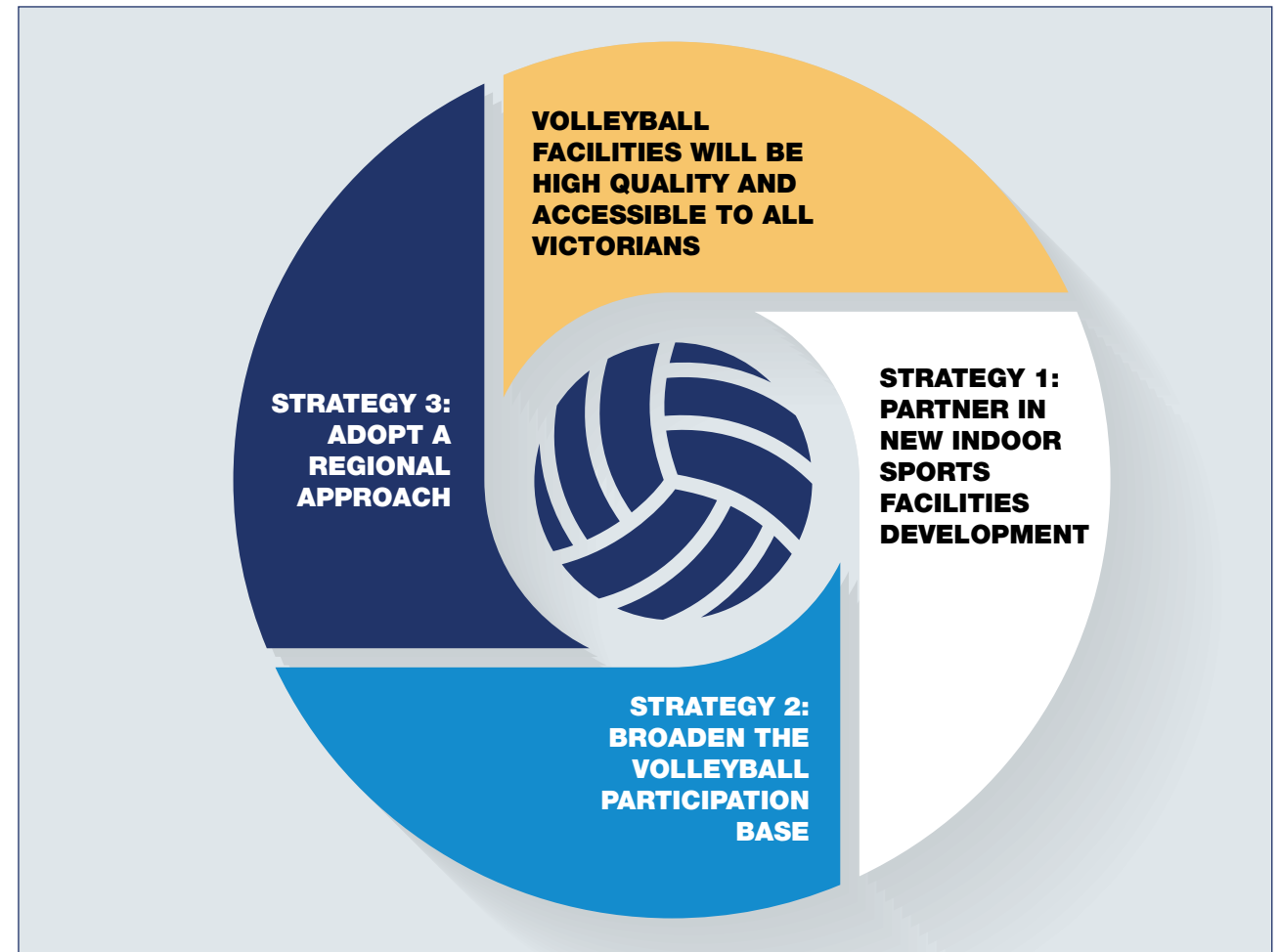
Volleyball Victoria has a STRIKE plan to create a network of high quality volleyball facilities which are accessible to all Victorians.

The STRIKE Plan will see a spike in participation growth and address key challenges facing the sport, including changing leisure patterns, the fierce competition by indoor sports for court space at peak times and the identified lack of Volleyball facilities in Victoria's growth areas.

Volleyball Victoria will partner with the State Government (Sport and Recreation Victoria), Local Government, peak indoor sporting bodies and volleyball affiliates in the development of new family friendly volleyball facilities in growth areas, and a network of regional volleyball hubs across Victoria to deliver sector development initiatives and new participation pathway programs.



The STRIKE Plan



4. THE STATE OF PLAY

What is the state of play for volleyball in Victoria?

4.1 Volleyball in Victoria

Volleyball Victoria has a membership that comprises 21 affiliate Associations (metropolitan and regional), 17 State League Clubs, three Academies, and now 5,204 individual members who play, coach, officiate, and support volleyball in Victoria (as at 31 March 2018).

The AusPlay national participation survey shows volleyball as being the most gender-equal sport in Australia! It is also one of the largest team sports by participation. There are more than 240,000 participants in Australia that span age groups from young children through to the over 50's.

In Victoria, indoor volleyball is traditionally played in winter months and participants are categorised as competitive (through a State League Club, Academy, or major event) or social/event (through a social competition in metropolitan areas through Volleyball Victoria, affiliate Associations, or private providers). In regional Victoria, most activity is categorised as social.

Organised competition in Victoria comprises of:

- Indoor Winter season (April to September) where weekly competitions are played as well as State League (nine adult and junior divisions, men & women), social (mixed & single gender) competition, Spikezone and Schools Cup events (One Day, Three Day and Primary Schools Cup).
- Indoor Summer season (October to March) where weekly competitions are played as well as Australian Volleyball League double-header home game events

(home & away for two Victoria franchises), social (mixed & single gender) competition and Spikezone.

- Beach Summer season (October to March) that includes the Victorian Beach Volleyball Series, Beach Volleyball Ranking and Community series, Spikezone and a Beach Schools Cup event (two days).
- Beach Winter season (April to September) where social indoor (mixed & single gender) is played.

4.2 The changing face of Volleyball

Volleyball Victoria and most of its affiliates conduct numerous indoor and beach events and tournaments throughout the year. These events attract a range of participants, from primary school to masters' teams, single and mixed gender, and special interest groups and are typically hosted in community-based facilities usually owned and operated by local government authorities or schools. These facilities are of varying standards and only available through advanced bookings. The **experience enjoyed at these events is impacted by the standard of venue** which cannot be guaranteed due to the heavy demand of high ball sports.

All sporting codes are looking at **new participation pathways to attract players in response to changing leisure patterns**. Spikezone is a popular school-aged participation development program launched by Volleyball Australia responding to these trends. AusPlay also found that physical health or fitness, fun/enjoyment and social are the main motivators of participating in a sport. These participation programs, trends and preferences will impact how volleyball facilities will be utilised into the future.

The **demand for indoor sports facilities in Victoria continues to grow**, with **current facilities under pressure** to accommodate a growing population, particularly in

metropolitan Melbourne and regional city areas.

There has been a number of recent indoor sports facility reviews conducted by Local and State Government and State Sports Organisations. Sport and Recreation Victoria Indoor Stadiums Needs Assessment Research Project identified 17 projects in metropolitan Melbourne and 19 projects in regional and rural Victoria in planning phase within four years responding to high demand for indoor court space.

Volleyball Victoria has tenancy of the State Volleyball Centre in Dandenong and utilises a variety of additional venues for the conduct of State League, social competitions, and events. These facilities have been identified on an ad hoc basis and the **security of tenure is not guaranteed** in many venues.

In addition, affiliate Associations access a range of facilities including the State Volleyball Centre, community facilities, and school venues where available. The **competition for indoor sports facilities is fierce**, with volleyball competing with other high ball sports including basketball, netball and futsal for peak timeslots.

Outdoor beach volleyball is run from South Melbourne and St Kilda beaches, with some regional affiliates utilising other venues like Inverloch for events. **Beach volleyball is increasing in popularity** and providing recognised venues to expand competition and support participation interest and growth is an objective of Volleyball Victoria. Indoor beach volleyball is provided at the State Volleyball Centre and a range of affiliated and non-affiliated private providers.

5. CHALLENGES FACING VOLLEYBALL IN VICTORIA

What have we learnt?

5.1 Volleyball's strategy for growing the game

Volleyball participation in Victoria has grown by 10-15% over the last two years. This growth is representative of the growth in the Victorian population. However, it falls short of the high population growth in urban growth areas.

New participation strategies and programs are being developed and implemented by Volleyball Victoria. These programs target schools, multicultural groups and disability groups.

Basketball Victoria and Netball Victoria have recently identified a significant shortfall in sports courts for their respective sports in their State Facilities Plans. These peak bodies are key partners with Volleyball Victoria in indoor sports centre developments.

The Federation Internationale de Volleyball (FIVB) Official Volleyball Rules 2013-2016 and Official Beach Volleyball Rules 2013-2016 stipulate the facility standards for volleyball. These standards are supported by industry sports facility design guidelines including Universal Design principles and Sport and Recreation Victoria's Female Friendly Design Guidelines. These standards and guidelines will inform the future development of Volleyball facilities in Victoria.



5.2 The demand for Volleyball facilities in Victoria

The following insights into the 5,204 Volleyball Victoria members show that most volleyball competition in metropolitan Melbourne is played through school competitions, whilst in regional Victoria, most volleyball competition is played through association competitions. Also, Volleyball is most attractive to both males and females in secondary school age and young adults.

The current 5,204 participants represents 0.086% of the total Victorian population. If the current penetration rate is maintained, the predicted participation levels over the next 5 and 15 years will be as follows:

Table 1: Predicted Volleyball participation over next 15 years

	2016 (current)	2021/22	2031/32
Population (Source Victoria in the Future 2016 Report)	6,048,791	6,605,700	7,733,300
Predicted participation (based on current participation rate)	5,204	5,681	6,651
Predicted participation (based on current 10% growth rate)	5,724	6,296	6,926

Where are the opportunities for growth?

Volleyball Australia commissioned research into the opportunities for volleyball in 2016. Beach volleyball and junior participation were highlighted as the sports' two biggest opportunities.



Key research insights:

- Traditional volleyball participation peaks at 13 to 19 years of age, with Beach Volleyball exhibiting stronger participation in late teenage and early adult years.
- Lapsed participants are twice as interested in playing volleyball as those who have never played. Current volleyball players n=465; lapsed volleyball players n=391; never participated in volleyball n=561.
- Approximately 750,000 Australians have played some form of volleyball in the last 12 months. A third of those participated in organised formats. Only 7% of organised participants are members of their State Association.

The continued growth in net overseas migration is a significant opportunity. Volleyball in Asia is experiencing an increase in popularity and participation.

There is a projected increase in the number of people aged up to 19 years in Victoria. This age group is the most active in indoor sports and volleyball participants, fuelling an increase in demand for volleyball facilities into the future.

There is a significant drop-off in volleyball participants after teenage years (school years). However, the data shows that lapsed volleyball participants are twice as likely to return to the sport.

More than half of the competition participation is centred around the State Volleyball Centre and nearby venues. Most of the facility utilisation outside of this area is for training and/or social competitions. With the exception of suburbs surrounding the State Volleyball Centre in Dandenong, there is very limited opportunity for participants to play in competitions within their municipality or adjoining suburbs.

Beach Volleyball participation and interest is growing, particularly in the older teenager age group. Facility opportunities across Victoria's coastline are limited,

however this trend may represent an opportunity for the sport in retaining participants beyond school years.

Most volleyball affiliates and facilities have waiting lists. The largest waiting lists relate to entry level programs.

What are the barriers to growing Volleyball participation?

Access to facilities due to high demand by other indoor sports and fierce competition for courts (basketball, netball, futsal) at peak times is a key issue facing volleyball and the main reason for the sport being restricted in growing participation.

Volleyball Victoria recently conducted a survey of Associations with 19 responses received. Of those affiliates interviewed, eight associations, clubs and providers reported that they are in significant growth phases that are primarily limited by access to facilities.

In reviewing new indoor sports facilities being planned, there are few that consider the current unmet and future demand for volleyball.

What makes a successful Volleyball facility?

Leisure facilities draw from a primary catchment of 5km (80% of participants) and secondary catchment of 10km (20% of participants) and therefore the most successful facilities will be those that are located within high population areas.

Facilities that are designed and operated to be 'multi-use' generally perform better than single sport/ specialist facilities. Larger regional facilities with four or more courts that are centrally located in large catchment areas are generally more financially viable.



5.3 The supply of Volleyball facilities in Victoria

A facilities audit has been developed for the project. The audit references the Volleyball Victoria participation database, Otium Planning Group's indoor sports facilities database, State Government land use planning maps, engagement findings from phone calls with affiliates and a review of each affiliate website. The audit captures participation, facility, land use and operational data for each venue. This section identifies the key findings from the audit and discusses the supply challenge.

Volleyball is played in 57 indoor multi-sport stadiums across Victoria. A total of 174 indoor courts are utilised for volleyball, with an average of 3.05 courts per venue.

What Volleyball facilities do we have?

Beach Volleyball is played in nine facilities, providing 24 beach volleyball courts in Victoria. Two Beach Volleyball facilities located in metropolitan Melbourne support training, elite teams and programs. There are limited venues for beach volleyball competition, despite this discipline receiving high interest and growth in participation.

Forty one (41) volleyball venues provide for a local community catchment – generally with one or two courts. The breakdown of remaining facilities are: seven district facilities; two regional facilities; five sub-regional facilities; and one state facility, being the Dandenong Indoor Sports Stadium – State Volleyball Centre.

Ninety seven percent (97%) reported that volleyball courts were constructed of timber with more than 70% of courts multi-lined for basketball/netball and have serving/run-off areas of less than 2.5m.

Many venues provide both full-sized courts with compliant run-offs, as well as courts with small run-offs. There are 92

courts available with full service areas and run-offs, representing 1.61 courts per venue. However often the full-sized courts are only used for special events.

Of the 174 courts marked and utilised for volleyball, 16 of the courts are used for community volleyball only, as overflow or substitute training courts or for special activities, such as tournaments.

Roof heights are generally higher than minimum standard for competitions. Thirty one (31) respondents provided information on estimated roof heights with the following heights reported: 97% \geq 7m high, 45% \geq 8m high and 26% \geq 9m high.

What are the supply issues?

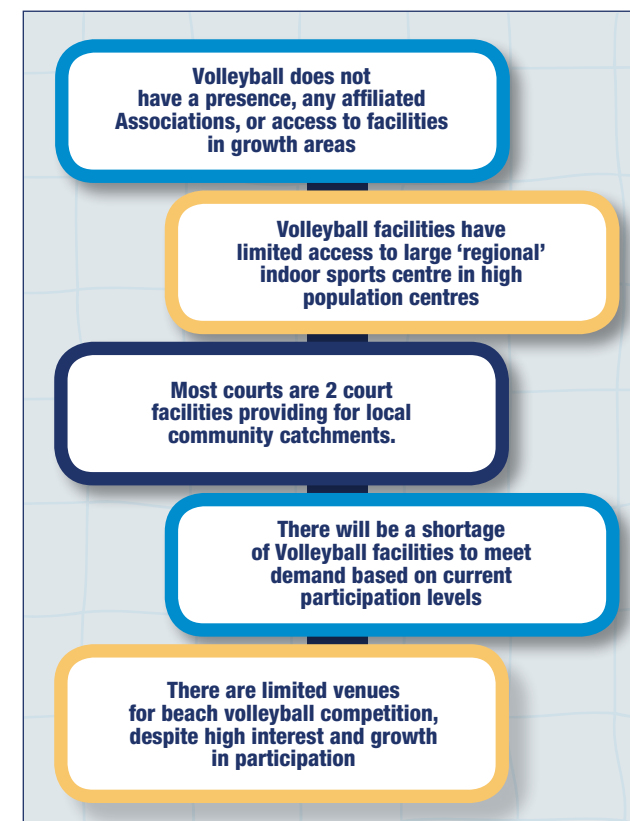
More than 90% of respondents reported that their facilities were fully accessible or accessible. Those that reported issues with accessibility generally identified that the access issues were either temporary (citing construction issues) or related to utilising schools in which only part of the venue is made available for volleyball use.

Volleyball organisations have limited access to large 'regional' indoor sports centre in the high population centres across the State. Most courts are two court facilities providing for local community catchments.

There are no affiliated Associations accessing indoor sports facilities in designated growth areas such as Casey, Hume, Wyndham and Whittlesea. Volleyball does not have a presence or access to facilities in growth areas.

Access to courts in the western, north-western and northern suburbs is limited and challenging with high participation growth from other indoor sports, particularly basketball.

There will be a shortage of volleyball facilities to meet demand based on current participation levels.



A series of maps have been prepared that show volleyball participants by postcodes, together with maps showing the location of facilities, affiliated Association sizes and current population size (2016) of Local Government Areas (LGAs) and projected population size (2031) of LGAs. These maps are shown on the following pages.

Figure 1: Membership by postcode in Victoria

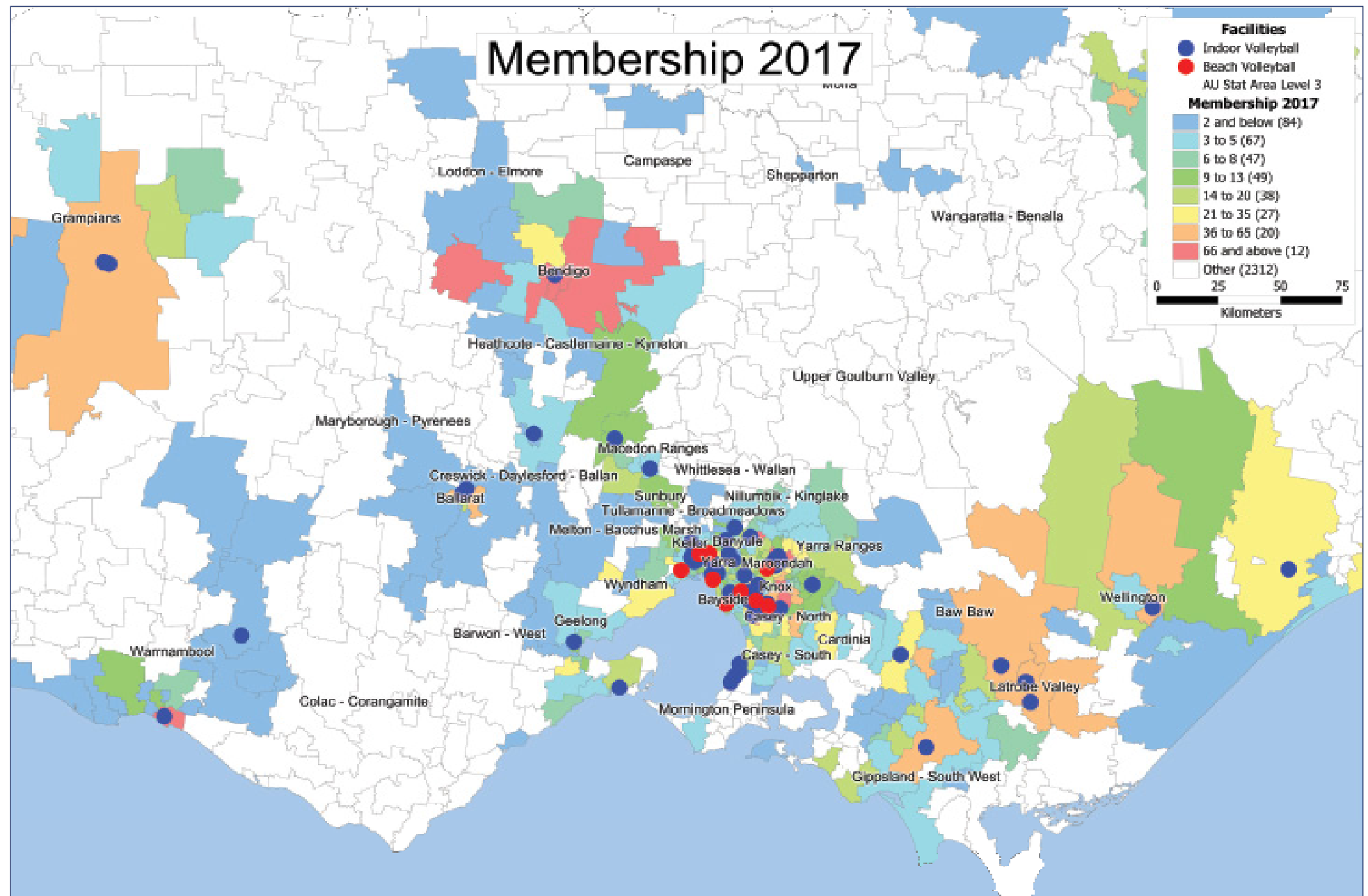


Figure 2: Membership by postcode in Greater Melbourne

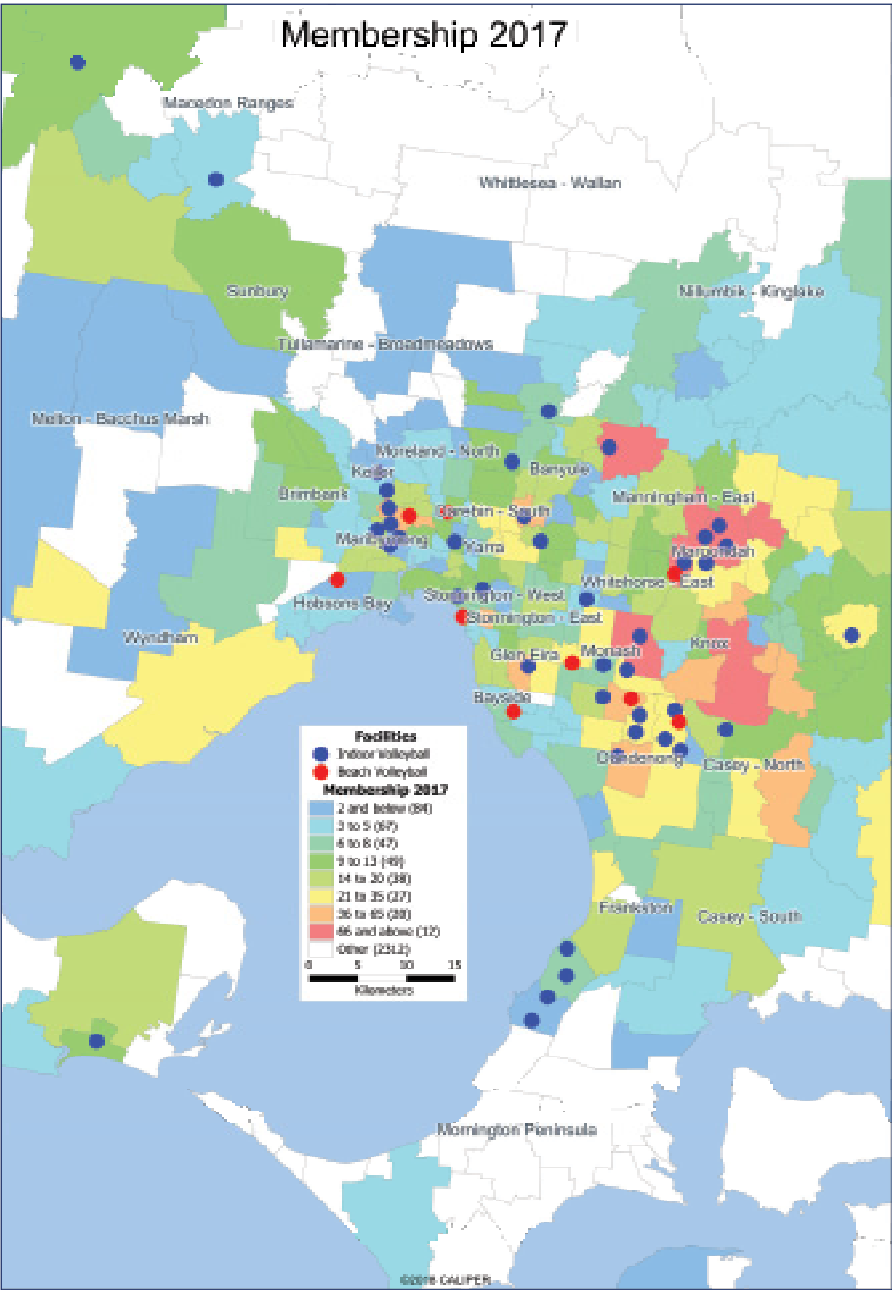
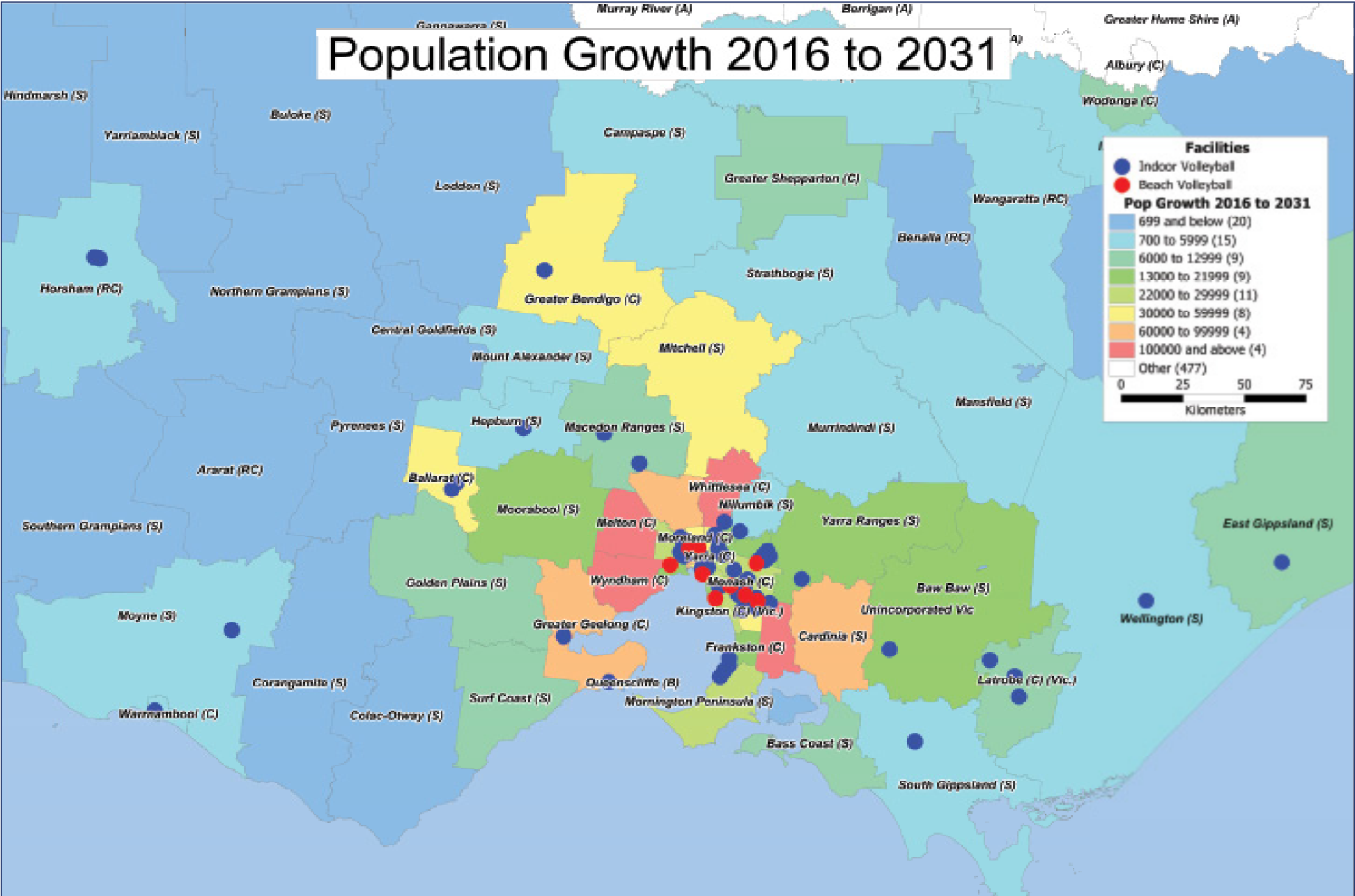


Figure 3: Facility location compared to population size and growth in Greater Melbourne



Figure 4: Facility location compared to population size and growth in Victoria



5.4 The management and operations of Volleyball facilities in Victoria

How are Volleyball facilities managed?

Local Government Authorities (LGA) and schools own and manage most volleyball facilities in Victoria. Facility owners are: 30% Private Schools, 35% Councils, 25% State Government (24% State Schools) and 9% Universities.

There are no volleyball facilities managed by volleyball organisations. Facility management is provided by: 30% Private Schools, 23% Local Government Authorities, 19% State Schools, 16% Community Organisations and 12% Universities, Private Organisations and State Government. Volleyball relies on more schools and universities for access to program space than other indoor sports.

Ninety six percent (96%) of clubs/associations operate under a hire agreement with little or no control over facility management and schedules. Three clubs/associations reported that they do not pay a hire fee in lieu of providing other services to the facility manager/owner, such as cleaning courts and equipment set and pack up.

Eighteen (18) facilities provided information on court hire fees. The average reported court hire fee is \$30.35 per court/hour. However, as many of these courts are multiple courts running across a basketball/netball court (an average of 1.47 volleyball courts per basketball court space) this equates to the equivalent of \$44.51 per basketball court per hour. The hire cost per m² paid by volleyball users is marginally higher than most other indoor sports. Volleyball is a viable tenant, especially in shared tenancy arrangement.

How are Volleyball facilities used?

The number of participants per m² of court space for volleyball is double that of basketball and netball at approximately

70% of facilities. Peak usage times are week days from 6.30pm to 10.00pm and Saturday and Sunday from 9.00am to 5.00pm. Volleyball provides less than 20% of utilised facility schedule in 70% of facilities.

A review of the programs and competitions data available show:

- Approximately 50% facilities support indoor juniors in training and/or competitions
- More than half of the facilities support state league teams
- 14% of venues are used for training
- 64% of venues are used for training and competition
- 18% of venues are used for competitions
- 2% venues are rarely used by volleyball except for special activities, such as tournaments
- Of the current facilities, 95% operate volleyball programs that are affiliated with Volleyball Victoria
- Eight facilities support elite teams and programs including the regional sports academies.

