

ENVIRONMENTAL SCAN

VENUES WEST

2 February 2022

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FEDERAL GOVERNMENT

Currently there is no date set for the next federal election however it is required to be held on or before 21 May 2022, currently Scott Morrison's Liberal coalition is in power.

Currently the Labor Party holds government in Western Australia, Victoria, Queensland, South Australia, Australian Capital Territory and the Northern Territory. The Liberal Party holds government in Tasmania and New South Wales.

COVID-19 – AUSTRALIA

- The global pandemic continues to impact the world with the spread of the Omicron variant in early November 2021. Although seen to be less deadly of a strain than Delta and less infectious with spikes in infections expected to peak in mid-January in many places around the world then drop slowly at first and then drastically, the Omicron variant is still expected to negatively impact the worldwide economy ([Fortune](#))

KEY POINTS ON CURRENT WA RESTRICTIONS

- Mask wearing ([more information](#))
 - Masks wearing requirements are currently in effect across Perth and Peel, the South West, Wheatbelt and Great Southern regions
 - Mask wearing is required in the following settings:
 - At all public indoor settings, including the workplace;
 - In all vehicles unless the person is travelling alone or with members of the same household;
 - At residential aged or disability care facilities, both indoor and outdoor; and hospitals
- Proof of vaccination requirements ([more information](#))
 - Proof of vaccination requirements apply state-wide at a number of venues (list can be seen in the link above)
 - Key venue types include: all hospitality, food and licensed venues; major stadiums; gym, indoor sporting centre, health club or dance studio, except when community sport is being played; and indoor events with over 500 patrons, specified outdoor high-risk events and outdoor music events with more than 500 patrons.
- Vaccination mandates ([more information](#))
 - Vaccination mandates are required for groups 1 and 2 industries and for certain industries / staff in the event of a lockdown.
 - Proof of vaccinations are also required for industries outside of groups 1 and 2 which include gym and fitness staff.
 - Vaccination compliance is required for employers to ensure their employees are vaccinated.
- Booster vaccination requirements ([more information](#))
 - Vaccination directed persons cannot enter or remain at a site if that person has not complied with the booster vaccination requirements or is exempt.
- Safe WA and contact registers ([more information](#))
 - Food and licensed venues, gyms, indoor sporting centres, fitness centres, indoor and outdoors swimming pools, amongst other businesses, are required to maintain a contact register with a manual register option also available.
- Controlled border ([more information](#))
 - Interstate travel: Currently, all Australian jurisdictions are classified as an extreme risk. WA maintains a controlled border with incoming travellers required to be double vaccinated, complete a G2G pass, quarantine for 14 days and undertake COVID-19 tests on days one, five and 13.
 - International travel: WA's borders did not open as planned on 5 February 2022 due to the spread of Omicron. International travellers into WA must be double vaccinated, complete 14 days hotel quarantine upon arrival and undertake COVID-19 tests on day one, day five, day 13, day 17 and day 21.

ECONOMIC IMPACT

The Morrison Government continues to deliver its economic recovery plan through:

- Tax incentives to drive investment across the country and tax cuts to put more money into the pockets of 11 million Australians and their families
- Guaranteeing healthcare and essential services for Australians

In April 2020, more than one million Australians lost their jobs or had their working hours reduced to zero.

In the June 2020 quarter alone, Australia's economy contracted by 7% (compared to 11% in New Zealand, 14% in France and 20% in the UK). Australian government priorities have now shifted to health and ensuring that strategies are in place for recovery. In the September 2020 quarter, real GDP increased by 3.3% - the largest increase since 1976.

The Morrison Government committed support to help Australians remain in jobs through:

- The COVID-19 Disaster Payment – over 3.2 million granted
- JobKeeper – which in its first phase supported over 3.8 million jobs and over 1 million businesses
- The Cashflow Boost, which provided \$35 billion in payments, helping over 800,000 small and medium businesses to stay afloat
- A 50% wage subsidy, supporting around 180,000 apprentices and trainees
- Up to 450,000 JobTrainer places for school leavers and job seekers
- The HomeBuilder program, to support the residential construction industry
- The Coronavirus Supplement, providing extra support for those on JobSeeker
- \$750 payments in April and July to millions of Australians, including pensioners. Additional payments of \$250 in December and March 2021
- Additional support for industries that have been particularly affected, including aviation, agriculture, fisheries, tourism and travel and the arts
- [Further information](#)

CASES / DEATHS

- In 2020, there were around 900 deaths from COVID-19 in Australia – 89% in Victoria and 7% in NSW – with a majority within the older age groups – 24% in the 85-89 year old group and 34% in the over 90 age group ([AIHW](#))
- By June 2021, there were just over 30,000 confirmed cases and 910 deaths in Australia ([AIHW](#))
- On June 16, 2021, the first Delta-variant positive case was identified in Australia.
- By 30 August 2021, Australia recorded 1,159 new cases in a day and 925 cases required hospitalisation (Source: [COVID-19 data](#))
- On 28 November 2021, two positive cases of the Omicron variant were identified in Sydney. On 12 December 2021, NSW recorded 64 new cases of the Omicron variant
- Australia recorded more cases in the first two weeks of 2022 than in the previous two years combined.
- On 16 January 2022, Australia reached its peak number of active COVID-19 cases at 923,868 cases since the pandemic began ([COVID-19 data](#)). Cases since are trending downwards.
- Australia's cases in hospital peaked on 25 January 2022 at 5,391 cases. ([COVID-19 data](#))
- By 31 January 2022, Australia recorded 436,836 national cases of COVID-19 ([COVID-19 data](#))
- There are currently (as at 2 February 2022) 3,835 cumulative deaths in Australia ([COVID-19 data](#))

VACCINATION PROGRAM

- Roll out of the COVID-19 Vaccination Program commenced on 22 February 2021.
- As of 1 November 2021, 16.47 million Australians are fully vaccinated (77.2% of the eligible population).
- On November 8, COVID-19 vaccine booster shots rolled out across Australia after early launches of the program in Victoria and New South Wales ([Nine News](#))

- As at 2 February 2022, 93.4% of the Australian population aged 16 and over are double vaccinated and 38.7% are triple dosed ([COVID-19 data](#)). In Western Australia, 91.2% of the eligible population double vaccinated and 36.9% are triple vaccinated.
- Worldwide, 53.3% of the eligible population is fully vaccinated.
- Currently recipients of the vaccine must receive two doses of the same vaccine to be considered fully vaccinated (double vaccinated). Recipients can receive any dose for the third vaccine.

VACCINATION MANDATES

- On 18 February 2021, the State Government made it mandatory for employees of WA health system entities to be fully vaccinated.
 - On 28 June 2021, the Australian Government made it mandatory for all residential aged care workers to be fully vaccinated.
 - On 5 October 2021 the State Government made it mandatory for FIFO and resources sector workers to be fully vaccinated by 1 January 2022 with the first dose required by 1 December 2021.
 - Safe Work Australia's guidance says "most employers will not need to make vaccination mandatory" to meet their workplace, health and safety obligations. The exceptions are when public health directions require them to do so.
 - The Fair Work Ombudsman says an employer needs to have a compelling reason before requiring vaccination of workers. Two conditions stand out:
 1. Employees must interact with people with an elevated risk of being infected with coronavirus. For example, if they work in hotel quarantine or border control.
 2. Employees must have close contact with people who are most vulnerable to the health impacts catching COVID. For example, if they work in aged care.
 - On 8 October 2021, following advice from the ATAGI, Australia's Minister for Health and Aged Care announced from the following week Australians who are severely immunocompromised will be able to receive a third COVID-19 vaccine dose as a booster to further protect against COVID-19 at a recommended interval of two to six months after their second dose of the vaccine. Pfizer or Moderna are the preferred booster options. It is expected that approximately 500,000 immunocompromised may need the booster dose over the coming months.
 - On 20 October 2021, the State Government announced further mandatory vaccinations across a range of new industries covering approximately 75% (1.1 million workers) of WA's workforce with employers and employees facing fines if they do not comply.
 - Occupations where the risk is sufficient due to high transmission, vulnerability or necessary to avoid catastrophic risk to safety of the community and must have their first vaccination dose by 1 December 2021 and fully vaccinated by 31 December 2021. The full list of occupations can be found [here](#).
 - Occupations deemed critical to the ongoing delivery of business function of the community must receive their first vaccination dose by 31 December 2021 and be fully vaccinated by 31 January 2022. This includes building, maintenance, or construction and childcare or family day care, amongst others ([full list](#))
 - In the event of a lockdown or similar restrictions, a list of occupations must be fully vaccinated to attend work, including Government or local government services where working from home is not possible and Members and staff of Members of Parliament of Western Australia, amongst others ([full list](#))
 - There are mandates underway for a number of additional occupations, including hotel quarantine staff and aged healthcare works ([full list](#))
 - In late 2021, proof of vaccination requirements were expanded to include employees in workforces who did not previously fall under the WA Government's mandatory vaccination policy but work at a venue that falls under the proof of vaccination requirements ([full list](#)). This includes gym and fitness employees.
 - Compliance for employers and their staff were also mandated requiring each employer or person in charge of a workplace to ensure their employees are vaccinated against COVID-19 or exempt from vaccination ([more information](#)).
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- [Further Information](#)
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 - [Further Information](#)

LOCKDOWNS

No Australian jurisdiction is currently in lockdown.

BORDER RESTRICTIONS

International travel restrictions:

- From 1 November 2021, Australian citizens and permanent residents aged 12 and over who are considered fully vaccinated are able to leave Australia without needing an outwards travel exemption.
- Travellers to, or transiting within, Australia must be tested for COVID-19 within 72 hours before scheduled departure and display evidence of a negative test result at the time of check-in.
- Quarantine-free travel between Australia and New Zealand was resumed on 31 October 2021.
- From 1 November 2021, the different State's have different arrangements with respect to quarantine arrangements for International travellers arriving in Australia, including citizens. Sydney now allows the entry of fully vaccinated travellers without the need for quarantine whilst the other states continue to operate with a mandatory 14 days quarantine.
- All inbound travellers must declare their vaccination status to enter the country and should complete an Australia Travel Declaration (ATD) prior to departure.
- Inbound travellers must also provide a negative accepted COVID-19 test result prior to departure, either 3 days or 48 hours dependent on which test they take (serology tests are not accepted). If you have recovered from COVID-19 within the last 30 days before your scheduled flight, you do not need to undertake a further COVID-19 test before departure, but must provide a certificate from your medical practitioner at check-in.
- Travellers must quarantine in the city they arrive and may be tested for COVID-19 within the first 48 hours and then between days of 10 to 12 of quarantine.
- [Further information](#)

Plan to re-open Australia's international border:

- In early October 2021, PM Scott Morrison announced the government is finalising plans to safely reopen Australia's international border in November for states that have reached the 80% vaccination rate.
 - It is anticipated that as the different States and Territories achieve target vaccination rates, quarantine standards will change to: Seven-day home quarantine for Australian citizens and permanent residents fully vaccinated
 - 14-day managed quarantine for anyone not vaccinated or vaccinated with a vaccine not approved or recognised by the TGA
- Western Australia's Premier Mark McGowan has announced the state will not re-open according to the PM's timeline. The state will instead only consider opening international borders once the state nears 90% vaccination rates
- Due to the spread of the Omicron variant globally and nationally, WA's plan to open its borders on 5 February 2022 after 90% of the population was double vaccinated did not go ahead. A new date has not been announced.
- [Further information](#)
- [Further information](#)

Interstate travel restrictions:

- WA's Chief Health Officer provides advice to the WA Government based on transmission in other jurisdictions on border arrangements.
- As at 2 February 2022, all jurisdictions are classified as extreme risk.
- Travellers from extreme risk jurisdictions must:
 - Have an approved G2G pass
 - Provide proof of double vaccination
 - Undertake 14 days hotel quarantine at a Government approved facility at their own expense
 - Undertake COVID-19 tests on days one, five and 13
- [Further information](#)

IMPACT ON THE AIRLINE INDUSTRY

- 2020 net post-tax losses at \$126.4 billion – higher than anticipated in the December forecast (\$118.5 billion) and in the June forecast (\$84.3 billion)
- 2021 net post-tax losses forecast at \$47.7 billion – higher than anticipated in the December forecast (\$38.7 billion) and in the June forecast (\$15.8 billion)
- This forecast implies cash burn in 2021 of \$81 billion. Most large airlines have already accounted for this and will be able to cover it. Smaller airlines, however, may need government aid to cover losses.
- At the end of March 2021, governments worldwide had provided nearly \$227 billion worth of aid to the industry.
- 2021 operating margin forecasted at -9.4% (was -7.1%)
- July 2021 Asia-Pacific international travel fell 94.2% compared to July 2019 as the region continues to have the strictest border control measures
- Australia's domestic travel fell 75.4% compared to July 2019 amid stricter domestic lockdowns in response to the Delta variant.
- [Further Information](#)
- [Further Information](#)

IMPACT ON TOURISM

Tourism loss since the start of the pandemic (March 2020 – June 2021) has totaled \$101.7 billion, down 52% on pre-COVID levels.

Of all the Australian States, WA continues to have the lowest per cent drop in overnight visitors of 21%, but a drop of 27% in overnight visitor spend.

- [Further Information](#) (PDF)
- [Further Information](#) (website)
- Post April 2020 when Australia entered a national lockdown, international tourist arrivals flat-lined and remained below 2019 levels by at least 99% for every month between April and December 2020.
- Tourism industry businesses (accommodation and food services) were affected more by COVID-19 than businesses in other industries:
 - 78% were adversely affected by COVID-19 compared to 49% of businesses in all industries (March 2020)
 - 75% were impacted by government restrictions compared to 29% of businesses in all industries (March 2020)
 - 33% find it difficult to find suitable staff compared to 21% of businesses in all industries (December 2020)
- Tourism losses for the year ending March 2021 were \$82.9 billion from \$146.1 billion in 2020 to \$63.2 billion
- Domestic travel spend decreased from \$104.6 billion in 2020 to \$62.4 billion in 2021, a 40% variance
 - Domestic overnight trips fell 42% (\$33.1 billion) to \$45.7 billion
 - Domestic day travel fell 35% (\$9.1 billion) to \$16.7 billion
- International travel spend fell 98% from \$41.5 billion in 2020 to \$0.8 billion in 2021
- Outbound travel expected to recover comparatively quickly due to Australian's higher propensity to travel than other nationalities.
- [Further Information](#)
- [Further Information](#)

STATE GOVERNMENT

The WA Labour Party retained government following the March State election with 61% of the vote. The win provided the WA Labour Party with an additional eight seats. The Liberal Party lost two seats and The Nationals lost one seat. Premier Mark McGowan continues to lead the WA Labour Party.

- [Further Information](#)

Western Australia's response to the COVID-19 pandemic has focused on efforts to restore the economy and industry, support the community, and build new infrastructure to create jobs through the WA Recovery Plan.

RECOVERY PLAN

The \$5.5 billion WA Recovery Plan outlines how our State will bounce back from the impacts of COVID-19 to reposition itself as a thriving and innovative place to live, work, visit and do business. The plan has 21 priority streams, each underpinned by direct commitments, including investment, resourcing and programs of work. The scope is comprehensive, ranging from new technologies, local manufacturing and training for tourism, patient care and the environment.

VenuesWest benefited from the \$300 million investment in sport and community infrastructure initiatives:

- \$1.5 million to upgrade existing halogen lights to LED lighting at HBF Arena in Joondalup and HBF Stadium in Mount Claremont;
- \$1 million to install solar panels on the roof of HBF Stadium to reduce energy consumption and improve environmental performance;
- \$2 million for a high performance dry land diving centre for Diving WA at HBF Stadium; and
- \$350,000 to install permanent shade structures at outdoor pools at HBF Stadium and leisure spaces at HBF Arena.
- [Further Information](#)

JOB OUTLOOK

Despite initial sharp falls in activity due to COVID-19, Western Australia's economy is recovering at a faster rate than other States and the national economy. This is largely due to better health outcomes, government assistance, a focus on the mining industry and a commodity intensive stimulus in China, which underpins strong export volumes and prices, especially for iron ore. Despite the global pandemic, more Western Australians have jobs now than ever before. Key highlights include:

- In July 2021, WA's unemployment rate fell to just 4.6%;
- WA's unemployment rate is the lowest it has been since 2014;
- The unemployment rate is expected to average just 4.5% by 2022-23, well below the decade-average of 5.5%;
- Treasury estimates an additional 34,000 Western Australians will gain employment in 2021-22;
- Job advertisements have risen to the highest level since the last mining investment boom underpinned by strong economic activity; and
- WA employment rate is at 77% at July 2021.

In 2021, the State Government in partnership with Western Australian industry held the inaugural Skills Summit which focused on identifying ways to attract a skilled workforce to the state. As a result of the Summit, WA's multibillion dollar infrastructure will be reviewed to be more in-line with the findings.

- [Further information](#)
- [Further information](#)

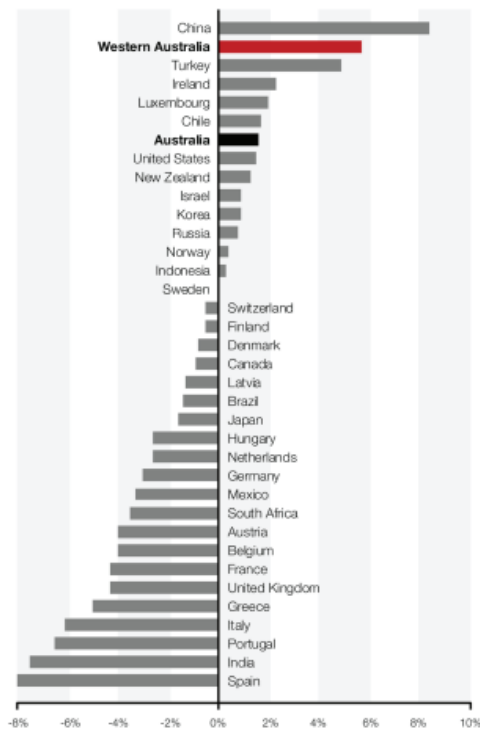
ECONOMIC

ECONOMIC PERFORMANCE 2020-21

The WA domestic economy grew by 4.3% in 2020-21, the highest of all Australian States for a second year in a row. The growth was broad-based across public final demand (up 6% on 2019-20), household consumption (up 2.6%), business investment (up 4.3%) and dwelling investment and ownership transfer costs (up 14.9%). WA is currently one of the top performing economies in the world. This is off the back of the State's approach to COVID-19, resulting in WA observing some of the lowest COVID-19 cases and deaths in the world. Since the start of pandemic, WA's domestic economy has grown 5.7%, almost double the growth of the rest of the nation. In the year, WA's exports grew to a record \$223 billion accounting for more than half of the national exports.

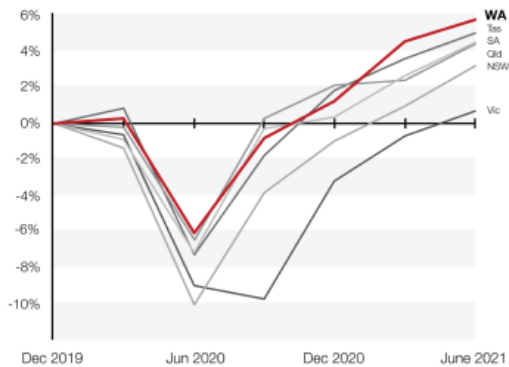
Economic Growth

GDP Growth - Q4 2019 to Q2 2021



Economic Growth during COVID-19

Quarterly State Final Demand



- [Further Information](#)
- [Further Information](#)

ECONOMIC OUTLOOK

WA's recovery from the initial impacts of COVID-19 has been quicker and stronger than expected. The State's economy is forecasted to grow by 3.5% in 2021-22, which is the fastest rate of growth since 2013-14. The State's fiscal capacity was significantly boosted by the Government's and industry's efforts to keep the mining sector operating safely throughout the pandemic.

Economic growth is expected to moderate from 2022-23, with Gross State Product (GSP) projected to grow by approximately 1.25% per annum.

- [Further Information](#)

STATE BUDGET 2021-22

In 2020-21, it is estimated that the State Government operating surplus is at \$5.6 billion, a revision upward of \$2.5 billion since projections in February 2021 (Pre-election Financial Projections Statements) of \$3.1 billion. The upward revision is due largely to a higher than assumed iron ore price and stronger than expected taxation collections resulting from the rebounding State economy.

For 2021-22, the operating surplus is estimated to be \$2.8 billion. The 2021-22 State Budget aims to use this fiscal capacity to continue to respond to the pandemic and address current and emerging priorities. These priorities include:

- a \$1.9 billion investment in the State's health and mental health systems;
- a \$750 million package of climate action initiatives;
- creation of a \$750 million Social Housing Investment Fund and a \$500 million Digital Capability Fund;
- investment of \$400 million towards the Westport project; and
- additional expenditure to support economic development and jobs creation, including \$120 million to speed up project approvals and \$100 million to establish an Investment Attraction and New Industries Fund.

- [Further Information](#)

The State Government has committed \$9 billion to the COVID-19 response and recovery. This includes:

- \$1 billion of additional support in the 2021-22 Budget;
- More than \$1 billion on frontline services including hotel quarantine, COVID-19 testing, medical equipment, the vaccine roll-out and border controls; and
- \$4.5 billion of response and social and economic recovery initiatives.

The \$1 billion as part of the 2021-22 State Budget includes:

- \$605 million for the vaccine roll-out and to equip frontline police and health services and community health and safety initiatives such as enhanced school cleaning and public transport;
- \$219 million to support businesses, including small business grants and industry assistance; and
- \$182 million in economic recovery and other initiatives.
- [Further Information](#)

PERFORMING ARTS

While the number of Western Australians accessing arts and cultural events had been increasing over previous years, the sector has been severely impacted by closures due to the pandemic. In August 2020 the WA Government announced a \$76 million recovery package to support culture and the arts in the State. Some of this was allocated to capital expenditure but included:

- \$5.65 million venue hire waiver for local performing arts companies for free access to State Government venues, including those managed by the Perth Theatre Trust, Botanic Gardens and Parks Authority, and VenuesWest;
- a \$350,000 contribution to events delivered by the Western Australian Music Industry Association; and
- up to \$9 million to underwrite COVID-19 related financial risks for live music and performance.

Playing WA grants program brings arts organisations to regional WA. In January 2021, four major WA touring companies were awarded a share of just under \$1.6 million to take their productions to regional Western Australia over the next three years, as part of the State Government's Playing WA Multi-year grants program. Playing WA grants are still open for up to \$120,000 for eligible participants.

In addition, more than \$1.5 million will be shared among 10 regional venues, to support the expansion of annual performing arts programs delivered by regional performing arts venues during a two-year period. Highly varied, the expanded programs span from community arts and cultural development, cross-art form, music and theatre.

- [Further Information](#)
- [Further Information](#)
- [Further Information](#)

ARTS GRANT

A total of 23 projects by artists and arts organisations from across the State will share in almost \$1 million in funding through the State Government's Arts 15k-plus grant program.

- \$986,055 awarded in latest Arts 15k-plus funding round
- Broad range of projects across WA supported, from Bunbury to Halls Creek
- Funding to support resumption of arts activity
- [Further Information](#) (4 December 2020)

LIVE ENTERTAINMENT INDUSTRY

This industry, along with aviation, has suffered the most extreme impact of the closures and quarantine measures necessitated by the response to COVID-19.

Impacts to financials:

- The nation's live entertainment industry recorded a lost revenue of \$1.4 billion in 2020 with 70% of revenue and attendance obliterated after March 2020 when the industry shut down¹;
- In 2020, Australia's live music industry recorded revenue of \$86 million, a decline of 90%²;
- Number of live performance events tickets fell by 68% to under 8 million, causing ticket sales revenue to fall by 69% to \$600 million whilst the average ticket price fell from \$92.89 to \$87.14 compared to 2019¹;

- Contemporary music accounted for over 50% of total live performance revenue in 2020, but still experienced a decline of 63% in revenue and 65% in attendance in 2020 from 2019¹;
 - Western Australia's live performance revenue declined 62.5% in 2020 and attendance declined 51.4% compared to 2019 figures¹;
 - On average, every West Australian spent \$27.24 on live event tickets, the second highest per capita in Australia, however, a significant decline from the average spend of \$73.40 on tickets in WA in 2019¹;
 - Contemporary music in WA declined in revenue by 71.5%¹;
 - Closed borders inhibit large venues abilities to operate at increased capacity levels¹; and
 - Closed borders and failure to contain the virus in the US and the UK have exacerbated Perth's difficulty to attract big name entertainment artists¹.
- 1. [Further Information](#)
 - 2. [Further Information](#)

Impacts to artists:

- Two-thirds of the workforce lost their jobs, equating to over 79,500 jobs (41,500 indirect jobs and 37,500 indirect jobs) ;
 - Since 1 July 2021, 32,737 gigs/events have been cancelled equating to nearly \$94.3 million of lost income;
 - Of those cancelled gigs/events, survey results show 99% had no income protection or event cancellation insurance;
 - 60% of respondents say they have recently looked for work in other industries;
 - Since March 2020, only 8% of professionals working in the live performance and events industries have been able to operate at pre-COVID levels;
 - Many respondents feel unseen and unsupported in the industry with over 67% ineligible for the Federal Government's Disaster Relief Payment and over 50% are unclear about funding being offered by their state/territory governments; and
 - Many respondents feel the government is prioritising sporting events over creative industries.
- [Further Information](#)

Industry forecasts:

- Recovery and reactivation of the industry is heavily delayed due to the Delta variant disruptions resulting in continued restrictions and border closures and also the natural lag time seen in the industry to plan and deliver events¹;
 - Major international acts, such as Bon Iver and Faith No More, have rebooked their 2021 tours cancelled due to various state lockdowns, which reinforces the challenges faced by acts and promoters in movement across state borders²;
 - Events are also threatened by new COVID-19 transmissions with the last-minute cancellation of the Byron Blues Festival in March 2021 and Melbourne's Rising Festival in May 2021³;
 - A number of major acts have been confirmed for 2021 and 2022, including Australian-based artists Amy Shark, Guy Sebastian and Delta Goodrem, and international acts such as KISS, Guns N' Roses and Alanis Morissette²;
 - Sentiment continues to improve within the live music industry as venues reopen and a more regular slate of predominantly local acts return to Australian stages²; and
 - Total revenue for the live music sector is expected to climb to \$2.2 billion by 2025, increasing slowly each year².
- 1. [Further Information](#)
 - 2. [Further Information](#)
 - 3. [Further Information](#)

Support required:

- Business confidence in the live entertainment industry has collapsed;
 - According to Live Performance Australia's CEO, Evelyn Richardson, the live entertainment industry requires an insurance scheme to underwrite the investment risk in 2022/23;
 - According to Richardson, the industry also urgently requires a targeted Business Reactivation package to operate once closures and restrictions ease; and
 - Richardson also notes governments need to pay closer attention to policy settings, investment levels and infrastructure required to support growth across the industry.
- [Further Information](#)

Federal Government response:

- In August 2021, the Australian Government provided Support Act, a music industry charity, with an additional \$20 million to assist music and performing art workers who have lost their livelihoods because of COVID-19 via grants.
- The Federal Government's support package for the arts and culture now totals \$475 million.
- The Australian Green Party is currently pushing for the Australian Government to support a federal insurance guarantee to the live performance sector like the £750 million government-backed program in the UK.
- [Further Information](#)

Reopening live performances:

- Recent research suggests that audience segments could decrease by 20-30 per cent in the recovery period.
- As exhibited by the recent streaming of the musical Hamilton, improved technology can enhance live streaming performances to be nearly better than attending live performances.
- A two-tiered price structure has been suggested where those attending live pay a higher price than those live streaming the event. Hay Festival events took this approach and, in the first weekend, the events were streamed 210,000 times to audiences in 63 countries.
- A three-step Roadmap was agreed by the National Cabinet for reopening live performances. Live venues and events can reach up to 75 per cent capacity in states that have had 14 days with no new locally acquired COVID-19 cases.
- \$60 million toward the Restart Investment to Sustain and Expand (RISE) Fund to support venues.
- Indoor and seated outdoor events will continue to be ticketed only with additional restrictions in place for large-scale multi-day outdoor music festivals.
- [Further Information](#)

SOCIAL

GLOBAL SPORTING TRENDS

Urban Sports

The emergence of urban sports has driven an additional requirement for high performance sporting infrastructure within the State, Australia and globally. This new infrastructure will enable an engagement with a new audience, drive participation and may also deliver new and exciting competition and entertainment within the State. Perth's proximity to Asia, as well as a favourable time zone to the world's largest domestic broadcast audience in China, provides a massive opportunity to develop the required sporting high performance infrastructure for these sports into the future.

In this context, 'urban sports' refers to:

Sport	Peak Competition
BMX Cycling (BMX Freestyle & Racing)	Tokyo 2020 Olympic Competition
Skateboarding	Tokyo 2020 Olympic Competition
Sport Climbing	Tokyo 2020 Olympic Competition
3 x 3 Basketball	Tokyo 2020 Olympic Competition
Breaking	Paris 2024 Olympic Competition
Parkour	World Urban Games

Urban Sports at the Olympic Games

- Recently the IOC has articulated a new standard for inclusive, gender-balanced and youth-centred games. Urban sports are typically easy to adopt and therefore more accessible to a broader audience. Ultimately the inclusion of these sports within the Olympics is driven by the requirement for the Olympic movement to remain relevant to a new generation.

- The inclusion of BMX cycling, skating, climbing and surfing into the Tokyo 2020 Olympics provided a major catalyst for focus on the high- performance requirements of these sports. Once 'fringe' sports, these sports are now looking to the adopt cutting edge training fields of play as well as sports science and technology.
- Given the immediate Australian success in BMX freestyle and park skateboarding at Tokyo 2020 Olympics, these sports have been further thrust into the national consciousness and with this higher profile will come a greater expectation of investment and success.
- Now validated as Olympic sports, the requirements and demand for international urban multi-sport competitions such as the X- Games, Nitro Circus World Games and World Urban Games will increase.
- There is therefore an opportunity to better develop high performance sporting infrastructure and competition requirements to harness the momentum of these sports, providing competition and entertainment within the State to a new population/demographic as a result.

Esports

- Like urban sports, esports has become a global movement and is also targeting inclusion as a future Olympic sport. Whilst the merits of this are debated, the fact remains that the movement has a rapidly growing competition schedule and truly global fan base and, importantly due to the Perth location and time zone, opportunity for very substantial engagement in Asia.
- The growth of esports, its global scale and relevancy coupled with its blend of sport and entrainment make it an ideal consideration within the VenuesWest master plan framework. Initially there was a global trend towards utilising existing sporting infrastructure (typically arenas) due to their scale and existing power/ data infrastructure however there are now purpose-built esport stadiums across the world.
- Whilst it is not currently anticipated this demand is prevalent in Australia or Perth, it is important to be able to accommodate esports facilities as well as providing a central home for esport competitions within the State.
- Given the relative infancy of this movement in Australia there is also the opportunity to be a national leader in this space by initially utilising existing infrastructure but also having a vision on how purpose built infrastructure could be considered.

TOKYO OLYMPIC AND PARALYMPIC GAMES 2020

After being postponed for twelve months, the Tokyo Olympic Games 2020 were held between 23 July 2021 and 8 August 2021 and the Tokyo Paralympic Games 2020 between 24 August 2021 and 5 September 2021, however no spectators were allowed into any venues.

- [Further Information](#)

Key facts:

- 486 athletes were selected for the 2020 Australian Olympic team from 33 sports
 - 308 athletes were debutants
 - 54 athletes were from Western Australia
 - 47 of the WA athletes received support from WAIS
 - 18 of the WA athletes train at a VenuesWest venue (HBF Stadium and WA Athletics Stadium)
 - In total, Australia won 46 medals, 17 of which were Gold
 - 11 WA athletes earned 14 medals, including 3 Gold medals
- [Further Information](#)
- 179 para-athletes were selected for the 2020 Australian Paralympic team, the largest ever Australian Paralympic team
 - Australia competed in 18 of the 22 sports in the Paralympic program
 - 24 para-athletes were from Western Australia
 - 23 of the WA para-athletes received support from WAIS
 - 15 of the WA para-athletes train at a VenuesWest venue (HBF Stadium, HBF Arena and WA Athletics Stadium)
 - In total, Australia won 80 medals, 21 of which were Gold
 - 4 WA para-athletes earned 8 medals, including 4 Gold
- [Further Information](#)

IMPACT OF COVID-19 ON COMMUNITY SPORT

Below are the findings from a survey administered by the Australian Sports Foundation (September 2021 update). The survey covers the timeframe since the start of the pandemic to June 2021, prior to the Delta strain breakout which is expected to exacerbate these findings:

- Community sporting clubs lost on average \$18,500 per club, greater than the \$15,000 projected in 2020
 - Nearly 83% of respondents noted lost revenue with nearly all revenue streams negatively affected, including sponsorships, fundraising and membership income;
 - Over 9,000 clubs, or 1 in 10 clubs, nationwide are at risk of financial insolvency;
 - 42% of clubs cannot source enough volunteers to support club operations;
 - 60% are concerned about a decline in participation and memberships;
 - Additional revenue provided the government and local governments covered less than a third of lost revenue;
 - 88% of clubs reported running costs stayed the same – of these, 47% had increased. Running costs include hygiene measures, member refunds and overheads;
 - 90% had reduced or plateaued financial reserves;
 - Only 10% improved their financial position;
 - 43% reported a decline in participation;
 - 23% reported an increase in participation;
 - 40% reported a decline in participation amongst the 11-18 years age bracket;
 - 42% reported a decline in volunteering;
 - Clubs have offered free or subsidised memberships to keep families engaged and offer mental health support; and
 - The COVID-19 pandemic has meant traditional fundraising methods have not been possible forcing clubs to adapt to new fundraising methods.
- [Further Information \(PDF\)](#)
 - [Further Information](#) (website)

Participation in sport

- Children participation dropped from 55% participating in community sport at least once per week in 2019 to 42% in 2020
- Children participation also dropped from 20% at least three times per week participation in sport in 2019 to 14% in 2020
- Adults, unlike children, became more physically active during COVID-19 driven by women participating more in walking, running, bush walking, swimming and yoga
- Adult participation grew from 42% participating in sport at least five times per week in 2019 to 44% in 2020
- Adult participation also from 25% participating at least seven times per week in 2019 to 28% in 2020

- [Further Information](#)

IMPACT OF COVID-19 ON COMMERCIAL SPORT

- Commercial sports have taken bigger hits than smaller sports
- AFL and NRL were forced to take cost cutting measures which still resulted in lost revenues
- NRL cut 25% of staff whilst the AFL cut 20%
- None of the main Australian sport leagues have returned to their pre COVID-19 levels

- [Further Information](#)

- Matches and competitions continue to be cancelled or athletes as well as non-stop live sports content the public has come to expect
- Owners, broadcasters and sponsors continue to try to navigate the impacts and implications of event cancellations and modifications

Every sport lost revenue but many still broke even

Decline in 2020 revenue and profit/loss share of 2020 revenue, selected sport annual reports.

League	2020 revenue (\$m)	2020 revenue decline percent	2020 profit/loss as share of 2020 revenue
AFL	675	-15%	-1%
NRL	420	-25%	-6%
Cricket	390	-20%	22%
Football	107	-19%	-2%
Rugby	66	-41%	-36%
Netball	29	-4%	-10%
Basketball	19	-10%	0%
Baseball	5	-30%	1%

2020 reporting period varies by sport.
Table: ABC • Source: Various annual reports.

- Financial and business continuity threats are arising from disrupted cash flows, legal and insurance challenges and impacts to attendances and engagement
- Questions arising from the pandemic include:
 - How do you simultaneously manage fan expectations, minimise operational disruption and plan for a future that, in both the short and long term, may not look anything like the past?
 - Can new technologies and channels help engage fans during suspended or modified league operations?
- [Further Information](#)

Deloitte's 2021 Sports Industry Outlook outlines three strategic opportunities to help sporting organisations thrive in a post pandemic world:

1. Reshape and expand revenue-generation models
 - a. Data-driven platforms and artificial intelligence
 - i. The sports analytics industry is expected to reach nearly \$4 billion by 2023
 - ii. Can help to sense the sentiment of fans, understand fan behaviour and better connect with fans
 - b. Expand novel partnerships to develop complex stories and platforms in which multiple vendors can participate
 - c. Attract private equity investment
 - d. Grow fan base by establishing a presence through community outreach and promotion
2. Rethink the role of sports in society
 - a. Engage in social issues and social justice using LEAD framework (Listen, Engage, Acknowledge and Do)
3. Redefine relationship with fans
 - a. 95% of fans have some sort of interaction with their favourite team or league in the off-season
 - b. 65% want to receive some sort of content from their team at least monthly during the off-season
 - c. Fans who engage just once a month in the off-season spend 40% more than fans with no engagement in the off-season
 - d. Organisations should consider other methods to drive fan engagement including esports, fantasy sports, sports betting, fan districts around stadiums and in-stadium improvements including contactless technology, connectivity (5G wireless technology) and more player-fan engagement

- [Further Information](#)

MAJOR SPORTING EVENTS

World Transplant Games 2023

Expected to be contracted with federal and state funding agreed.

To be held across VenuesWest venues and UWA sports park in April 2023

- The theme for the games is the celebration of health care support and the recognition of health care professionals.
- Participation by adult and junior athletes, families and volunteers (3,500).
- 13 – 16 sports represented.
- Closing function for 3000 international athletes.

Commonwealth Games 2026

- 2026 host country and city is yet to be determined, however Melbourne has emerged as a likely host of the 2026 Commonwealth Games, with the Victorian government confirming an approach from a desperate Commonwealth Games Federation
- Victorian government is conducting feasibility studies to determine if the state can justify hosting the event, with a focus on regional centres.
- The games committee have indicated that the format needs to change with a change in sports and participation
- Athlete accommodation and hosting costs are significant and prohibitive.
- The 2018 Brisbane Commonwealth Games cost \$2.02 billion of which \$1.3 billion was invested by the State, returning \$2.5 billion gross state product over 9 years post the games.
- Perth did not put in and EOI which was due on 30 September.

Special Olympics World Games October 2027

- Games for athletes with intellectual disabilities (ID athletes), athletes who have neurotypical support.
- The events will be delivered in an Olympic format

- 78 countries will have athletes participating
 - Participation of 7,000 athletes and families
 - 20,000 volunteers anticipated
 - Economic impact expected to be between \$155 million and \$275 million

Brisbane 2032 Olympic Games

Given the recent announcement that Brisbane will be the host of the 2032 Olympic Games, there is no short/ medium term ambition to host the Summer Olympics in Perth, however:

- the proximity to Asia, the city lifestyle and the development of world-class high performance infrastructure to facilitate lead-in competitions and training bases for visiting international teams provide a huge opportunity to leverage world class facilities, in the lead up to and during the Games;
- there are clear advantages of moving early and establishing key and targeted high performance sport training and competition facilities in the lead up to the Olympics. WA had 78 athletes in 19 sports at the Tokyo Olympic Games and it would be anticipated that with a home Olympics in 2032 the demand for participation in more high performance sports would increase;
- this will be a key consideration in the selection of new sporting infrastructure and is captured through the High-Performance Sport Strategy and the portfolio test of the Master Plan Framework;
- Opportunity for VenuesWest venues to be used for training hubs and training camps for international teams in the lead up:
 - HBF Stadium – Swimming, Diving, Water polo
 - WA Athletics Stadium – Athletics, pole vault
 - Mt Claremont Precinct, Urban Sports Park* – BMX freestyle, Skateboarding park, Sport Climbing, Parkour
 - Champion Lakes Regatta Centre – Rowing, canoeing
 - SpeedDome – Track cycling

*subject to feasibility, funding and development through the Master Planning program of works.

FIFA WOMEN'S WORLD CUP 2023

- Expanded to 32 teams
- Jointly hosted by Australia and New Zealand from 20 July to 20 August 2023
- First match to be held at Eden Park in Auckland and the final match at Stadium Australia in Sydney
- Remaining match and training locations have yet to be finalised
- Qualification matches have commenced
- A play-off tournament will be hosted by Australia and New Zealand from 17 to 23 February 2023
- HBF Park is a confirmed host venue, **with 5 pool games allocated in the draw**
- Significant investment of \$35 million will be made into the venue as a result and legacy infrastructure will benefit rectangular sports moving forward.

DEPARTMENT OF LOCAL GOVERNMENT, SPORT AND CULTURAL INDUSTRIES (DLGSC)

DLGSC's Strategic Directions: 2020 - 2023: Strategies and programs have a number of priorities relevant to VenuesWest (listed in the Appendix).

- [Further Information](#) (website)
- [Further Information](#) (PDF)

Of note for VenuesWest, WA does not have a State Strategy for high performance sport.

WESTERN AUSTRALIAN INSTITUTE OF SPORT (WAIS)

The Federal Government's announcement of \$54.5 million investment in high performance sport is a welcome support for Australia's high performance athletes. The investment enabled AIS to maintain baseline support for National Sporting Organisations providing certainty for 2020 Olympic and Paralympic athletes who competed in Tokyo and athletes looking toward the 2022 Beijing Winter Olympic and Birmingham Commonwealth Games.

Impact on high performance athletes:

- 78 West Australians competed for Australia at the 2020 Tokyo Olympic and Paralympic Games
- 70 of the West Australians who competed for Australia were supported by WAIS

- Government exemptions during the pandemic allowed for a continuance of training for the Games
- Each WA Olympian and Paralympian selected for Tokyo 2020 received a \$4,000 State Government grant to support training and road to the Games.
- [Further Information](#)

TECHNOLOGICAL

- Connected technologies are now an essential part of people's lives – social media, ecommerce, streaming content and video games have all seen significant growth in the past 12 months
- Social media users are up 13% globally on previous year to 4.2 billion worldwide users
- New social media platforms, such as TikTok, are growing exponentially and social gaming is proving to be a prominent presence
- Ecommerce has grown rapidly, with 82% of households shopping online and 57% year-on-year growth in online purchases
- The number of internet users in Australia increased by 2.3% between 2020 and 2021
- Internet penetration in Australia stood at 89% in January 2021 with the number of social media users equivalent to 80% of the total population and the number of mobile connections equal to 126% of the total population
- Australians spend an average of 6.13 hours a day on the internet across all devices with television, social media and music streaming having the largest daily time spent
- Over a third of Australian use voice search regularly in 2020 (We are Social, 2021)
- Over 1 in 3 users in Australia use social media to gather information about brands they are considering
- As a result, a brand's social presence is considerably important in communicating with customers and promoting goods and services
- The average mobile connection speed is now almost 50% faster than it was last year
- 5G deployment has accelerated in Australia in 2020 with coverage enabled for 41% of the population and aims to cover 75% by June 2021 (RCR Wireless, 2020)
- Sport entities have created new content types with higher value engagements including storytelling to excite fans, celebrate victories and duration and format specific to social media channels (Nielsen 2021)
- Various aspects of digital have become more politicised over the past year with some countries enforcing targeted platform restrictions to control political, monetisation and privacy issues
- [Further Information - We are Social](#)
- [Further Information - RCR Wireless](#)
- [Further Information – Nielsen Company](#)

Sport and entertainment technologies:

- 5GT Technology – providing richer content and gathering more precise information. And interactions with sports brands.
- Interactive fan experience (Virtual Reality, Augmented Reality and Mixed Reality)- in terms of sports, VR, AR and MR may be used both to engage fans and to improve our athletes' performance.
- Artificial Intelligence (AI) – the power of algorithms and artificial intelligence in bettering our decision-making process. The use of artificial intelligence should make predicting sports competitions' outcomes more reliable.
- Digital infrastructure – High speed Wi-Fi, LED lighting and digital displays, self-service POS
- Automated amenities – cashless stadiums, smartphone purchases, in-seat ordering
- Connecting venues – fully integrating venues into urban environments, so they are no longer standalone objects

In a research report, Deloitte declared the future of sport venues is contactless outlining ways to make stadiums better the customer experience in contactless ways such as:

- receiving a text message the day before the event with information on the game, including start time and venue map with best gate to enter;
- digital fan accounts where the patron can scan their ticket and buy food and merchandise at the game;
- automated temperature checks at the gates via cameras;
- ordering of food via mobile device and pays via their digital fan account;
- placing bets via digital sports book linked to the digital fan account;
- a designated exit time via push notifications sent to their phone; and
- push notifications for post event feedback survey.

- [Further Information](#)

LEGAL

MAJOR EVENTS LEGISLATION

- The Major Events Bill is in development with a view to being in place for the 2023 FIFA Womens World Cup. With the exception of Tasmania and Western Australia, every Australian state and territory has enacted legislation establishing a framework designed to enable safe and orderly operation and regulation of major events.
- The development of the legislation is being driven by Tourism WA, with assistance from the State Solicitor's Office.

TICKET SCALPING LEGISLATION

- On 8 September 2021 the Ticket Scalping Act 2021 was passed. VenuesWest worked collaboratively with the Department of Mining, Industry Regulation and Safety in its development.
- The Ticket Scalping Act 2021 focusses on agencies and resale businesses who resell event tickets at more than 10% above their face value and in the long term will protect all ticket buyers. It ensures that ticket buyers will not only pay the most appropriate price for a ticket but they are less likely to be turned away from an event due to the possession of an invalid ticket.
- Consequences for those attempting to resell tickets above the 110% imposed limit will see individuals face criminal penalties and fines of up to \$20,000 while companies can expect a \$100,000 penalty. Those who have been found to use the banned bots to bulk purchase tickets can face a \$50,000 penalty.
- Reselling agencies are utilising sophisticated software to bypass computer security systems to bulk purchase tickets which has a detrimental impact on genuine fans who miss out or end up paying vastly inflated prices.

MODERNISATION OF WORK HEALTH AND SAFETY LAWS

- The *Work Health and Safety Act 2020* (WHS Act) was assented to by the Governor on 10 November 2020. The WHS Act will commence once the WHS regulations are finalised, this is expected to occur in 2021.
 - While the regulations are being developed workplace participants will have time to become familiar with the provisions of the WHS Act.
 - Transitional arrangements be in place for matters covered by the WHS regulations based on the transition principles established by Safe Work Australia.
 - The new crime of industrial manslaughter forms one element of provisions in the WHS Act which are intended to focus workplace participants on their duties to eliminate hazards or minimise risks in the workplace.
 - The most significant change in the new legislation in comparison to the Occupational Safety and health Act 1982 is the inclusion of a penalty provision for industrial manslaughter (s. 30A).
 - It is intended that introducing industrial manslaughter provisions in the WHS Act will have a strong deterrence effect and completely accords with community expectations that every worker has the right to come home safely after a day at work. The Government has introduced these provisions to ensure that deaths at the workplace, caused by the conduct of PCBUs and their officers, are met with substantial penalties, including imprisonment.
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- [Further Information](#)
 - [Further Information](#)

ENVIRONMENTAL

GLOBAL STADIUM ENVIRONMENTAL INNOVATIONS

The O2 Arena, London

In early 2021, the London arena, The O2, partnered with British start-up Alpha 311 to be the first venue in the world to trial ten of the start-ups ground-breaking vertical axis wind turbines. The partnership is in an effort by parent company AEG to reduce its carbon footprint by reducing GHG emissions and exploring new ways to power the planet via its global entertainment venues. The installation of the 10kW turbines would allow the venue to produce an estimated 87,600 kWhs a year, equivalent to the total electricity use by 23 British households. The O2 already has many energy efficient initiatives in place including a state-of-the-art waste compound, green cleaning program, ongoing energy reduction projects and on-site Wormery and Eco-Digester. These initiatives have resulted in a 40% reduction in transport to site, less than 1% of waste going to landfill per year and reduction in GHG emissions by about 6,000 metric tonnes each year. The O2 shares its actions to fans, bands and brands via its Good Vibes All Round platform. In July 2021, Alpha 311 revealed the first O2 Arena turbine which will be installed 'soon'. The start-up is also working with the US-based socially responsible asphalt manufacturer Green Asphalt which has ordered 54 turbines that will generate enough power to meet the energy needs of 43 American homes.

- [Further Information](#)
- [Further Information](#)
- [Further Information](#)

VenuesWest has been in contact with Alpha 311 to get a detailed picture of if, how and when we can make use of their product. According to conversations in August 2021, Alpha 311 is starting the design process for the turbine using recycled plastic which they are hoping to roll out in 2022. This design would be cheaper and more aligned to use at our venues compared to their carbon fibre design which is very expensive and more suited for freeway locations.

Xi'an Olympic Sports Center Stadium, China

The Xi'an Olympic Sports Center has the 14th National Transportation Power Supply Guarantee Joint Command Center and the front-line command center, which can monitor the operation of equipment, the patrol of power protection personnel, and the emergency command of the entire region. It can effectively integrate power supply service command and substation robot patrol inspection. And other business system data, supplemented by related power supply guarantee management information, to realize the coordinated management of power grids, equipment, personnel, materials, etc. In addition, the 14th National Games and the Paralympic Games venues "green electricity" deal was concluded, marking that all venues of the 14th National Games and Paralympic Games will achieve 100% clean energy power supply for the entire schedule. To set an example for the goal of "carbon neutrality", this is also the effort made by the Organizing Committee of the 14th National Games to implement the concept of "Green National Games".

Allegiant Stadium, Las Vegas

In partnership with Coors Light, Ball Corporation will now use recyclable Ball Aluminium Cups at the Allegiant Stadium. Aluminium is the most sustainable beverage packaging material as it can be infinitely recyclable. In fact, Ball Corporation claims 75% of all aluminium ever produced is still in use today.

- [Further Information](#)

WESTERN AUSTRALIAN CLIMATE POLICY

The Government of Western Australia issued a Climate Policy was released in November 2020, the strategy sets out the plan for a climate-resilient community and a prosperous low-carbon future.

The policy looks beyond business-as-usual measures to highlight the significant actions that we are taking in collaboration with industry and the community to boost our economy and prepare for climate change.

- [Further Information](#)

APPENDIX

DLGSC's Strategic Directions: 2020 - 2023: Strategies and programs relevant to VenuesWest:

1. Strategic priority and infrastructure programs

- WA Recovery Plan — infrastructure investment program of work
- Local Government Sustainability — program of work
- State Football Centre
- State Sporting Infrastructure Plan — implementation
- Screen infrastructure
- Strategic asset maintenance guidance and monitoring
- Creative Industries Strategy
- Multicultural Policy Framework
- Regional Aboriginal Communities Framework.

2. Sector sustainability, capacity building and excellence

- WA Recovery Plan — sustainability program of work
- Women in sport and leadership
- Guidance/monitoring of sector infrastructure management practices
- Motorsport Strategy — continue implementation
- Regulations to support the Liquor Control Amendment Bill 2018
- Support Aboriginal Cultural Centre
- Lead truth telling Aboriginal History projects
- State Local Government Partnership Agreement

3. Agile operations and strong business support systems

- Develop Public Value Model and measurement framework
 - Culture and values program — embedding values and behaviours
 - Workforce planning — embed fit for purpose operating model
 - System Enhancement and Digitisation (incl. digital security), contemporary systems integration (new technologies) and realise benefits of existing systems
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- [Further Information](#) (website)