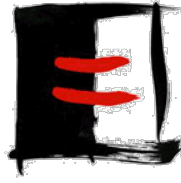


# **ATTACHMENT TO AGENDA ITEM**

Ordinary Meeting

20 September 2016

<b>Agenda Item 5.3</b>	<b>KidsTown Group Accommodation - Concept and Feasibility</b>	
<b>Attachment 1</b>	<b>KidsTown Group Accommodation and Camp Facility - Economic Assessment - Final .....</b>	<b>145</b>
<b>Attachment 2</b>	<b>KidsTown Groups Accommodation/Dining Hall Concept - Drawings .....</b>	<b>182</b>
<b>Attachment 3</b>	<b>KidsTown Master Plan - Updated June 2016 .....</b>	<b>187</b>
<b>Attachment 4</b>	<b>KidsTown Group Accommodation Facility - Drawings....</b>	<b>188</b>



ESSENTIAL ECONOMICS

**SPC KidsTown**  
**Group Accommodation and Camp Facility**  
**Economic Assessment**

Prepared for  
Greater Shepparton City Council

by  
Essential Economics Pty Ltd

**April 2016**

**Authorship**

<b>Report stage</b>	<b>Author</b>	<b>Date</b>	<b>Review</b>	<b>Date</b>
Draft report	Nick Brisbane	1 February 2016	John Henshall	2 February 2016
Final report	Nick Brisbane	21 April 2016	John Noronha	22 April 2016

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**Contact details**

For further details please contact Essential Economics Pty Ltd at one of our offices:

96 Pelham Street  
Carlton  
Victoria 3053  
Australia  
PH +61 3 9347 5255  
FAX +61 3 9347 5355

Level 26 / 44 Market Street  
Sydney  
New South Wales 2000  
Australia  
PH +61 2 9089 8654

EMAIL [mail@essentialeconomics.com](mailto:mail@essentialeconomics.com)  
WEB [www.essentialeconomics.com](http://www.essentialeconomics.com)

ABN 92 079 850 427

**Our Reference: 15098**

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## INTRODUCTION

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### Background

SPC KidsTown ('KidsTown') is a Greater Shepparton City Council community facility located in a bush setting, between Shepparton and Mooroopna. KidsTown is a children's adventure play ground that relies on support, donations and voluntary work of local businesses, community groups and residents.

Attracting approximately 150,000 visitors a year, KidsTown also hosts *Kidsfest*, which is the region's largest children's festival.

Greater Shepparton City Council are planning the development of a group accommodation and camp facility at KidsTown that could be used to facilitate school and other forms of camps, as well as meet the demand for low cost group accommodation in Greater Shepparton.

The proposal involves the development of group accommodation that could accommodate up to 200 persons plus various activities, including high ropes, rock climbing wall, flying fox, etc. The facility will also be able to utilise the adjoining KidsTown playground and bushland areas for activities.

Greater Shepparton City Council are proposing an educational program that would be catered to the needs of future customers and will likely include a focus on Aboriginal culture, sustainability and food.

This report provides an economic assessment of the proposed facility, including an overview of demand for such a facility and the economic impacts that may be expected to be derived once the facility is fully operational.

A Future Directions Plan Study and a draft Masterplan for the KidsTown precinct have been prepared. The Future Directions Plan includes a draft concept plan that demonstrates the potential to transform vacant land at the site into a 'Food Hub', providing a range of education programs similar to the award winning CERES located in East Brunswick. In addition, a Draft Programs and Accommodation Feasibility Study has also been prepared for the KidsTown site.

This report takes into consideration these assessments, along with architectural designs for the facility prepared by EME architects, consultation with the Australian Camps Association (the peak national body for camps) and estimates of construction costs prepared by Prowse Quantity Surveyors Pty Ltd (dated 10 March 2016).

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## **This Report**

This report contains the following chapters:

- 1 SPC KidsTown Context
- 2 Overview of Demand for Camp and Group Accommodation
- 3 Economic Impact Assessment
- 4 10-Year Financial Operational Assessment
- 5 Summary of Main Findings

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## 1 SPC KIDSTOWN CONTEXT

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### 1.1 Regional Location

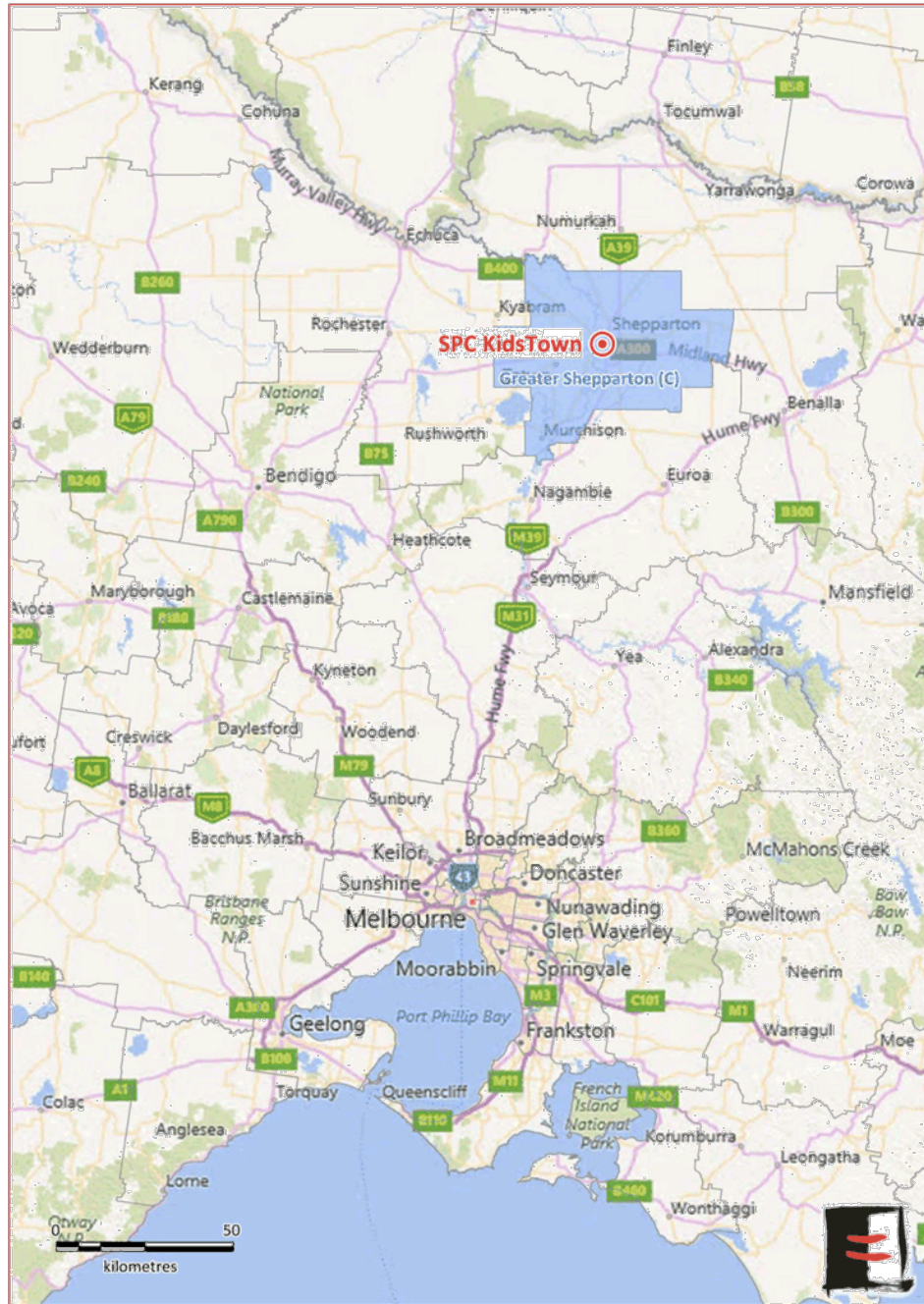
KidsTown is located on the Midland Highway between Shepparton and Mooroopna, in the Greater Shepparton municipality. The site is accessible to metropolitan Melbourne via the Hume Freeway and is approximately a two-hour drive north of central Melbourne.

A native flora and fauna reserve adjoins the site to the north and east, while vacant land is located to the immediate west of the playground. This vacant land is the proposed site for the group accommodation and camp facility.

Figure 1.1 shows the regional location of KidsTown, while Figure 1.2 shows the local context of the site.

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Figure 1.1: SPC KidsTown – Regional Location

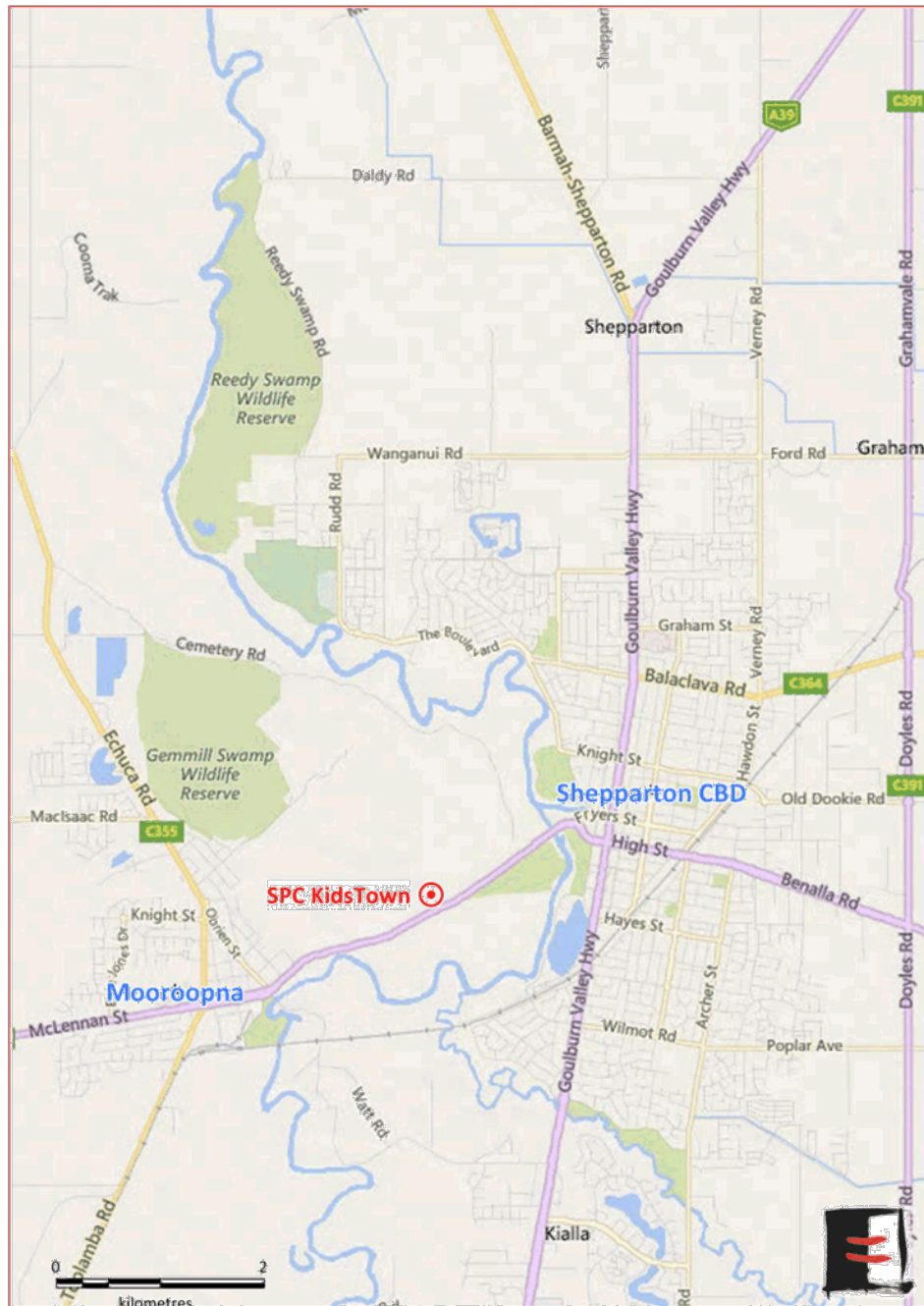


Produced by Essential Economics using MapInfo and BingMaps



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Figure 1.2: SPC KidsTown – Local Context



Produced by Essential Economics using MapInfo and BingMaps

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## 1.2 SPC KidsTown – Existing Situation

KidsTown is a Greater Shepparton City Council community facility located in a bush setting, between Shepparton and Mooroopna. The operation of the children’s adventure playground relies on support, donations and voluntary work of local businesses, community groups and residents.

Approximately 150,000 visitors are attracted to KidsTown each year, which also hosts the region’s largest children’s festival – *Kidsfest*. The adventure playground was one of the first large-scale adventure playgrounds constructed in Victoria. Entry to the playground is via a gold coin donation. A café operates between 10am and 2pm on weekdays and 10am to 3:30pm on weekends.

KidsTown currently employs three full-time staff (Co-ordinator, Duty Supervisor and a Duty Supervisor Operations), one casual staff member (Operations Supervisor), and numerous casual staff in the café and when events are held at the venue. In addition, approximately 100 volunteers assist in the ongoing operation of KidsTown, including the running of Kidsfest.



The Connection Shepparton is a conference and function centre which is located to the immediate south of the adventure playground and comprises three function rooms that can cater for up to 160 seated guests.

Land located to the immediate west of the adventure playground is currently vacant. The northern portion of this vacant land is the proposed location for the group accommodation facility, while plans exist for a ‘Food Hub’ to be accommodated on the balance of the vacant site which would comprise an education centre, community garden and market site (refer Section 1.4).

Figure 1.3 shows an aerial image of the KidsTown site.

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Figure 1.3: SPC KidsTown



Prepared by Essential Economics using MapInfo and Nearmap (January 2016)

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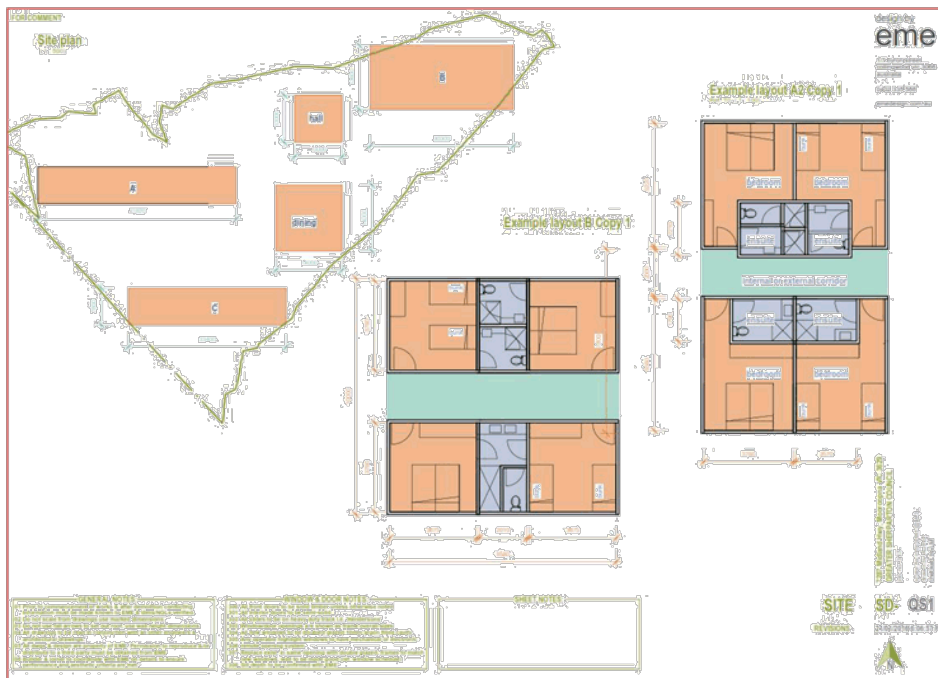
**1.3 Proposed Groups Accommodation and Camp Facility**

The group accommodation and camp facility that is assessed in this report involves the construction of the following:

- Three separate accommodation buildings ranging up to three storeys in height
- Total bed capacity of up to 200 beds in a total of 52 rooms
- All accommodation rooms will contain ensuites, storage, lounge areas and verandas
- A dining hall containing dining areas and kitchen facilities
- A multi-purpose hall
- A flying fox, high ropes and rock climbing wall will be incorporated into the design of the dining hall and multi-purpose hall.

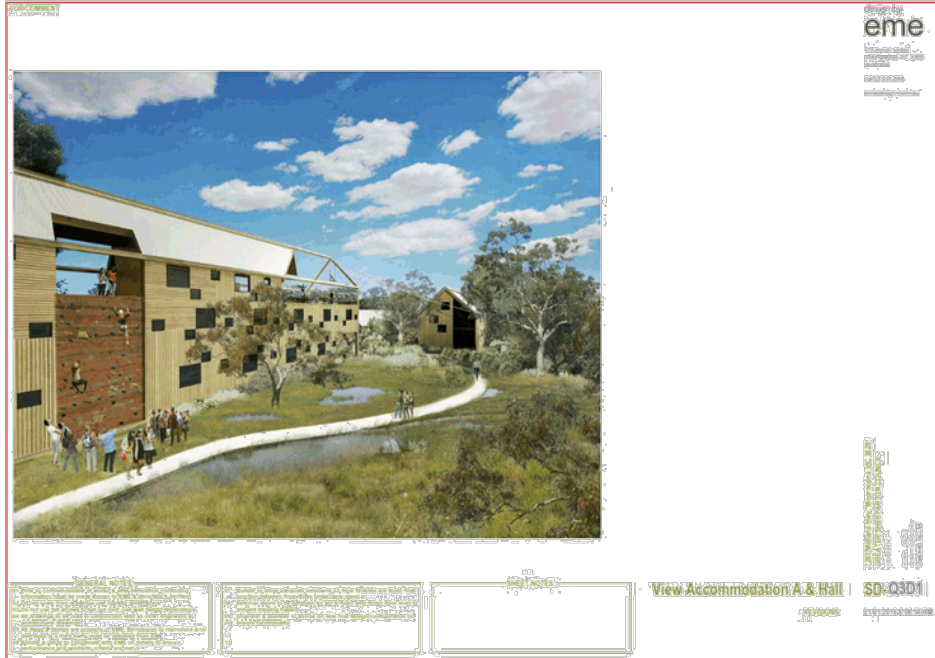
Indicative plans prepared by EME architects are provided below and on the following pages.

**Site Plan**

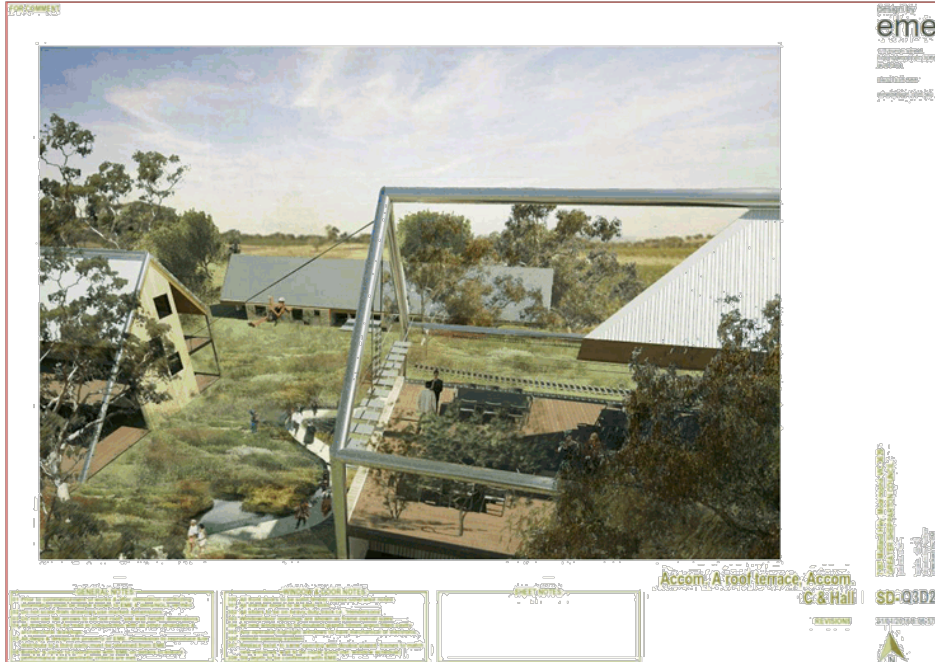


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Accommodation A and Hall



Accommodation A and C, and Hall



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#### 1.4 SPC KidsTown Future Directions Plan and Food Hub Concept

The *SPC KidsTown Future Directions Plan* (the 'Plan') was prepared by Greater Shepparton City Council and provides the following vision for the broader KidsTown precinct:

*"A place that centralises local food services, provides food education programs and enhances community spirit".*

The Plan focuses on the vacant land located to the west of the playground. This site has significant indigenous cultural heritage features, not only due to its original inhabitants, the Yorta Yorta people, but also as the settlement site for the historic 'Cummeragunja walk-off' in 1939.

The adjacent Goulburn River floodplain also has a history of settlement associated with Daish's Paddock, and 'The Flats' is both culturally and historically significant to the Yorta Yorta community.

The Plan identifies three key development concepts that include an education centre, community garden and market site:

- 1 **Education Centre:** Incorporating an education centre and workshop area, as well as an indigenous garden. The Education Centre aims to facilitate opportunities around education of local children and families based on healthy and sustainable food production and local indigenous and multi-cultural history and culture, as well as create opportunities for school camps and additional tourism visitation. It is envisaged partnerships will be formed with indigenous, multi-cultural, agricultural, and horticultural and education-based organisations in the region.
- 2 **Community Garden:** The community garden areas will accommodate multiple services including school tours, gardening workshops, up-skilling, and employment and volunteer programs. A number of community organisations and schools have already indicated a strong support for the concept, recognising its relationship and potential to support their own objectives and programs including the on-going development of local neighbourhood-based community gardens.

An Indigenous Garden has been proposed for the north end of the site so as to blend into the adjacent forest and billabongs associated with the Goulburn River floodplain. It is anticipated the garden will be signposted as a self-guided tour through the indigenous vegetation of the area, as well as incorporate guided tours of indigenous bush food and cultural customs.

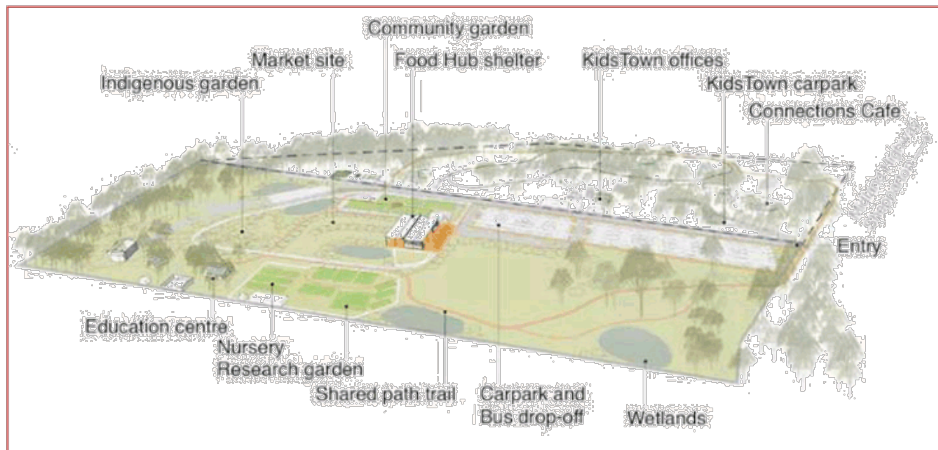
- 3 **Market Site:** The market site proposal is based on a large, flexible space that can house multiple services and change according to particular events. The space will support on-going event and festival type programs and associated visitation growth.

Council have noted that the Plan will be 'fluid' to allow for directional shift around opportunities as they present themselves, such as the proposed group accommodation and camp facility. It is envisaged that the above components of the Plan would be utilised by camps and visitors to the group accommodation and camp facility.

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A plan for the proposed Greater Shepparton Food Hub is shown in Figure 1.4.

**Figure 1.4: Proposed Greater Shepparton Food Hub**



Source: Greater Shepparton City Council, Greater Shepparton Food Hub – Future Directions Plan

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## 2 OVERVIEW OF DEMAND FOR CAMP AND GROUP ACCOMMODATION

### 2.1 Characteristics of the Camps Market

The Australian Camps Association (ACA) is a not-for-profit organisation that is recognised as the peak national body for residential and outdoor camps. Based on consultation with ACA during the preparation of this report, key features of the camps market include the following:

- **The camps sector is supported by the Victorian Government** which recently unveiled the \$148 million Camps, Sports and Excursions Fund that ensures all Victorian students can take part in school trips and sporting activities.
- **The Victorian camps sector is a very mature camp sector**, with almost 140 camps registered with ACA. However, many smaller camps are being offered for sale and overseas operators (e.g. PGL Adventure Camps) are entering the Australian market, including Victoria.
- **The median bed capacity of camps in Victoria is 108-beds.** Figure 2.1 shows the bed capacity of camps in Victoria and illustrates that the proposed 200-bed facility at KidsTown will be considered a larger camp in the Victorian context.
- **School camps are generally conducted on a year-level basis**, as opposed to individual classes. Successful camps will be able to accommodate an entire year-level of school children plus teachers, parents and other volunteers. In some schools where composite classes are provided (e.g. year 3/4), camps are provided for the entire composite year level. Analysis of the Victorian Department of Education & Training (DET) statistics for Government schools in 2015 shows the following:
  - The average year-level size for Primary school grades 3-6 is 39 students
  - The average year-level size for Secondary school years 7-10 is 125 students.

In this context, the proposed 200-bed facility at KidsTown will be able to accommodate a large proportion of Victorian year levels. Figure 2.2 shows that a 200-bed facility could accommodate 100% of primary school and 74% of secondary school year levels, based on analysis of DET statistics Government schools for 2015. The proposed facility also has the potential to accommodate multiple camps at the same time.

- **School camps are 'generally' conducted over a 2-night/3-day period** and this allows for camp facilities to accommodate two camps per week, although the length of camps can extend to a week. According to ACA, the average length of camp is three nights and four days, which takes into consideration longer camps.
- **Schools will generally travel around two hours to attend a camp** and are typically offered to primary school students in grades 3-6 and secondary school students in years 7-10.



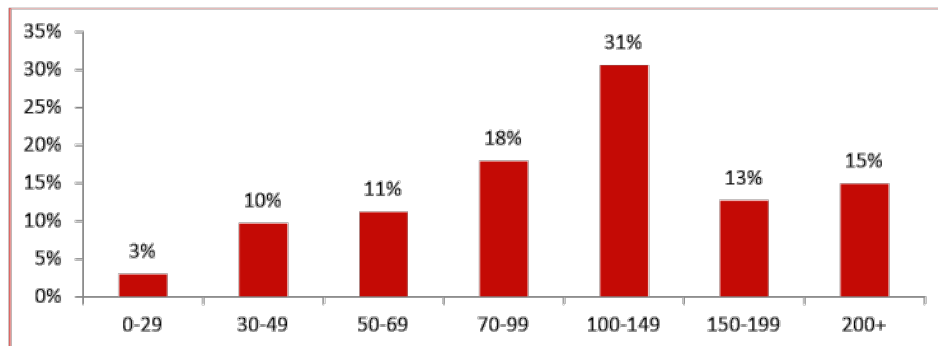
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- Limited examples of new camps exist in Victoria**, with many camps having either been developed some time ago or having been a re-use of another facility. For example, Camp Marysville (operated by the Outdoor Education Group) is a re-use of temporary housing built by the Department of Housing to accommodate Marysville residents affected by the Black Saturday bushfires in 2009.
- Expectations of camp facilities and on camps operators are changing.** In the past, many camps have been ‘teacher’ run, with the teachers and school running the camp program. However, camps nowadays are expected to design, provide and facilitate camp programs. This has had implications on the need for more staff and consequently increased the cost of running camps.

Expectations on the quality of camp accommodation have also increased. For instance, newer and more successful camps are now expected to provide ensuite rooms where this has previously not be the case.

- A benchmark for occupancy used by ACA in relation to school camps** is that successful camps need to be two-thirds full for two-thirds of the time.
- A large proportion of revenue from camp facilities is derived from school camps;** however, while attracting school camps will be important to the viability of the camp there is a need to target non-school camps as well. In addition, promoting the facility to those seeking low-cost accommodation is also important.

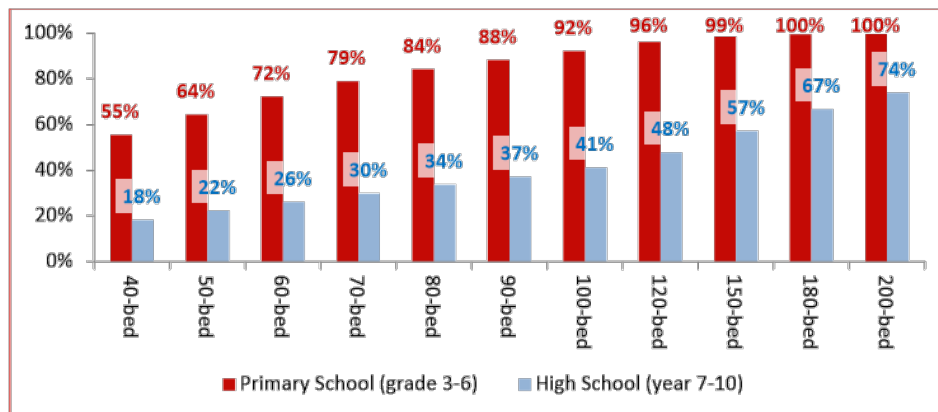
**Figure 2.1: Distribution of Camps in Victoria by Bed Capacity, 2015-16**



Source: Australian Camps Association, Guide to Camps & Outdoor Activity Providers, 2015-16

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Figure 2.2: Share of Victoria 'year-levels' that can be Accommodated by Camp Size (no. of beds)



Source: Department of Education and Training; Essential Economics

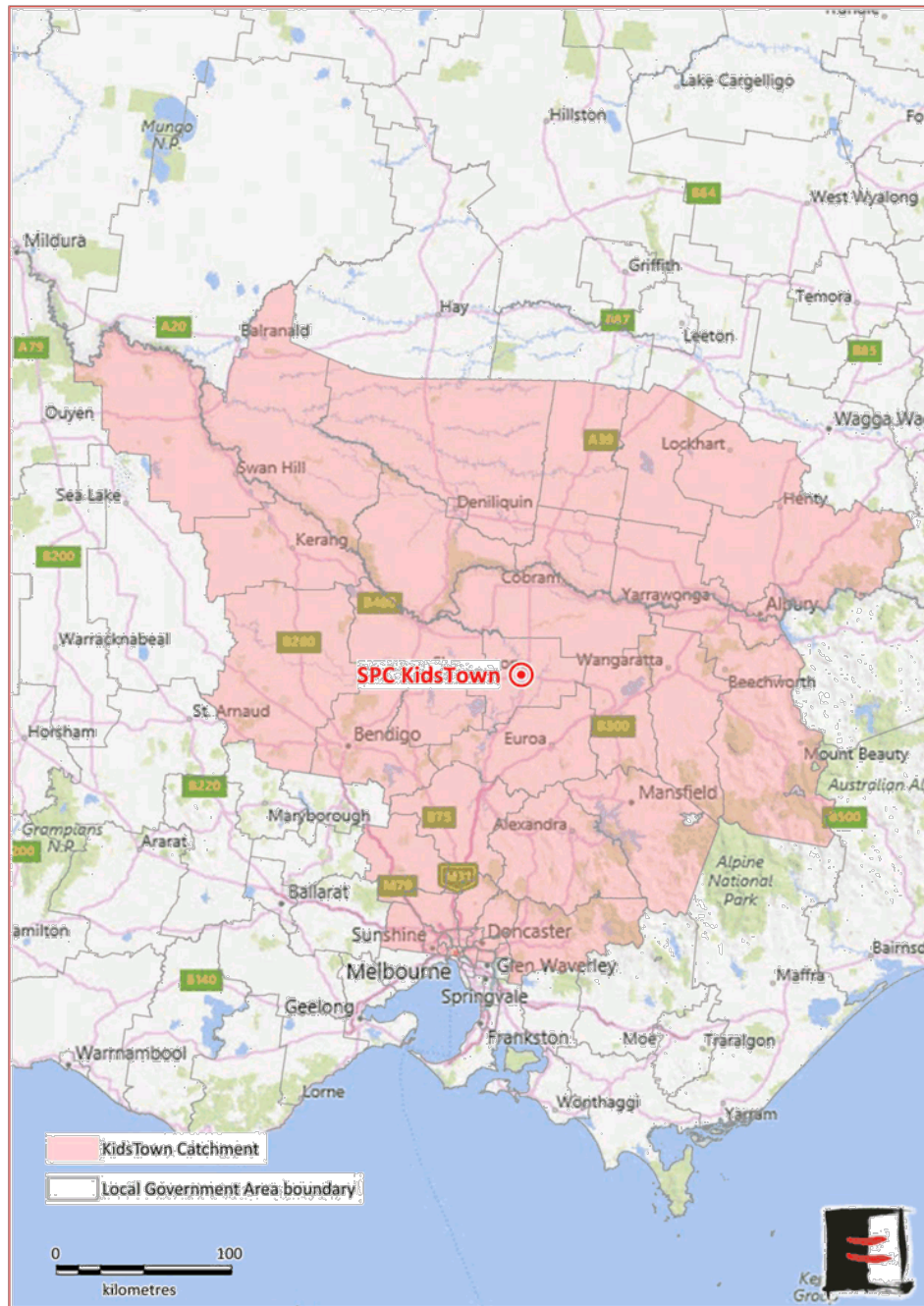
## 2.2 Regional Catchment

An indicative catchment from which a camp facility at KidsTown would expect to attract visitors is shown in Figure 2.3 and is broadly based on municipalities within a 2 to 2.5 hour drive from Shepparton.

As shown in Figure 2.3, the catchment includes the northern municipalities of metropolitan Melbourne and extends to Swan Hill in the west, Albury in the east, and into New South Wales to Jerilderie in the north.

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Figure 2.3: KidsTown Regional Catchment



Produced by Essential Economics using MapInfo, StreetPro and BingMaps

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### 2.3 Competition

As identified earlier, almost 140 camps are registered with ACA, based on the *ACA, Guide to Camps & Outdoor Activity Providers, 2015-16*.

The proposed KidsTown camp will compete with other camps that are located within approximately a two-hour drive from Melbourne, particularly for the northern Melbourne part of the catchment shown in Figure 2.3.

In addition, KidsTown is also likely to compete with other larger camps that could accommodate more than 100 persons. The location of camps that can accommodate 100 persons or more are shown in Figure 2.4.

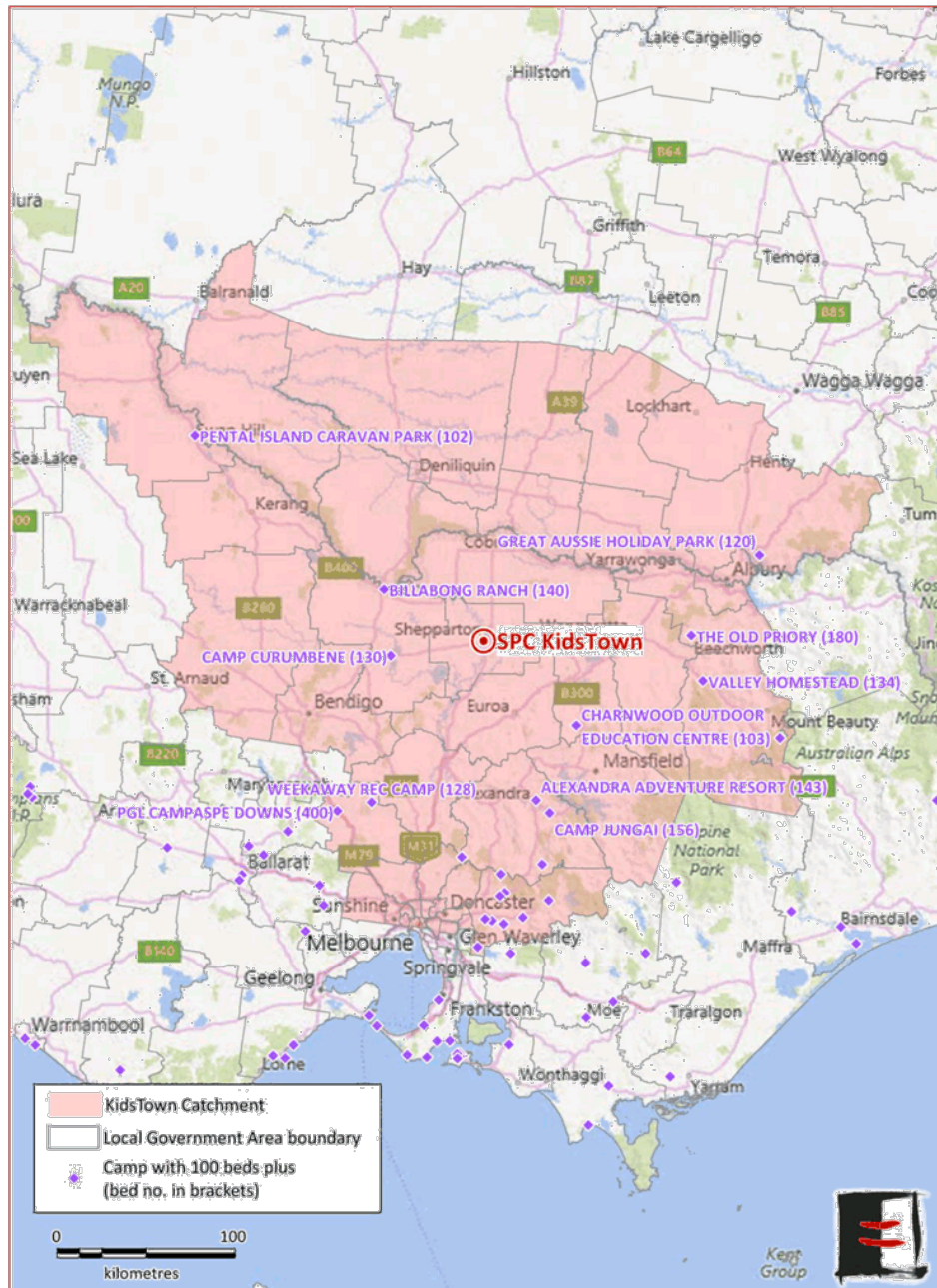
Figure 2.4 also shows that many of the larger camps are closer to metropolitan Melbourne and only a limited number of camps can accommodate 100 persons or more in the region immediately surrounding Greater Shepparton. The proposed KidsTown camp will be the first camp of its type in Greater Shepparton. Larger camps in the neighbouring municipalities include:

- Campaspe Shire:
  - Billabong Ranch, which can accommodate 140 persons
  - Camp Curumbene, which can accommodate 130 persons
- Benalla Rural City:
  - Charnwood Outdoor Education Centre, which can accommodate 103 persons.

The proposed KidsTown camp will benefit from the new facilities that are proposed, while the KidsTown playground and the potential integration of the facility with the Greater Shepparton Food Hub project will also provide a point of difference. It will be important that the camp facilities and the program offered are sufficiently attractive in order to attract new customers, including schools. Many schools will have existing relationships with other camps and therefore KidsTown will need to offer a superior 'package' of facilities and programming in order to entice schools to KidsTown.

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Figure 2.4: Competing Camps that can Accommodate 100 Persons or More



Produced by Essential Economics using MapInfo, StreetPro, Bing and information contained in the ACA Guide to Camps and Outdoor Activity Providers, 2015-16

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## 2.4 Catchment Analysis

### *Number of Schools in the Catchment*

More than 1,110 primary and secondary schools are located within the KidsTown catchment, with the majority of these located in the Victoria. These schools represent potential school camp customers for KidsTown.

Table 2.1 summarises the number schools located in the catchment by school-type. Note that Catholic and Independent schools in NSW are not included in the Table.

**Table 2.1: Number of Schools in the Catchment, 2015**

Catchment Sector	Government	Catholic	Independent	Total
Victorian Catchment	700	243	104	1,047
New South Wales Catchment	67	na	na	67*
Total Catchment	767	243*	104*	1,114*

Source: Victorian Department of Education and Training; New South Wales Department of Education  
Note: \*excludes New South Wales Catholic and Independent Schools

### *Forecast Catchment Population of 'Camp-age'*

As indicated in Section 2.1, the majority of school camps are undertaken by the following year levels:

- Grades 3 to 6 in primary school; and
- Years 7 to 10 in secondary school.

In order to provide an indication of the potential size of the school camp market, population forecast have been prepared for the age cohorts that broadly reflect the age of children in these years levels.

For the purpose of this analysis, the 8-11 year age cohort is representative of primary school children in grades 3-6 and the 12-15 year age cohorts reflects secondary school children in years 7-10. It is acknowledged the age of children within different school grades/years can vary depending on a variety of reasons; however, these age cohorts are intended to reflect the typical age for children in the nominated year levels.

In 2015, the KidsTown catchment is estimated to contain a population of 2.9 million persons, including approximately 271,100 persons considered to be of 'camp-age' (i.e. between 8 and 15 years old).

Over the period 2015 to 2025, the 'camp-age' population is forecast to increase to approximately 334,600 persons, representing an increase of +63,500 children over the 10 years. The growth in school-age children is expected to exceed the growth for the general population over this period. These trends are shown in Table 2.2.

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Having regard for the Victorian Government's policy to provide support for all children to attend school camps, it is expected that the school camp market for the proposed KidsTown group accommodation and camp facility will increase over the next 10 years.

Table 2.2 summarises the population forecast of 'camp-age' children in the KidsTown catchment, based various Commonwealth and State Government population projections.

**Table 2.2: Forecast 'camp-age' Children in the Catchment, 2015-2025**

Category	2015	2020	2025	Average Annual Change	
				2015-20	2020-2025
Total Catchment Population	2,979,100	3,258,400	3,541,200	1.8%	1.7%
<i>Share of population of 'camp-age'</i>					
Primary School (8-11 yrs)	4.6%	4.7%	4.8%	-	-
Secondary School (12-15 yrs)	4.5%	4.6%	4.7%	-	-
<b>Total population of 'camp-age'</b>	<b>9.1%</b>	<b>9.3%</b>	<b>9.4%</b>	-	-
<i>Population of 'camp-age'</i>					
Primary School (8-11 yrs)	137,200	153,100	169,400	2.2%	2.0%
Secondary School (12-15 yrs)	133,900	148,800	165,200	2.1%	2.1%
<b>Total population of 'camp-age'</b>	<b>271,100</b>	<b>301,900</b>	<b>334,600</b>	<b>2.2%</b>	<b>2.1%</b>

Source: ABS, Regional Population Growth, Cat No. 3218.0; DPTI, Victoria in Future, 2015; Department of Planning & Environment, NSW State and Local Government Area Population, Household and Dwelling Projections, 2014; Department of Social Services, Population Projections, 2012

### **Indicative Size of the School Camp Market**

Not all children of 'camp-age' will attend a school camp every year. Typically, schools would offer camps every second year. Therefore, the size of the school camp market on an annual basis is approximately 50% of the number of the 'camp-age' population.

On this basis, the indicative size of the school camp market for the proposed KidsTown facility is estimated at approximately 135,600 children in 2015 and is forecast to increase to approximately 167,330 by 2025, representing growth of +31,700 children over the 10-year period.

### **Opportunity for Non-school Camps and Group Accommodation**

In 2016, public schools in Victoria are open for 41 weeks and – after taking into account public holidays, weekends and school holidays – are open for approximately 200 days, or 55% of the year. The majority of school camps are held during the weekdays of these 41 weeks, with the second and third terms understood to be the most popular times of the year for school camps.

If KidsTown target school camps only, the facility would be under-utilised for much of the year. Therefore, there is a need to market the facility for other camps, including the following:

- Scouts groups

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- seniors groups, which is understood to be a growing sector of the camps market
- business and corporate groups
- sporting, community, religious and youth groups.

In addition to camps which may offer a program of events and catering, the facility may also be used by visitors seeking low-cost group accommodation.

Sporting groups are one particular market that may be attracted to group accommodation at KidsTown. Shepparton offers a wide range of sporting facilities and host a number of major sporting events, including the following:

- GSBA Annual Junior Basketball Tournament: 165 teams, 1,500 players and an estimated 2,500 spectators over two days
- BMX Nationals: 6-day event, 1,300 riders from across Australia
- Country Week Tennis: 185 teams, 1,200 players across Victoria and interstate
- Victorian Open Bowls: 6-day event, 1,100 players across Victoria
- Challenge Triathlon: 2-day event, 1,400 participants
- Victorian Short Course Swimming Championships: 2-day event, 600 participants.

While school camps are likely to be the major source of visitors and revenue to the planned facility at KidsTown, significant potential exists to attract a range of non-school camp customers and this would contribute to improve viability of the facility.

## 2.5 Market Assessment

Based on consultation with ACA, the industry 'rule-of-thumb' for a successful camp facility is to be '2/3 occupied for 2/3 of the year'. In the case of the proposed 200-bed facility at KidsTown, this equates to, on average, having 133 beds occupied (i.e. 2/3 x 200 beds) for 243 nights (i.e. 2/3 x 365 days) a year. This equates to a bed occupancy rate of 44% (i.e. 2/3 x 2/3).

Assuming a bed occupancy of 44% is the minimum target for KidsTown, the following outcomes are expected by 2025:

- approximately 32,400 bed nights
- approximately 10,800 visitors, assuming an average length of stay of 3 nights
- approximately 7,000 camp visitors, assuming 65% of visitors are involved in camps
- approximately 80 school-camps, assuming an average camp size of 90 persons
- approximately 3,800 school-camp visitors assuming 35% of visitors are not involved in school-camps.  
(Note, figures are rounded)



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In order to achieve the above outcomes, KidsTown would need to capture a market share of 4% of the estimated school camp market of 167,300 children in 2025. This is considered achievable, having regard for the level of competition in the surrounding region (refer Section 2.3) and the development of new facilities that will provide KidsTown with a competitive advantage over older facilities.

The above analysis is summarised in Table 2.3.

**Table 2.3: KidsTown School Camp Market Analysis, 2025 – 44% Occupancy**

Category	Low Scenario
Beds	200
Annual bed nights available	73,000
Required bed occupancy (assuming 2/3 full, 2/3 of the time)	44%
Estimated bed nights	32,400
Estimated visitors (assuming av. 3 night stay)	10,800
Assumed share of visitors from school camps	65%
Estimated school camp visitors	7,000
Estimated non-school camp visitors	3,800
Estimated school camp market size in catchment	167,300
Market share of 'school camp market' required	4%
Source:	Essential Economics
Note:	Figures are rounded

The above analysis reflects a situation whereby KidsTown can achieve an occupancy rate of 44%, which is considered to be the industry 'rule-of-thumb' a successful camp facility. However, the more successful facilities achieve occupancy rates above 44%.

Assuming KidsTown achieves an occupancy rate of say, 60%, the following outcomes are expected by 2025:

- approximately 43,800 bed nights
- approximately 14,600 visitors, assuming an average length of stay of 3 nights
- approximately 9,500 camp visitors, assuming 65% of visitors are from camps
- approximately 110 camps, assuming an average camp size of 90 persons
- approximately 5,100 non-school camp visitors.

KidsTown would need to achieve a market share of 6% of the estimated school camp market of 167,300 children, as shown in Table 2.4.

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**Table 2.4: KidsTown School Camp Market Analysis, 2025 – 60% Occupancy**

Category	High Scenario
Beds	200
Annual bed nights available	73,000
Required bed occupancy (assuming 2/3 full, 2/3 of the time)	60%
Estimated bed nights	43,800
Estimated visitors (assuming av. 3 night stay)	14,600
Assumed share of visitors from school camps	65%
Estimated school camp visitors	9,500
Estimated non-school camp visitors	5,100
Estimated school camp market size in catchment	167,300
Market share 'school camp market' required	6%
Source:	Essential Economics
Note:	Figures are rounded

Based on the above analysis and research, a market exists for a group accommodation and camp facility at KidsTown.

The following Chapter assesses the economic impact that would be likely to arise from the proposal.

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### 3 ECONOMIC IMPACT ASSESSMENT

#### 3.1 Investment

Prowse Quantity Surveyors Pty Ltd (letter dated 10 March, 2016) estimate total investment associated with the development of the KidsTown facility will be in the order of \$9.18 million.

The scale of this investment represents a significant stimulus to the region, and will provide opportunities for local construction businesses and other firms in the supply chain to participate in the project. These opportunities will span the range activities associated with site preparation, construction and fit-out of the facility.

#### 3.2 Construction-related Economic Impacts

The KidsTown group accommodation and camp facility project has a construction value of \$9.18 million. This investment will create economic opportunities for residents and business located within and beyond the City of Greater Shepparton.

The key economic outcomes resultant from the construction phase of the project have been modelled using the the National Institute of Industry Research economic impact model which is presented in economy id. These outcomes include:

- Direct construction jobs: 47 jobs
- Indirect construction-related jobs: 44 jobs
- Total jobs (direct and indirect): 91 jobs
- Jobs for Greater Shepparton residents 80 jobs
- Total economic 'output' of \$20.8 million, comprising:
  - Greater Shepparton output impact: \$16.5 million
  - Output impact elsewhere in Australia: \$4.3 million.
- Impact on Gross Regional Product (Greater Shepparton) : +\$5.7 million

Above figures are presented in 2012/13 dollars.

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### 3.3 Ongoing Employment

#### *Direct Employment*

Based on consultation with ACA, the following provides an indication of potential ongoing employment outcomes that would be expected at the proposed KidsTown group accommodation and camp facility:

- Administration: 1 Full-time Equivalent (FTE) job
- Program Director: 1 FTE jobs
- Chef: 1 FTE
- Kitchen support: Up to 1.5 FTE (varies based on occupancy)
- Maintenance: 1 FTE
- Cleaning: Up to 1.5 FTE, likely to comprise part-time/contract positions (varies based on occupancy)
- Marketing: Up to 1 FTE job
- Camp facilitators: 1 casual staff per 15 camp attendees (varies based on occupancy).

Excluding camp facilitators (the number of facilitators depends on the number of camps booked, the number of attendees, the length of camp and the camp program), it is estimated the proposed KidsTown group accommodation and camp facility would support up to 8 FTE jobs.

As indicated in Section 2.4, potential exists for KidsTown to accommodate between 80-110 camps a year, assuming an average camp size of 90 persons. This number of camps is sufficient to support 10-13 FTE facilitators based on the following assumptions:

- an average of 15 camp attendees per facilitator and 6 facilitators per camp
- each facilitator, on average, works 40 hours per camp comprising four x 10-hour days.

Therefore, potential exists for the KidsTown group accommodation and camp facility to generate a total of 18 FTE to 21 FTE jobs.

#### *Indirect Employment*

In addition to the on-going jobs directly supported at the proposed KidsTown group accommodation and camp facility, many jobs will be sported indirectly through the employment multiplier effect. These indirect jobs will be supported in the wider economy through inputs to the ongoing provision of services at the camp (e.g. purchases, maintenance services, accountants, etc) and the spending of employee wages.

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ABS National Accounts data takes into consideration detailed inter-industry linkages within the broader economy, and this data shows an employment multiplier of 2.3 is applicable to the *accommodation, café and restaurant* industry. That is, for every 10 direct jobs created, a further 13 indirect jobs are created elsewhere in the wider economy.

With an estimated 18-21 FTE direct jobs generated at the KidsTown group accommodation and camp facility, an estimated 23-27 FTE indirect jobs are created elsewhere in the economy. A share of indirect jobs would be supported by local businesses, with the balance supported in the wider State and national economies.

Table 3.1 summarises the potential employment outcomes associated with the proposed KidsTown group accommodation and camp facility.

**Table 3.1: Direct and Indirect Employment**

Job Types	Low	High
Direct jobs	18 FTE	21 FTE
Indirect jobs	23 FTE	27 FTE
<b>Total jobs</b>	<b>41 FTE</b>	<b>48 FTE</b>

Source: Essential Economics

### 3.4 Estimated Visitors and Visitor Expenditure

#### *Estimated Visitor Nights and Visitors*

The proposed KidsTown group accommodation and camp facility has the potential to attract new visitors and their associated spending to Greater Shepparton, that would otherwise not be attracted to the region.

Based on the analysis undertaken in Section 2.5, potential exists for KidsTown to attract between 10,800 and 14,600 visitors who would stay a total of 32,400 to 43,800 visitor nights.

Table 3.2 below summarises the potential level of visitation that could be attracted to the planned group accommodation facility at KidsTown.

**Table 3.2: Potential Visitation at KidsTown**

Category	Low (44% Occupancy)	High (60% occupancy)
<b>Total bed nights</b>	<b>32,400</b>	<b>43,800</b>
<b>Total visitors</b>	<b>10,800</b>	<b>14,600</b>
- school camp-related visitors	7,000	9,500
- non-school-camp visitors	3,800	5,100

Source: Essential Economics

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### **Estimated Visitor Expenditure**

The planned KidsTown group accommodation and camp facility has the potential to attract an estimated \$3.9m to \$5.3m in visitor expenditure per year.

This estimate includes \$2.5m to \$3.4m in expenditure from camp-related visitors which would largely be directed to the operator of the facility. Camps are typically self-contained and very limited visitor expenditure would be directed to businesses elsewhere. This estimate assumes an average spend of \$360 per visitor per stay at the camp (or \$120 per night) which includes food, facilitators, accommodation, etc.

In addition, an estimated \$1.4m to \$1.8m of visitor would be expected to be generated by non-camp related visitors. A proportion of this spending would be directed to local retailers, café and restaurants, and other tourism-related businesses. This estimate assumes average visitor expenditure of \$360 per visitor (or \$120 per night) and is based on Tourism Research Australia data relating to visitor expenditure for Greater Shepparton.

Table 3.3 summarises the estimated visitor expenditure generated by visitors to KidsTown group accommodation and camp facility.

**Table 3.3: Estimated Visitor Expenditure (\$2015)**

Category	Low (44% Occupancy)	High (60% occupancy)
<u>Camp-related Expenditure</u>		
Estimated visitors	7,000	9,500
Expenditure per visitor	\$360	\$360
<b>Estimated total school camp-related expenditure</b>	<b>\$2.5m</b>	<b>\$3.4m</b>
<u>Non-school-camp Expenditure</u>		
Estimated visitors	3,800	5,100
Expenditure per visitor	\$360	\$360
<b>Estimated total non-school-camp-related expenditure</b>	<b>\$1.4m</b>	<b>\$1.8m</b>
<u>Total Expenditure</u>		
Estimated visitors	10,800	14,600
Expenditure per visitor	\$360	\$360
<b>Estimated total expenditure</b>	<b>\$3.9m</b>	<b>\$5.3m</b>

Source: Essential Economics; Tourism Research Australia data

Note: Figures are rounded

### **3.5 Other Potential Benefits**

The development of the proposed KidsTown group accommodation and camp facility will generate other benefits in addition to employment and the attraction of visitors and their spending. Examples of these benefits are described below.

S P C K I D S T O W N  
G R O U P A C C O M M O D A T I O N A N D C A M P F A C I L I T Y  
E C O N O M I C A S S E S S M E N T

### ***Contribution to Shepparton's tourism offer***

The *Goulburn River Valley Destination Management Plan* (Goulburn River Valley Tourism and Urban Enterprise, 2014) identifies a gap in the Shepparton region for low-cost group accommodation, noting that no other camp facility is located in the municipality (refer Figure 2.4).

The development of group accommodation and a camp facility at KidsTown will contribute to the overall tourism product offering in Shepparton and the wider region.

### ***Marketing benefits***

Marketing activities undertaken by the operator of the facility (i.e. Greater Shepparton Council) will also contribute to the marketing of Shepparton as a visitor destination. The attraction of new visitors to the region will also provide additional exposure to the region and promote repeat visits.

### ***Community and social benefits***

The delivery of education programs at the camp will provide significant education benefits to attendees. School camp providers typically provide outcome-focused programs that seek to:

- instil confidence
- contribute to a sense of social and environmental awareness
- encourage the importance of a healthy lifestyle, physical activity and team work
- provide attendees with new skills
- encourage personal qualities such as increased initiative, perseverance, self-reliance and responsibility
- provide new experiences.

Council have indicated the potential for KidsTown to deliver a camp program that has a focus on aboriginal culture and history, and food. These programs would also contribute to the community, social and educational benefits that would be derived from the facility.

### ***Contribution to Greater Shepparton Food Hub***

The proposed facility has the potential to contribute positively to the Greater Shepparton Food Hub by being an activity generator within the precinct. Opportunities to integrate the Food Hub with camp programs will also add to the number of visitors and utilisation of the Food Hub.

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GROUP ACCOMMODATION AND CAMP FACILITY  
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## 4 10-YEAR FINANCIAL OPERATIONAL ASSESSMENT

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This Chapter provides an indication of the potential 10-year financial operating outcome for the proposed KidsTown group accommodation and camp facility. The analysis has been informed from a variety of industry sources including the following:

- Analysis of publically available annual and financial reports from camp operators
- Industry benchmarks for the various accommodation sub-industries as sourced from IBISWorld
- Research on the pricing of other camp operators in Victoria
- Discussions with ACA.

Note, limited information is available on the financial operation of private sector operators of camp and group accommodation facilities. The assessment assumes the facility will be run by Council and therefore no costs associated with rent have been included in the assessment. All figures are expressed in constant 2016 dollars.

### 4.1 Assumed Occupancy and Visitor Nights

As indicated in Chapter 2, a bed occupancy of 44% is considered an ‘industry rule-of-thumb’ for a successful camp facility. However, it is expected to take some time for KidsTown to build its reputation and establish itself within the industry. Many schools already have existing relationships with school-camp providers and KidsTown will need to attract these customers away from competitors.

For the purpose of this financial assessment, it is assumed that in Year 1 KidsTown will achieve a bed occupancy rate of 15% and this rate will increase to 50% by Year 10.

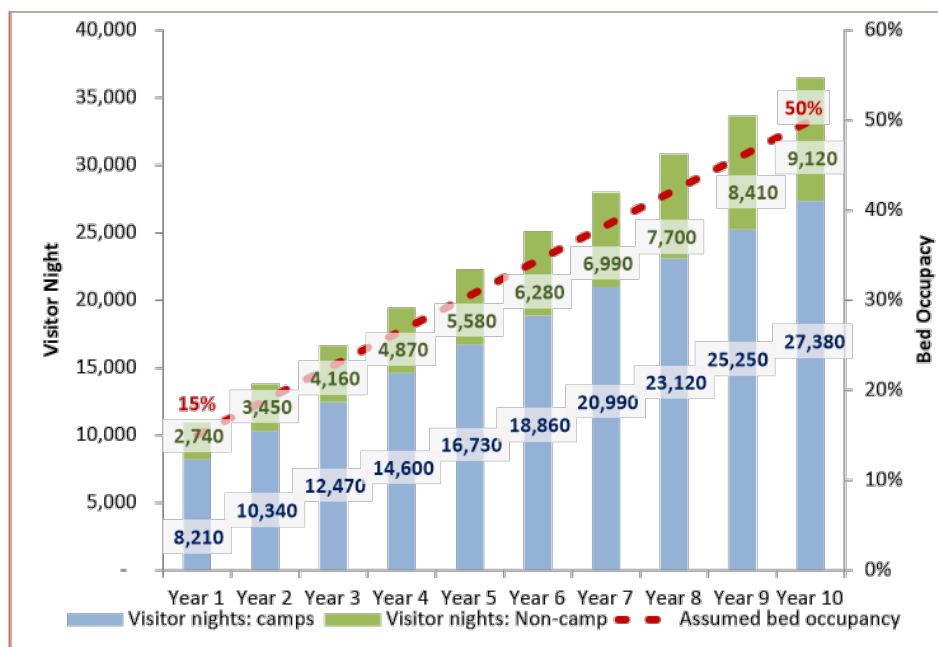
It is also assumed that 75% of bed nights would be associated with camps, including both school and non-school camps, with the balance of bed nights (25%) occupied by those seeking group accommodation.

The estimate of visitor nights based on these assumptions is shown in Figure 4.1.



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GROUP ACCOMMODATION AND CAMP FACILITY  
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Figure 4.1: Assumed Bed Occupancy and Visitor Nights, Year 1 to 10



Source: Essential Economics

## 4.2 Revenues

### Key Assumptions

The key assumptions upon which revenues have been forecast are as follows:

- 1 Average revenue per visitor night for camps: assumed to be \$120 per night, remaining constant over the forecast period.
- 2 Average revenue per visitor night for non-camps (or group accommodation): assumed to be \$50 per night, remaining constant over the forecast period. This assumption takes into consideration those seek group accommodation will not require catering and camp facilitators, and has been based on indicative pricing of cabins in nearby caravan parks.

### Key Findings

Revenues at the proposed KidsTown camp and group accommodation are forecast to increase from approximately \$1.1 million in Year 1 to \$3.7 million in Year 10. Details of forecast revenues are provided in Table 4.1.

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**Table 4.1: Forecast Revenues, Year 1 to Year 10 (constant 2016 dollars)**

Year	Camp revenue	Non-camp revenue	Total revenue
Year 1	\$985,200	\$137,000	\$1,122,200
Year 2	\$1,240,800	\$172,500	\$1,413,300
Year 3	\$1,496,400	\$208,000	\$1,704,400
Year 4	\$1,752,000	\$243,500	\$1,995,500
Year 5	\$2,007,600	\$279,000	\$2,286,600
Year 6	\$2,263,200	\$314,000	\$2,577,200
Year 7	\$2,518,800	\$349,500	\$2,868,300
Year 8	\$2,774,400	\$385,000	\$3,159,400
Year 9	\$3,030,000	\$420,500	\$3,450,500
Year 10	\$3,285,600	\$456,000	\$3,741,600

Source: Essential Economics

**4.3 Expenditures****Key Assumptions**

The key assumptions upon which expenditures have been forecast are as follows:

- 1 **Fixed employment costs:** The following positions and salaries have been assumed to be constant over the 10-year period:

- Administration: 1 FTE job with an annual salary of \$60,000
- Program Director: 1 FTE job with an annual salary of \$90,000
- Chef: 1 FTE job with an annual salary of \$60,000
- Maintenance: 1 FTE job with an annual salary of \$60,000
- Marketing: 1 FTE job with an annual salary of \$65,000

All salaries identified above are inclusive of superannuation and other on-costs

- 2 **Variable employment costs:** The following positions will vary depending on the level of occupancy:

- Cleaning: Increasing from 0.5 FTE job in Year 1 to 1.5 FTE jobs in Year 10, with an average annual salary of \$50,000/FTE job
- Kitchen support: Increasing from 0.5 FTE job in Year 1 to 1 FTE jobs in Year 10, with an average annual salary of \$50,000/FTE job
- Camp facilitators: Increasing from 3.6 FTE jobs in Year 1 to 12.2 FTE jobs in Year 10, with an average annual salary of \$50,000/FTE job. This assumption takes into account the estimates of camps per year increasing from approximately 30 camps in Year 1 to approximately 100 camps in Year 10; an average size of 90 persons per camp; and 1 camp facilitator per 15 camp visitors.

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All salaries identified above are inclusive of superannuation and other on-costs

- 3 Purchases: Assumed to be 35% of revenue based on industry benchmarks for various accommodation sub-sectors sourced from IbisWorld. Purchases include food stuffs for catering.
- 4 Utilities: Assumed to be 2.5% of revenue based on industry benchmarks for various accommodation sub-sectors sourced from IbisWorld.
- 5 Other costs: Assumed to be 20% of revenue based on industry benchmarks for various accommodation sub-sectors sourced from IbisWorld. Other costs include marketing, advertising, administrative costs, insurance and accounting fees, etc.
- 6 Depreciation: Assumed to be 3.5% of revenue based on industry benchmarks for various accommodation sub-sectors sourced from IbisWorld.

### Key Findings

Operating expenses at the proposed KidsTown camp and group accommodation are forecast to increase from approximately \$1.3 million in Year 1 to \$3.4 million in Year 10. Details of forecast revenue are provided in Table 4.2.

**Table 4.2: Forecast Operating Expenses, Year 1 to Year 10 (constant 2016 dollars)**

Year	Employment Costs			Purchases	Depreciation	Utilities	Other	Total operating expenses
	Fixed	Variable	Total Employment Costs					
Year 1	\$335,000	\$231,687	\$566,687	\$392,770	\$39,280	\$28,060	\$224,440	\$1,251,237
Year 2	\$335,000	\$291,248	\$626,248	\$494,660	\$49,470	\$35,330	\$282,660	\$1,488,368
Year 3	\$335,000	\$350,809	\$685,809	\$596,540	\$59,650	\$42,610	\$340,880	\$1,725,489
Year 4	\$335,000	\$410,370	\$745,370	\$698,430	\$69,840	\$49,890	\$399,100	\$1,962,630
Year 5	\$335,000	\$469,931	\$804,931	\$800,310	\$80,030	\$57,170	\$457,320	\$2,199,761
Year 6	\$335,000	\$529,492	\$864,492	\$902,020	\$90,200	\$64,430	\$515,440	\$2,436,582
Year 7	\$335,000	\$589,053	\$924,053	\$1,003,910	\$100,390	\$71,710	\$573,660	\$2,673,723
Year 8	\$335,000	648614.12	\$983,614	\$1,105,790	\$110,580	\$78,990	\$631,880	\$2,910,854
Year 9	\$335,000	\$708,175	\$1,043,175	\$1,207,680	\$120,770	\$86,260	\$690,100	\$3,147,985
Year 10	\$335,000	\$761,680	\$1,096,680	\$1,309,560	\$130,960	\$93,540	\$748,320	\$3,379,060

Source: IbisWorld; Essential Economics

### 4.4 Financial Operational Analysis

Based on the expenditure and revenue estimates presented above, the KidsTown camp and group facility is forecast to make a net operating loss for Years 1 to 3, before starting to making an operating profit in Year 4 with this profit margin increasing thereafter.

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The industry average for the profit margin for Australian accommodation facilities is 7.7% (IbisWorld). By Year 8, KidsTown is forecast to achieve this industry-wide benchmark.

**Table 4.3: Net Operating Profit/Loss Forecasts, Year 1 to Year 10 (constant 2016 dollars)**

Year	Revenues	Expenses	Net Operating Profit/Loss	Margin
Year 1	\$1,122,200	\$1,251,237	-\$129,037	-11.5%
Year 2	\$1,413,300	\$1,488,368	-\$75,068	-5.3%
Year 3	\$1,704,400	\$1,725,489	-\$21,089	-1.2%
Year 4	\$1,995,500	\$1,962,630	\$32,870	+1.6%
Year 5	\$2,286,600	\$2,199,761	\$86,839	+3.8%
Year 6	\$2,577,200	\$2,436,582	\$140,618	+5.5%
Year 7	\$2,868,300	\$2,673,723	\$194,577	+6.8%
Year 8	\$3,159,400	\$2,910,854	\$248,546	+7.9%
Year 9	\$3,450,500	\$3,147,985	\$302,515	+8.8%
Year 10	\$3,741,600	\$3,379,060	\$362,540	+9.7%

Source: Essential Economics

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ECONOMIC ASSESSMENT

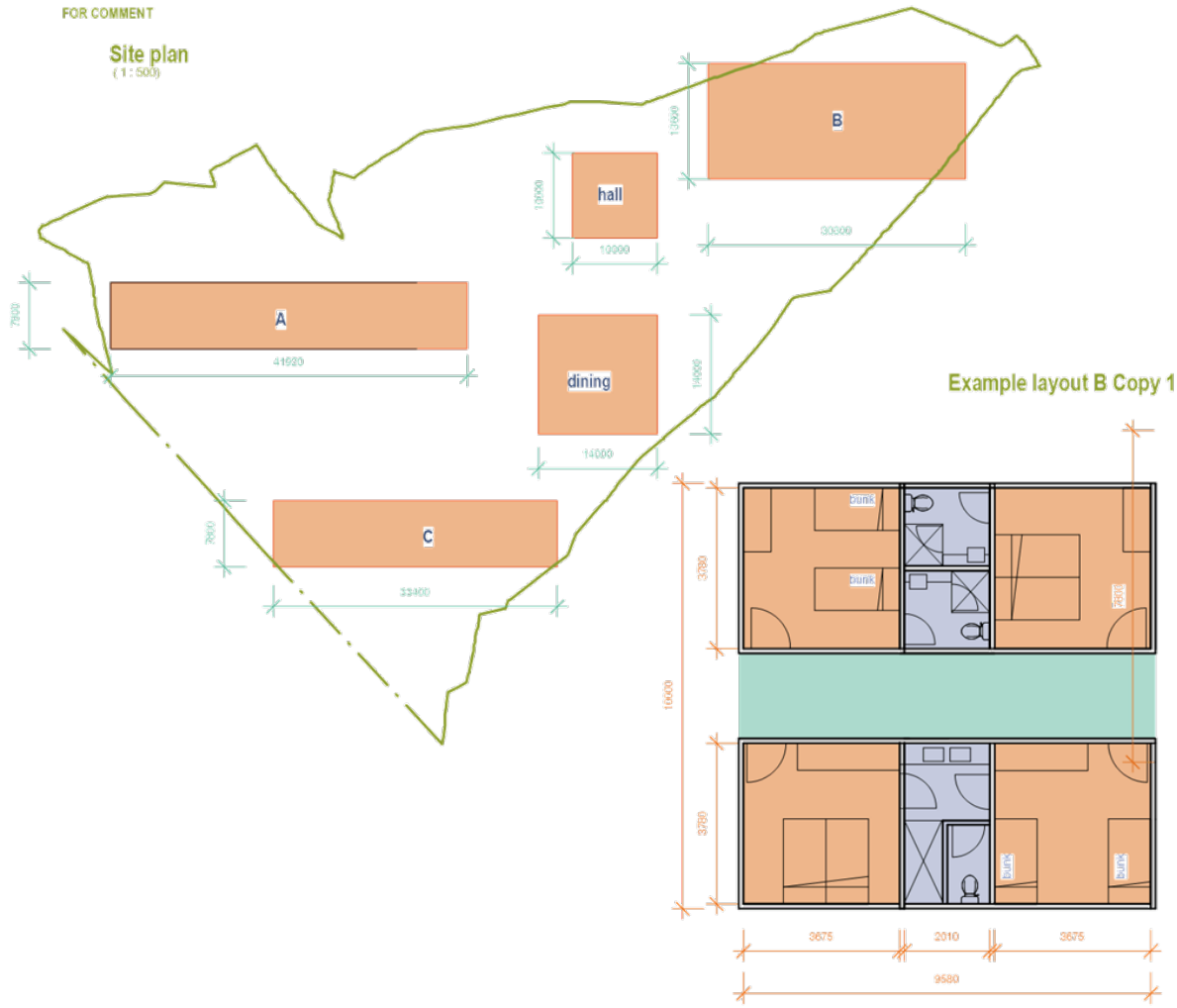
## 5 SUMMARY OF MAIN FINDINGS

The main conclusions derived from the analysis presented in this report are as follows:

- 1 The 'camps' sector is well supported by the State Government which recently unveiled the \$148 million **Camps, Sports and Excursions Fund** that ensures all Victorian students can take part in school trips and sporting activities.
- 2 The proposed KidsTown group accommodation and camp facility will have the following key competitive advantages:
  - The 200-bed facility is large enough to host the needs of the majority of Victorian schools and has the potential to host multiple camps at the one time. Only 15% of camps in Victoria have 200 beds or more.
  - KidsTown will be a new, modern and purpose-built facility in a sector where the development of new camps does not occur very often.
  - Potential to integrate local Aboriginal culture and heritage, and food into the camp program.
- 3 A expanding market exists for the proposed KidsTown group accommodation and camp facility, with the number of 'camp-age' children (i.e. 8-15 years old) living within 2-2.5 hours from Shepparton is forecast to increase from 271,000 children in 2015 to 334,600 children in 2025.
- 4 In 2015, an estimated market of approximately 135,600 children of 'camp-age' exists in the catchment. In order to be 'two-thirds occupied for two-thirds of the time' (or a bed-occupancy rate of 44% which is an industry benchmark), KidsTown would be required to capture just 4% of the indicative market size for 'camp-age' children in 2025. In order to achieve a bed-occupancy of 60%, KidsTown would be required to capture a market share of just 6%.
- 5 In addition, KidsTown also has the potential to attract many other customers seeking low-cost group accommodation. Low-cost group accommodation is identified as a gap in the local tourism market in the *Goulburn River Valley Destination Management Plan* (Goulburn River Valley Tourism and Urban Enterprise, 2014).
- 6 The development is expected to generate significant economic benefits, including the following:
  - The attraction of 10,800 to 14,600 visitors a year, based on a 44% and 60% bed occupancy respectively.
  - Total visitor nights of 32,400 to 43,800, assuming a 44% and 60% bed occupancy respectively.
  - Total visitor expenditure of \$3.9m to \$5.3m, based on a 44% and 60% bed occupancy respectively.
  - Construction-related investment of \$9.18 million
  - An estimated 47 direct and 44 indirect construction-related jobs.
  - The creation of 18-21 direct FTE jobs, plus a further 23-27 indirect FTE jobs.

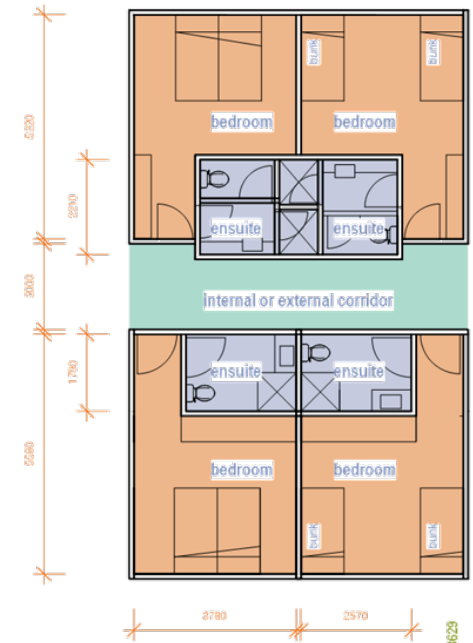
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- 7 10-year financial operating forecasts for the proposed KidsTown camp and group facility show a net operating loss for Years 1 to 3, but operating profits from Year 4 onwards. By Year 8, KidsTown is forecast to achieve a net operating profit of 7.9%, which is in-line with the industry-wide benchmark for the accommodation industry.



design by  
**eme**  
177 byron street  
collingwood vic 3066  
australia  
0402 335 588  
emedesign.com.au

Example layout A2 Copy 1  
Ref. T0 (1:100)



**GENERAL NOTES:**

- 01 Prior to commencement of works & after demolition conflicting information must be made known to EME & dims/NGLs verified.
- 02 Do not scale from drawings use marked dimensions.
- 03 Do not use full arrows to set out rock, use wall height dimensions.
- 04 All drawings to be read in conjunction with all other engineers & architectural drawings.
- 05 All dwgs & design are property of EME. Permission to reproduce &/or distribute to a third party must be obtained from EME.
- 06 Builder & joiner to coordinate with EME on details to ensure performance and aesthetic criteria are met.

**WINDOW & DOOR NOTES:**

- 300 All front doors to be solid timber unless otherwise noted
- 301 All interior doors to be solid timber
- 302 All slides to be on heavy duty track Lx. 'Hendersons'
- 303 Window/door openings are shown as frame over all sizes
- 304 All new windows to be double glazed 10mm argon filled cavity
- 305 Any operable highlight windows to have mechanical or electronic remote opening system
- 307 Replace exist. in same opening with double glazed, frames to match new windows, wall to be made good (ref. window schedule)
- 308 Sill depth to be confirmed with EME

**SHEET NOTES:**

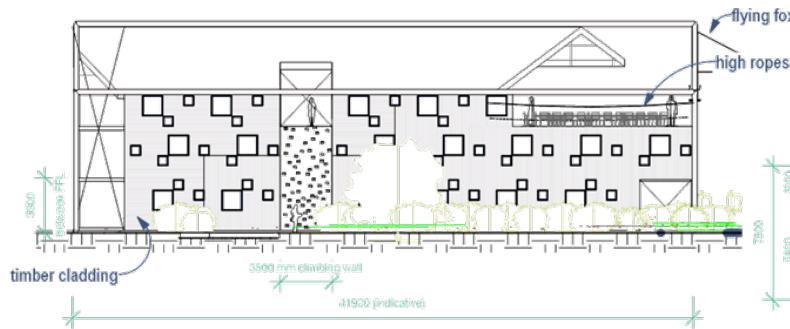
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GREATER SHEPPARTON COUNCIL  
job no. 317  
scale As indicated @ A3  
drawn by Author  
checked by LM

**SITE SD- QS1**

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FOR COMMENT

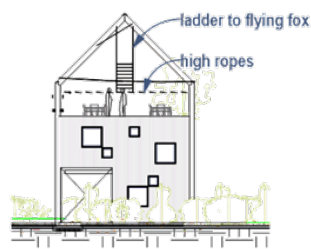
Accommodation A - South Elevation



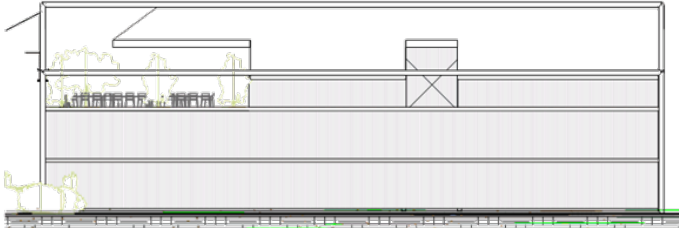
Accom. A - West Elev



Accom. A - East Elev



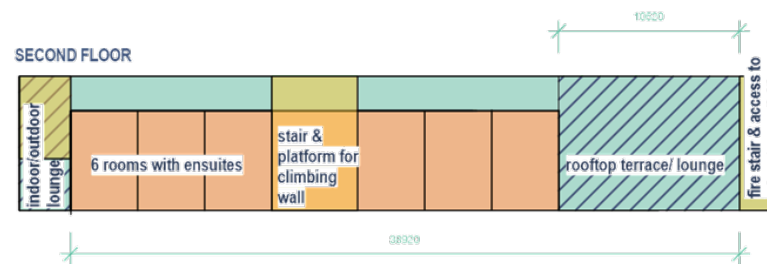
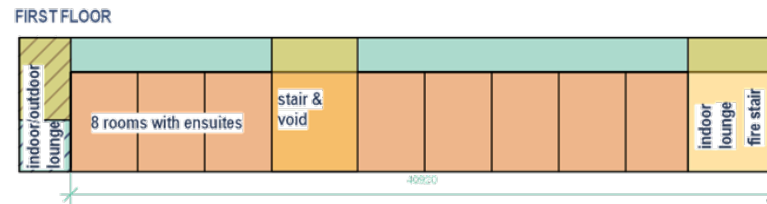
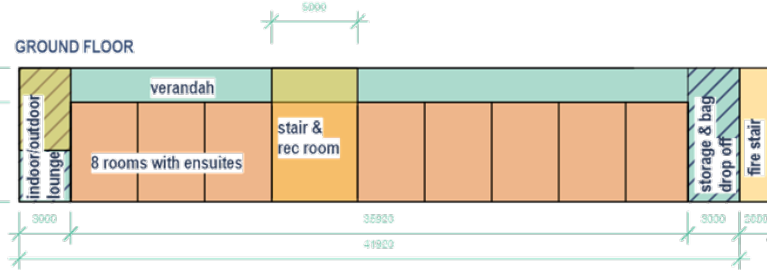
Accom. A - South Elev



- GENERAL NOTES:**
- 01 Prior to commencement of works & after demolition conflicting information must be made known to EME & dims/NGLs verified.
  - 02 Do not scale from drawings use marked dimensions.
  - 03 Do not use fall arrows to set out roof, use wall height dimensions.
  - 04 All drawings to be read in conjunction with all other engineers & architectural drawings.
  - 05 All dwgs & design are property of EME. Permission to reproduce &/or distribute to a third party must be obtained from EME.
  - 06 Builder & joiner to coordinate with EME on details to ensure performance and aesthetic criteria are met.

- SHEET NOTES:**
- 07 Builder to allow adequate setdowns so floor finishes are flush, hide junction between floor types under door panel
  - 08 External doors to be setdown so sill is flush with finish floor level to prevent tripping hazard
  - 09 Engineer & plumber to advise on new roof design/configuration to ensure functionality
  - 10
  - 11
  - 12

Accommodation A - Plans



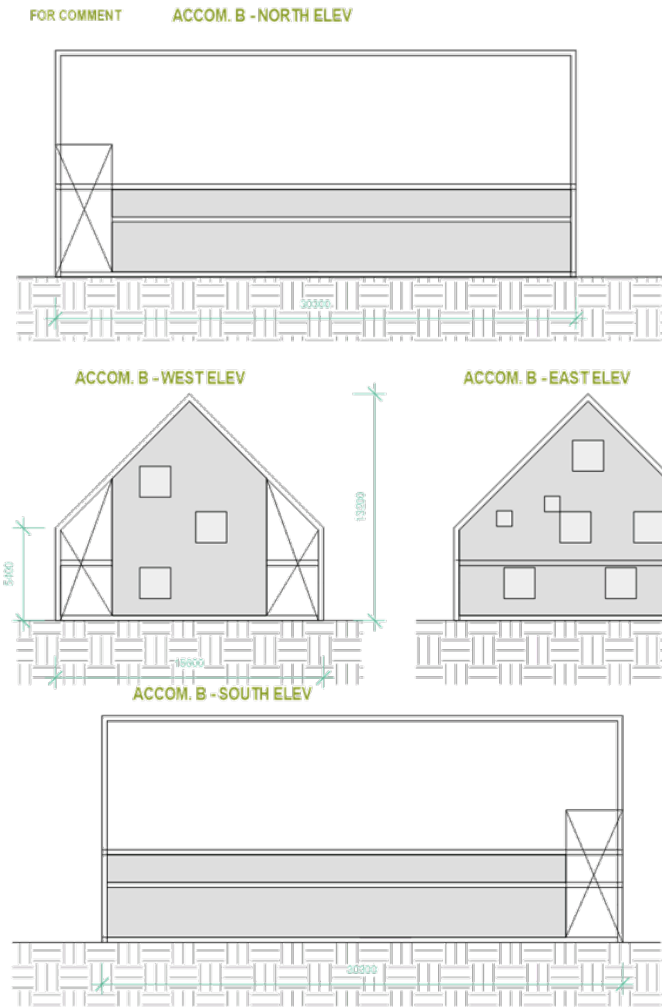
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7287 Midland Hwy, Mooroopna VIC 3629  
GREATER SHEPPARTON COUNCIL  
job no. 317  
scale 1:350 @ A3  
drawn by JLN  
checked by LM

Accommodation A SD- QS2

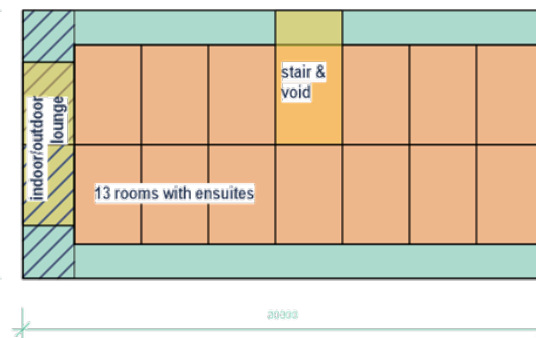
REVISIONS 29/04/2016 9:41:28 AM



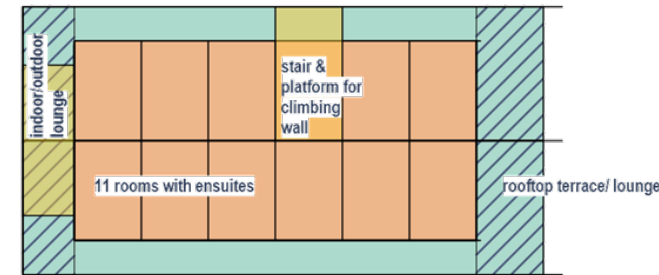


Accommodation B - Plans

GROUND FLOOR



FIRST FLOOR



fire stair & access to  
adventure activities

design by  
**eme**  
177 byron street  
collingwood vic 3066  
australia  
0402 335 588  
emesign.com.au

**GENERAL NOTES:**  
01 Prior to commencement of works & after demolition conflicting information must be made known to EME & dims/NGLs verified.  
02 Do not scale from drawings use marked dimensions.  
03 Do not use fall arrows to set out rock, use wall height dimensions.  
04 All drawings to be read in conjunction with all other engineers & architectural drawings.  
05 All dwgs & design are property of EME. Permission to reproduce &/or distribute to a third party must be obtained from EME.  
06 Builder & joiner to coordinate with EME on details to ensure performance and aesthetic criteria are met.

**WINDOW & DOOR NOTES:**  
300 All front doors to be solid timber unless otherwise noted  
301 All interior doors to be semi solid  
302 All slides to be on heavy duty track Lx 'Hendersons'  
303 Window/door openings are shown as frame over all sizes  
304 All new windows to be double glazed 10mm argon filled cavity  
305 Any operable highlight windows to have mechanical or electronic remote opening system  
307 Replace exist. in same opening with double glazed, frames to match new windows, wall to be made good (ref. window schedule)  
308 Sill depth to be confirmed with EME

**SHEET NOTES:**

Accommodation B SD- QS3

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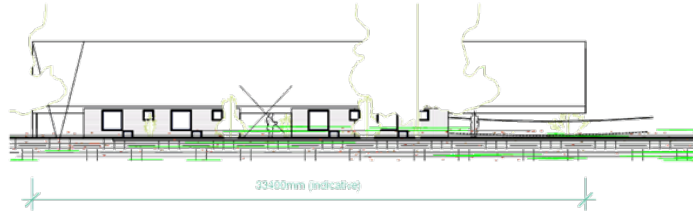
7287 Midland Hwy, Mooroopna VIC 3629  
GREATER SHEPPARTON COUNCIL  
job no. 317  
scale 1:350 @ A3  
drawn by Author  
checked by LM



FOR COMMENT

design by  
**eme**  
177 byron street  
collingwood vic 3066  
australia  
0402 335 588  
emedesign.com.au

Accom. C - North Elev



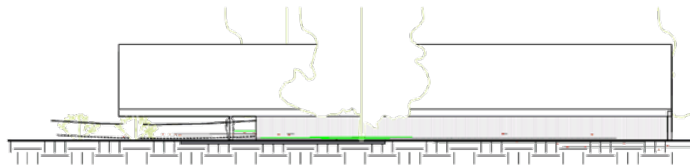
Accom. C - West Elev



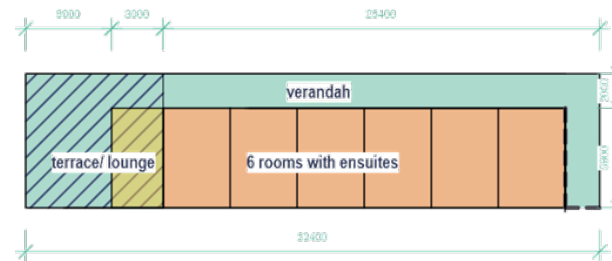
Accom. C - East Elev



Accom. C - South Elev



Accommodation C - Plans



**GENERAL NOTES:**  
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308 Sill depth to be confirmed with EME

**SHEET NOTES:**

7287 Midland Hwy, Mooroopna VIC 3629  
GREATER SHEPPARTON COUNCIL  
job no. 317  
scale 1:350 @ A3  
drawn by JLN  
checked by LM

Accommodation C SD- QS4

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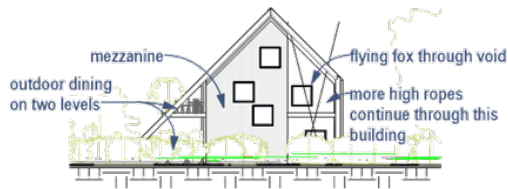
FOR COMMENT

design by  
**eme**  
177 byron street  
collingwood vic 3066  
australia  
0402 335 588  
emedesign.com.au

**Dining Hall - North Elev**  
(1 : 250)



**Dining Hall - West Elev**  
(1 : 250)



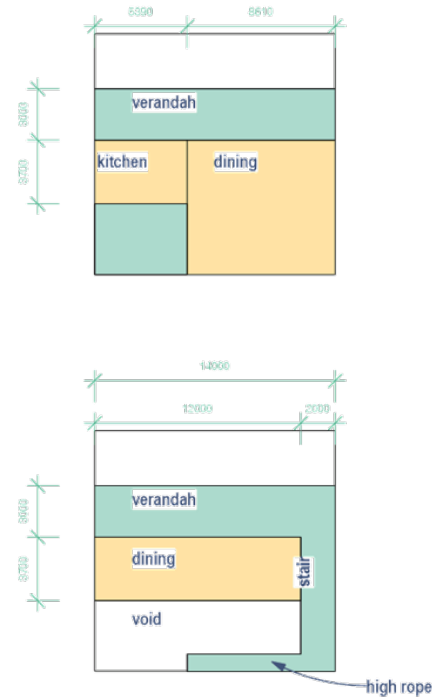
**Dining Hall - East Elev**  
(1 : 250)



**Dining Hall - South Elev**  
(1 : 250)



**Dining Plan**  
(1 : 250)



**GENERAL NOTES:-**  
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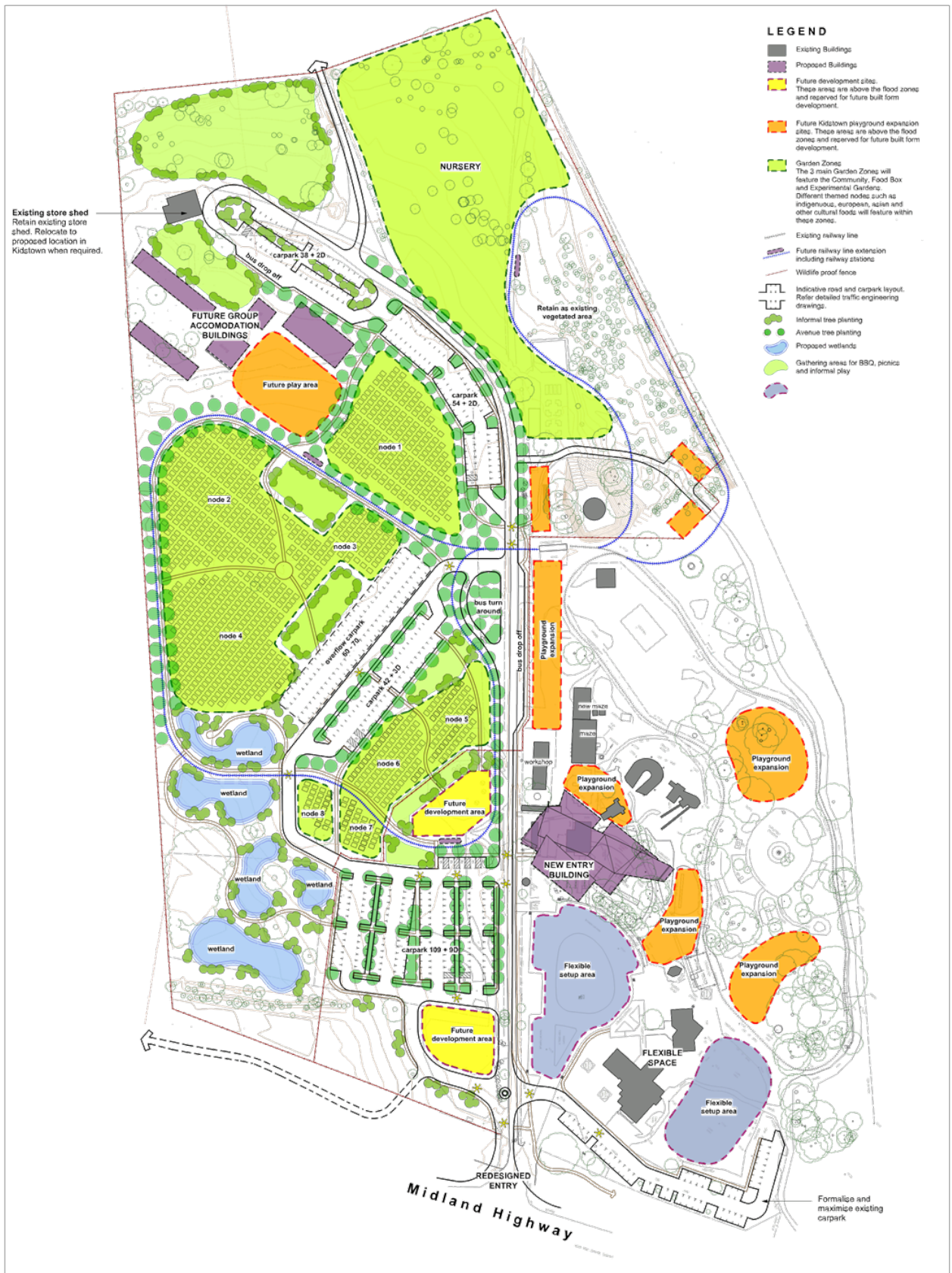
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308 Sill depth to be confirmed with EME

**SHEET NOTES:-**

7287 Midland Hwy, Mooroopna VIC 3629  
GREATER SHEPPARTON COUNCIL  
job no. 317  
scale 1 : 350 @ A3  
drawn by Author  
checked by LM

**Dining Hall SD- QS5**  
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Landscape Masterplan  
**Ardmona Kidstown and Food Hub Precinct**  
 Midland Highway, Shepparton



PROJECT NUMBER	DRAWING NUMBER	REV
2490	MP01	C
ISSUE DATE	DRAWN BY	CHECKED
28.06.16	LK	MJ



