

IPSWICH INDOOR SPORTS COMPLEX FEASIBILITY STUDY FINAL REPORT



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Contents

Executive Summary	1
1. Introduction	3
1.1 Study Need	3
1.2 Study Objectives	4
1.3 Strategic Alignment	5
2. Catchment Analysis	6
2.1 Ipswich – Primary Catchment	6
2.1.1 Ipswich Regional Population	6
2.2 Regional - Secondary Catchment	8
2.2.1 Regional Population	9
2.3 Facilities	9
2.3.1 Ipswich Basketball Stadium	10
2.3.2 Council-Owned Facilities	10
2.3.3 Private Facilities	10
2.3.4 Education Facilities	11
3. Participation	12
3.1 Ipswich Basketball Association	12
3.2 Indoor Sports and Activities	13
3.3 Events	14
3.3.1 Show Court	15
4. Trends	17
4.1 Drivers of Participation	17
4.1.1 National Participation	17
4.1.2 Changing Sport Participation	18
4.2 Emerging Sports	19
4.2.1 Technology-Enabled Activities	19
4.3 Facility Design	20
4.3.1 Multi-purpose Indoor Court Facilities	21
4.3.2 Location	21
4.3.3 Scale	21
4.3.4 Design & Layout	22
4.3.5 Diversified Use	24
4.4 Social Factors	25
4.4.1 Holistic Health	25
4.4.2 Diversity and Inclusion	25
4.5 Health and Fitness Trends	26

4.5.1	Diversified Health and Fitness Offerings	26
4.6	Climate	28
4.7	Case Studies	29
4.8	2032 Olympic and Paralympic Games	29
5.	Stakeholder Engagement	32
6.	Demand	35
6.1	Indoor Court Venues	35
6.1.1	Demand Modelling	35
6.1.2	Supply & Demand Assessment	36
7.	Key Findings & Influencers	37
8.	Project Feasibility	39
8.1	Component Schedule	39
8.2	Cost Estimate	39
8.3	Concept Design	39
8.4	Operating Model	41
8.5	Operational Analysis	44
8.5.1	Primary Assumptions	44
8.5.2	Financial Assessment	45
8.5.3	Visitation	45
8.5.4	Benefits Assessment	45
8.6	Funding Model	46
8.6.1	Funding Programs	46
8.6.2	ITC Land Transfer	47
8.6.3	Partnerships	48
8.6.4	Fundraising	49
8.6.5	Debt Servicing	50
9.	Conclusion and Future Direction	51
10.	Warranties and Disclaimers	52
	Appendix 1: Strategic Document Alignment	53
	Appendix 2: Case Study Exemplar Facilities	58
	Appendix 3: Cost Estimate	66
	Appendix 4: Concept Design	67
	Appendix 5: Operating Models	68
	Appendix 6: Financial Operating Assessment	72

Executive Summary

The Ipswich Basketball Association (IBA) and Ipswich Turf Club (ITC) have entered a Heads of Agreement to work together to build an 11-court, multi-purpose facility at 219 Brisbane Road in Bundamba. The facility will include a show court and aims to meet the region's current and future needs for indoor courts.

IBA and Basketball Queensland have reported that the Ipswich Basketball Stadium is currently at full capacity. The existing indoor courts in the region are unable to meet the current membership needs or the future market demand for indoor sports. This high demand for indoor courts results in expensive bookings, making it difficult for families to afford, leading them towards more affordable activities. Despite the region's attractiveness for large indoor sporting events due to its population size and amenities, the lack of a suitable event venue complicates event management and affects feasibility.

This Feasibility Study aims to secure government funding for pre-event training facilities in preparation for the 2032 Olympic and Paralympic Games.

Study Insights and Impacts

The analysis of key findings and influencers provides strong backing for the proposed Ipswich Indoor Sports Complex. The primary and regional catchment areas are notably large and are expected to double in population by 2041. The demographics of these areas, mainly consisting of families with children and younger adults, make them well-suited for organised indoor sports such as basketball.

The City of Ipswich (the City) has 13 indoor courts suitable for sports competitions. The majority of the indoor court network is mainly used for training or single-use activities, such as dance or martial arts, and it is the only major area in South-East Queensland without a large indoor venue, whether planned or existing. The Ipswich Basketball Stadium is at capacity and lacks multi-use functionality, and the IBA constantly faces the challenge of spreading competitions across multiple venues.

Over the past six years, participation in major indoor sports, particularly children's basketball, has significantly increased. For the IBA to increase its membership, programs, and competitions, it requires improved access to indoor courts. The region is also unable to host state and regional championships as there are no suitable venues (8+ courts).

The City currently has a shortfall of nine indoor courts and if the Centre was built today, it would be operating nearly full capacity. Without action, this shortfall is expected to grow significantly, leading to a deficit of 26 indoor courts by 2041. Potential user groups and stakeholders strongly support the development of the Centre due to the need for additional multi-purpose indoor courts and the capability to host more sports events. The proposed Centre also includes a show court, which would distinguish it from other indoor venues and attract major regional events.

Feasibility

Collaborating with the ITC, the IBA has worked with Gibson Architects to create a conceptual design for the proposed Ipswich Indoor Sports Complex. As of Q3 2024, the estimated cost for the Centre is \$136,629,913.

Several management model options for the Centre have been assessed. While the federal and state government may provide funding for the development, they are unlikely to manage the Centre, as they typically oversee larger sports and entertainment venues. Alternatively, the ITC has stated that they are unable to commit to providing the necessary resources and asset management to support the Centre for the duration of its lifespan.

A potential outcome is for the City of Ipswich to assume the role of Asset Owner, taking responsibility for operational results and asset management. A few viable options exist for the daily management of the Centre, including the potential of a leisure industry specialist or the ITC being the operator. The IBA would become a primary user of the Centre, ensuring sufficient court access and creating a fair pricing system that encourages usage while supporting the venue's long-term viability.

The 25-year performance forecast indicates that the Centre will achieve strong outcomes, with an average cost recovery of 109.56%, annual visitations projected to reach 733,561, and a conservative Benefits to Cost ratio of 1.25.

Constructing a large multi-court venue with a show court in the City is expected to significantly boost the local economy by attracting tourists. A recent example from the U18 State Championships brought in \$11 million over five days, highlighting the potential economic gains from similar events. This venue would attract regional, state, and national sports competitions, benefiting local businesses, the hospitality industry, and retail.

Next Steps

The Ipswich Indoor Sports Complex has received strong support from stakeholders and indicates that the Centre would be in high demand. The feasibility study confirms the Centre's prime location, community benefits, and long-term sustainability, strongly supporting the case for advancing the project.

To progress the project, it is recommended to commence securing stronger partnership support, exploring funding options and strategies, and compiling comprehensive project documentation, including refined concept designs, cost evaluations, and technical assessments.

1. Introduction

The IBA has a rich history of successfully running basketball programs and managing the Ipswich Basketball Stadium. The stadium, situated at 2A Ross Llewellyn Dr, Booval, features three indoor courts and includes changing rooms, a kiosk, and a meeting room and can accommodate basketball, futsal, netball, pickleball, boxing and jiu jitsu activities.

Located at 219 Brisbane Road in Bundamba, next to the Ipswich Basketball Stadium, the ITC has undeveloped land (the Site, Figure 1) and is interested in exploring opportunities for community infrastructure.

IBA and the ITC, with support from Basketball Queensland, are considering developing an 11-court, multi-purpose facility, including a show court, at the proposed Site to meet the regional indoor court demand.

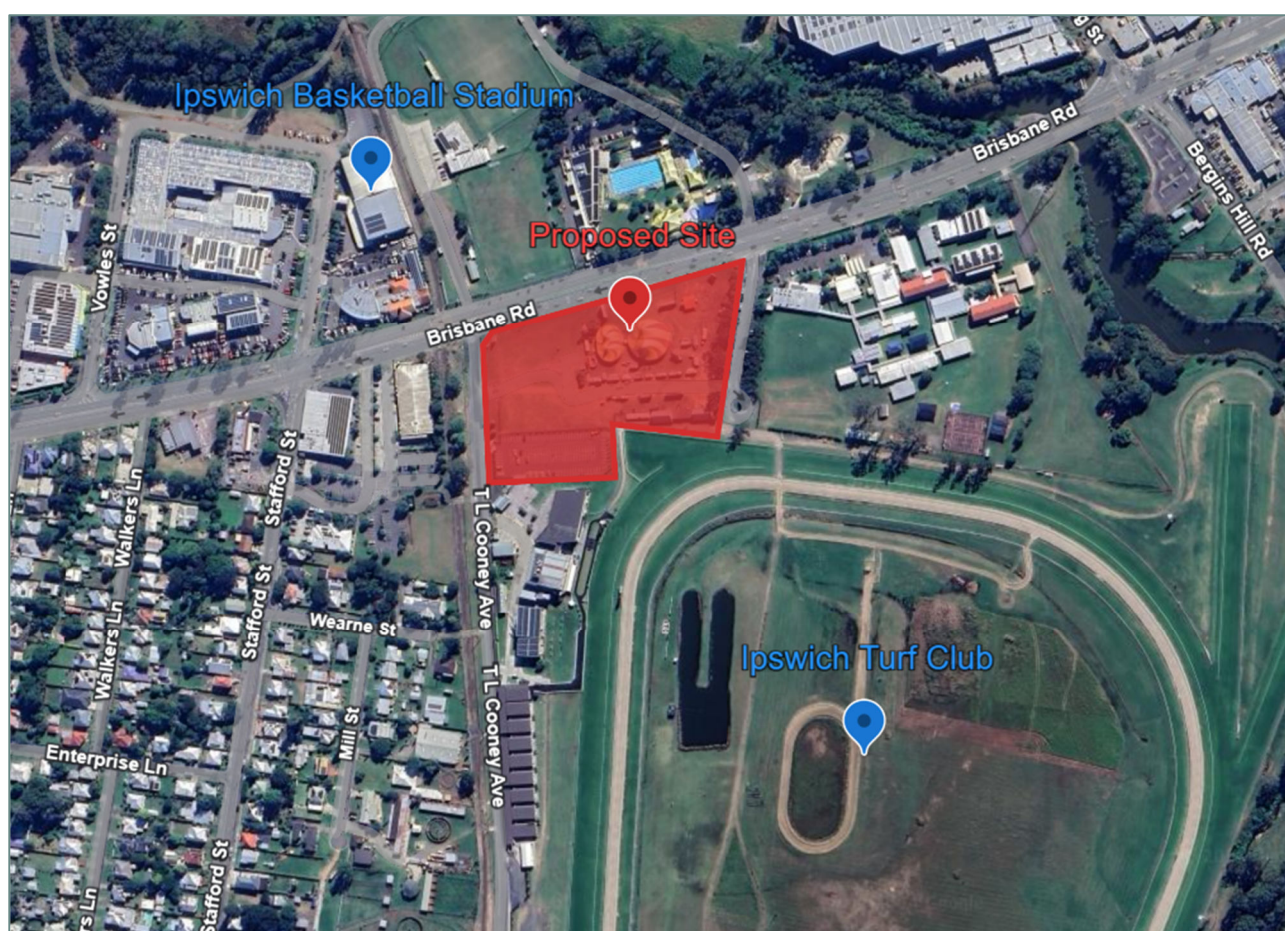


Figure 1: Proposed Site - Aerial Image

1.1 Study Need

IBA and Basketball Queensland have reported that the Ipswich Basketball Stadium (Figure 2) is at capacity, and the Ipswich Region's (Region's) existing indoor courts cannot meet current membership needs or future market demand for indoor sports.

The IBA organises competitions at various venues, but for operational sustainability, it would be advantageous to hold them at a single location. The high demand for indoor courts in the Region also leads to expensive court bookings, which makes it challenging for families to afford and as a result, they tend to seek out more affordable activities.

Although the Region is attractive for large indoor sporting events due to its population size and various amenities that can cater to tourists, the lack of a suitable event venue complicates event management and affects feasibility.

It's beneficial to have two sustainable organisations, the IBA and ITC, leading a project like this. In the future, funding may be available for facilities providing pre-event training and acclimatisation opportunities for the 2032 Olympic and Paralympic Games (the Games). This Feasibility Study (the Study) provides an opportunity to secure government funding for the proposed development (the Centre) and emphasises Ipswich as an excellent training hub for international teams preparing for the Games.

IBA acknowledges that for pre- and post-Games sports facilities to be utilised and maintained effectively, they must align with local government sport and recreation plans and meet the present and future needs of the local communities.



Figure 2: Ipswich Basketball Stadium

1.2 Study Objectives

The Study will be fundamental for advocacy, and examines the following:

- The current and future needs of the IBA and the demand for indoor courts in Ipswich.
- Evidence-based components and features of the Centre.
- Capital funding constraints and potential funding sources.
- Sustainable and viable usage opportunities and adaptations for a growing community.
- Design flexibility to accommodate changing participation trends and maximise multi-use capabilities.
- Management models and partnership opportunities.

- Avoid the duplication of facility components and align the relationship with the Ipswich Basketball Stadium and other indoor courts within the region.
- Environmentally sustainable design outcomes.
- Revenue generation and efficient expenditure for long-term sustainability.

1.3 Strategic Alignment

The Study includes reviewing planning documents at the local, state, and national levels, examining strategies from indoor state sports organisations, and reviewing key documents from the IBA and ITC. A summary of the strategic alignments of the Centre is presented in Figure 3 and Appendix 1.



Figure 3: Strategic Alignment Summary

2. Catchment Analysis

This section provides an overview of the current and projected population demographics and the indoor court facilities in the Region. The Centre will focus on the following catchment areas:

- **Ipswich - Primary:** Within a 15-minute drive from the Site, per Australian planning standards.
- **Regional - Secondary:** Within a 30-minute drive from the Site, capturing the Region, considering the Centre's potential to host Regional competitions and events.

2.1 Ipswich – Primary Catchment

The primary catchment area is shown in Figure 4 and is determined by a 15-minute drive time analysis from the Site. According to this analysis, the Centre's primary users extend to RAAF Base Amberley to the west, Carole Park to the east, Stanton Cross to the north, and Ripley to the south.

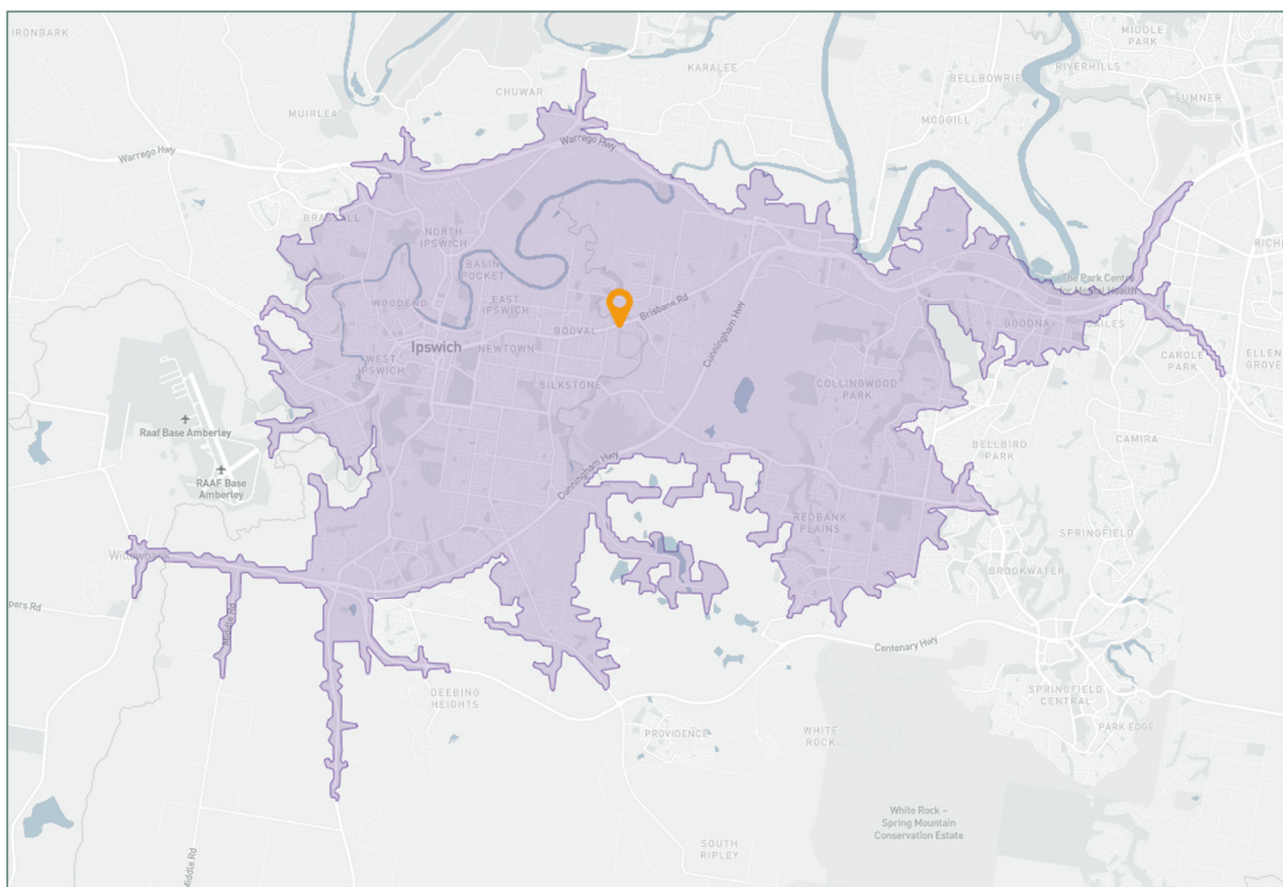


Figure 4: 15 Minute Drive Time Analysis

2.1.1 Ipswich Regional Population

As outlined in Table 1, in 2021, the primary catchment area had 128,499 residents. With an annual growth rate of 3.6%, it is projected to reach 261,991 by 2041, representing an increase of 133,492 people (103.8%) who will have primary access to the Centre.

According to data from the Queensland Government Statisticians Office¹ and the City’s LGIP 2024, the population of the City in 2021 was 233,302. Over the past five years, the City has seen an average annual growth rate of 3.5%, 1.7% higher than Queensland's average growth rate of 1.8%.

A significant increase in the City is expected, with a projected total population of 455,569 by 2041², which would signify 95.2% growth with an additional 222,267 residents. This suggests that if no new indoor courts are added to the network, demand in the Ipswich primary catchment, which is already at full capacity, will almost double.

Table 1: Primary Catchment Population Projections

	2021	2026	2031	2036	2041
Primary Catchment Estimated Population	128,499	153,737	183,574	219,051	261,991
City of Ipswich Estimated Population	233,302	272,052	319,743	384,032	455,569

Figure 5 provides a comparison of the age distribution in the primary catchment area of the Centre and Greater Brisbane. The primary catchment consistently displays higher percentages of individuals under 35 years old and lower proportions of adults aged 35 and above, compared to Greater Brisbane.

The City has a higher percentage of families with children, 33%, compared to Queensland's 28%. 23.7% of the City’s population is aged 15 or below, which is higher than Queensland's 18.7%. The City's median age is also younger, 33 years, compared to Queensland's median age of 38 years.

It is evident that there is a significant number of young adults and children in the primary catchment area that would regularly use the indoor courts for organised sports, such as basketball.

¹ (Queensland Government, 2024)

² (Queensland Government, 2024)

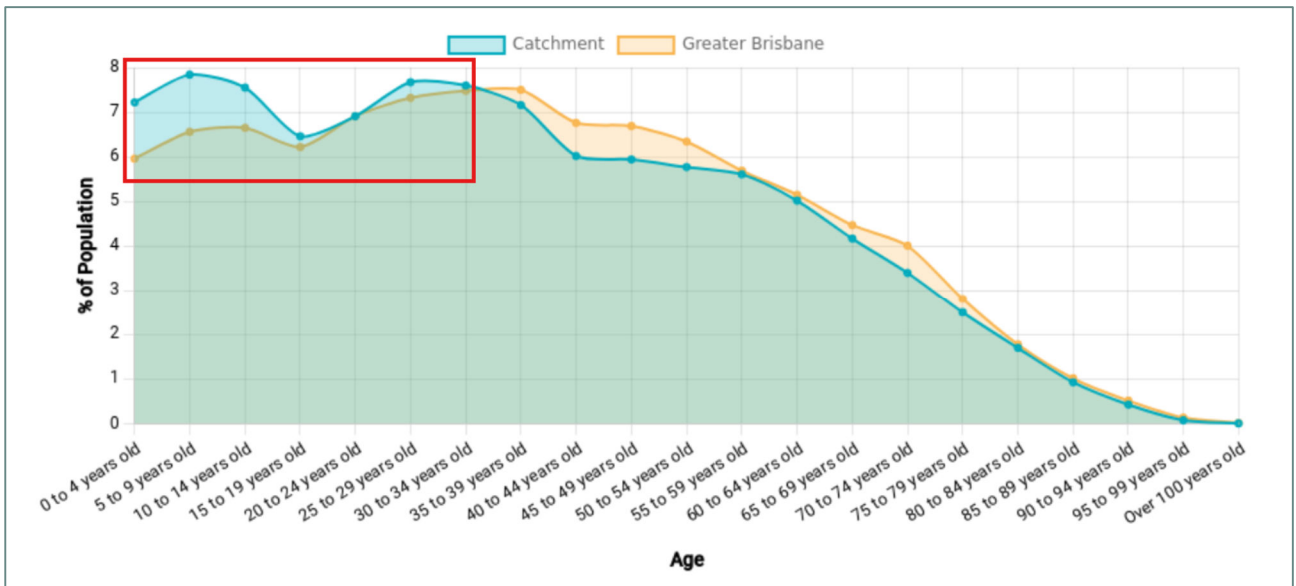


Figure 5: Primary Catchment Age Breakdown

2.2 Regional - Secondary Catchment

Figure 6 illustrates the secondary catchment area, which is determined by a 30-minute drive time assessment from the Site. This assessment shows that the Centre's secondary users will come from across the City of Ipswich and also from Logan, Brisbane, Somerset, and Scenic Rim LGAs.

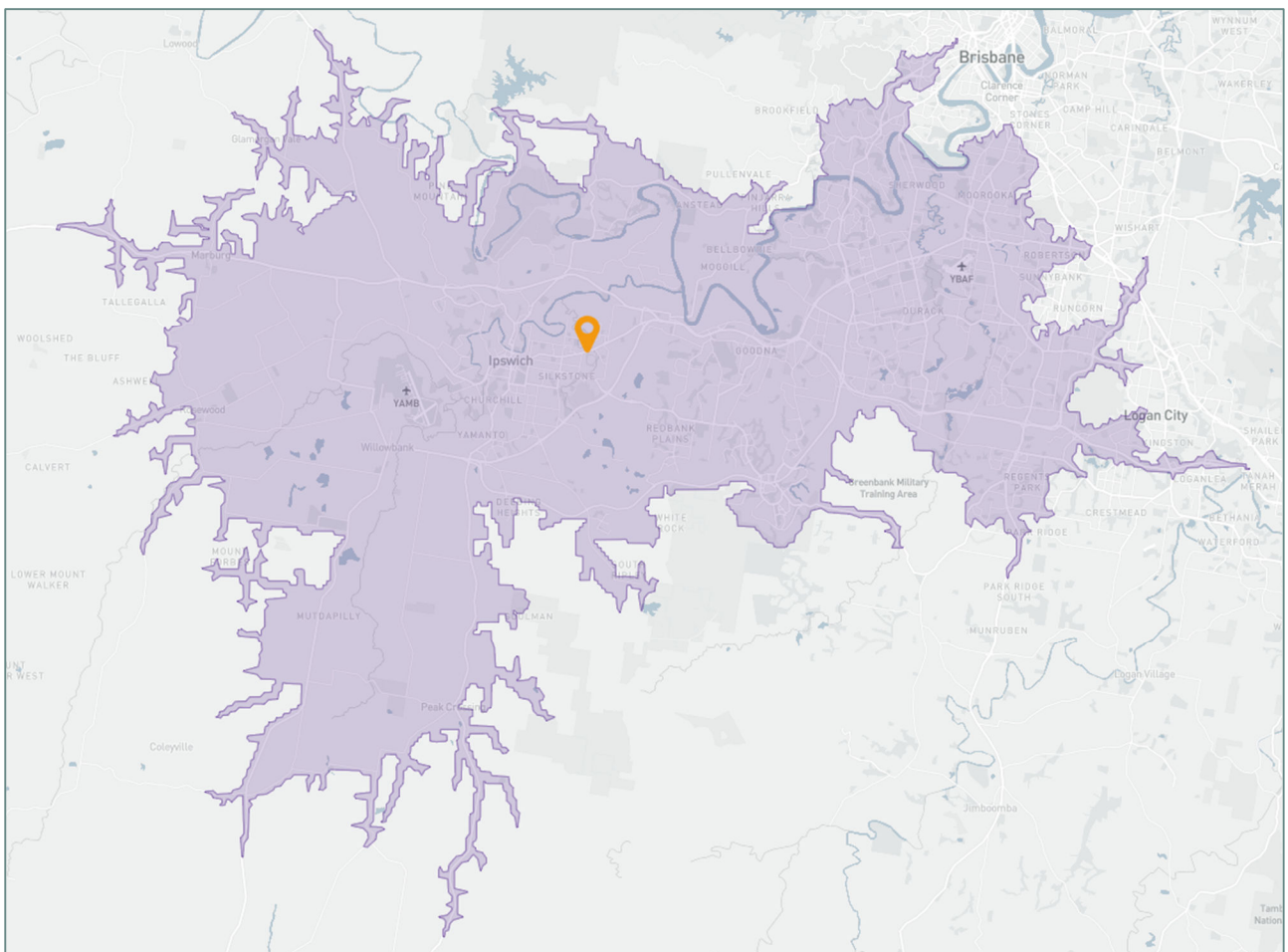


Figure 6: 30-minute Drive Time Analysis

2.2.1 Regional Population

As indicated in Table 2, the secondary catchment area had 615,501 residents in 2021. Assuming a 3.6% annual growth rate similar to the City's and consistent drive time, it is projected to reach 1,255,097 by 2041, representing an increase of 639,596 people (103.9%) with secondary access to the Centre.

This catchment area is not only significant enough to regionally serve the Centre currently, but if the projected growth occurs, it will provide regional indoor court access to what would be the equivalent of approximately half (47.3%) of the current Greater Brisbane population.

Table 2: Secondary Catchment Population Projections

	2021	2026	2031	2036	2041
Secondary Catchment Estimated Population	615,501	736,238	879,524	1,050,079	1,255,097

2.3 Facilities

The City provides 19 venues for indoor sports and has a total of 13 suitable indoor courts within the network. While there may be several individual courts available at schools and other venues, these facilities typically offer limited opportunities for training or single-use activities such as dance or martial arts. As a result, suitable indoor court facilities consist of two or more courts, and educational facilities also need to provide more than 10 hours per week of community sports access to show they are publicly accessible. The assessment of the indoor court facilities within the City includes the following facilities:

- Ipswich Basketball Stadium
- Redbank Collingwood Park Sports Complex (*not suitable for basketball due to floor condition*)
- YMCA Springfield Central Sports and Community Centre (*used by another basketball association*)
- Bremer State High School
- Ripley Valley Secondary State College
- Woodcrest State College.

The following is a summary of current indoor court and indoor specialised sports facilities within the City:

- Three major venues (indoor sports centres) and one private national sporting franchise venue.
- Two commercial indoor sports or recreational venues.
- Four specialised facilities.
- Seven educational facilities (including private schools).
- Two general indoor facilities.

Figure 7 illustrates the major indoor venues³ located within a 100km radius of the Centre, highlighting accessibility gaps in the City and Logan population corridors. The potential development of the Logan Indoor Sports Centre could be used for the Games warm-up events and future sporting and community activities. It will address the gap in provision in this area and as a result, the City of Ipswich will remain the only major population hub without a major indoor venue.

³ (The Games Venue and Legacy Delivery Authority, 2024)

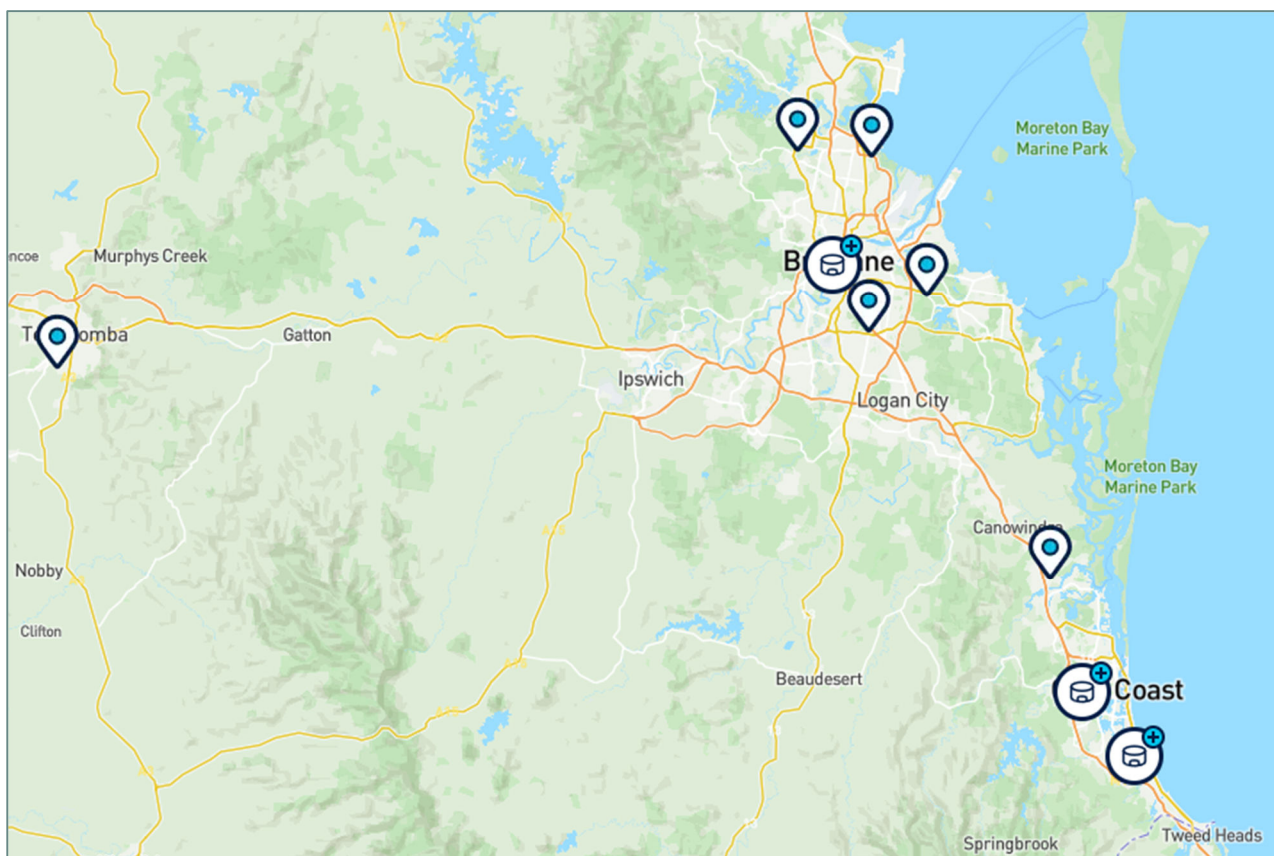


Figure 7: Major Indoor Venues Within 100km

2.3.1 Ipswich Basketball Stadium

Currently, the IBA uses three courts at the Ipswich Basketball Stadium and an additional seven courts across the Region for competitions on most evenings. However, managing multiple sites is challenging for the IBA, and clubs find it difficult to coordinate across various locations. IBA owns the Ipswich Basketball Stadium and intends to continue its operations while introducing a new venue.

The Ipswich Basketball Stadium offers casual shooting opportunities throughout the day. Schools and TAFE Queensland rent it for daytime outreach programs. Although already at capacity, the venue currently lacks the proper court dimensions for netball and markings for pickleball to improve its multi-sport utilisation.

2.3.2 Council-Owned Facilities

The Redbank Collingwood Park Sports Complex is the only indoor sports complex run by Council with multiple courts (two). It mainly hosts gymnastics and fitness activities, which limits its use for other indoor sports. As a result, the single court at the complex sees less activity. The venue also includes outdoor courts and has the potential to better serve court sports for the growing area. This venue is not suitable for basketball or netball due to the floor condition.

Council can assist with public access to the YMCA Springfield Central Sports and Community Hall, but the school has priority, which complicates scheduling for public use. Council also owns several community halls and leased facilities, including the Ipswich PCYC, which supports various indoor sports on a smaller scale.

2.3.3 Private Facilities

Several private providers, such as the Ipswich Indoor Sports Centre, offer indoor sports facilities in Ipswich. Additionally, martial arts, gymnastics, and dance schools regularly hire community halls, schools, and private venues.

2.3.4 Education Facilities

There are currently several court facilities available within educational institutions, especially in Springfield and Ripley Valley. Additionally, some private schools have multi-court facilities that can be hired for limited public use. Although these facilities offer overall increases in indoor court supply, they are typically restricted by their scale, accessibility, and primary use by educational institutions.

Next to the Site, Bundamba State School has an indoor hall with limited capacity for sports competitions. They currently use the Ipswich Basketball Stadium and would probably use the proposed Centre. It's important to ensure that this doesn't negatively affect the existing business of the Ipswich Basketball Stadium.

3. Participation

3.1 Ipswich Basketball Association

A summary of the IBA participation and competitions is outlined below.

Membership

- 1,647 current players, a 0.24% increase over the past year (see Table 3).
- The IBA’s goal is to achieve a 3% annual growth rate and reach 2,170 members by the end of 2024. As shown in Figure 8, limited access to indoor courts hinders this objective.

Table 3: IBA Participation

	2022 S2	2023 S1	2023 S2	2024 S1
Junior	1,181	1,369	1,412	1,372
Senior	264	274	325	275
Total	1,445	1,643	1,737	1,647

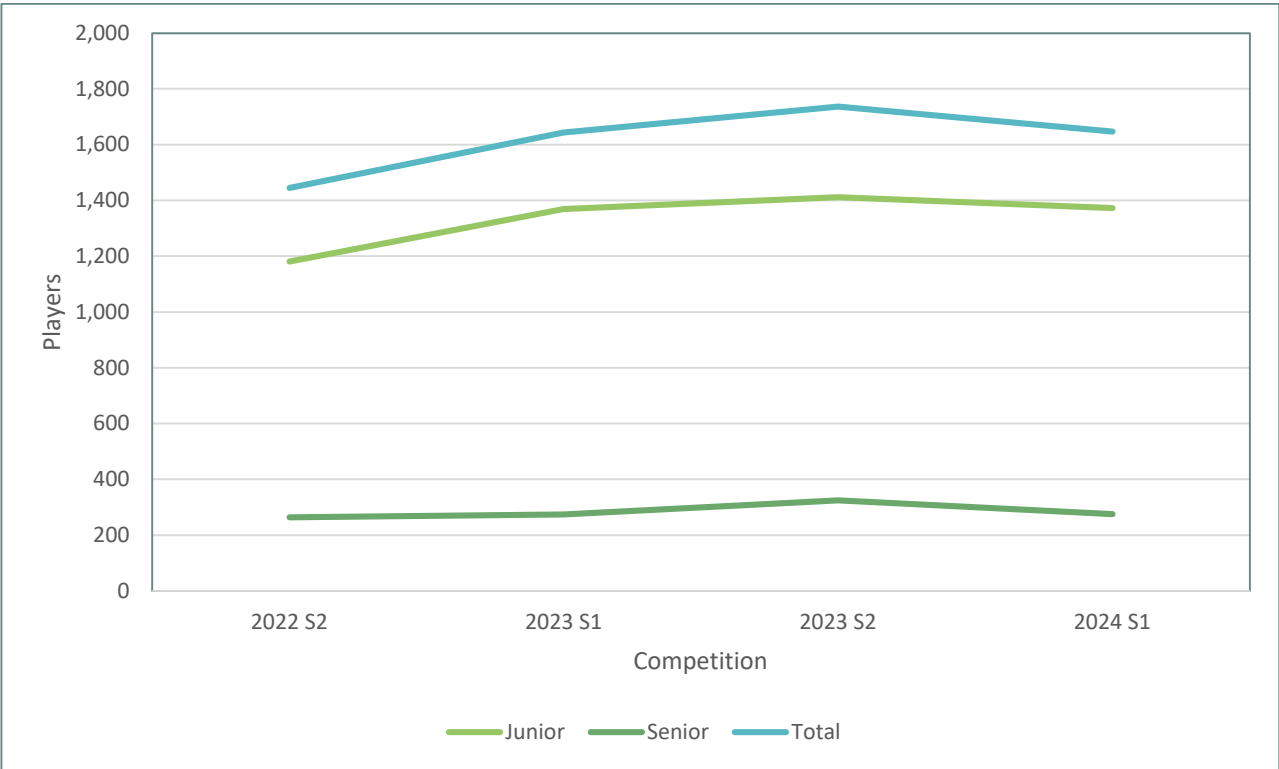


Figure 8: IBA Player Growth

Competitions and Programs

The IBA offers programs six days a week, covering social and competitive leagues, introductory basketball courses, and performance pathways during both peak and off-peak periods.

Junior			
U8	Saturday AM	U16 Girls	Monday PM
U10	Saturday AM	U16 Boys	Wednesday PM
U12 Girls	Monday PM	U18 Girls	Monday PM
U12 Boys	Thursday PM	U18 Boys	Wednesday PM
U14 Girls	Monday PM	Force Future Stars	Friday PM (school terms)
U14 Boys	Thursday PM	G-Force	Friday PM (school terms)
Senior			
Men's	Tuesday AM	Ladies Daytime	Tuesday AM (school terms)
Women's	Monday PM		

The IBA is unable to host additional local junior competitions due to a shortage of available courts. Currently, junior competitions are held at four different venues, and three other venues are used for junior representative training, QSL, and NBL1 North training sessions. The IBA competes with other basketball clubs for venues, and matches need to be programmed to start early and finish late.

The demand for training space is high, forcing the use of subpar school facilities. To manage, some clubs schedule very short or even no training sessions. Of the eight clubs, only one has access to training facilities at the IBA.

With access to additional indoor courts, the IBA could expand competitions, offer training facilities and explore new opportunities such as walking basketball and wheelchair basketball.

3.2 Indoor Sports and Activities

In the last six years, adult participation in major indoor sports and activities⁴ has increased by 7.6%, while children's participation has grown by 14.5%. In the children's sports sector, participation in basketball and gymnastics has significantly increased, with both sports having more than doubled their participation rates. The growth in Queensland's indoor court facility network, reflecting national trends, has led to smaller indoor venues (two or fewer courts) being transformed into dedicated gymnastics facilities, while basketball organisations are moving towards larger venues (three or more courts) to centralise competitions. Indoor court sports like badminton and volleyball also face limited growth due to restricted access to available venues, often in educational institutions and with additional operational challenges.

It's worth noting that these figures may be underestimated as they do not account for sports such as futsal, indoor netball, and pickleball, which could not be distinguished from their traditional outdoor sports formats. Table 4 summarises the participation rates and trends for indoor sports and activities in Queensland from 2016/17 to 2022/23.

⁴ (Australian Sports Commission, 2024)

Table 4: Queensland Indoor Participation Rates and Trends

Sport	Adult (15+ Years)			Children (0-14 Years)		
	2016/17	2022/23	Variance	2016/17	2022/23	Variance
Badminton	0.5%	0.9%	+ 0.4%	0.2%	0.1%	- 0.1%
Basketball	2.2%	3.9%	+ 1.7%	2.7%	6.4%	+ 3.7%
DanceSport and Recreational Dancing	1.7%	2.2%	+ 0.5%	8.1%	10.6%	+ 2.5%
Gymnastics	0.6%	0.5%	- 0.1%	6.1%	14.3%	+ 8.2%
Martial Arts	1.2%	1.2%	0%	1.6%	2.1%	+ 0.5%
Pilates & Yoga	6.6%	10.2%	+ 3.6%	0.9%	0%	- 0.9%
Volleyball	1.0%	2.5%	+ 1.5%	0.4%	1.0%	+ 0.6%

**Indoor Netball and Futsal participation rates are not specified by the Australian Sports Commission*

Non-indoor activities such as yoga, pilates, and dance have also experienced significant growth. However, due to their more flexible facility requirements, they encounter fewer obstacles in securing suitable venues. Schools assist with meeting the community's demand for indoor sports and activities, with most schools having a multi-purpose indoor community area. While these spaces may not be suitable for indoor court sports competitions, they are well-suited for specialised sports and activities that require less space.

3.3 Events

Currently, the IBA cannot host state and regional championships because it does not have a facility with enough courts. The proposed venue, as it meets the eight-court minimum requirement, could host regional and state basketball events in the future. Subsequently, the Ipswich Jets Netball Club faces challenges due to the limited availability and court dimensions at the Ipswich Basketball Stadium. As a result, they currently use Nissan Arena, which is located 30 kilometres away.

The venue is capable of hosting a variety of large-scale sporting events, including but not limited to:

- SQJBL, Queensland State Basketball Championships and national basketball events.
- Molten Championship Basketball School of Queensland competition.
- Boxing, Jiu-Jitsu, and martial arts tournaments.
- Volleyball, indoor soccer, gymnastics, and pickleball championships.
- eSports competitions.
- Regional school sports.
- Preparation and event pre-acclimatisation for the Brisbane 2032 Olympic and Paralympic Games.

The versatile multi-use court area within the venue will also allow the City to host a wide variety of non-sport events, including:

- Concerts and entertainment acts.
- Conferences, trade shows and conventions.
- School exams, graduations, formals, awards and educational activities.
- Community and cultural gatherings and festivals.
- Celebrations, weddings, and social functions.
- Corporate events, meetings, and professional development sessions.

The venue is situated within the broader ITC site, allowing for synergies between the two venues to complement or co-host larger events. This is further demonstrated by the plan to establish self-contained travel accommodation on the site, to support event programming.

3.3.1 Show Court

A permanent show court with dedicated spectator seating has been proposed for the venue, which was made possible by maximising the available space at the Site. The show court would set this venue apart from other indoor court venues and attract showpiece events to a region where venues for up to 5,000 spectators are scarce.

The show court concept, inspired by the Nissan Arena and Carrara Indoor Sports Complex models, will allow for hosting state league matches while ensuring uninterrupted community access to the outer courts. Additionally, with fixed seating, management would not need to assemble or disassemble the seating, creating operational efficiencies at the cost of losing the flexibility that a retractable system offers. Securing show court events will be crucial for the venue's financial viability, with potential sports events including:

- Basketball showpiece events such as NBL pre-season games and the NBL North Grand Finals.
- Due to the growing interest in women's basketball, a future WNBL Ipswich team could attract up to 5,000 spectators within the next eight years.
- Super Netball matches, supported by a future Ipswich Jets license, could also draw up to 5,000 spectators.

An analysis of entertainment and theatre-style venues in Ipswich that could host non-sport events has revealed several smaller-capacity locations, including:

- Ipswich Events and Entertainment Centre, part of the ITC, can accommodate up to 500 people in a theatre layout, which would complement the scale of event programming between both venues.
- Ipswich Civic Centre's George Hogg Auditorium is the largest theatre in Ipswich, with 760 seats.
- North Ipswich Reserve Corporate Centre can host 300 people.
- Ipswich Showgrounds Events Centre has a capacity of 500 people.
- Showplace Reception Centre can accommodate 220 guests.
- Incinerator Theatre Complex holds 80 people.

Larger event venues also remain scarce in the Greater Brisbane and Gold Coast regions. Many event centres, such as Redcliffe, Logan, Heritage Park, and Beenleigh, typically accommodate around 500 people.

The proposed show court is a unique feature designed to meet the standards for high-level sports, especially catering to basketball and netball, with its larger court dimensions. The show court provides excellent access to these events for the areas of Ipswich, Logan, and Toowoomba and is comparable to the following other venues:

- Carrara Indoor Stadium – 1,600 seat capacity.
- Queensland Performing Arts Centre - 2,000 seat capacity.
- The Star Events Centre - 2,300 seat capacity.
- Nissan Arena - 5,000 seat capacity.
- Gold Coast Convention Centre – 5,269 seat capacity.
- Brisbane Entertainment Centre – 13,601 seat capacity.

The proposed venues can also host show court events as part of the event planning for the Games, thereby increasing competition in the regional events market.

- Brisbane Arena – 15,000 seat capacity.
- Chandler Sports Precinct, Indoor Sports Centre - 10,000 seat capacity.
- Moreton Bay Indoor Sports Centre – 10,000 seat capacity.
- Sunshine Coast Indoor Sports Centre – 6,000 seat capacity.

4. Trends

4.1 Drivers of Participation

Convenience has become a fundamental trend across the sport and recreation industry. Our community now expect access to products and services 24/7, with speed and accessibility being the crucial factors, particularly with millennials. Adults are experiencing greater time fragmentation, which can impact those around them, including their children. In addition, the rise of dual-income families has reduced leisure time and increased transportation barriers for children.

There is also an increasing trend of consumers playing sports to get fit and a rising participation rate in non-organised activities such as walking, running and fitness/ gyms. To cater to these trends, sports organisations must consider changing their products and offerings to suit participants' schedules.

The Australian Sport Commission, in its 2017 Intergenerational Review, has identified several imminent threats poised to challenge Australia's sporting future:

1. A notable marginalisation of sport in the educational environment.
2. An escalating trend of inactivity and obesity is exemplified by 81% of Australian children failing to satisfy recommended activity levels and two-thirds of adults and one-fourth of children exceeding healthy weight ranges.
3. The increase of a time-scarce society, which in turn puts pressure on traditional sporting clubs and the inherent social cohesion they promote.

In response to these emerging issues, the report aims to address these challenges by modernising sporting initiatives to maintain relevance and appeal, encouraging greater integration of sport within school curricula, amplifying the use of sport for preventive health endeavours and fostering the development of thriving sports organisations, that are pivotal in building stronger and more inclusive communities.

4.1.1 National Participation

According to national statistics⁵, 89.1% of adults in the country engage in physical activity regularly, with an average of two activities per person. However, non-sport-related activities are more popular, with 59% of the population participating through an organisation or venue, compared to 21% through a sports club or association. Figure 9 displays the top activities for adults and children, with most adult activities comprising non-structured and casual activities.

In contrast, children have a slightly lower participation rate of 73.2%, but they still have an average of two activities per child. Children are more likely to participate in sport-related activities than non-sport activities, with 44% participating through a sport club or association.

⁵ (Australian Sports Commission, 2024)

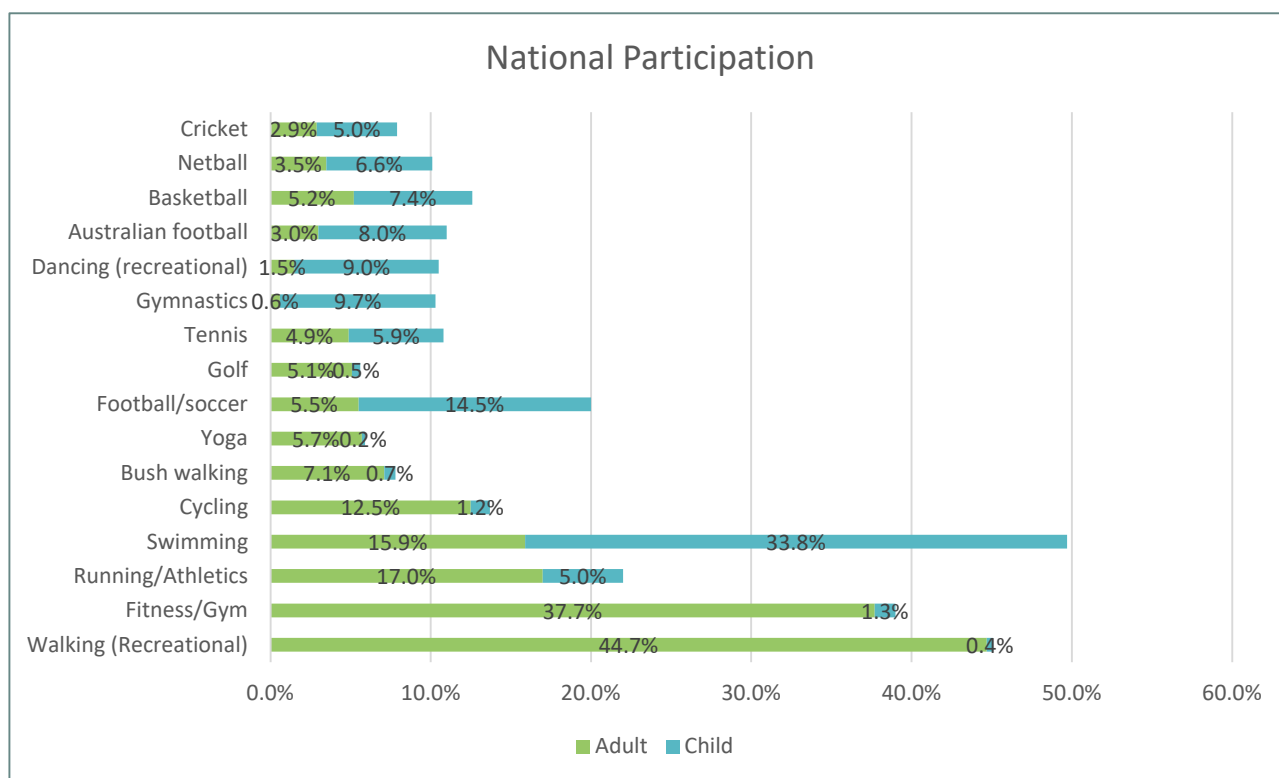


Figure 9: Adult and Child National Participation

According to recent data, the proportion of Australian adults leading inactive lifestyles and asserting that physical activity is not a priority rose from 7% in 2020-2021 to 11% in 2021-2022.

Despite this shift, key motivating factors encouraging participation in physical activities remain prominent. These primary incentives include improving/ maintaining physical health or fitness, accounting for 83%, followed by enjoyment or fun at 48%, and social reasons at 38%. Notably, these motivators have seen an increase in significance since 2016-17, and this upward trend is particularly evident in psychological/ mental health/ therapy-based incentives, which have witnessed a rise of 6% to now stand at 31%. Likewise, the motivation to be outdoors and enjoy nature also displayed a 5% growth, to now reflect 20% of sport participation motivations.

Specific barriers to participation remain and include poor health or injury (27%), lack of time due to other commitments (24%), and lack of prioritisation of physical activities (11%).

4.1.2 Changing Sport Participation

Table 5 depicts the national sports trends over the past 21 years, highlighting a significant increase in the popularity of non-structured and casual physical activities and a general decline in traditional sports. Gym and fitness memberships, walking and running programs, such as parkrun, and meditative practices like yoga have become increasingly popular in recent years. These activities offer flexibility and adaptability, catering to different attendance sizes, locations and schedules, which resonates with Australians who prioritise convenience and a healthy lifestyle.

Except for football, which has seen a 1.6% increase in popularity and *basketball (1.4% increase)*, most traditional sports have remained relatively stable in terms of their market share over the past two decades.

Table 5: National Sports Trends Since 2001

Sport	2005	2010	2015	2020	2022
Fitness/ Gym	4.8%	10.4%	14.6%	21.5%	22.1%
Walking (Recreation)	8.5%	7.0%	12.1%	18.1%	15.5%
Running/ Athletics	0.5%	3.4%	7.1%	11.6%	9.3%
Cycling	1.3%	2.4%	3.2%	6.2%	5.5%
Yoga	1.9%	2.0%	2.5%	5.5%	5.1%
Bushwalking	0.4%	-0.4%	-1.3%	3.3%	3.9%
Football/ Soccer	0.5%	1.6%	1.8%	1.2%	1.6%
Canoeing/ Kayaking	0.3%	0.6%	0.8%	1.0%	1.5%
Basketball	0.0%	-0.1%	0.2%	0.8%	1.4%
Swimming	-1.5%	-3.0%	-0.8%	1.1%	1.4%
Surfing	0.2%	-0.4%	0.4%	0.6%	1.0%
Boxing	0.1%	0.8%	0.7%	1.0%	0.9%
Mountain Biking	-0.5%	0.2%	-0.8%	0.6%	0.7%
Australian Football	1.0%	1.0%	0.4%	0.4%	0.6%
Rugby League	0.1%	0.3%	0.0%	-0.3%	-0.1%
Equestrian	-0.3%	-0.5%	-0.4%	-0.5%	-0.1%
Volleyball	-0.4%	-0.5%	-0.6%	-0.3%	-0.1%
Martial Arts	0.1%	0.2%	-0.3%	-0.3%	-0.2%
Ski and Snowboard	0.3%	-0.1%	-0.1%	0.1%	-0.3%
Dancing (recreation)	0.3%	0.6%	-0.8%	-0.3%	-0.3%
Netball	-0.4%	-0.3%	-0.2%	-1.2%	-0.6%
Fishing (recreation)	-0.3%	-0.2%	-0.3%	-0.5%	-0.8%
Bowls	0.2%	0.0%	-0.9%	-0.7%	-0.9%
Cricket	0.0%	0.0%	0.6%	-1.3%	-0.9%
Touch Football	-0.5%	-0.2%	-0.5%	-1.0%	-1.1%
Squash	-0.7%	-0.8%	-1.2%	-1.3%	-1.5%
Golf	-1.1%	-1.5%	-3.0%	-2.9%	-2.4%
Tennis	-1.3%	-3.2%	-4.3%	-4.2%	-3.3%

4.2 Emerging Sports

The demand for experiences, rather than products, is rising, particularly among Millennials. This trend is evident in the increased spending on concerts, events and sport-based activities, such as the Colour Run and Tough Mudder.

This shift towards experiential offerings for the sports and recreation industry means that traditional sports must be reimagined as experience-based. One approach could be to view a sport as a series of events, focusing on maximising participants' enjoyment across each event.

4.2.1 Technology-Enabled Activities

As technology continues to evolve, it is anticipated that it will be used to create customer experiences that are conventionally located, offering a range of virtual reality, augmented reality and eSport opportunities. Predictions are that virtual reality, over-the-top video and eSport, will be the fastest-growing segments in the media and entertainment industry from 2020 to 2025⁶, with eSport having rapidly evolved around competitive video gaming and growing faster than any other sport, even surpassing football and basketball in potential revenue growth.

⁶ PricewaterhouseCoopers, 'Sport Survey 2019'.

ESport is gaining worldwide popularity, with millions of viewers watching tournaments and competitions. This has resulted in the emergence of professional eSport players and teams and the development of dedicated eSport arenas and leagues. ESport has been included as part of the Asian Games, and there have been ongoing attempts to have it included as a demonstration sport in the Olympic and Paralympic Games. Marking a significant milestone in the Olympic Movement's recognition of virtual sport, the inaugural Olympic eSport Week occurred in June 2023. This event deepens the connection between traditional and virtual sports, highlighting the emerging influence of eSport in today's sports industry. As a result, there is increasing recognition and formalisation of eSport as a sport, which will likely continue over the coming decade⁷.

Although virtual reality use cases remain limited to the gaming industry, companies are exploring ways to integrate virtual reality into everyday life. This has led to the popularity of virtual fitness classes, allowing people to participate in exercise programs from home. It is suggested that the widespread adoption of virtual reality and augmented reality could pave the way for a future fitness and recreation 'metaverse'.



Figure 10: Augmented Reality

4.3 Facility Design

Trends currently influencing sports facility planning and design include:

- The planning process for new facilities has significantly improved, with effective feasibility studies becoming the norm. These studies typically include management, marketing, financial plans and demand projections based on sophisticated market analysis.
- There is a shift from single-purpose facilities to multi-purpose and integrated facilities. However, it's crucial to design facilities that can still effectively meet key user groups' specific needs.
- Contemporary planning aims to create 'community hubs' for sports, facilitating a broader range of needs and promoting higher utilisation and viability, allowing the adaptation of traditional venues for emerging non-traditional sports.
- More flexible designs are being adopted, recognising the need for periodic renovation and upgrades. There's an understanding that facilities have a 'customer interest lifespan', which may be shorter than the facility's physical lifespan.
- Sports facility designs increasingly need to accommodate different levels and standards of competition and training.
- Development of synthetic playing surfaces in areas with limited provision opportunities, high usage of existing facilities, or challenges in maintaining grass fields to suitable standards.
- Lighting is increasingly essential for playing fields and parks to enhance safety and extend functionality, particularly for evening competitions.
- Emphasis on providing socialising spaces as a key component of facility design.
- Implementation of environmentally sustainable design principles for facilities.

⁷ Australian Sport Commission, 'The Future of Australian Sport'.

- Toilets and changerooms are expected to be adequate in size, accessible to playing areas, and designed according to universal design principles. Gender equality policies and practices are becoming increasingly required, often linked to government funding.
- Growing importance of accessibility to facilities, mainly via walking and cycling.
- Consideration of joint venture arrangements between private and public sectors and sports associations, to address increasing capital costs and ongoing economic constraints.
- The Victorian Government recently mandated that LGAs must enforce a Gender Inclusion Policy and related initiatives to be eligible for funding for sport and recreation facilities and projects. This initiative is expected to be adopted by other states soon. As a result, Gender Equality needs to be incorporated into the planning and operational stages of new sports and recreation facilities.

4.3.1 Multi-purpose Indoor Court Facilities

Understanding the key principles of effective sports and recreation facility design is essential for creating new venues that optimise community use and sustainability. Key principles in multi-purpose indoor court facilities are:

- A minimum of three to four courts is generally needed for effective sustainability. Centres with fewer than three courts typically have lower income-generating capacity and are less likely to maximise their use and viability.
- Facilities should be situated in prominent locations near major population centres, designed for multi-use, and clustered with other community or sports facilities.
- Designed to meet the demands of local community sports, all the way to becoming a premier destination for higher-level events.
- Many indoor facilities in Queensland rely heavily on those provided by public or private schools or tertiary institutions, which can create access constraints.
- Higher quality finishes, amenities, wall finishes, lighting, audio/ visual systems, and seating are being incorporated to support broader community and cultural events. These spaces must be welcoming, universally accessible, and fit for purpose.
- Food and beverage facilities are being designed to support larger-scale sporting, community and cultural events.
- There is a growing interest in non-traditional indoor recreation, such as Bounce and Ninja Warrior-style facilities and social sports like Pickleball and eSports. While commercial facilities are currently meeting this growing interest, public facilities could consider offering these activities in the future as they become more formalised, including offering structured competitions.
- There is a shift away from management structures run by individual sports.

4.3.2 Location

Indoor sports centres located near public transport and serving large populations are more likely to thrive and be sustainable. Currently, investments are increasingly directed towards multi-purpose complexes that offer aquatic, health, fitness, and both indoor and outdoor sports facilities, as they are more frequently used than traditional single-use facilities.

4.3.3 Scale

There is a growing trend towards larger indoor sports facilities with four or more courts as they transition from being used for a single purpose to being multi-use. Otium has worked on several projects involving

both existing and proposed indoor sports facilities, conducting financial modelling to assess their future financial performance.

Table 6 provides details of the financial modelling conducted for an indoor sports facility, highlighting the differences between a four-court and a ten-court development. This illustrates that larger, multi-use facilities tend to attract more visitors, offer greater revenue opportunities, and achieve improved expense efficiencies. Smaller facilities with two courts or fewer exhibit significant inefficiencies and have not been modelled as their development is not recommended. It's important to note that the modelling assumes a sufficient population catchment to utilise the facility, so this information should be used as a guide only.

Table 6: Scalability of Indoor Court Facilities

	Otium Four Court	Otium Six Court	Otium Eight Court	Otium Ten Court
Expense Recovery	118%	120%	127%	144%
Gross Receipts	\$734,085	\$1,092,000	\$1,373,000	\$1,755,151
Gross Expenditure	\$624,253	\$913,000	\$1,079,000	\$1,220,684
Visits	156,000	227,000	285,000	348,510
Labour Costs	\$251,253	\$392,479	\$438,174	\$438,174
Labour Costs Per Visit	\$1.61	\$1.72	\$1.54	\$1.26

The scalability of a facility and its impacts on a centre's performance are supported, as demonstrated in the University of South Australia's Centre for Environmental and Recreation Management (CERM) Performance Indicators for Recreation Centres (2016) (see Table 7). The CERM data compares the performance of a standard two-court facility with that of a standard four-court facility. The figures provided represent the median, indicating that half of the facilities would be performing better than the values shown in the table. The CERM data indicates that the larger the facility, the higher the cost recovery, greater secondary spend per visit, and significantly lower labour costs per visit.

Table 7: CERM Indoor Court Facility Scalability

	CERM Data <2000m ² / <2 Courts	CERM Data >3000m ² / >3 Courts
Expense Recovery	79%	86%
Gross Receipts	\$563,324	\$699,644
Gross Expenditure	\$649,993	\$798,077
Visits	64,378	249,645
Visits per m ²	53	43
Secondary Spend Per Visit	\$0.22	\$0.26
Labour Costs	\$395,523	\$403,415
Labour Cost Per Visit	\$7.64	\$2.46

4.3.4 Design & Layout

When designing a sports facility, it is crucial to ensure that it can accommodate various needs while meeting the specific requirements of different user groups. This includes ensuring the facility meets the proper sport-specific guidelines, including runoff and facility standards.

Due to global climatic shifts and increased sports participation, training in extreme weather conditions is becoming more challenging. Indoor court facilities are being used to address these issues, offering benefits such as consistent year-round training, athlete safety, multi-use facility usage, and targeted skill development.

Recognising the potential of indoor venues for wet-weather training to meet the specialised needs of outdoor sports is essential. This includes considering features such as customised net systems, expanded court areas, and varied surfaces like synthetic grass.



Figure 11: Contemporary Multi-use Indoor Court Exemplar

Indoor synthetic sports venues feature surfaces such as artificial turf that mimics natural grass, and multi-layered, rubberised hard courts that replicate outdoor courts. These surfaces are specifically tailored to various sports and offer the benefits of durability and low maintenance. Synthetic surfaces also provide increased injury prevention through shock absorption, which appeals to athletes and older adults. However, it's important to consider specialised surfaces that might limit multi-use capabilities, the environmental impacts of production and disposal, and the potential need for participants to adjust to the different feel and performance compared to natural outdoor surfaces.

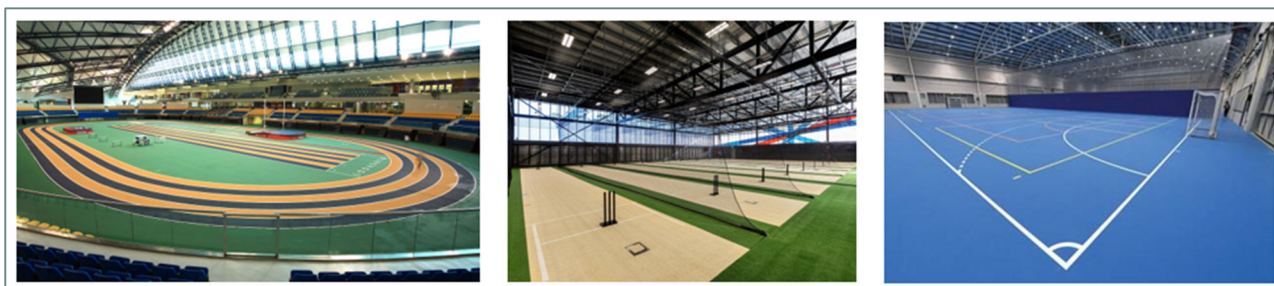


Figure 12: Indoor Synthetic Sport Surfaces

Integrating a gymnasium into a multi-use sports complex significantly enhances the facility's appeal and functionality, broadening the demographic reach and enriching the community's health and wellbeing. Adding a gymnasium provides various operational benefits due to increased economies of scale, including shared utilisation of amenities, distribution of facility overheads, additional revenue generation, and sustained patronage across all hours, including 24/7.

Facilities are being designed to include multi-functional breakout spaces near the show courts. These spaces will be used by sports teams for pre-game and post-game gatherings, as well as special game-day events. They can also be easily adapted for group fitness classes, martial arts, and educational training, making them a valuable community asset. Secondary spending should also be considered, by seamlessly integrating food, beverage, and merchandise areas within the facility. Both indoor and outdoor facilities should include minor embellishments to support various community events and broader purposes.

The trend among sports participants is shifting towards informal and social competitions. Many people seek opportunities to engage in 'turn-up-and-play' social sports without committing to regular training and competition. There are also opportunities to develop programs that cater to mature-aged markets, such as 'walking basketball', as Australia's population ages. These programs can be scheduled during off-peak times to make the most of the facility's availability.

4.3.5 Diversified Use

Sports facilities are busiest in the late afternoon and evening during the week and in the morning to early afternoon on weekends. To maximise their revenue potential, many venues are making small, relatively low-cost facility improvements to generate additional income by hosting community and corporate events, conferences, presentations, training sessions, and functions during off-peak hours. Some of these design enhancements include:

- Easily accessible food and beverage serveries.
- Improved lighting and audio/ visual capabilities.
- Consideration of acoustic treatments to reduce noise.
- Provision of portable or permanent staging for events.
- Walking/ running loops with fitness and exercise stations around sporting precincts to improve diverse user attendance.



Figure 13: Diversified Use

4.4 Social Factors

4.4.1 Holistic Health

Our community is dedicated to pursuing healthier lifestyles by embracing a holistic approach to achieving optimal physical and mental health and with aging populations, there is a stronger focus on maintaining youth and vitality than in previous generations. This trend has significant implications for sports to remain relevant, with sports organisations needing to consider incorporating health messages into their programs and promoting the benefits of the activities they offer to participants. It is also crucial to diversify the sports activity offerings and find ways to develop the whole person and improve their overall health through various interconnected programs.

4.4.2 Diversity and Inclusion

Diversity and inclusion have become focal points in the sports sector, and there is now greater support for creating a more representative and inclusive industry that reflects the diversity of Australia's population. The sector is making significant strides towards becoming more inclusive, reaching out to older adults, Indigenous Australians, individuals with disabilities, those from culturally and linguistically diverse backgrounds and those who identify as LGBTIQ+.

The need for community sports venues to accommodate individuals with disabilities has become increasingly paramount, reflecting a broader understanding of inclusivity principles. Beyond adhering to compliance with updated legislation and universal design standards, venues are now expected to review their programs, staff training and community engagement for maximum inclusion. This ensures that sports and recreation are accessible and enjoyable for all, including one in six Australians with a disability. Recognising and catering to this specific demographic is not only ethically sound but also presents a substantial economic opportunity, supporting the venue's community wellbeing and financial sustainability.

To ensure that our public spaces are accessible and enjoyable for all community members, we must emphasise the needs of individuals who are more likely to seek alternative, low-impact, physical activities such as walking and cycling. To achieve this, we must prioritise the development of wider pathways, wheelchair-friendly access, increased lighting, dog parks and shaded seating areas.

The push for increased female participation and representation is becoming more prominent across the sector, with a growing effort to empower women to participate in sports through campaigns like 'This Girl Can.' The increased recognition, attendance, and coverage of elite women's sports have positively impacted community sports participation, and the FIFA Women's World Cup in 2023, hosted by Australia and New Zealand, has amplified the focus on women's sports further.

Wheelchair basketball has experienced significant growth in participation in Australia. The sport is played at various levels, ranging from recreational to elite, contributing to its popularity. Accessibility programs have played a role in driving participation. The rise of the Paralympic Games has expanded the fanbase of wheelchair basketball, contributing to its growth. The sport's rich history of trailblazing Australian stars, combined with its competitive nature, has attracted attention and interest from a broader audience.

Further demand for indoor sports facilities is being experienced through opportunities for older adults through modified versions of traditional sports and new emerging sports such as pickleball. Older adult indoor sports participation in Australia is influenced by various factors, with approximately 30% of older adults engaging in physical activity, including sports, in club settings.

4.5 Health and Fitness Trends

In 2022, IBISWorld prepared the 'Gyms and Fitness Centres in Australia' industry report, which identifies that over the past five years, the gym and fitness industry faced adverse conditions, primarily due to the COVID-19 pandemic. Government mandates, social distancing and capacity limits led to a contraction of industry revenue by 5.5% through 2021-22. While there was steady growth before the pandemic, the pandemic's overall impact and market saturation of budget gyms have been challenging. With easing restrictions and projected increases in health consciousness and obesity rates, the gym and fitness industries are anticipated to return to grow 1.3% each year over the next five years, through 2026-27.

However, trends like continued at-home gym practices and revitalisation of community sports are identified as challenges, along with the following key industry trends:

- Increased health consciousness has supported industry demand over the past five years.
- Premium and functional training gyms have increased in popularity.
- The COVID-19 pandemic's effects have caused heavy revenue declines for industry operators.
- Boutique and small-scale gyms are projected to grow in popularity over the next five years.

The steady rise in health consciousness has supported the gym and fitness industries performance over the past five years. Greater awareness about the health risks of sedentary lifestyles, including increased risk of heart disease, hypertension, diabetes and osteoarthritis, has driven high demand for gyms and fitness centres as people have sought to stay fit for health benefits. Furthermore, the increase in the level of obesity over the same period has underpinned demand for industry services, as people have sought to assuage their health concerns. For many, the use of gyms and fitness centres is seen as a leisure activity and heightened working hours have constrained the amount of time individuals have been willing to allocate to industry services.

Gyms are typically becoming smaller. New franchise owners favour areas with high foot traffic, like shopping centres and shopping strips, where space is generally limited. Limited foot traffic in CBDs as a result of working from home has subdued demand for inner-city locations. While many larger gyms in warehouse-style spaces are accessible, most premium gyms operate in smaller locations, bordering on studio size. These smaller spaces have lower overhead costs, making these businesses more easily accessible to franchisees.

4.5.1 Diversified Health and Fitness Offerings

Allied Health

There are clear synergies between health and fitness facilities, programs and services and allied health. There has been a strong trend towards expanding health and fitness offerings to include allied health services.

Services can be diverse, however, typically include:

- Physiotherapists
- Dieticians
- Exercise Physiologists
- Podiatrists
- Massage Therapists
- Acupuncturists.

These services are provided in quiet environments, away from direct connectivity to the main gym areas. The focus is on providing members of the community with much-needed support in the management and prevention of chronic disease and injury.

Once clients have recovered or progressed to the required level, they can simply transition to ongoing health and physical activity in the primary health and fitness centre. Options exist for incorporating the allied health services into the broader health and fitness centre structure or for a commercial external specialist partnership.



Figure 14: Allied Health

Recovery Sciences

An extension of allied health colocation within health and fitness centres is the rise in popularity of recovery science offerings. These services are increasingly being sought by amateur through to professional athletes, as a means of accelerating sports recovery and performance.

Recovery sciences typically include:

- Compression
- Percussive (pulse) therapy
- Infrared sauna
- Contrast water therapy.



Figure 15: Recovery Science

Like allied health, recovery sciences can act as an extension of the broader health and fitness centre structure, or as an external specialist partnership on a commercial basis. The fit-out and equipment can be permanent or temporary, or they can be used for portable installation.

4.6 Climate

As the impact of climate change continues to be felt worldwide, Australia is also experiencing extreme temperatures, prolonged droughts and more severe rainfall and storms. These weather events will significantly impact sports and daily life across the country in the coming decades. To ensure that our sports infrastructure remains viable and accessible and that participation opportunities are not lost, we must explore measures for adapting to a changing climate.

As public awareness of the impact of climate change grows, sustainable practices are becoming increasingly important. Research shows that 60% of Australians now consider global warming a serious and pressing problem, and 32% of the community is highly engaged in adopting a more sustainable lifestyle⁸. To address these challenges, we need to consider a range of strategies for responding to changing climatic conditions. Summer sports are particularly vulnerable to extreme heat conditions, heatwaves, and extreme weather events, which will also impact sporting infrastructure, especially in vulnerable areas like floodplains, coastlines, and natural forests. To address these issues, we can provide lighting to enable evening or night-time use of sports facilities when temperatures are cooler, implement drainage and irrigation systems to respond to rainfall variations, investigate the use of water harvesting programs to enhance irrigation capacity, increase natural and built shading to improve user and spectator safety and comfort, use sustainable materials and provide improved recycling options and increase planning and consideration of indoor facilities, as an all-weather opportunity for a diverse range of sporting codes.

Figure 16 displays the change in mean temperature of Eastern Australia compared to today's climate. The data indicates that over the next four decades, there will be a significant increase in the frequency of above-average temperatures, with the darker red being more extreme (hotter) and the lighter cells representing less extreme, above-average temperatures (cooler). This rise in temperature presents a challenge that communities must prepare for, as it may have far-reaching consequences for public health, infrastructure, and the environment.

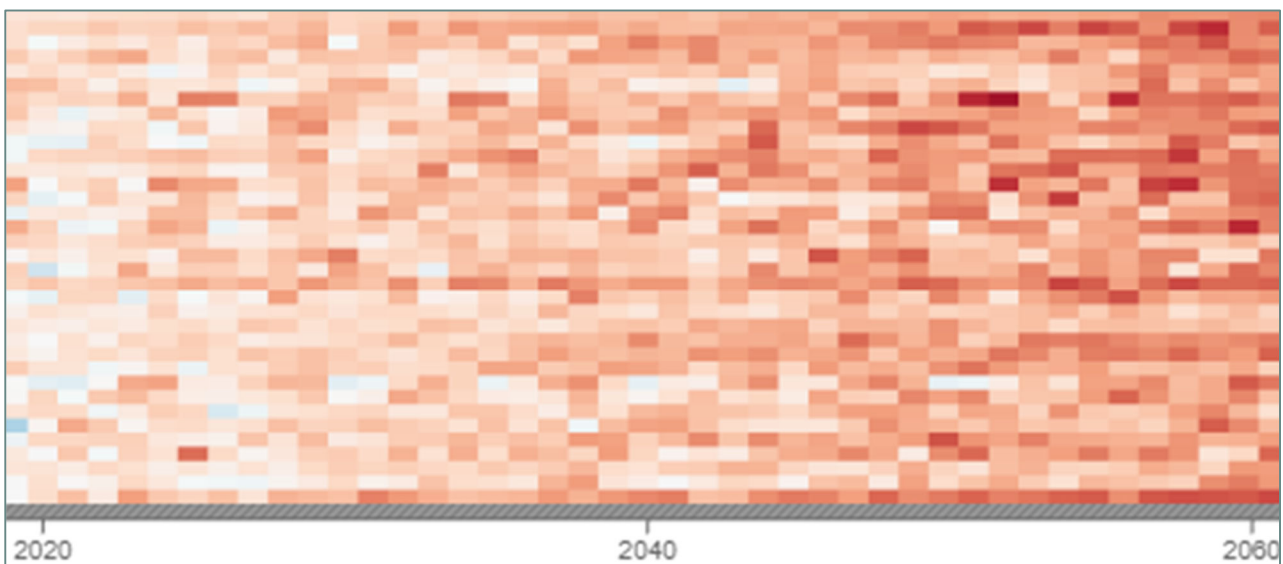


Figure 16: Climate Stripes Eastern Australia⁹

⁸ Deloitte, 'Digital Consumer Trends - Touch-Less, Healthier, Wiser'.

⁹ Intergovernmental Panel on Climate Change, 'AR6 WGI Atlas',

One way to manage the costs of constructing all-weather facilities is to pivot towards becoming more multi-use orientated. This can be achieved by reducing energy consumption, or adopting local renewable energy systems and following sustainable principles in development and construction. By doing so, we can reduce costs and prioritise accessibility, energy efficiency, sustainability, technology integration and multipurpose community use in the design¹⁰.

Strategies for responding to changing climatic conditions can include:

- Providing lighting to enable evening/ night-time use of sports facilities when temperatures are cooler.
- Providing drainage and irrigation to help respond to rainfall variations.
- Investigating the use of water harvesting programs to enhance irrigation capacity.
- Increasing natural and built shading to enhance user and spectator safety and comfort.
- Increased planning and consideration of indoor facilities.
- Consider the implications of synthetic fields on urban heat generation and the impact of heat stroke on participants.
- Investigating new technologies, such as dry hockey fields instead of traditional wet fields.

It's important to note that climate resilience measures should be considered in the context of local conditions, facility supply and utilisation and economic viability. By taking a holistic approach and considering a range of potential solutions, we can ensure that our sport infrastructure remains viable and accessible, even in the face of a changing climate.

4.7 Case Studies

The Study recognises the intent to develop a multi-court indoor facility within the City. Appendix 2 contains exemplars of indoor sports facilities that have achieved a similar vision and provide strategies around optimising the use and viability of an indoor sports centre.

4.8 2032 Olympic and Paralympic Games

The Games are anticipated to boost grassroots participation in sports, similar to the effect of the FIFA World Cup and the growth of women's football and the experience from the legacy of the 2018 Gold Coast Commonwealth Games. Basketball Queensland also acknowledges the significant impact of new indoor facilities as part of the infrastructure development for the 2032 Brisbane Olympic and Paralympic Games. These additional venues are expected to increase demand across all facilities in the Southeast Queensland Region. This presents an opportunity for future growth and development and increasing sport provision pressures.

The City will have one venue within the Games planning, Brighton Homes Arena, also known as Ipswich Stadium, and it is proposed to host the Olympic modern pentathlon event and is well placed to capitalise on pre-event climatisation training and events in consideration of:

- Scale of public infrastructure.
- Within less than 1.5 hours of Brisbane, Gold Coast and Toowoomba Wellcamp Airports.
- Close proximity to the host city, Brisbane.
- Quality accommodation offerings.
- Quality food, beverage and entertainment offerings.

¹⁰ Australian Sport Commission, 'The Future of Australian Sport'.

The provision of a multi-court indoor sports facility within Ipswich of a scale and standard to support high-performance needs in the lead-up to the Games presents another opportunity for Ipswich and the Southwest Regions to create a legacy opportunity.

Table 8 lists seven more indoor sports facilities in Southeast Queensland, with five built specifically for the Games. While these new venues may increase competition for hosting indoor sporting events, the demand assessment shows that the extra indoor courts at the Centre are necessary to meet local and regional needs for suitable indoor sports facilities.

The proposed 5,000-seat show court at the Centre has the potential to host mid-sized indoor events, including large concerts, sports competitions, conferences, conventions, and exhibitions. However, the increased delivery of these major indoor sport venues for the Games will affect the Centre's ability to attract these events. This has been taken into account in the financial assessment to reflect its impact on market penetration.

Table 8: Other Major Indoor Sport Venues

Name	Local Government Area	Status	# Indoor Courts
Sunshine Coast Indoor Sports Centre	Sunshine Coast	Planned	11
Gold Coast Sport and Leisure Centre	Gold Coast	Existing	15
Coomera Indoor Sports Centre	Gold Coast	Existing	8
Sleeman Centre	Brisbane City	Planned	10
Logan Indoor Sports Centre (location TBC)	Logan	Planned	TBC
Moreton Bay Indoor Sports Centre	Moreton Bay	Planned	9
Brisbane Indoor Sports Centre*	Brisbane City	Planned	12



Figure 17: Other Major Indoor Sport Venues



Figure 18: Artist Impression of Proposed Moreton Bay Indoor Sports Centre for 2032 Olympic and Paralympic Games

5. Stakeholder Engagement

To inform the study, interviews were conducted with the following stakeholders to understand opportunities and constraints, as well as the level of support and funding opportunities associated with the development of the Centre.

- Ipswich Turf Club
- Ipswich City Council
- Basketball Queensland
- Queensland Government, Department of Tourism and Sport
- Ipswich Jets (Netball)
- TAFE Queensland Academy of Sport
- Volleyball Queensland
- Pickleball Association of Queensland
- Australian Futsal
- Badminton Queensland
- Queensland Brazilian Ju Jitsu Circuit.

The key points from the engagement with the stakeholders were:

Demand

- The development of the Centre is strongly supported due to the need for more multi-purpose indoor courts and the potential to host more sports events.
- Post-COVID-19, there is a strong demand for indoor sports in Ipswich, which is considered a priority area.
- The lack of current facilities forces some sports, such as badminton and futsal, to use school venues, which limits their expansion. Existing facilities are overbooked.
- This facility should be integrated into the Council's regional indoor sports network and be multi-use, with the potential to host sports such as gymnastics or squash.
- Basketball – There is a very high demand for basketball, and the Region currently lacks enough suitable courts to host club, state and national championship events.
- Pickleball—Facility to accommodate either two basketball courts or six to eight pickleball courts. These facilities should be available from 8 a.m. to 8 p.m. every day. Currently, only social play is available, but demand is expected to increase significantly once a league is formed.
- Badminton—Groups of 20-30 participants could play on one to two courts for a couple of hours. These sessions are social and often include morning tea and coffee. They are popular among retirees as they are held during off-peak hours.
- TAFE Queensland Academy of Sport – Run a program for 11th and 12th-grade students from 9am to 3pm, following the school term calendar. The program provides students with Cert2 sports coaching and Cert3 qualifications, as well as practical court training. Upon completion, students will progress into clubs as coaches.

Events

There is a need for a large indoor court space venue in Ipswich to accommodate various sports and events, which would maximise regional tourism and economic benefits. There is also an increase in the number of National Championships being held in Queensland in the lead-up to the Games. Such events could include:

- More frequent basketball state and national championships and a potential expansion of the WNBL, with plans for an Ipswich team in the future.
- Ipswich Jets (netball) matches typically draw between 500-1,000 spectators, with approximately 16-17 games held annually and twice-weekly training sessions. They also aim to host a biannual Magic Round of Netball. Netball state championships could occur every one to three years.
- Regional volleyball school championships and school camps can be held over three days and are great for use during off-peak times, which would be possible at the Centre. State-level volleyball events usually take place on the Gold Coast, where there is access to over 40 courts.
- Pickleball state and national championships to be held approximately every five years.
- Futsal tournaments, ideally held at a venue with ten courts. Weekend training sessions are possible, with Sunday being the most suitable day requiring eight courts. Additionally, a large school program could be possible during the year for three weeks of five-day sessions.
- Brazilian Jiu-Jitsu could use the centre for events in the show court. The events occur twice a year and typically attract around 500 to 1,000 people. The State Championships, which can have 3,000 attendees over two days, would use the outer courts.
- Badminton championships require 12 courts, equivalent to five basketball courts, and around 400 games can be played in one day.
- ITC is interested in hosting major events such as boxing or concerts on the show court, as well as larger-scale conferences on the outer courts.
- Queensland-based sporting conferences catering for 300-400 attendees.

Facility Design

- Multisport lines need to cater for identified key user groups. Court layouts should be strategically planned, aiming to maximise the number of appropriately sized courts. Effective netting solutions, such as drop curtains, are preferable, although they aren't mandatory; low-level barriers can also serve as alternatives.
- For the TAFE Queensland Academy of Sport, a dedicated classroom equipped with AV facilities, internet access, power outlets, and projectors is necessary. This space should accommodate up to 30 students per session.
- Access to gym facilities and a venue that matches the changeroom amenity standards for elite sports are essential to support high-performance and academy programs.
- A show court with a seating capacity ranging from 1,000 to 5,000.
- Adequate storage facilities for user groups with a loading zone to the show court.
- The design is to include high ceilings and free-span roof structures, with many flexible shared-use spaces.
- Mining experts and engineers should be consulted regarding the undermining hazard within the site location.

Funding

- Various government levels offer sports facility grants, and investing in larger indoor venues would support more indoor sports and help the City attract and host events.
- The federal government may provide funding for a comprehensive business case in the next phase of the project.
- The ITC aims for a partnership-based approach and owns the land with freehold rights. They require permission from Racing Qld and the State Government to develop the land, both of which support the proposal.
- The ITC plans to develop the property in partnership with the IBA. It is seeking funding from all levels of government and does not plan to contribute any capital beyond the land. It believes that whoever provides the primary funding for the development should own the asset.
- As a precedent, the Ipswich Baseball Club previously owned its own facility but chose to sell it to Council in exchange for a long-term lease, facilitating future developments and maintenance at the Site.
- Obtaining capital funding will be the main challenge since the development is not included in Council's capital works plan, and Council does not plan to provide any capital. Council suggests applying for state and federal funding streams and is keen on reviewing the Study's findings.
- Broad community partnerships are essential for the project's success. There is considerable local interest in this facility, and co-branding the project with ITC and IBA should create more support.
- Before applying for funding, it's crucial to thoroughly review management models and lease agreements and establish MOUs and terms of reference with key stakeholders.

Operational Management

- There is an opportunity for a major leisure operator to manage the Centre, and Basketball Queensland could consider taking on this role.
- The ITC could be a suitable option for management consideration; however, currently, they do not have the capability but may consider scaling up if the opportunity is sustainable.
- The ITC prioritises achieving a return on investment with a community-first approach rather than solely focusing on immediate higher commercial returns. The ITC Committee is open to a number of suggestions, with the likely desired outcome being for ITC to lease the property to Council for an agreed fee.
- If Council owned the asset, it would likely be operated under a lease agreement, with the Council undertaking major maintenance.
- The IBA should be responsible for managing the facility's primary activation.
- Further discussion is needed for operational management, as determining the feasibility of the project relies on understanding the responsibility of ongoing maintenance costs.

6. Demand

6.1 Indoor Court Venues

6.1.1 Demand Modelling

Otium has developed a Demand Analysis Model to inform potential facility demand for sport and recreation facilities. There is no single adopted industry standard for the provision of indoor sports courts, and the amount of social play makes demand more difficult to assess. The Demand Assessment Model is assumption-based and takes into account a range of factors, such as participation data, capacity of playing areas and current/ projected population, to determine actual facility requirements. The Demand Analysis Model is summarised in Figure 19:

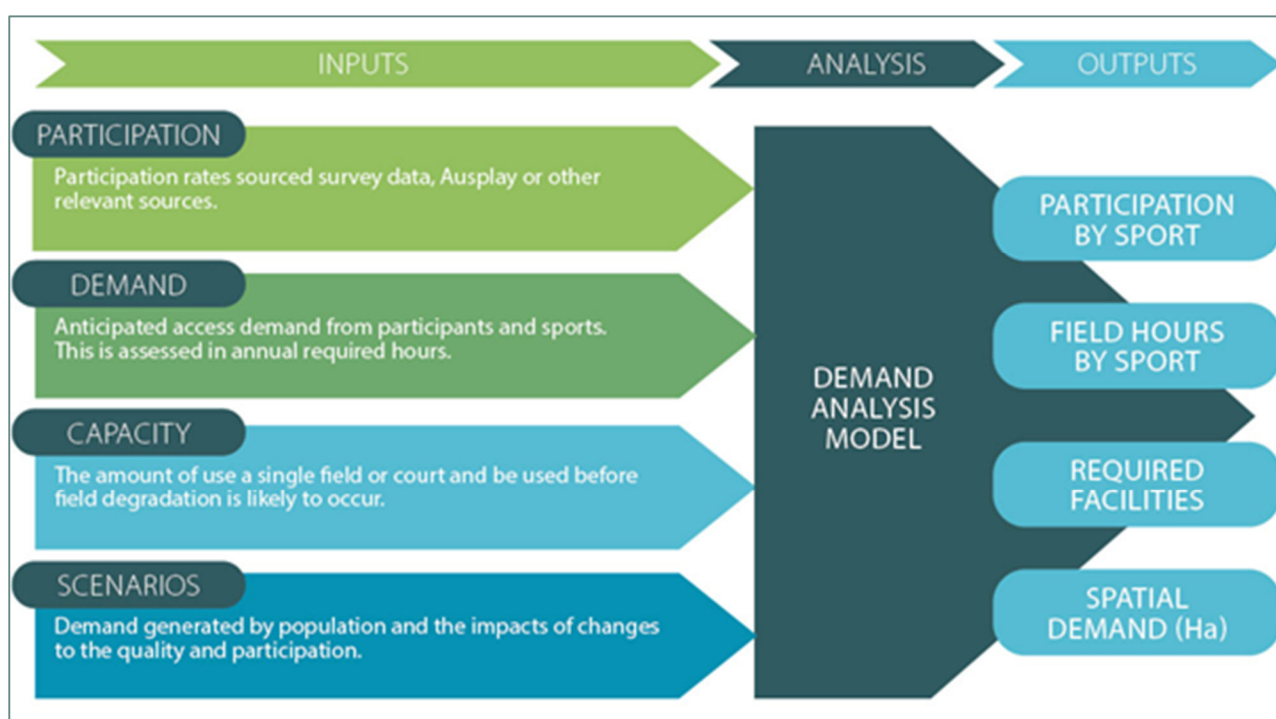


Figure 19: Otium Demand Model

Calibration

The Demand Analysis Model has been developed using a complex set of relational data. However, in simple terms, the model calculates demand around three fundamental calculations.

1. Each sport, based on its participants' needs, will require access to a facility for an average number of hours per year, per participant.
2. Each sport will have a maximum number of users per hour that can be accommodated, on average, within a single indoor court.
3. An indoor court has an available hours capacity per season/ year. The model assumes that each indoor court is used to capacity before another is needed.

This simply means that modelling facility demand uses the available participation data to determine how many facilities are required to meet the annual demand generated by that participation. The Demand Analysis Model has been applied to the City of Ipswich to determine the demand for indoor sports facilities. The assumptions that have been applied to the model for this project are explained in the following sections.

Population Projections

Demand assessment modelling was undertaken for 2023, and the projected 2041 population based on the Queensland Government population estimates¹¹ for the City.

Participation Data

The participation data for this model comes from AusPlay data specific to Queensland¹². Although there are challenges related to sample sizes and confidence levels for certain individual sports, these issues become less significant when the participation data is combined for all indoor court sports.

The following assumptions have been used to determine indoor court demand:

- Age Groups:
 - Junior: 5 – 14 years
 - Senior: 15+ years.
- Indoor Court Sports:
 - Badminton
 - Basketball
 - Futsal - 10% of football (soccer) participation is considered indoor futsal.
 - Netball - 10% of total participation is considered indoor netball.
 - Volleyball.

Capacity

- An average use of 50 hours per week, per court.
- New indoor court triggers when the participation demand reaches 20%.

6.1.2 Supply & Demand Assessment

There is no universally accepted industry standard for indoor sports facilities. Therefore, various factors have been considered to measure the demand. Table 9 gives a summary of the anticipated demand for indoor courts compared to the existing supply within the City.

Table 9: Provision of Indoor Courts in the Ipswich LGA

Facility Type	Current Provision	2023		2041	
		Demand	Variance	Demand	Variance
Indoor Courts	13	22	- 9	39	-26

The City has an estimated shortfall of nine indoor courts, and if the Centre were constructed today, it would be operating at near full capacity. Without intervention, the deficit is projected to increase rapidly, resulting in a shortage of 26 indoor courts by 2041. This is due to substantial regional population growth, the rising popularity of indoor sports, and the existing shortfall of indoor court facilities.

¹¹ (Queensland Government, 2024)

¹² (Australian Sports Commission, 2024)

7. Key Findings & Influencers

The following summarises the main findings and factors shaping the Centre's future direction. This summary is drawn from an analysis of catchment areas, participation and facility trends, stakeholder engagement insights, and demand assessment.

- The primary catchment area (15 minutes' drive time) is projected to reach 261,991 by 2041, representing an increase of 103.8%. The growth rate, 1.7% higher than the Queensland average, suggests that if no new indoor courts are added to the network, *demand in the Ipswich primary catchment, which is already at full capacity, will double.*
- The secondary catchment area (30 minutes' drive time) is not only currently significant enough to serve the broader Region, but by 2041, it will *provide regional indoor court access* to the equivalent of approximately half *(47.3%) of the current Greater Brisbane population.*
- The City has a *higher percentage of individuals under 35 years* old and lower proportions of adults aged 35 and above compared to Greater Brisbane. Additionally, the City has a *higher percentage of families with children*, and the median age is also younger than the Queensland average. It is evident that a significant number of young adults and children in the primary catchment area would regularly use the indoor courts for organised sports, such as basketball.
- The City has *13 indoor courts within the network* that are suitable for sports competitions. While several individual courts may be available at schools and other venues, these facilities typically offer limited opportunities for training or single-use activities such as dance or martial arts.
- The potential development of the Logan Indoor Sports Centre, which can be used for the Games warm-up events and future sporting and community activities, will address the gap in provision in this growth corridor. As a result, the City of Ipswich will remain *the only major population hub without a major indoor venue.*
- The IBA finds managing multiple sites challenging, and clubs find it *difficult to coordinate across various locations*. Although already at capacity, the Ipswich Basketball Stadium currently lacks the proper court dimensions for netball to improve its multi-sport utilisation.
- The IBA's membership has reached a plateau, and the limited access to indoor courts hinders its growth. The IBA is unable to host additional local junior competitions due to *a shortage of available courts*. With access to additional indoor courts, the IBA could expand competitions, offer training facilities and explore new opportunities such as walking basketball and wheelchair basketball.
- In the last six years, *adult participation in major indoor sports and activities has increased by 7.6%*, while *children's participation has grown by 14.5%*. In the children's sports sector, participation in basketball and gymnastics has significantly increased, with both sports having more than doubled their participation rates.
- The IBA cannot host state and regional championships as they do not have a facility with enough courts. The proposed venue, as it meets the eight-court minimum requirement, *could host regional and state basketball events* in the future. The venue is capable of hosting a variety of large-scale sporting events. The versatile multi-use court area within the venue will also allow the City to host various non-sport events.
- The show court would set this venue apart from other indoor court venues and *attract showpiece events to a region* where venues for up to 5,000 spectators are scarce. An analysis of entertainment and theatre-style venues regionally has revealed several smaller-capacity locations (< 500). The show court provides excellent access to these events for the areas of Ipswich, Logan, and Toowoomba and is comparable to existing venues. However, the proposed venues for the

Games can also host show court events as part of the event planning for the Games, thereby increasing competition in the regional events market.

- Over the past 20 years, participation in basketball has steadily increased by 1.4%. However, *new emerging sports*, which prioritise participants' enjoyment and introduce new technologies, *are gaining popularity*.
- The key principles of effective multi-purpose indoor court facilities include being located in a prominent, visible location, having a larger scale (four or more courts) to maximise efficiencies, *meeting sport-specific requirements* for functionality, and *providing diversified use*.
- The provision of a multi-court indoor sports facility within Ipswich of a scale and standard to support high-performance needs in the lead-up to the Games presents another opportunity for Ipswich and the Southwest regions to *create a legacy opportunity*.
- The development of the Centre is strongly *supported by potential user groups and stakeholders* due to the need for more multi-purpose indoor courts and the potential to host more sports events.
- The facility design should cater towards the requirements of various user groups to *maximise diverse sports opportunities*.
- *Obtaining capital funding* will be the main challenge for the project, as only state and federal funding sources have been identified as viable options. Broad community partnerships are crucial for the project's success, and before seeking funding, it is necessary to develop a detailed business case that includes management models and lease agreements.
- The City has an estimated *shortfall of nine indoor courts*, and if the Centre were constructed today, it would be operating at near full capacity. Without intervention, the deficit is projected to increase rapidly, resulting in a shortage of 26 indoor courts by 2041. This is due to substantial regional population growth, the rising popularity of indoor sports, and the existing shortfall of indoor court facilities.

These key findings and influencers provide strong evidence for the proposed development of the Ipswich Indoor Sports Complex.

8. Project Feasibility

8.1 Component Schedule

Together with the ITC, the IBA has worked with Gibson Architects to create a conceptual design for the proposed Ipswich Indoor Sports Complex. The primary facility components include:

- Show court, with fixed spectator seating, feature screen/ scoreboard, and air conditioning.
- Ten indoor courts, located in a separate hall, without air conditioning.
- Changerooms.
- First aid.
- Referees room.
- Board room/ offices
- Conference room.
- Foyer.
- Kiosk with kitchen.
- External works, including landscaping.
- Ground-level car park located underneath the building.

The Site's Master Plan has 51 accommodation units and a reception office to support the Centre and the nearby turf club's event operations. This Study does not assess the feasibility of providing accommodation services.

8.2 Cost Estimate

As of Q3 of 2024, the estimated cost for the concept design of the proposed Ipswich Indoor Sports Complex is **\$136,629,913**, as detailed in Appendix 3. This estimated cost includes pro-rata site works.

8.3 Concept Design

Figure 20 and Figure 21 illustrate the concept design, as detailed in Appendix 4. A few key points:

- The projected capacity of the show court is not confirmed, but it is estimated to have around 5,000 fixed seats for spectators.
- The grey numbered areas in the site plan indicate the accommodation units.
- Car parking will be placed beneath the structure due to the site's flood risk.
- The current design situates the show court in the first stage and the outer courts in the second. To address current demand, it would be better to reverse this order.
- The concept design should be updated based on a revised component schedule that considers user group requirements, integrates health and fitness services, and improves changing facilities, umpire rooms, and foyer entry for large events.

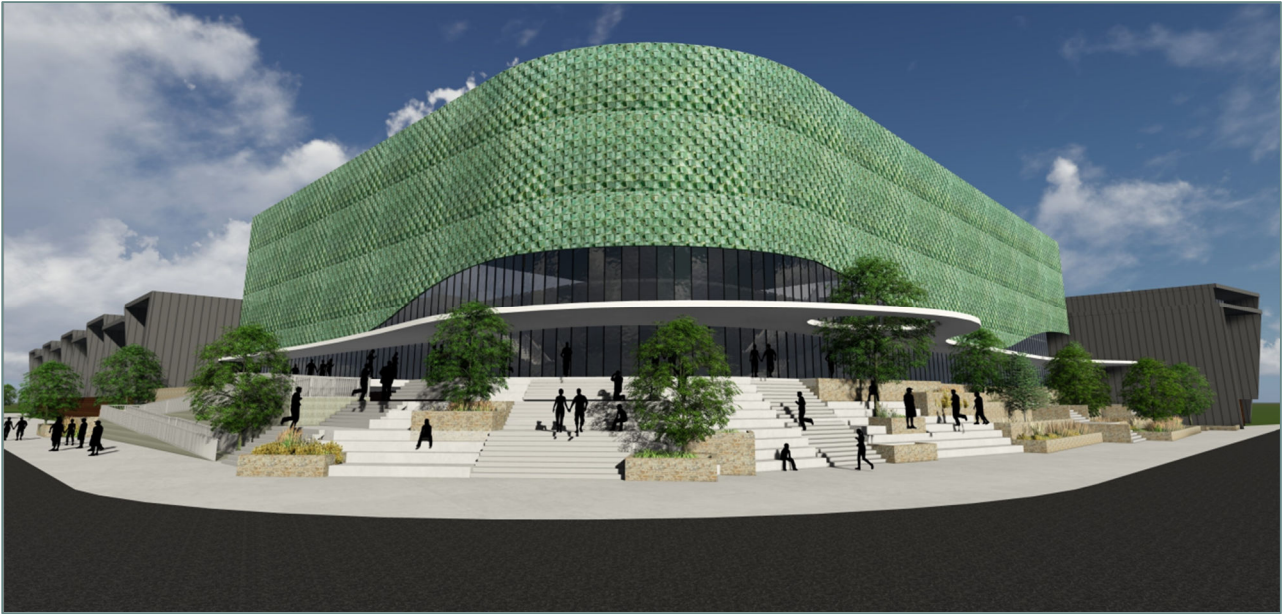


Figure 20: Proposed Ipswich Indoor Sports Complex Facade - Concept Design



Figure 21: Proposed Ipswich Indoor Sports Complex Floorplan - Concept Design

8.4 Operating Model

The following factors should be taken into account when considering a management model for multi-purpose indoor court facilities:

- Assess whether the model would restrict venue usage and overall viability.
- Identify any obstacles to performance, such as fees, marketing, programming, technology, or facility investment.
- Determine if the organisation lacks specialised expertise to effectively manage the assets.
- Evaluate if the risks involved outweigh the organisation's core responsibilities.
- Consider the venue size and the variety of support revenue from events and fitness programs.
- Consider the need for support services such as event management, catering, cleaning, and security.
- Assess how the venue management award structure impacts model viability (e.g., Local Government Award or Other Award vs. Fitness Industry Award).

The management model will require additional review during the detailed business case phase, especially after establishing a funding model. The following points offer general insights to steer future discussions about the operating model for the Ipswich Indoor Sports Complex. These operating models are further explored in Appendix 5.

Asset Owner

Effective management of community facilities is crucial to ensure they are well-maintained, optimised, and available for long-term public use. This involves regular maintenance, strategic planning, and efficient resource allocation, which can extend the facilities' lifespan and reduce unexpected repair costs. Balancing affordability with sustainability includes setting reasonable fees, implementing energy-efficient practices, and seeking alternative funding such as grants or partnerships. This ensures accessibility and functionality for future facility users while maintaining financial viability.

The asset owner must handle these financial outcomes and asset management responsibilities, which involve a level of risk and responsibility that is best suited to government organisations. Possible options that align with this outcome include:

1. **Commonwealth of Australia**
The proposed Centre would not be under federal authority, and the Commonwealth does not have suitable mechanisms to oversee local or regional sports facilities. This would not be a possible outcome.
2. **Queensland Government - Department of Sport and Tourism or Stadiums Queensland**
The Queensland Government manages various community sports facilities throughout the state; however, the proposed Centre does not align with its existing asset portfolio. Stadiums Queensland oversees major sports and entertainment venues throughout Queensland, which are typically of a greater scale than the proposed Centre. The Department of Sport and Tourism oversees sports facilities that have a long history of being managed. However, it's unlikely that they would be willing to take on management responsibilities for the Centre.
3. **City of Ipswich**
Local governments typically manage local and regional sports facilities. They have the internal resources, close access to the venue, experience with social infrastructure management, and the capacity to handle the associated risks and responsibilities.

The City of Ipswich has well-established asset management services and strategic planning in place to effectively address the Centre's significant capital maintenance needs. Even though Council's current capital expenditure planning does not include funding for the proposed Centre, its future asset maintenance contribution and operational responsibility would be significant enough to qualify it as an investment partner in the project.

Operator

The operator oversees the centre's daily operations, ensuring that the annual key performance indicators are met in accordance with the objectives outlined in the business plan. Selecting the right operator is crucial since it influences community access, user experience, and the centre's sustainability. As a facility's scale increases, its services become more varied and complex, transitioning from single-purpose to multi-use. Smaller operators often face challenges in handling new business opportunities because they may lack the expertise, experience, and internal frameworks needed for specialised and distinctive elements and opportunities. In such situations, it is common for the centre to contract out its secondary business components in order to maintain service quality and streamline operations. Although this addresses the immediate operational challenge, it often compromises the financial health of the centre, as secondary components such as food and beverage, health and fitness, and major events are typically the most profitable. When evaluating the best operator for the Centre, the following organisations would be the most suitable choices.

1. Leisure Industry Specialists

Numerous operators in the leisure industry in Queensland have the skills, experience, and capability to manage the Centre efficiently. Unlike facilities in more rural areas that struggle with growth, geography, staffing, and achieving economies of scale, the Centre presents an appealing opportunity likely to attract strong market interest.

In an ideal market, specialised facility managers are typically more cost-effective and have shown success in meeting facility goals. They provide a positive customer experience, manage essential operational maintenance, and offer innovative multi-use programming that enhances alternative revenue streams.

Conducting a market-sounding exercise is an effective tool for understanding the level of interest in operating the Centre with prospective operators and benchmarking financial and utilisation factors that would further strengthen the Centre's projected performance.

2. Ipswich Turf Club or Basketball Queensland

Both organisations have expressed interest in managing the centre and potentially have the necessary business frameworks to meet its operational requirements. For these organisations, a key factor will be their willingness to diversify their existing business portfolio through investing in a major sports and leisure facility. Aligning the Centre's sport, leisure, and event capabilities with the core business of these organisations strengthens the opportunity.

A sports organisation managing a multi-use facility often finds it challenging to balance the needs of its members' use of the facility with those of the broader community, multi-use, and sustainability objectives. To maximise funding opportunities for this development, it is essential to highlight that the Centre is multi-purpose, inclusive, and accessible to the entire community. Therefore, this selection of an operator should be carefully evaluated from this perspective.

Thoroughly documented contract specifications that align with the Centre's community goals, combined with diligent contract oversight, are the most effective methods for mitigating this risk. However, as this reduces the capacity for programming towards specific user groups, it diminishes the appeal of the opportunity for these organisations.

3. City of Ipswich

The City oversees a variety of community facilities, but most are managed externally, except for libraries and the Ipswich Civic Centre. The City's current organisational framework does not have the capability to efficiently run a major sports and leisure centre, which would require significant internal restructuring for effective management. As a result, achieving such an outcome seems unlikely.

Primary User Group - Ipswich Basketball Association

The IBA effectively manages the Ipswich Basketball Stadium and has experience with indoor court venue management. However, the larger scale and varied services of the Centre might challenge its ability to manage it sustainably, especially since the organisation's main goal is to offer various basketball opportunities to the community and not venue management. Additionally, the IBA might consider the operational risks of managing the venue to be too high.

If the IBA manages the Centre, there might be a focus on basketball activities, potentially overshadowing other sports. It's important to consider the facility's usage by primary user groups, outline the rights of use and MOUs for the Centre, gain support from community partners, and demonstrate its multi-use capabilities.

An ideal outcome for the IBA would be to ensure adequate court access and establish a balanced pricing system to promote usage while maintaining the venue's long-term sustainability. This is commonly achieved through long-term tenancy agreements or sub-leases.

8.5 Operational Analysis

A 25 year financial forecast has been created for the Ipswich Indoor Sports Complex, with a detailed analysis provided in Appendix 6. The primary assumptions used for this model are outlined below.

8.5.1 Primary Assumptions

Global

- 3% per annum applied to income and expenditure.
- Venue market establishment:
 - Reduced by 20% Year One (2028)
 - Reduced by 10% Year Two (2029).
- Business growth:
 - 92% Year One (2028)
 - 95% Year Two (2029)
 - 100% consequent years.
- Management Model:
 - At the time of this report, the future management model for the Centre is yet to be determined.
 - The management approach for this financial analysis has assumed major asset management and replacement costs will rest with the asset owner or lessee.
 - Operating costs associated with minor and routine asset management are assumed to rest with the party responsible for the management of the Centre and are captured within this forecast.

Income

- Indoor Courts:
 - Ten multi-purpose indoor sports courts suitably designed to netball dimensions, however suitable for multiple indoor sports, including basketball, volleyball, badminton and futsal with an area of 9,513m².
 - Based on an hourly court hire rate consistent with South East Queensland market rates.
 - A typical weekly usage schedule is provided in Appendix 6.
- Show Court and Entertainment:
 - One show court/ entertainment space with retractable seating suitable for sporting events and community events and entertainment with an area of 7,880m².
- Ancillary spaces:
 - Conference room, board room, offices, café.

Expenditure

- Capital Cost Estimate - *Ipswich Indoor Sports Complex, Indicative Cost Estimate, Cost Plan Group, May 2024*:
 - \$103,945,176. This excludes pro-rata site works and only includes infrastructure costs.
- Salaries and wages (excluding café and functions) for 9 FTE.

8.5.2 Financial Assessment

Outlined in Table 10 is a summary of the 25-year financial operating forecast for the Ipswich Indoor Sports Complex.

Table 10: Financial Assessment Operating Result

	2028	2034	2040	2046	2052	Average
Operating Result	-\$259,410	\$409,326	\$488,756	\$583,600	\$696,849	\$462,664
Cost Recovery	91.36%	110.74%	110.74%	110.74%	110.74%	109.56%

The 25-year financial operating forecast for the Ipswich Indoor Sports Complex suggests:

- Income will increase over a 25-year period from \$2,741,674 to \$7,187,484.
- Expenditure will increase over the 25-year period from \$3,001,083 to \$6,490,634.
- The operating profit will increase over the 25-year period from \$-259,410 to \$696,849.

The Centre could improve its cost recovery performance by integrating additional commercial components that complement its purpose. This could include allied health services, health and fitness facilities, a gymnasium, and retail spaces. These commercial additions could be incorporated into the current design by utilising a second level over the ancillary spaces, or potentially by repurposing an existing space, such as the conference room or an indoor court.

8.5.3 Visitation

Outlined in Table 11 is a summary of the 25-year visitation forecast for the Ipswich Indoor Sports Complex.

Table 11: Visitation Result

Visitation	2028	2034	2040	2046	2052	Average
Indoor Courts	431,186	501,430	501,430	501,430	501,430	496,995
Show Court and Ancillary Spaces	177,008	240,500	240,500	240,500	240,500	236,565
Total	608,194	741,930	741,930	741,930	741,930	733,561

The 25-year visitation forecast for the Ipswich Indoor Sports Complex suggests:

- Indoor court visitation will increase over a 25-year period from 431,186 to 501,430.
- Show court and other facility attendance will increase over the 25-year period from 177,008 to 240,500.
- The overall visitation of the Centre will increase over the 25-year period from 608,194 to 741,930.

The Centre is expected to attract a large number of visitors, with an average of 733,561 attendees per year.

8.5.4 Benefits Assessment

The estimated total benefits for the Centre through to 2052 is **\$329,109,601**. The net present value and benefits cost ratio based on Optimistic (4%), Base (7%) and Conservative (10%) discount rates are outlined in Table 12.

Table 12: Benefits Assessment Result

Discount Rate	4%	7%	10%
Net Present Value	\$212,007,437	\$162,369,206	\$130,058,742
Benefits Cost Ratio	2.04	1.56	1.25

The construction of a large multicourt venue with a show court in Ipswich could have a significant positive impact on the local economy through increased tourism. Events like the U18 State Championships, which Basketball Queensland has estimated to generate \$11 million for the Gold Coast in just five days, demonstrate the substantial economic benefits that such events can bring. This type of venue would not only attract regional, state, and national sporting events, but also stimulate local businesses, hospitality, and retail sectors, creating a vibrant community hub and drawing visitors from across the country.

8.6 Funding Model

Securing the necessary funds for the proposed Ipswich Indoor Sports Complex will depend on a variety of funding sources. Initial investigations by the IBA and the ITC have explored a multifaceted funding approach, seeking contributions from all levels of government, land donation by the ITC, future capital replacement costs covered by the City of Ipswich, and the option for a staged development to reduce the initial funding requirement.

Below are potential future funding sources for the recommended developments, including:

- Local, Queensland and Federal Government.
- Transfer of land by the Ipswich Turf Club.
- Collaborations with major sporting organisations.
- Large city-based corporations.
- Health and wellbeing partnerships.
- Community fundraising efforts.
- Debt servicing schemes.

8.6.1 Funding Programs

The IBA and ITC have consulted with all levels of government regarding this project, seeking state and federal funding support. The City of Ipswich does not have any capital funds allocated for this project in its long-term budget, and both the IBA and ITC do not intend to invest capital funds. The project's progress is currently heavily reliant on state and federal funding.

Queensland Government - Local Government Grants and Subsidies Program (LGGSP)

The LGGSP aims to provide funding assistance to support councils to deliver priority infrastructure and essential services, that meet the identified needs of their communities.

The objectives of the LGGSP are to support eligible projects that:

- Deliver priority infrastructure.
- Align with state, regional and local priorities.
- Contribute to building safe, connected and liveable communities.
- Contribute to economic growth and employment.
- Maintain and extend the functional life of existing infrastructure assets.
- Encourage collaboration and resource sharing between local governments.

Eligible Local Government projects include:

- New infrastructure, or upgrade of existing infrastructure, that will extend the life of existing infrastructure, in one of the following categories:

- (ii) An Economic Development Project (examples include *tourism infrastructure*, town centre works (including beautification works), sale yards, airstrips and airports, caravan/ tourist parks, *community hubs*, works depots and car parks).
- (iii) A Community Wellbeing Project (examples include arts and cultural centres, *sport and recreation centres*, security and community safety infrastructure, library/ knowledge centre, playgrounds and parks, public toilets, swimming pools and splash parks, skate/ bicycle parks and community halls).

Approved projects will be allocated a subsidy of up to 60% of the Total Eligible Project Costs, and funding of up to \$115 million is available for 2024-28 projects. Up to \$10 million of the total funding may be allocated to planning projects.

Queensland Government – Go for Gold Fund

The *Queensland Government Go for Gold Fund* will allow Queensland schools, both state and non-state, to apply for up to \$5 million for new or upgraded sports infrastructure.

Eligible infrastructure includes:

- *Indoor* or outdoor *sports facilities*.
- *Multi-purpose courts*.
- Athletics pitches or upgrades to ovals.
- Refurbishment of outdoor court surfaces.
- *Investment in emerging sports*.

Even though applications for the Go for Gold Fund have ended, there may be an opportunity for a third round of funding in the future.

Federal Government – Local Roads and Community Infrastructure

The community infrastructure program from the Department of Infrastructure, Transport, Regional Development, Communications, and the Arts supports local infrastructure, jobs, businesses, and procurement. Funding recipients can choose from various projects to meet community needs and are encouraged to use local businesses and the workforce for delivery. Even though up to \$11.7 million was available, all four phases of the LCRI program have been allocated. A replacement program has not been announced yet but is expected in line with the political calendar.

Federal Government – Growing Regions Program

The program is multi-round through the Department of Infrastructure, Transport, Regional Development, Communications, and the Arts. It provides funding for community-focused infrastructure, revitalising regions and enhancing amenities and liveability throughout regional Australia.

Up to \$15 Million in funding is available, and Round Two is now open for applications and closes on October 10, 2024.

8.6.2 ITC Land Transfer

The proposed Site at 219 Brisbane Road in Bundamba presents an excellent development opportunity. It is centrally located in Ipswich, with major highway frontage, situated in a precinct with other sports groups, and is conveniently located near public transportation (train) and a school. Another significant challenge in developing major community infrastructure in metropolitan zones is the lack of suitable greenfield sites. Therefore, offering this land for the proposed development is highly beneficial for the community and cannot be overstated.

The ITC has several methods for transferring the land to support the development, thus serving as a crucial part of the project's capital funding contribution. The cost of the land is currently excluded from the cost estimate. This can be achieved by either transferring the land freehold to the asset owner, likely Council, or by establishing a long-term lease agreement (25+ years) for the Site's use.

The ITC may request financial compensation to facilitate the land transfer, such as leasing fees, a share in operating performance, management rights, or fee waivers for other development ventures.

8.6.3 Partnerships

Partnership with the City of Ipswich

Council has confirmed that no capital funds are allocated for this project in the long-term budget. However, they may still contribute as a partner in its development through other opportunities, such as:

- As the Centre's owner, taking on operational risk, as well as asset maintenance and renewal, is a significant responsibility. Considering the long-term financial costs and depreciation of the asset is part of sound asset management practices and could contribute up to 2% per annum of the initial capital investment. This ongoing responsibility would ensure that Council remains a key partner in this development, aligning with its strategic goal to enhance the indoor facility network within the City.
- Council could consider lowering development application fees to make the development more affordable. This initiative could be expanded to cover the entire ITC site, which would help implement the Site's Master Plan and encourage the land transfer opportunity.
- To raise funding for contributing towards the capital investment, Council could consider implementing a Major Community Facilities Levy on all rateable properties. The funds collected from this levy will be used exclusively to develop indoor sports centres and cannot be allocated to other Council functions.

Partnership with State and Federal Governments

Given the significant and growing costs of providing growth-related community infrastructure, such as indoor sports and recreation facilities, it is appropriate that all three levels of government assist in the capital delivery of such investment. This is even more important in the context that the operational management of such facilities over their useful life and, therefore, most of the whole-of-life costs remain with the Local Government Authority.

Early partnership engagement should occur to support these outcomes, with both levels of government supported by the Study, a well-developed and costed concept plan, and potentially an associated business case. A recent example of these direct co-funding opportunities is the recent funding by the Queensland and Federal Governments of the \$70M Logan Indoor Sports Centre.

In the lead into the Brisbane 2032 Olympic and Paralympics, opportunities may present themselves in the context of required pre-Games training facilities and the reputational benefits of retaining these opportunities within South East Queensland.

Partnerships with Peak Sporting Bodies

Some of the recommended facility development will support major events and high-performance outcomes. On this basis, there may be an opportunity to secure funding partnerships with peak sporting bodies (e.g. Basketball Australia).

Major City-based Company Partnerships

As the City is a major economic destination for several major companies, there may be an opportunity to explore funding opportunities with major companies based in the City. This support could take the form of:

- Contra support, where equipment and labour resources from the major companies could be used to undertake targeted development works (e.g. bulk earthworks, infrastructure services).
- Energy companies to reduce general electricity costs.
- Major sponsorship and/ or supplier arrangements. These arrangements could be in the form of cash sponsorship and/ or supplier arrangements for free or reduced goods and services.
- Naming rights sponsorship could be offered to a major company, in return for long-term naming rights of an indoor venue.

Partnership with Education Queensland

There is an opportunity to partner with education facilities that have been successfully undertaken previously in the City under a joint development agreement to develop indoor facilities that can service both the school and the broader community. Typically, under this arrangement, schools would be provided with use during school hours, with community use outside of these times and on weekends.

The Bundamba State School is located next to the site and presents a special opportunity to establish a partnership. This partnership could not only provide capital support for the development but also create strong off-peak facility usage opportunities. As a result, it is important to further explore collaboration with the Department of Education, and future design concepts and facility programming should consider providing access to the Bundamba State School.

Health and Wellbeing Partnerships

Over recent years, planning for active and healthy lifestyles has emerged as a key issue in improving public health in Australia. Furthermore, governments in Australia and worldwide have recognised planning for active living as a key action area in addressing the global obesity epidemic.

There is very strong evidence linking physical inactivity with adverse health outcomes, including major non-communicable diseases such as coronary heart disease, type 2 diabetes, breast and colon cancers and shortened life expectancy.

Given that the primary usage of indoor sports centres is associated with physical activity, there may be opportunities to partner with organisations that align their values and business purpose with healthy and active living outcomes (e.g., private health insurance providers).

Further, there may be opportunities to seek partnerships with universities (e.g. University of Southern Queensland) that may have an interest in research projects that measure the health benefits to persons that participate at sports facilities. Any partnership of this nature may also provide prestige to the Centre and act as a further incentive to prospective corporate and/ or government funding agencies.

8.6.4 Fundraising

The community is increasingly coming together to fundraise for major facilities. There is an opportunity to form a group dedicated solely to fundraising for the development. This group could attract funding through strategies such as:

- Encouraging individual contributions.
- Organising major events like concerts.
- Offering 'buy-a-brick' sponsorships with permanent acknowledgments.
- Seeking corporate sponsorships from local businesses.
- Implementing levies on user group membership fees.

Tax deductibility for donations of \$2 or more can be set up under the Australian Sports Foundation, which helps raise funds for clubs and organisations to develop and increase participation.

8.6.5 Debt Servicing

By having the right location and facilities, such as aquatic, fitness, wellness, retail, and food outlets, leisure centres can enhance their return on investment and reduce operational costs. These commercial features may be financed through a debt arrangement to cover fit-out expenses, reducing initial capital funding requirements and long-term maintenance costs. A comprehensive Cost Benefit Analysis is necessary to confirm any financial benefits.

9. Conclusion and Future Direction

In summary, the *Key Findings and Influential Factors* clearly demonstrate significant demand and stakeholder support for the proposed development of the Ipswich Indoor Sports Complex. Furthermore, the ITC's prime site location, positive social and economic benefits for the community, and long-term sustainability, as confirmed by the Feasibility Study, strongly support the project's advancement.

Figure 21 presents the projected timeline for the development, with the additional measures to achieve expansion being:

1. Collaborate with key stakeholders and establish partnerships that define the operating model and user group rights of use.
2. Investigate funding options, including collaborating with all tiers of government.
3. Develop a funding plan to secure the remaining capital necessary to develop the Centre.
4. Enhance project documentation with a Detailed Business Case, refine the concept design to accommodate all user groups, optimise financial sustainability, update cost estimate, and assess any required Site technical studies.
5. Acquire project funding commitments.
6. Commence the project delivery through detailed design, procurement, and construction.

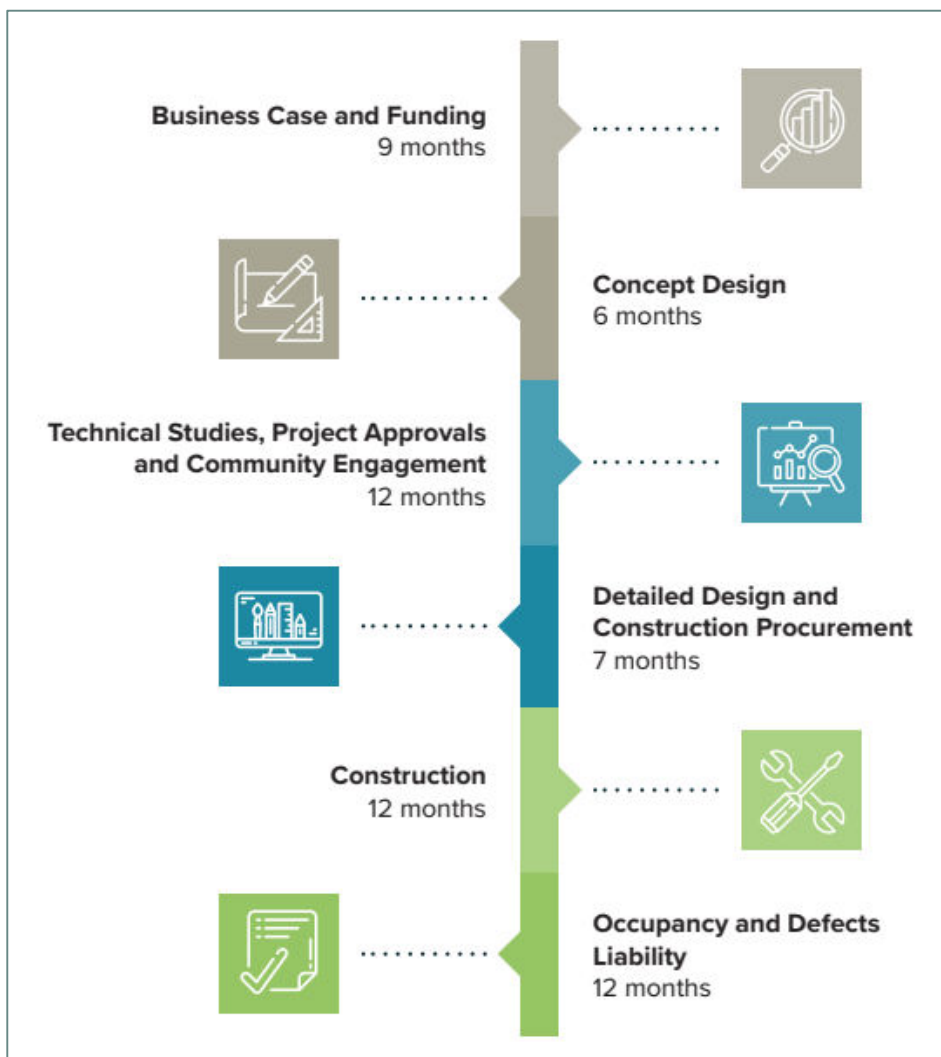


Figure 22: Estimated Project Timeline

10. Warranties and Disclaimers

The information contained in this report is provided in good faith. While Otium Planning Group Pty Ltd (Otium) has applied their experience to the task, they have relied upon information supplied to them by other persons and organisations.

We have not conducted an audit of the information provided by others but have accepted it in good faith. Some of the information may have been provided 'commercial in confidence', and these venues or sources of information are not specifically identified. Readers should be aware that the preparation of this report may have necessitated projections of the future that are inherently uncertain and that our opinion is based on the underlying representations, assumptions and projections detailed in this report.

Otium's advice does not extend to, or imply professional expertise in the disciplines of economics, quantity surveying, engineering or architecture. External advice in one or more of these disciplines may have been sought, where necessary, to address the requirements of the project objectives. There will be differences between projected and actual results because events and circumstances frequently do not occur as expected, and those differences may be material. We do not express an opinion as to whether actual results will approximate projected results, nor can we confirm, underwrite, or guarantee the projections' achievability, as it is impossible to substantiate assumptions based on future events.

This report does not constitute advice, investment advice, or opinion and must not be relied on for funding or investment decisions. Independent advice should be obtained in relation to investment decisions.

Accordingly, neither Otium nor any member or employee of Otium undertakes responsibility arising in any way whatsoever to any persons other than the client in respect to this report for any errors or omissions herein arising through negligence or otherwise caused.

Appendix 1: Strategic Document Alignment

Document	Description
Activate Queensland 2019-2029	<p>Activate! Queensland: 2019-2029 is an initiative of the Queensland Government and is a 10-year strategy with a long-term vision to enrich the Queensland way of life through physical activity. The strategy aims to direct investment at:</p> <ul style="list-style-type: none"> • Creating quality infrastructure to support physical activity. • Addressing barriers to participation. • This will support more Queenslanders to be active regardless of age, background, gender or ability. <p>Underpinning Activate Queensland is the Activate! Queensland Action Plan: Accelerate 2022-2025. Accelerate centres on five key commitments:</p> <ul style="list-style-type: none"> • Collaborate with the active industry to get more Queenslanders moving • Enhance pathways for Queensland's athletes, coaches, and officials • Operate precincts and venues that serve the community and industry from grassroots to elite • Champion an industry-leading network of infrastructure across Queensland • Leverage events and opportunities. <p><i>The expansion of indoor courts supports Activate Queensland's goals by offering more chances for the Ipswich communities to stay physically active. Since the existing courts in the Ipswich area are at capacity, many members of the community are unable to participate and are being turned away.</i></p>
City of Ipswich Corporate Plan 2021-2026	<p>The City of Ipswich's Corporate Plan 2021-2026 (iFuture) is Council's leading strategic plan. It provides for shorter-term planning for both Council and the community to collectively work toward achieving the community's vision for 2041: Ipswich—a city of opportunity for all.</p> <p>iFuture has been divided into four themes, each identifying several outcomes and catalyst projects to support the outcome of the Plan and its vision. The themes and the relevant outcomes and catalyst projects are listed below:</p> <p><i>Vibrant and Growing</i></p> <ol style="list-style-type: none"> 1. <i>Our City's design and development promote quality placemaking and liveability. We seek positive environmental, sustainable, inclusive, and cultural outcomes.</i> 2. <i>Our City is active and healthy, with a variety of activities, facilities, and services on offer for all to enjoy.</i> 3. <i>Our strategic planning enables us to prepare and respond to the City's rapid growth and expansion of infrastructure networks.</i> 5. <i>Ipswich is a sought-after location for business, industry and visitors.</i> <p><i>Catalyst Projects:</i></p> <ul style="list-style-type: none"> • <i>New Local Government Infrastructure Plan</i> • <i>The Active Ipswich Strategy and Implementation Plan is to increase access and opportunity for participation in sports, recreation, physical activity, and nature-based recreation.</i>

	<p><i>Safe, Inclusive and Creative</i></p> <p>7. <i>Our community has access to the services they need, particularly health and social services.</i></p> <p><i>Catalyst projects:</i></p> <ul style="list-style-type: none"> • <i>Community Development Strategy and Implementation Plan to plan and respond to community needs and growth.</i> • <i>Strengthening the Ipswich Communities Plan will assist in understanding the City and help strategically guide the Council's investment, programming and advocacy for community facilities and services.</i> <p><i>A Trusted and leading Organisation</i></p> <p>1. <i>We are leaders in advocacy, and we require support from Federal and State Governments. This includes City-shaping opportunities and needs such as major infrastructure, policy reform, and services.</i></p> <p>6. <i>We are transparent and evidence-based in our planning, reporting and decision-making.</i></p> <p>10. <i>Construction and maintenance of Council's assets are managed to meet the community's needs and growth.</i></p> <p><i>Catalysts projects:</i></p> <ul style="list-style-type: none"> • <i>Develop new funding models to better meet the demands of our rapid growth across the Local Government Area</i>
Active Ipswich Strategy 2021-2031	<p>The Council's Active Ipswich Strategy 2031 is its commitment to improving health and well-being by creating a more active City. This ten-year strategy to improve participation in and increase opportunities for physical activity in Ipswich identified 27 key actions for the development of public open space and sporting infrastructure in the future.</p> <p>Among these key actions, the Council is currently developing a revised Open Space Strategic Plan and a revised Local Government Infrastructure Plan (LGIP) to guide the Council's prioritised planning and delivery of the complete open space network over the next 10 years. In addition to the above projects, the strategy also identified a high-priority need to prepare an Indoor Sports Facilities Plan (Action 22).</p>
Ipswich Basketball Association Business Plan 2024	<p>The IBA's vision is to be the leading sporting association in Ipswich, providing an inclusive, innovative, and safe environment by building a stronger and more connected community. The IBA aims to promote basketball as the ultimate sports activity and provide the required infrastructure, expertise, services, and opportunities for their sponsors, community partners, staff, volunteers, and participants to thrive.</p> <p>The business plan outlines a strategy to increase basketball participation in the local Ipswich Community and beyond. This will be achieved by offering inclusive and innovative participation opportunities and collaborating with Basketball Queensland and community stakeholders to ensure that the association is equipped to manage the increase in participation.</p>

	<p>The plan aims to boost participation, referees, and coaches, as well as expand the limited number of courts and infrastructure available in the Region.</p>
<p>BMT Flooding Assessment – Ipswich Turf Club (2022)</p>	<p>The flooding assessment report conducted by the ITC for the Site determined that the proposed uses within the Study area can be accommodated. However, it's necessary to place certain uses in areas less prone to flooding and to restrict or prohibit other uses in areas significantly affected by flooding.</p> <p>The ability for land within the Northern Precinct (the Site) to be used for on-grade uses will require confirmation via additional modelling in relation to local catchment runoff. A summary of uses for the Site and considerations is provided below:</p> <p>Car Parking and Entertainment Subject to the consideration of local flooding (with respect to the extent of inundation, immunity, and ability to evacuate), car parking and entertainment can occur on grade outside the extent of the 1 in 100 AEP event, including climate change in Bundamba Creek. Car parking within the Bundamba Creek flood line should be acceptable in areas affected by shallow inundation, subject to the consideration of evacuation times.</p> <p>Short Term Accommodation (potentially including restaurant) For accommodation use, it is recommended that floor levels be set at the 1 in 100 AEP flood level, including climate change (20.94 mAHD). This will necessitate setting the lowest level above the existing ground level. It would also be beneficial for the accommodation to include sufficient storeys to provide an area above the level of the PMF (36.2 mAHD). This would potentially allow a shelter-in-place strategy to be adopted during major flood events in the Bremer/ Brisbane River system.</p> <p>Professional Services Unless a particular use can tolerate inundation (in which case flood resilient design will be required), it is recommended that floor levels be set at the 1 in 100 AEP flood level, including climate change (20.94 mAHD).</p>
<p>Geleon Traffic and Transport Technical Note - 2022</p>	<p>The ITC conducted a traffic and transport assessment for the Site, creating option designs for a northern car park and revised intersection or road realignment upgrades, along with associated cost estimates.</p> <p>Based on the initial assessment, it is recommended that the ITC implement the proposed infrastructure upgrades to secure its future expansion and maximise connectivity for its patrons and surrounding local business partners. The ITC should also collaborate with key stakeholders to ensure that the proposed infrastructure upgrades result in a workable outcome for all parties involved.</p>
<p>Basketball Queensland Strategic Plan 2020 – 2022</p>	<p>The Strategic Plan articulates a future for basketball in Queensland that is innovative, unified and inclusive. It aims to position the sport at the forefront of sports delivery and development within the broader Queensland community and as a prominent member of the national basketball fraternity. Basketball Queensland's mission is to accomplish this vision by providing inspiring leadership and an all-encompassing framework that empowers growth, development and participation in basketball across Queensland. This framework will pave the way for national and international opportunities.</p>

	<p>The following are key outcomes Basketball Queensland seeks to achieve:</p> <ul style="list-style-type: none"> • Enhanced participation in basketball across the entirety of Queensland. • A steadfast commitment to continually enhancing the skills of our players, coaches, officials and administrators. • Strengthened the capability of our associations to accommodate and support the sport's growth. • An augmented delivery of basketball through the innovative and efficient employment of technology. • Amplified engagement with stakeholders through digital platforms, including social media, websites, apps and e-newsletters. • Recognition for the excellence of our customer service. • Promoted unity and strategic alignment between Basketball Queensland and all pertinent stakeholders.
Volleyball Queensland 2025 Strategic Plan	<p>The Strategic Plan is to cultivate a robust Queensland volleyball community that provides enduring engagement opportunities within the sport. We envisage a comprehensive array of inclusive competitions, ensuring locations to play and crafting opportunities for all volleyball members, including players, coaches, referees, volunteers and administrators.</p> <p>This will be achieved through improved venue access, with the objective of ensuring that volleyball in Queensland has consistent and ready access to superior venues across the state, both presently and in the future.</p>
Pickleball Australia Association Strategic Plan 2020-2023	<p>The Strategic Plan aspires to cultivate a robust national network of affiliated state associations, clubs, and individual members, thereby facilitating the expansion of social and competitive play. Concurrently, Pickleball Australia is committed to establishing a highly regarded accreditation system for coaches, trainers, and players while providing a comprehensive suite of support services to aid our sport's growth.</p> <p>Considering the current membership growth rate at the club, state and national levels, the number of pickleball players is anticipated to mirror that of other established sports within 2 to 3 years. If the expansion aligns with the trajectory of pickleball growth observed in other countries, pickleball will confidently project the attainment of our target of 5,000 players by the year 2023.</p> <p>A strategic initiative central to the growth plan is enhanced access to facilities to accommodate membership expansion. In addition, pickleball plans to stimulate growth through the execution of increased interclub, intrastate and interstate events, offering open and exclusive participation options.</p>
Table Tennis Queensland Strategic Plan 2020-2022	<p>The Strategic Plan envisions a future for table tennis in Queensland, where the sport enjoys a growing participant base, a strong community profile, an engaged and proficient workforce and high-performing athletes, coaches and officials. Furthermore, it aims to ensure the sport's viable and sustainable future.</p> <p>Key strategic objectives of the Plan include promoting membership growth and retention. This will be achieved by fostering relationships with schools and developing and implementing innovative participation programs and competitions. Simultaneously, the Plan seeks to elevate the relevance and profile of table tennis by investing in enhanced facilities.</p>

<p>Badminton National Strategic Plan 2021-2024</p>	<p>The Strategic Plan is designed to foster an inclusive environment that positions badminton as a sport for life while promoting the growth and development of badminton athletes, coaches and officials throughout Australia.</p> <p>One of the Plan's paramount objectives is to stimulate significant growth in badminton participation across the nation. The aspiration is to engage 350,000 individuals in badminton activities, with a targeted membership base of 35,000.</p>
<p>Netball Queensland Strategic Plan 2023-25</p>	<p>Netball Queensland's Strategic Plan envisions a future where it becomes the most played and widely supported sport within Queensland. To leverage the potential of the indoor sport domain, Netball Queensland plans to forge a Memorandum of Understanding (MOU) with the Indoor Netball Federation of Queensland. This collaboration is intended to facilitate a seamless transition of participants between both game formats.</p> <p>Furthermore, a feasibility study will be undertaken in collaboration with the Indoor Netball Federation of Queensland. This initiative investigates the potential for fully integrating indoor netball into Netball Queensland's scope of operations. This strategic approach is expected to enhance netball's reach and versatility within the region.</p>
<p>Queensland Cricket Infrastructure Strategy 2023-28</p>	<p>The Queensland Cricket Infrastructure Strategy 2023-2028 is a comprehensive plan that outlines the priorities and framework for cricket infrastructure development across the state. Its purpose is to guide the Queensland cricket community and its stakeholders toward a future rich with opportunities for growth and expansion.</p> <p>Regarding the indoor cricket format, the Strategy indicates that the sport boasts 19,607 participants, accounting for 18.9% of all cricket engagement. The Strategy is currently exploring the potential development of indoor training facilities. These would provide year-round access and support talent pathways, participation programs and training opportunities for coaches and officials.</p>

Appendix 2: Case Study Exemplar Facilities

Coomera Indoor Sports Centre – City of Gold Coast

Set in the City's Northern Growth Corridor within the Coomera Regional Sports Park, the Centre was built as a Commonwealth Games competition and legacy facility. Built by the State Government in 2016, with contributions from all three levels of Government, it's one of two Citywide indoor facilities on the Gold Coast. It was the GC2018 competition venue for gymnastics and netball finals and is currently proposed to be the Brisbane 2032 Olympic venue for Volleyball and the Paralympic venue for Wheelchair Rugby.



Area	Description
Facility Description and Areas	Built on a total footprint area of 4Ha, the main arena, with a building footprint of 11,760m ² , incorporates 8 multipurpose courts (100m x 55m) plus an additional 1,100m ² gymnastics facility. The sports hall is supported by a street that incorporates 6 change rooms, 3 meeting rooms, accessible amenities, 2 first aid rooms, management and two lease offices, 2 kiosks, mezzanine viewing and seating for 350 and two car parking areas with 230 car spaces.
Centre Operating Hours	<ul style="list-style-type: none">Monday to Friday: 6am – 10pm.Weekends: 8am – 9:30pm (bookings required after 4pm with the venue only remaining open if booked).
History of Development	<ul style="list-style-type: none">The City purchased additional land for the Coomera Regional Sports Park, through its Strategic Land Acquisition Program for Sport and Recreation in 2004

Area	Description
	<ul style="list-style-type: none"> Opened November 2016 at a total cost of \$43M Sited next to AFL, Rugby Union/ Touch Football and Rugby League facilities.
Current Management Arrangement	<ul style="list-style-type: none"> Owned and operated by Council It is one of four multi-use indoor sports and events centres within its Major Sporting Venues portfolio.
Overview of Programming and Usage	<p>Community Hire (weekly use/ comps):</p> <ul style="list-style-type: none"> Basketball (Seahawks Basketball Association based at Centre and rent office space) Netball Volleyball Futsal Badminton Gymnastics (Gold Coast Gymnastics lease both the gymnastic area and office space) Inclusion Sport - Basketball Meeting and functions (including the City's learning and development program). <p>Regular Events at Venue (estimated annual economic benefit of \$6.2M):</p> <ul style="list-style-type: none"> Pan Pacific Games Volleyball Schools Cup and State Championships Basketball Schools Cup and State Championships.
Fees and Charges (2021-22)	<ul style="list-style-type: none"> Court Hire (per court/ hour) – Community: <ul style="list-style-type: none"> Off- Peak Monday to Friday - \$38; Off-Peak Weekend - \$48 Peak - \$58; Peak - Public Holidays \$84. Court Hire – Commercial: Non-peak \$62; Peak \$84; Public Holidays \$114. Casual shoot - \$5.
Other Information	<p>Located in the Northern Growth Corridor adjacent to Dreamworld and within 2.5 km of the Coomera Town Centre and regional train station. This and the Pimpama Sports Hub are the major regional sports and recreation precincts for the Northern Growth Corridor that will grow to a population greater than 170, 000 residents. It is one of two City-wide indoor sports facilities currently within the Gold Coast.</p>

Key points of relevance to the Study:

- Scale of facility positions the Centre with a strong capability to attract multiple sports and events, at both a state and national level, maximising social and economic benefits
- Scale and mix of facility support very high operational recovery rates and improved whole-of-life costs, unlike smaller district facilities
- The Centre's catchment is Citywide, and it is a new Olympic Games indoor venue exemplar for B2032 venues to be built in the Moreton, Logan City, Brisbane, and Sunshine Coast Council areas.

Hyland Road Sports Complex – Cumberland City Council

The proposed Hyland Road Sporting Complex is a former landfill site located within the Cumberland City Council LGA in NSW. The proposed redevelopment will transform the underutilised 10ha site (excluding the riparian corridor) into a regional-standard sport and recreation destination.

The proposed facility will provide the following key components.

Outdoor Sports	Indoor Sports	Recreation
<ul style="list-style-type: none">• Four rectangular sporting fields with two oval overlays.• Cricket practice nets.• Nine multi-use small-sided grass fields.	<ul style="list-style-type: none">• Indoor sporting hall with four courts.• Integrated clubhouse amenities.	<ul style="list-style-type: none">• Playground & social spaces.• Path network.• Fitness stations.

The Complex will support a variety of indoor and outdoor sports, including potential for football (soccer), Australian Rules Football, rugby league, rugby union, cricket, netball, basketball, volleyball and badminton.

The estimated cost of the project is \$53.7M, and funding is sought from the NSW Government via the WestInvest Fund.

Key points of relevance to this study:

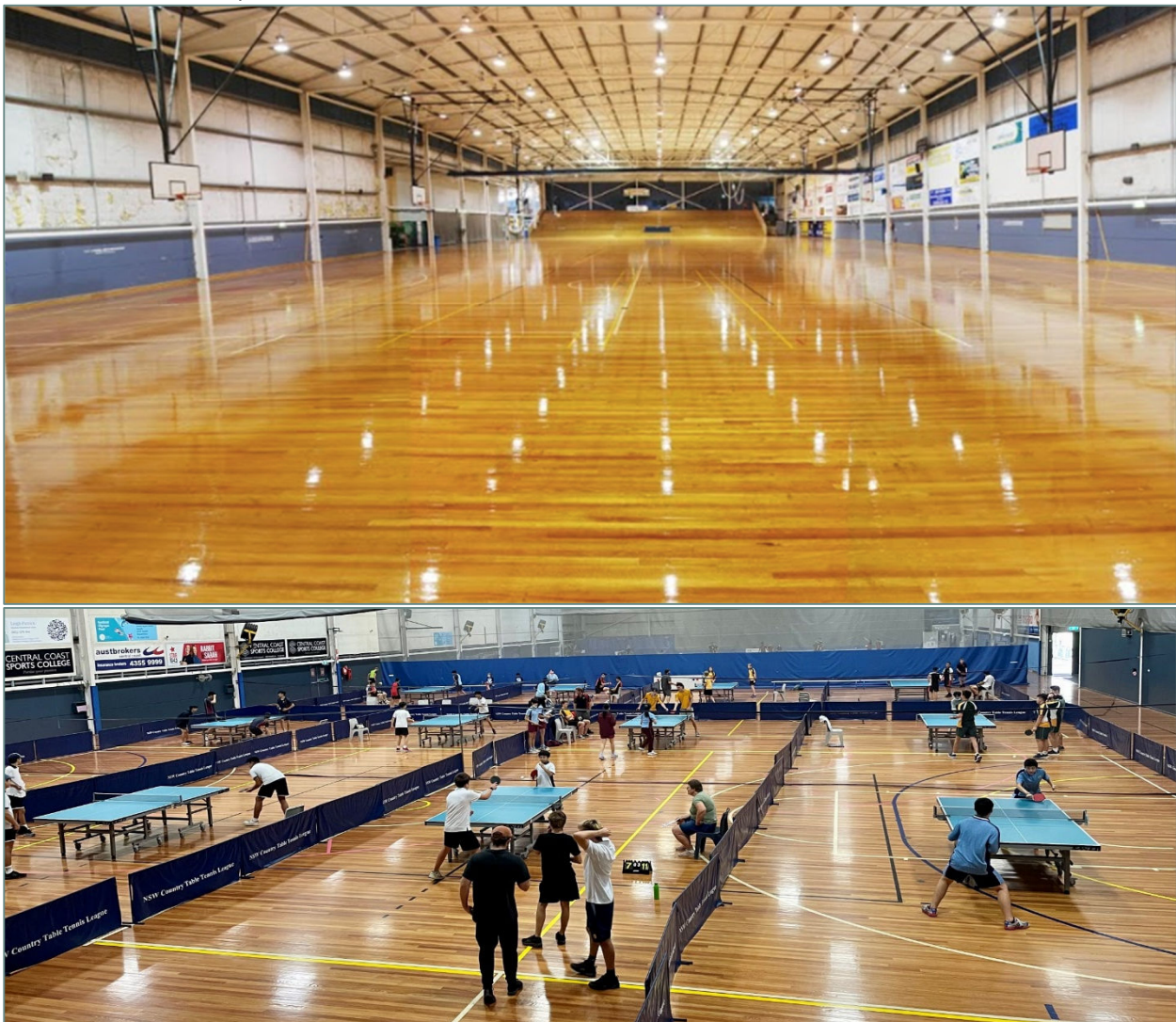
- Adjacent to other sporting facilities within the precinct and combination of a range of sport and recreation infrastructure – with both indoor and outdoor components.
- Targeting regional standard training and competition.



Niagara Sports Stadium - Central Coast Council

Niagara Park Stadium is owned and managed by Central Coast Council, NSW. The Stadium is a stand-alone indoor sports centre based at Niagara Park near Narara, Lisarow and Gosford and includes:

- Four indoor multi-purpose courts.
- Sports hall with 700-seat grandstand.
- Indoor archery.
- Multipurpose spaces for martial arts, dance lessons, tai chi, etc.
- Events and private venue hire.



Key Points of Relevance to this Study:

- Combination of a range of sport and recreation infrastructure – indoor courts and separate multi-use spaces.
- Provision of youth recreation spaces.
- Co-location of multiple sports and recreation facilities within a site.

PCYC Wagga Wagga - Wagga Wagga City Council

All three tiers of Government played a significant role in funding the \$23 million facility:

- Federal Government: \$10 million through Community Development Grant.
- NSW State Government: \$10 million.
- Wagga Wagga City Council: \$3 million.

Planned for (within an approx. 1Ha site):

- Four indoor multi-purpose courts.
- Amenities and changerooms.
- Office space.
- After-school care.
- Studio spaces.
- A commercial café.
- Gym.
- Car-parking.



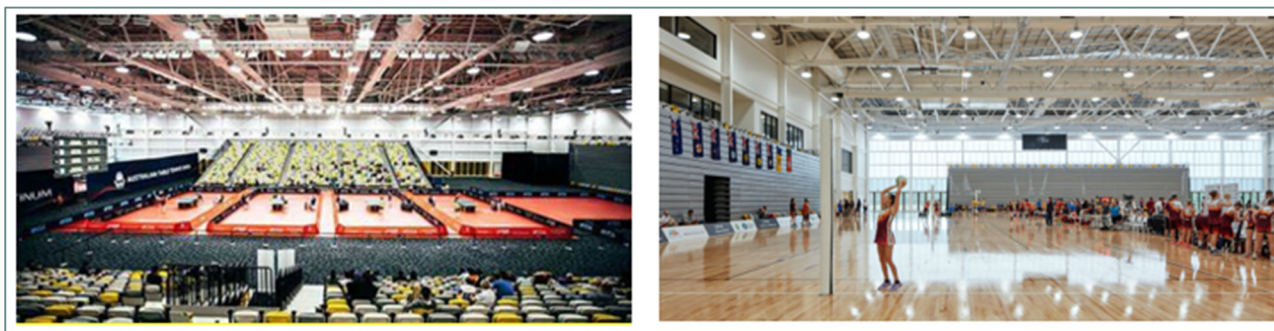
Key points of relevance to this study:

- Combination of a range of sport and recreation infrastructure – indoor multi-use spaces.
- Provision of youth recreation spaces.
- Co-location with existing sporting facilities.
- Inclusion of community spaces such as after-school care, programmable spaces, studio spaces, etc.
- Multi-tier Government partnership and collaboration in delivering the facility

Gold Coast Sports and Leisure Centre – City of Gold Coast

The venue was constructed for the 2018 Commonwealth Games and comprises 15 multi-use courts with seating for up to 5,000 spectators. The facilities include:

- Café and bar.
- Specialty rooms for physiotherapy, drug testing, and first aid.
- Four official and eight team changing rooms.
- A Changing Places facility to cater to accessibility needs.
- 400 undercover parking spaces and four electric charging stations.



Ballina Indoor Sports Centre - Ballina Coast High School

This four-court project is a collaboration between council and the state government. It involves constructing a community-oriented facility within Ballina Coast High School, and the operations will be leased back to a community organisation. The development comprises of:

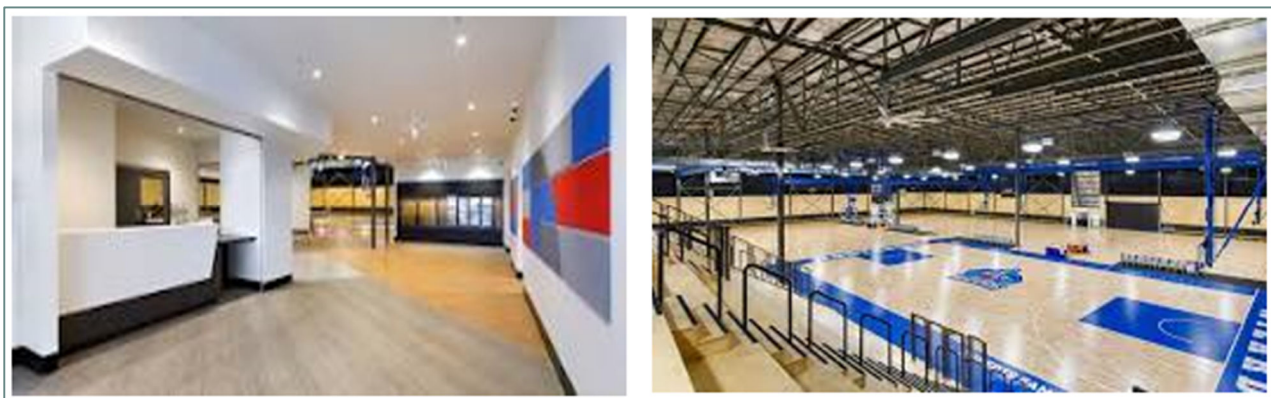
- Two multi-sport courts with engineered sprung timber floors, as well as an additional two multi-sport courts are located on the school premises.
- Retractable seating for up to 530 spectators.
- Changing rooms and amenities.
- Foyer/reception area, and a first aid room.
- Three modern, air-conditioned meeting rooms accommodating up to 48 people.



Northside Indoor Sports Centre – Brisbane City Council

The State Government funded (\$8M) the development of this recently opened five-court basketball stadium, by converting a state-owned warehouse in Zillmere. The main stadium area consists of five courts, amenities and change rooms, a mezzanine floor and a meeting room. Northside Wizards Basketball Association are the primary occupant and is funding the development of the office/ administration area and the Development Centre, which is a building approximately $\frac{1}{4}$ the size of a basketball court, for shooting and drill practice.

Mirroring another five courts at the opposite end of the building could accommodate an additional five courts, delivering a 10-court venue and giving the site the capacity to serve as a state-level facility.



PCYC West Ryde Multi-Sports Facility – School Infrastructure NSW

This facility is being developed through a school and not-for-profit partnership. Once operational, the PCYC NSW will manage the West Ryde Multi-Sports Facility on behalf of the Department of Education. The new 5,000m² indoor courts facility will feature 4 multipurpose courts and supporting spaces, including:

- 32 outdoor netball courts with associated amenities.
- Landscaping with an ecological protection zone.
- Communal areas with open lawns, picnic tables, and seating.
- New car and bicycle parking facilities.



Appendix 3: Cost Estimate

2. Indicative Estimate

Cost Plan Summary

Project: Ipswich Indoor Sports Complex	Details: Concept Estimate Rev1
Building: Ipswich Indoor Sports Complex	

Description	Quantity	Unit	Rate	Total
EARLY WORKS - GROUND LEVEL CARPARK, ROAD WORKS & SIGNALISATION	1	item	40,814,935.84	40,814,936
STAGE A - FULL COURT	7,388	m2	7,040.29	52,013,656
STAGE B - COURTS 1 TO 10	9,513	m2	5,459.01	51,931,520
STAGE C - ACCOMMODATION	2,841	m2	9,123.39	25,919,548
TOTAL ESTIMATED NET PROJECT COST	19,742	m2	8,645.51	170,679,660
CLARIFICATIONS				0

Cost Plan Detail

Project: Ipswich Indoor Sports Complex

Details: Concept Estimate Rev1

Building: Ipswich Indoor Sports Complex

Description	Quantity	Unit	Rate	Total
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EARLY WORKS - GROUND LEVEL CARPARK, ROAD WORKS & SIGNALISATION

Allow for ground level carpark, road works, signalisation, etc - refer budget provided by Ipswich Turf Club 12 April 2024	1	item	15,000,000.00	15,000,000
E/O for foundation such as piling below ground level carpark to support proposed Sports Complex built over	1	item	17,908,636.03	17,908,636
Early Works Subtotal	1	item	32,908,636.03	32,908,636
Allow for estimating contingency (2.5%)	2.5	%		822,716
Allow for design development contingency (10%)	10.0	%		3,373,135
Allow for preliminaries	INCL			INCL
Allow for margin	INCL			INCL
Early Works Estimated Net Construction Cost	1	item	37,104,487.13	37,104,487
Allow for professional fees (10%)	10	%		3,710,449
Early Works Estimated Net Project Cost	1	item	40,814,935.84	40,814,936

EARLY WORKS - GROUND LEVEL CARPARK, ROAD WORKS & SIGNALISATION

40,814,936

STAGE A - FULL COURT

Allow for Stage A building including show court (incl. A/C), change rooms, first aid, referees room, board room/offices base-build, foyer base-build, kitchen/canteen base-build, etc - suspended over ground level carpark	7,388	m2	3,700.00	27,335,600
E/O for feature awning	415	m2	800.00	332,000
E/O for feature screen	1,283	m2	800.00	1,026,400
E/O for board room/offices fitout	1,982	m2	300.00	594,600
E/O for foyer fitout	1	item	150,000.00	150,000
E/O for kitchen/canteen fitout	198	m2	1,000.00	198,000
Allow for Stage A external works including tiered seating, ramps, hard/soft landscaping, etc	2,723	m2	1,000.00	2,723,000
Stage A Subtotal	7,388	m2	4,380.02	32,359,600
Allow for estimating contingency (2.5%)	2.5	%		808,990
Allow for design development contingency (10%)	10.0	%		3,316,859
Allow for preliminaries (20%)	20.0	%		7,297,090
Allow for margin (8%)	8.0	%		3,502,603
Stage A Estimated Net Construction Cost	7,388	m2	6,400.26	47,285,142
Allow for professional fees (10%)	10	%		4,728,514
Stage A Estimated Net Project Cost	7,388	m2	7,040.29	52,013,656

STAGE A - FULL COURT

52,013,656

STAGE B - COURTS 1 TO 10

Allow for Stage B building including including practice courts 1 to 10 (excl. A/C) - suspended over ground level carpark	9,513	m2	3,300.00	31,392,900
Allow for Stage B external works including hard/soft landscaping, etc	3,052	m2	300.00	915,600
Stage B Subtotal	9,513	m2	3,396.25	32,308,500
Allow for estimating contingency (2.5%)	2.5	%		807,713
Allow for design development contingency (10%)	10.0	%		3,311,621
Allow for preliminaries (20%)	20.0	%		7,285,567
Allow for margin (8%)	8.0	%		3,497,072

Cost Plan Detail

Project: Ipswich Indoor Sports Complex	Details: Concept Estimate Rev1
Building: Ipswich Indoor Sports Complex	

Description	Quantity	Unit	Rate	Total
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STAGE B - COURTS 1 TO 10 (Continued)

Stage B Estimated Net Construction Cost	9,513	m2	4,962.73	47,210,473
Allow for professional fees (10%)	10	%		4,721,047
Stage B Estimated Net Project Cost	9,513	m2	5,459.01	51,931,520

STAGE B - COURTS 1 TO 10 51,931,520

STAGE C - ACCOMMODATION

Allow for Stage C building including reception, hotel rooms, etc	2,841	m2	5,500.00	15,625,500
Allow for Stage C external works including hard/soft landscaping, etc	1	item	500,000.00	500,000
Stage C Subtotal	2,841	m2	5,675.99	16,125,500
Allow for estimating contingency (2.5%)	2.5	%		403,138
Allow for design development contingency (10%)	10.0	%		1,652,864
Allow for preliminaries (20%)	20.0	%		3,636,300
Allow for margin (8%)	8.0	%		1,745,424
Stage C Estimated Net Construction Cost	2,841	m2	8,293.99	23,563,226
Allow for professional fees (10%)	10	%		2,356,323
Stage C Estimated Net Project Cost	2,841	m2	9,123.39	25,919,548

STAGE C - ACCOMMODATION 25,919,548

CLARIFICATIONS

<p><u>DOCUMENT REGISTER</u></p> <p><u>Architect - Gibson Architects</u></p> <p>Scanned in pack titled 'Ipswich Indoor Sports Complex Proposal - Bundamba' provided by Ipswich Turf Club via GA dated 16 April 2024</p> <p>Dwg. 23803CD_Site Plan for QS provided by GA dated 24 April 2024</p> <p>Dwg. 23803 GA Mark Up QS 24.04.2024 provided by GA dated 24 April 2024</p> <p><u>CLARIFICATIONS</u></p> <p>It is assumed the Client's budget for Early Works (\$15m) is for carpark only, extra over allowance for foundation works such as piling has been included with this estimate</p> <p>It is assumed the project does not qualify to be delivered under the Queensland State Government's 'Best Practice Principles' (BPP)</p> <p>It is assumed Stage A, Stage B and Stage C works will be built at the same time using a single contractor</p> <p>It is assumed any site works including but not limited to demolition, earthworks, civilworks, site services reticulation, infrastructure upgrades, connections with existing services, etc are included as part of the Early Works budget provided by Ipswich Turf Club</p> <p>It is assumed normal ground conditions (ie no asbestos, contaminated soils, acid sulphate soils, rock, etc)</p> <p>It is assumed the show court will be A/C and the practice courts will be non-A/C</p> <p><u>PC RATES</u></p> <p>N/A</p> <p><u>PROVISIONAL SUMS</u></p> <p>N/A</p> <p><u>EXCLUSIONS</u></p> <p>The following is specifically excluded;</p>				
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Cost Plan Detail



Project: Ipswich Indoor Sports Complex	Details: Concept Estimate Rev1
Building: Ipswich Indoor Sports Complex	

Description	Quantity	Unit	Rate	Total
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CLARIFICATIONS	<i>(Continued)</i>			
Asbestos removal				
Excavation and/or treatment of contaminated soils, acid sulphate soils, etc				
Excavation in rock				
Loose FF&E (including sporting equipment, workstations, tables, chairs, catering equipment, beds, etc)				
Sundry client fees and charges				
QLeave/PLSL				
Escalation beyond Qtr 3 2024				
GST				

CLARIFICATIONS	0			
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Appendix 4: Concept Design





Appendix 5: Operating Models

This section provides an overview of common operating model types, discussing their advantages, disadvantages, and suitability for the Centre.

Lease Management

A lease allows an independent entity, such as a commercial provider or a sports association, to take over the operational and managerial duties of a facility. This is typically set up through a tender process that specifies the responsibilities and reporting requirements.

Lessees (operators) are generally responsible for:

- Staffing and supervision.
- Training and accreditation.
- Managing booking and entry systems.
- Cleaning.
- Minor maintenance of facilities and equipment.
- Operation of plant and equipment.
- Outgoings.
- Day-to-day management of energy and waste.
- Exclusive rights to food, beverage and retail.
- Setting of fees.
- Insurance (lessee equipment and contents, improvements if applicable, public liability, professional indemnity, worker's compensation).
- Marketing.
- Compliance with minimum opening hours.
- Licence approvals.
- Operational performance reporting.

Lessors (asset owners) are generally responsible for:

- All maintenance, repair and replacement of buildings, plant and lessor-owned equipment (other than of minor nature).
- Insurance (infrastructure, plant and equipment, public liability).
- Management of the lease agreement.

Leases can be designed for short, medium, or long terms. The latter is typically reserved for instances where the lessee plans to invest significant capital into the facility. However, Long-term leases could also limit the lessor's ability to pursue other developments during the lease period and might result in inheriting poorly maintained or degraded assets at the end of the lease term.

To effectively manage a lease, the lessor needs to clearly communicate the following aspects:

- Strategic objectives (e.g. access, diversity of use, appearance, sustainability).
- Operational objectives (e.g. hours of operation, qualifications, health and safety, competitions/ events, maintenance, regulatory compliance, public/ stakeholder relations, risk management, community programs).
- Reporting requirements (e.g. business plan, attendance).

Potential advantages of a Lease Management Model:

- Ability to engage commercial providers with specialised venue management expertise.
- Lessee assumes full responsibility for staffing and human resources.
- The lessee absorbs the risk of variations in net operating costs, allowing the lessor's annual expenses to remain within a pre-set budget.
- Lower corporate overhead costs compared to traditional in-house operated models.
- Increased flexibility in day-to-day management and decision-making processes.
- Lessor can selectively retain certain aspects of facility management, such as major asset maintenance.

Potential disadvantages of a Lease Management Model:

- Qualified commercial providers might be scarce, or non-profit sports organisations might not have the necessary experience or capacity for managing large multi-use venues.
- The lessor does not have input into daily operations and pricing agreements, although fees and charges could be outlined within the lease terms and conditions and reviewed annually if desired.
- Granting tenure to a specific sport could lead to issues with equitable access.
- Lessees might neglect asset maintenance and replacement, leaving the lessor with facilities in poor condition at the end of the lease period (although requiring lessees to contribute to an asset fund could mitigate this risk).
- Setting up and overseeing lease contract conditions can impose a significant "hidden cost" on the lessee and should be factored into the total lease cost.

Contract Management

In a contract management setup, the asset owner retains overall control but hires a contractor to handle daily operations. The asset owner would retain responsibility for:

- Establishing fees and charges.
- Scheduled building maintenance.
- Operational expenses (excluding salaries and wages).

The contractor will provide personnel and services for a set fee, which includes their profit. Depending on the facility's size and revenue, as well as the asset owner's contractual preferences, the asset owner can choose to retain all revenues, share them, or allow the contractor to keep all income from food, beverage, court hire, retail, and programs.

The contractor is typically responsible for staffing, supervision, training and certification, managing booking and entry systems, cleaning, minor repairs, operating equipment, energy and waste management, relevant insurances, advertising, compliance with opening hours, and obtaining license approvals, among other duties.

Management contracts typically have shorter durations than leases and allow the asset owner access to the premises. Reporting requirements are similar to those for lease management, although income reporting may be necessary based on the specifics of the contract. These agreements may also include covering utility costs to promote efficiency.

Potential advantages of the Contract Management Model include:

- Outsourcing management to contractors usually results in lower costs compared to direct in-house management.
- All staffing and human resource responsibilities are handled by the contractor, reducing exposure to industrial relations issues.
- Commercial providers often specialise in industry-specific expertise in venue management.
- The asset owner maintains a better understanding and greater control over the facility's daily operations.
- This model offers more flexibility in everyday management and decision-making compared to in-house operation.

Potential disadvantages of the Contract Management Model include:

- There may be a shortage of qualified commercial providers, or non-profit sports organisations might not have the necessary experience or capacity for managing large multi-use venues.
- Granting tenure to a specific sport could lead to issues with equitable access.
- The asset owner bears the risk of changes in net operating costs.
- Managing customer expectations and WH&S requirements might be challenging.
- The asset owners must clearly understand the venue's objectives and contractor responsibilities and provide resourcing for effective contractor management.

In-house Management

Under the in-house management model, asset owners are responsible for the day-to-day management of the centre.

This approach can take different forms, for instance, staff might be employed under current enterprise bargaining arrangements, or a separate enterprise bargaining agreement could be applied exclusively to the centre. Staff responsibilities may follow the usual hierarchical chain of command, with decision-making processes aligning with those of other services provided by the asset owner.

Indoor sports facilities are part of the wider leisure services sector, and they often have long operating hours and face competition from other providers, such as events. The decision-making process within some organisations can be slow, which can limit how quickly managers can respond to issues. However, there are successful examples where these services are operated as business units and maintain some independence and the authority to operate commercially.

The advantages of in-house management include:

- Utilising existing management hierarchy and systems for venue management within the asset owners' organisation.
- Having real-time, hands-on control over daily operations and asset upkeep.

- Ensuring that assets remain in good condition.
- Providing accurate performance data for future tender assessments if external management is considered later.
- Reducing equity access issues to provide for diverse sports.
- Enhancing event attraction and management, which lowers net operating costs and boosts local economic and community benefits from hosted events.

The disadvantages of in-house management include:

- The asset owner assumes all operational risks.
- All operating costs and unexpected deficits are the responsibility of the asset owner.
- Staffing costs are higher due to using existing enterprise bargaining agreements, leading to increased overall costs.
- Internal policies may impede commercially driven decisions and can be time-consuming.
- There is limited flexibility to address customer issues.
- In-house systems often lack the adaptability necessary for a competitive leisure services industry.

Hybrid Management

As facilities expand and offer more services such as event management, accommodation, logistics, food and beverage, cleaning, and security, the asset owner may decide to handle overall venue management in-house but outsource specific services in areas where they lack expertise or face higher risks.

Newly Established Company

The asset owner establishes a company exclusively dedicated to overseeing the centre. The asset owner, who is the sole shareholder, appoints a board to administer the company according to prearranged financial and performance objectives outlined in a statement of intent. Lately, some of these management companies have been merged back into their original asset owner's organisation.

Appendix 6: Financial Operating Assessment

Ipswich Basketball Association (Association), in partnership with the Ipswich Turf Club (Turf Club), are exploring the feasibility of developing a multi-court indoor sports complex (Complex) in the north-western corner of the Ipswich Racecourse.

The Complex is to incorporate the following facility components:

- 10 x multi-purpose indoor sports courts suitable designed to netball dimensions, however suitable for multiple indoor sports, including basketball, volleyball, badminton and futsal
- 1 x showcourt/ entertainment space with retractable seating suitable for sporting events and community events and entertainment
- Boardroom
- Offices
- Café
- Amenities and changerooms.

This report investigates the forecast usage, financial and economic impacts of the Complex development.

Financial Operating Assessment

The Otium Analytics Financial Operational Model provides an assessment of a facility's anticipated operations and utilisation. The model considers the facility's catchment, anticipated revenue streams, programming, membership, staffing structure, overhead expenses, additional costs (such as pre-opening expenses and add on costs), accounts for CPI and business growth over a 25-year period.

Over the last 25 years, the model has been used and refined for over 250 aquatic, sport, health and leisure facility projects and is recognised by local, state and federal governments as a reputable and reliable business financial forecasting and operational tool.

The key model inputs include:

- Anticipated revenue sources, which could include class income, membership, leases, admission fees etc.
- Programming of spaces.
- Overhead expenses and distribution.
- Staffing levels and wages.
- Business growth.

The model outputs include:

- Overall operating position, income per activity space, expenses per activity space.
- Total anticipated visitors per activity space.
- Revenue and expense per visitor.
- Total FTE and wages.

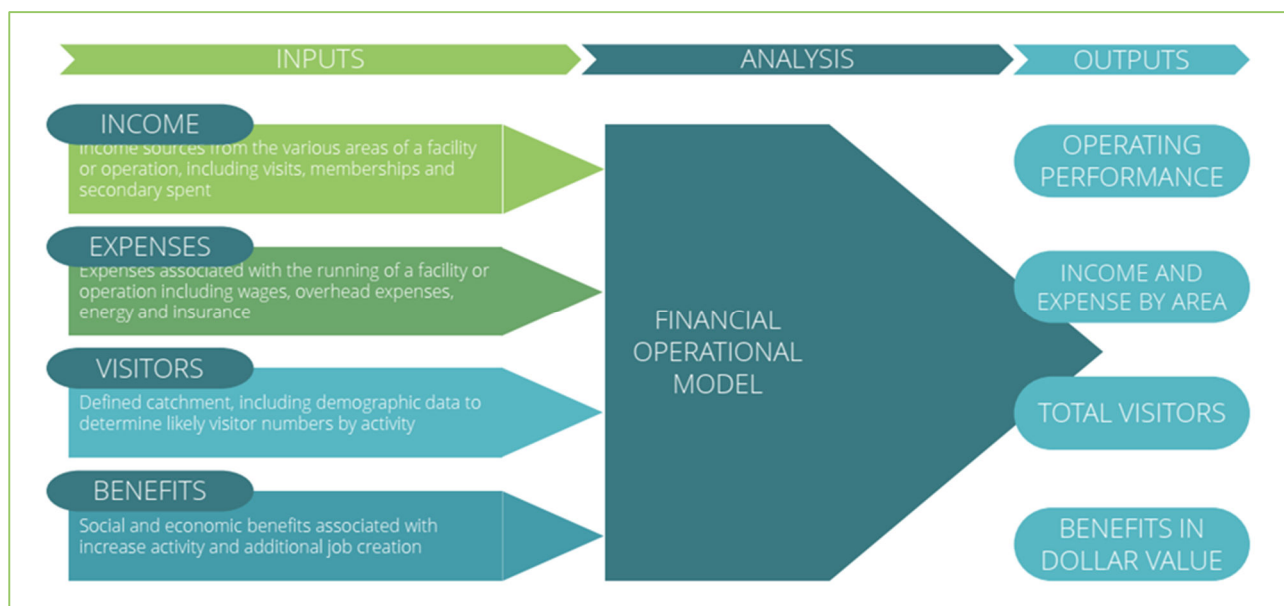


Figure 23: Otium Analytics Financial Operating Model

Assumptions

Global Assumptions

- 25 year forecast – 2028 - 2052
- CPI – 3%
- Percentage of full year revenue/users reduced as follows:
 - Venue market establishment
 - Reduced by 20% Year 1 (2028)
 - Reduced by 10% Year 2 (2029)
- Business growth
 - 92% Year 1 (2028)
 - 95% Year (2029)
 - 100% consequent years
- Closure
 - 2 weeks per annum equivalency for maintenance, non-playable court surfaces
- Operating hours
 - 88 hours per week
- Gross floor area
 - Ipswich Indoor Sports Complex, Indicative Cost Estimate, Cost Plan Group, May 2024
 - Indoor courts
 - 9,513m² (64.21%)
 - Showcourt (including Boardroom and Offices)
 - 7,88m² (43.71%)
- Management Model
 - At the time of this report, the future management model for the Complex is yet to be determined.
 - The management approach for this financial analysis has assumed major asset management and replacement costs will rest with the asset owner or lessee

- Operating costs associated with minor and routine asset management are assumed to rest with the party responsible for the management of the Complex and are captured within this forecast

Income

- Fees and charges
 - Consistent with South East Queensland market rates for all other fees and charges
- Casual individual court hire
 - \$4.20 per person
 - 130 person per week
- Events
 - Discounted down from benchmarked penetration in consideration of:
 - Increased indoor sport event market competition as a result of the five planned large multi-purpose indoor court facilities being developed as part of 2032 Games
 - Average event days per event
 - 3 days
 - Event Penetration

Event type	Base number (event days)	Average hiring price (per event day)	Average Spectators per Day
Futsal Regional/ State	4	\$4,000	3,250
Basketball Regional/ State	6	\$4,000	6,500
School Regional/ State	7	\$3,000	6,500
Inclusive Sports Regional/ State	6	\$4,000	1,950
Table Tennis Regional/ State	1	\$4,000	750
Volleyball Regional/ State	4	\$4,000	2,600
Pickleball Regional/ State	3	\$4,000	1,950
Concerts/ Presentations/ Awards (3 courts)	6	\$1,000	1,950
Conference/ Trades	6	\$3,000	2,600
Major Sport Events	26	\$4,000	3,250
Community Entertainment	48	\$4,000	3,250

- Holiday programs
 - Days per week
 - 5
 - Weeks per annum
 - 10
 - Daily duration
 - 6 hours
 - Fees and charges
 - \$50
 - Daily participants
 - 75
- Secondary spend

Activity area	Income type	Average spend per User	Penetration rate
Indoor Courts	Café	\$4	15%
Indoor Courts	Merchandise	\$10	3%
Showcourt	Café	\$8	33%
Showcourt	Merchandise	\$9	15%

- Room hire

Room Type	Charge per Hire	Average Bookings per Week
Board Room	\$90	4

- Sponsorship
 - No allowance for sponsorship included
- Indoor courts capacity

Season Type	Peak/off-peak	Weeks (p.a.)	Users (per hour)	Cost per hour
Court Hire Sumer	Off-peak	20	18	\$ 50.00
	Peak	20	18	\$ 60.00
Court Hire Winter	Off-peak	20	18	\$ 50.00
	Peak	20	18	\$ 60.00
Court Hire Holidays	Off-peak	10	20	\$ 50.00
	Peak	10	20	\$ 60.00

- Indoor courts typical weekly schedule
 - Schedule codes

Activity	Code
Basketball	BB
Netball	NB
Futsal	FT
Badminton	BT
Volleyball	VB
Schools	SC
Pickleball	PB
Inclusive Sports	IS

- Typical weekly schedule

Expenditure

- Capital Cost Estimate
 - Ipswich Indoor Sports Complex, Indicative Cost Estimate, Cost Plan Group, May 2024
 - \$103,945,176
- Other Expenses
 - Cost rate against capital cost estimate as per table below:

Activity Area		Asset Management	Cleaning	Business Services	Energy	Total
Expenditure Rate against Capital Cost Estimate		0.3%	0.1%	0.25%	Nominal Allowance	
Indoor Courts	56.29%	\$175,532	\$58,511	\$146,277	\$166,056	\$546,375
Showcourt	42.54%	\$132,655	\$44,218	\$110,546	\$125,493	\$412,912
Café	1.17%	\$3,648	\$1,216	\$3,040	\$3,452	\$11,357
Total	100.00%	\$311,836	\$103,945	\$259,863	\$295,000	\$970,644

- Cost of Goods Sold
 - Café (including wages)
 - 66%
 - Merchandise
 - 30%
- Salaries and Wages (excluding café and functions as above)
 - Full-time equivalent roles

Staff type	FTE
Venue Manager	1
Duty Supervisors	3
Sports Coordinator	1
Maintenance Officer	1
Administration Officers	2
Program Officers	1
9.0	

- Wage rates
 - Relative consistency with *Queensland Local Government Industry Award – State 2017*

Activity area	Staff type	Wage rate
Other	Venue Manager	\$140,000
Indoor Courts	Duty Supervisors	\$70,000
Indoor Courts	Sports Coordinator	\$95,000
Other	Maintenance Officer	\$70,000
Other	Administration Officers	\$65,000
Indoor Courts	Program Officers	\$70,000

Financial Assessment Results

Operating Result

Table 13: Financial Assessment Operating Result

	2028	2034	2040	2046	2052	Average
Operating Result	-\$259,410	\$409,326	\$488,756	\$583,600	\$696,849	\$462,664
Cost Recovery	91.36%	110.74%	110.74%	110.74%	110.74%	109.56%

Income

Table 14: Financial Assessment Income Summary

Income	2028	2034	2040	2046	2052	Average
Casual Hire	\$22,615	\$36,689	\$43,808	\$52,310	\$62,460	\$44,302
Holiday Programs	\$155,320	\$251,984	\$300,882	\$359,269	\$428,986	\$304,275
Events	\$362,000	\$587,291	\$701,257	\$837,337	\$999,824	\$709,163
Indoor Courts	\$955,152	\$1,425,626	\$1,702,273	\$2,032,602	\$2,427,034	\$1,726,736
Secondary Spend	\$1,231,677	\$1,896,107	\$2,264,051	\$2,703,396	\$3,227,996	\$2,293,435
Room Hire	\$14,911	\$24,190	\$28,885	\$34,490	\$41,183	\$29,210
Total	\$2,741,674	\$4,221,889	\$5,041,156	\$6,019,404	\$7,187,484	\$5,107,123

Expenditure

Table 15: Financial Assessment Expenditure Summary

Expenditure	2028	2034	2040	2046	2052	Average
COGS	\$663,671	\$1,021,571	\$1,219,809	\$1,456,516	\$1,739,156	\$1,235,645
Asset Management	\$346,867	\$414,178	\$494,550	\$590,518	\$705,110	\$505,861
Business Services	\$289,056	\$345,148	\$412,125	\$492,099	\$587,591	\$421,551
Cleaning	\$115,622	\$138,059	\$164,850	\$196,839	\$235,037	\$168,620
Energy	\$328,140	\$391,817	\$467,850	\$558,637	\$667,042	\$478,550
Salaries and Wages	\$1,257,726	\$1,501,791	\$1,793,217	\$2,141,195	\$2,556,699	\$1,834,231
Total	\$3,001,083	\$3,812,563	\$4,552,400	\$5,435,804	\$6,490,634	\$4,644,458

Visitation

Table 16: Financial Assessment Visitation Summary

Visitation	2028	2034	2040	2046	2052	Average
Indoor Courts	431,186	501,430	501,430	501,430	501,430	496,995
Function Room	177,008	240,500	240,500	240,500	240,500	236,565
Total	608,194	741,930	741,930	741,930	741,930	733,561

Economic Benefits

The Otium Analytics – Benefits Assessment Model¹³ analyses the economic benefits of a proposed project and converts social and health benefits to an economic value. The assumptions and economic outputs are updated and calibrated for each project to reflect any new work on benefits calculation and the local economic conditions of the project being modelled.

Otium's Social and Economic Benefits Model provides an assessment of projects to identify:

- Direct economic benefits in terms of:
 - Capital spends
 - Revenue generated
 - Recurrent spend (operating expenditure)
 - Jobs created in construction and operation
- Indirect economic (flow-on) benefits in terms of:
 - Additional economic activity
 - Additional jobs
- Social and Health benefits in terms of:
 - Criminal and social justice benefit
 - Human capital benefit
 - Personal health benefit
 - Productivity benefit
- Net Present Value and BCR (benefit to cost ratios) using a range of discount rates.

The model considers a range of inputs and estimated economic outputs to derive the above, including:

- Regional economic and industry data
- Proposed capital cost
- Estimated Recurrent / operating expenses and revenues
- FTE jobs associated with construction and operation (usually based on industry figures for the region)
- Industry/ activity specific economic multipliers
- Likely per visit expenditure
- Economic benefit of deferring or avoiding health costs
- Assumptions on 10 (or more) year operating periods
- Assumptions on management and operational models.

The following primary inputs were used to calculate the estimated benefits:

- Indicative Cost Plan – Cost Plan Group, May 2024
- Financial Operating Forecasts – Otium, August 2024.

¹³ Otium are not economists and as such these economic benefits forecasts should not be used for investment decision purposes.

The figure below summarises the Benefits Assessment Model:

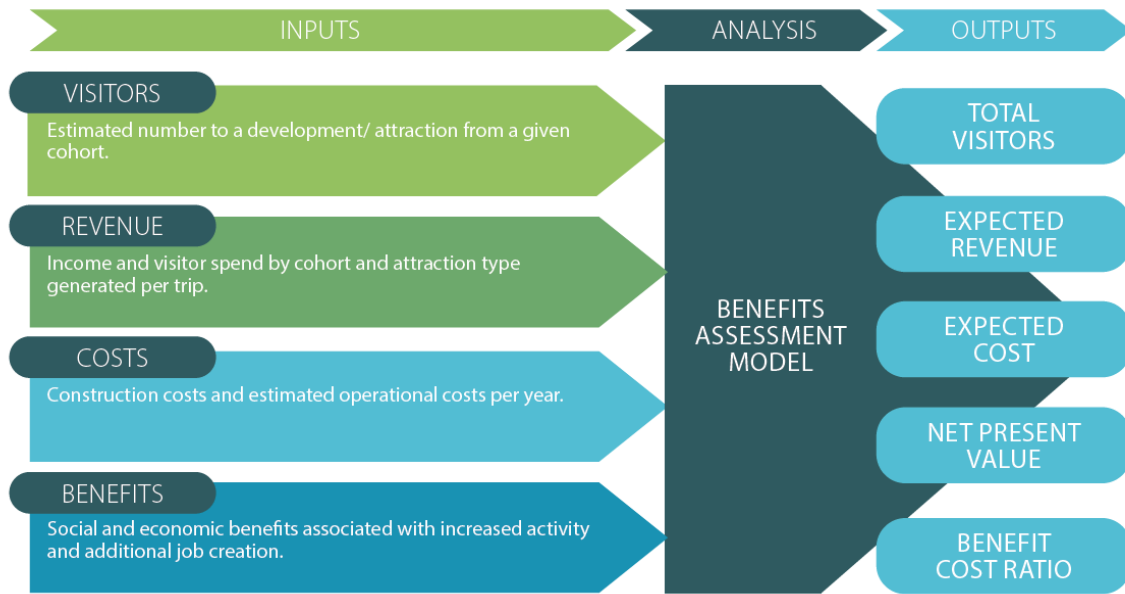


Figure 24: Otium Analytics Benefits Assessment Model

The Benefits Assessment Model has calculated benefits based on the following discount rates:

- Optimistic – 4%
- Base – 7%
- Conservative – 10%.

The estimated total benefits for the Complex through to 2052 is **\$329,109,601**. The net present value and benefits cost ratio based on the above discount rates are outlined in the table below:

Table 17: Ipswich Indoor Sports Complex – Total Benefits

Discount Rate	4%	7%	10%
Net Present Value	\$212,007,437	\$162,369,206	\$130,058,742
Benefits Cost Ratio	2.04	1.56	1.25